



Northern & Western
Regional Assembly

LECP Briefing Note for Galway City Council

August 2022



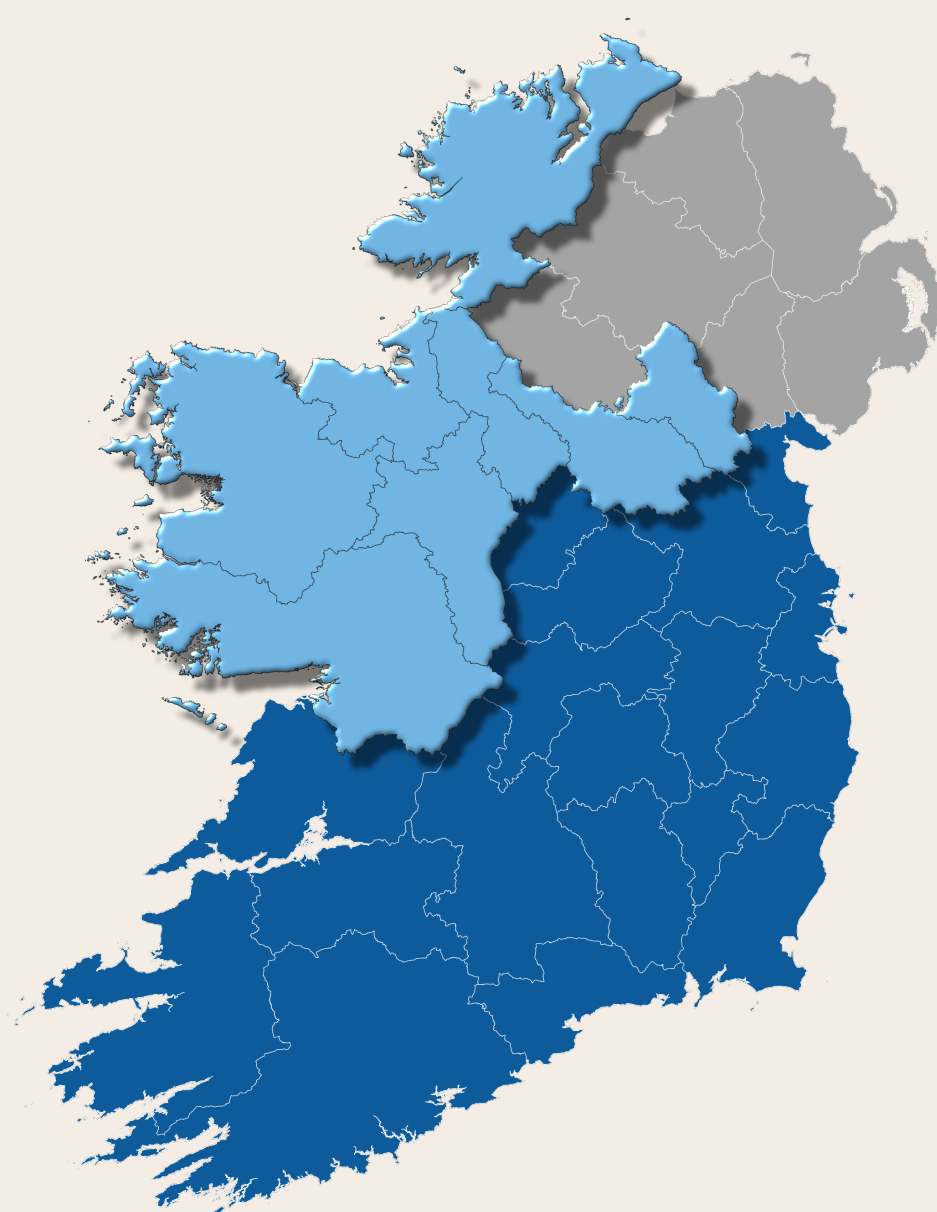
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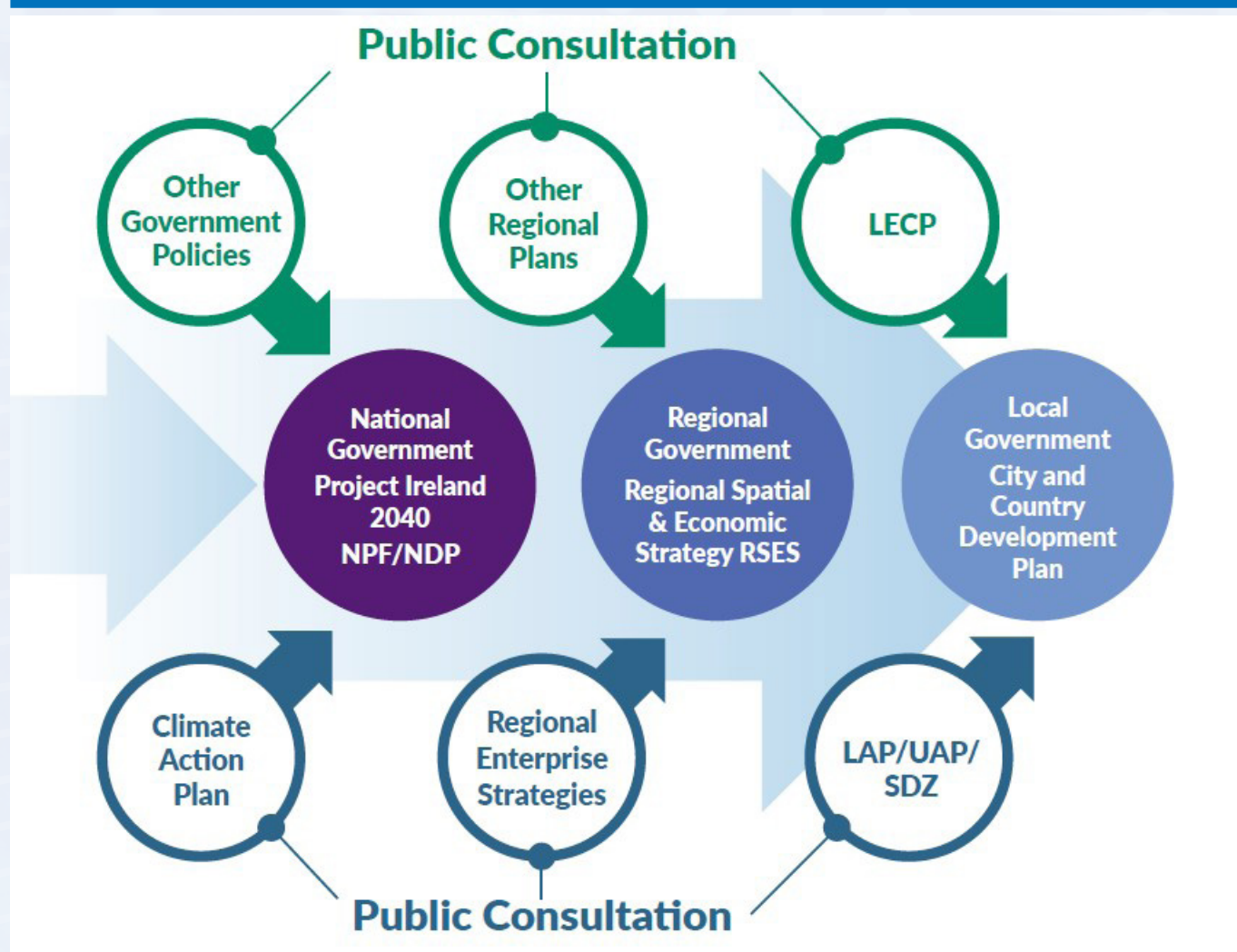
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As outlined in Figure 1, the Local Economic and Community Plans (LECPs) are a part of the overarching policy framework of Project Ireland 2040, which includes the National Planning Framework (NPF), the National Development Plan (NDP), the Regional Spatial and Economic Strategies (RSES) and County and City Development Plans.

Within this policy framework, the specific purpose of the LECPs is to set out the objectives and actions needed to promote and support economic and community development within the relevant Local Authority area over the next six-year period,¹ as provided for in the Local Government Reform Act 2014. In doing so, the LECPs are one of the primary mechanisms – at local level – to bring forward relevant actions arising from national and regional strategies and policies that have a local remit.

Figure 1: Policy structure of Project Ireland 2040



Source: Local Economic and Community Plans Guidelines 2021

¹ <https://www.gov.ie/en/press-release/59c83-ministers-humphreys-and-obrien-launch-local-economic-and-community-plans-guidelines-2021/>

As noted in the 2021 guidelines of the LECPs – and in line with the Local Government Reform Act 2014 – the LECPs must be consistent with the appropriate RSEs and City and County Development Plans. Unfortunately, at the time of writing, the level of up-to-date data specifically relating to the Galway City Council area and the area of the Galway Metropolitan Area Strategic Plan was limited, with the lack of data in this regard credited to the latest Census being delayed due to the outbreak of COVID-19.

Although data with respect to the Galway City Council area and the area of the Galway Metropolitan Area Strategic Plan is available from Census 2016, such information is quite dated and the forthcoming Census 2022 results - which are due to be released next year - will provide significant insights for Galway City Council with respect to the implementation of their Development Plan, the Galway Metropolitan Area Strategic Plan (MASP) and their LECP. Considering this policy requirement and mindful of the lack of up-to-date data on the Galway City Council area, the Northern and Western Regional Assembly has prepared this “LECP Briefing Note”; the purpose of which is to highlight some of the more up-to-date county and Local Authority socio-economic indicators that are available and which will help inform the objectives and actions of the LECP. In this regard, this “LECP Briefing Note” outlines the performance and data source of socio-economic indicators related to Galway - and where possible tailored for the Galway City Council area - in the following three areas, namely:

- Economic indicators
- Quality of life indicators
- Environmental and low carbon economy indicators

It is also important to note that the data that is presented in the “LECP Briefing Note” for Galway City Council will be available through the “**Regional Development Monitor**”, which is currently being prepared by the three Regional Assemblies of Ireland in partnership with the All-Island Research Observatory (AIRO) in Maynooth University.

Specifically, the “**Regional Development Monitor**” will be available online, free of charge and will monitor around 60 socio-economic indicators under the following four themes, namely:

- Our People and Places
- Our Green and Sustainable Future
- Our Region’s Economy
- Our All-Island Perspective

The majority of socio-economic indicators that will be monitored in the “Regional Development Monitor” meet the following three principles:

- The data is provided by a reliable source
- The data can be updated every year, which allows for annual evaluations outside of the Census
- The data is as up-to-date as possible

In doing so, the “**Regional Development Monitor**” will be an important online data platform that will monitor national, regional and county trends on key socio-economic indicators and will be a useful policy tool for Local Authorities in preparing their LECPs and monitoring up-to-date trends in their respective Local Authority areas.



The RSES is crafted on the principle that it wants to work collaboratively to deliver effective regional development for all our communities, regardless of administrative boundaries. This means that we need to understand their catchments and their potential and to enable the spatial development opportunities specific to each of the sub-regions.²

The RSES aims to be responsive to trends – such as urbanisation, digitisation and globalisation – whilst also interpreting socio-economic and environment risks by connecting our plans to the United Nation’s (UN) Sustainable Development Goals (SDGs), the EU’s Growth Strategy (including the EU Green Deal) and the National Strategic Outcomes (NSOs) of the NPF.

At its core, the RSES recognises the weak urban infrastructure in the Northern and Western Region and that this region has not prospered economically compared to the other two NUTS 2 Regions of Ireland. This is evident from the reclassification of the Northern and Western Region by the European Commission from a ‘More Developed Region’ to a ‘Transition Region’ for the funding period of 2021 to 2027³ with other economic challenges also highlighted in the NWRA’s recent publication ‘**A Region in Transition: The Way Forward**’.⁴ Furthermore, the European Parliament’s Committee on Regional Development has categorised the region as a “**Lagging Region**”, which is a region characterised by extremely low growth which is divergent from the rest of its country,⁵ while the European Commission’s 2021 ‘Regional Innovation Scoreboard’ classified the Northern and Western Region as a ‘**Moderate Innovator**’; the only region on the island of Ireland to hold such a status.⁶

Figure 2: Growth Ambitions of the RSES of the Northern and Western Region



Source: RSES of the Northern and Western Region

² Sub-regions available via Figure 2 of the RSES: <https://www.nwra.ie/pdfs/NWRA-RSES-2020-2032.pdf>

³ <https://www.gov.ie/en/press-release/17e02-minister-mcgrath-appoints-regional-assemblies-to-erdf-managing-authority-roles/>

⁴ <https://www.nwra.ie/wp-content/uploads/2020/01/region-in-transition-the-way-forward-final.pdf>

⁵ [https://www.europarl.europa.eu/RegData/etudes/STUD/2020/652215/IPOL_STU\(2020\)652215_EN.pdf](https://www.europarl.europa.eu/RegData/etudes/STUD/2020/652215/IPOL_STU(2020)652215_EN.pdf)

⁶ https://ec.europa.eu/info/research-and-innovation/statistics/performance-indicators/regional-innovation-scoreboard_en

Within this context, the RSES responded by adopting a clear strategy that aims to deliver on the key elements known to inform business location choices, namely:

KEY BUSINESS ELEMENTS

1. Development of compact urban centres with critical mass in population; encouraging the revitalisation of urban areas and reinhabitation of urban cores.
2. Provision of connectivity and access (including national and international), enabled by physical and technology infrastructures with capacity resilience and quality especially post-Brexit.
3. Establishment of competitive, smart and integrated public transport networks within and between cities and urban areas.
4. Nurturing of world-class infrastructure and competitive services with capacity, resilience and quality.
5. Growing our third level infrastructures, access to skills and research, development and innovation.
6. Availability of property solutions – including ‘ready-to-go’ commercial properties, ‘landing spaces’, co-working spaces and flexible property solutions and affordable housing.
7. Co-location or dynamic clustering, enabling connectivity and linkages within and between suppliers and purchasers, between enterprises and Higher Education Institutes (HEIs).
8. Development of quality of life factors and sense of Place, including harnessing the social, and cultural dimensions of the living experience of communities, including the unique social, linguistic and cultural dimensions of our Gaeltacht communities.

Furthermore, the RSES has also introduced the concept of a ‘Growth Framework’ that links strategic and operational challenges with prioritised capital interventions. The ‘Growth Framework’ will be the basis for determining metrics, linking with NSOs and assessing the region’s actual contribution to the UN’s SDGs. The Growth framework incorporates five ‘Growth Ambitions’ that define each priority and how they are mutually complementary with a focus on ‘People and Places’. In this regard, our ambition is for a region that is **“Vibrant”, “Natural”, “Connected”, “Inclusive”** and a **“Great Place to Live”**, consolidated by a strong settlement strategy focusing on **“People and Places”**.

It brings a new “place-based” approach that involves tapping into the economic potential that remains unused, so that all parts of the Northern and Western Region – whether they be cities, towns, or their rural hinterlands – can contribute to national development.

“The LECPs of the Northern and Western Region have an opportunity to deliver on the vision and objectives outlined within the RSES.”

2.1: Galway Metropolitan Area Strategic Plan

Central to delivering on the ambitions of the RSES will be the ability of Galway County Council, Galway City Council and other stakeholders to achieve the targets and implement the objectives outlined in the Galway Metropolitan Area Strategic Plan (MASP).

The MASP provides a strategic focus on the City as a functional area and it sets out how it is envisaged the NPF will be implemented within the regional context of the RSES. The vision for Galway, as provided in the RSES, is that it will be a leading European city renowned for its quality of life, its history, its culture and its people. It is and will be a place that embraces modern technologies, high standards of education, delivering competitive and sustainable enterprises.

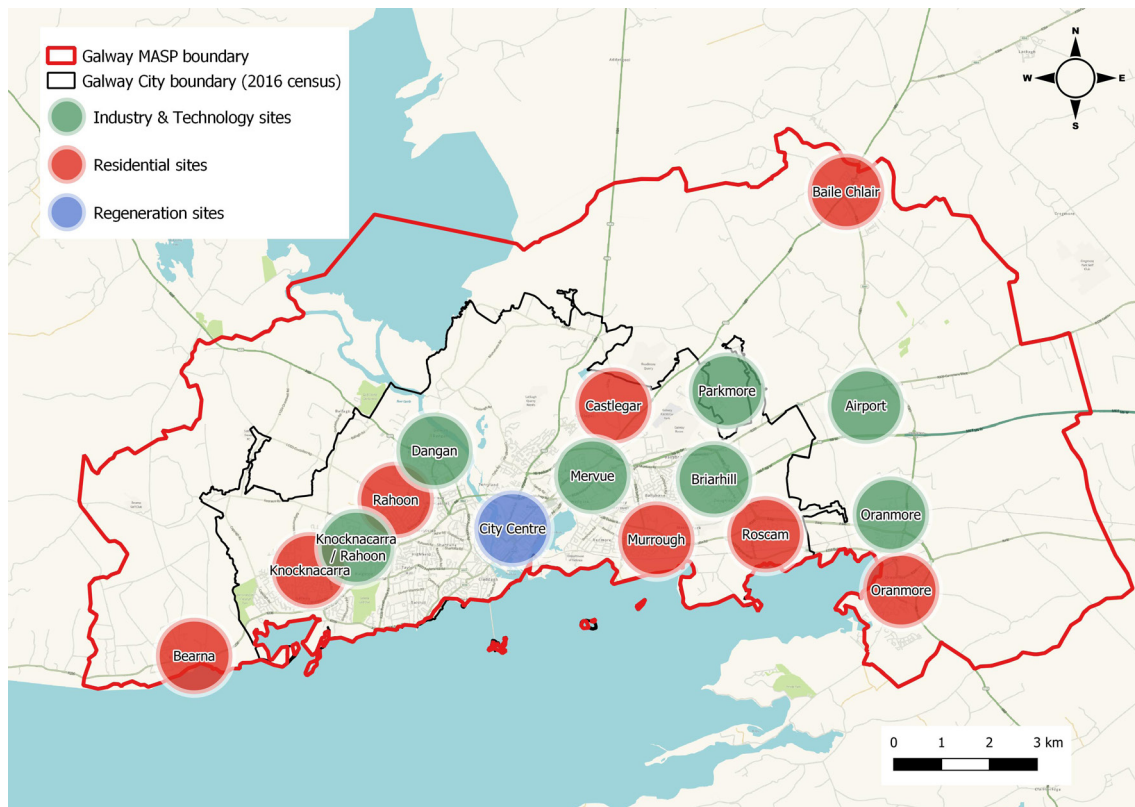
The LECP is an opportunity for the development of an integrated and joint approach by Galway County Council and Galway City Council to support the achievement of key targets set by the Galway MASP, including:

1. Increase the population of the Galway Metropolitan Area by 27,500 to 2026, and by a further 14,500 by 2031, with the population of the city and suburbs accommodating 23,000 to 2026 and a further 12,000 to 2031.
2. Deliver at least half (50%) of all new homes that are targeted within the MASP to be within the existing built-up footprint
3. Provide employment opportunities for the increasing population at ratio of 0.66:1
4. Support delivery of infrastructure projects identified and prioritised within the MASP
5. Deliver the necessary economic, social and community support services - including health, education, green networks and to provide for climate change resilience as a cross-cutting theme.

As evident from Figure 3, a number of strategic locations have been identified in the MASP that present the opportunity and capacity to deliver the necessary quantum of housing and employment to facilitate the targeted growth and these include locations within the functional area of Galway City Council but also other locations that lie within the administration area of Galway County Council.

In this context, a Joint Meeting of the Planning SPCs of Galway County Council and Galway City Council was held in July as a joint initiative to focus upon the implementation of the MASP. To what extent the Galway MASP is implemented will depend on the ability of Galway City Council, Galway County Council and other stakeholders to collaborate together as a means of supporting the vision and objectives of the RSES of the Northern and Western Region.

Figure 3: Strategic locations that have been identified in the MASP that present the opportunity to deliver the necessary quantum of housing to facilitate targeted growth.



Source: RSES of the Northern and Western Region

Section 3 of this briefing note analyses economic indicators, specifically focusing on trends in the following areas:

- Disposable income per capita
- Enterprise base
- COVID-19 employment impact
- Employment supported by Enterprise Agencies
- Human capital profile
- Project Ireland 2040 funds
- Sectoral specialisms

3.1: Disposable Income Per Capita

A key indication of the economic wellbeing of a geographical area is the level of disposable income per head of population, which is essentially the average person's income after deducting taxes and social contributions and including social benefits.

As evident from Figure 4, average disposable income per head of population in Galway was estimated to be €21,615 in 2020, which was below the State average of €23,615. Although average disposable income levels in Galway have recovered from the previous financial crisis, it should be noted that the gap in disposable income levels between Galway and the State average has progressively increased in recent years, rising from a gap of €748 per head of population in 2011 to €2,000 in 2020.

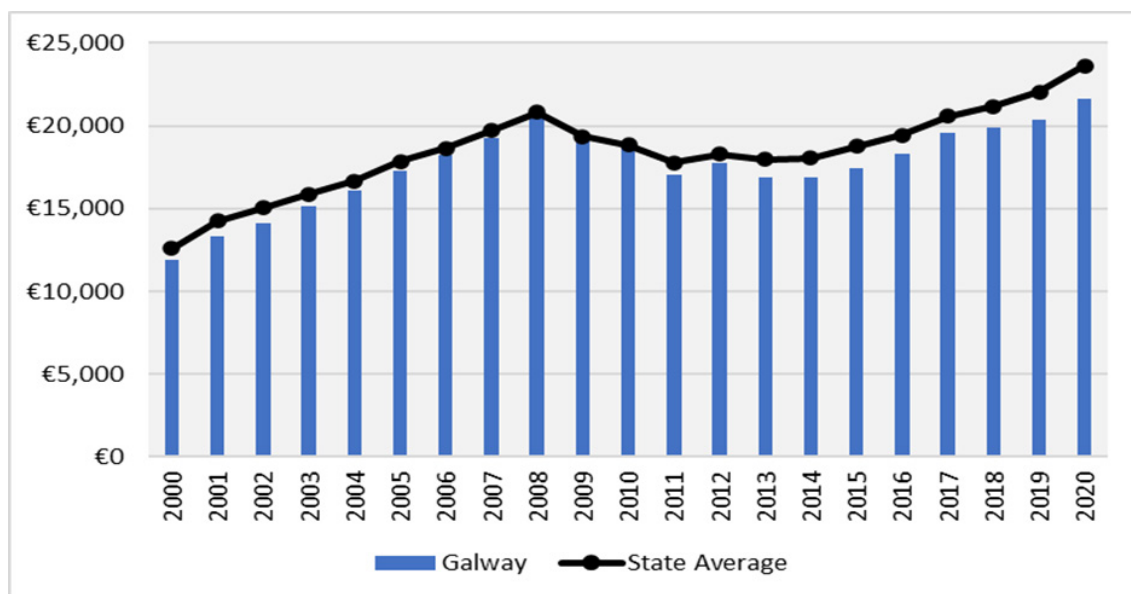
3.2: Enterprise Base

The vibrancy of a geographical area's commercial environment is a significant factor in determining its economic wellbeing. International institutions such as the OECD have stated that the UN's Sustainable Development Goals can only be achieved if countries manage to build up a strong enterprise base – particularly SMEs – thereby highlighting their importance to regional economic development.⁷

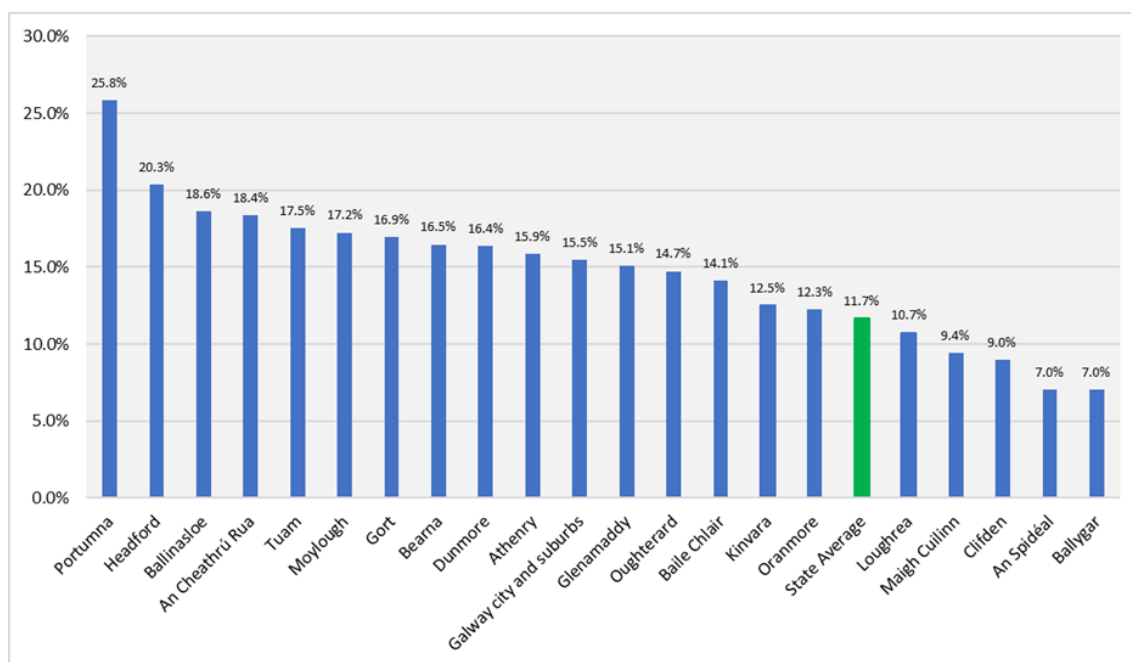
Commercial vacancy rates provide a general indication of the level of commercial vibrancy and activity within a geographical area. Based on GeoDirectory data, the commercial vacancy rate in Galway stood at 13.7 per cent as of December 2021, which was 2 percentage points higher than the State average of 11.7 per cent.

In terms of the higher level towns and villages that have been highlighted in the current suite of Galway City and County Development Plans, Portumna had the highest commercial vacancy rate in Galway as of December 2021, with a rate of 25.8 per cent. Further information in this regard can be found in Figure 5.

⁷ <https://oecd-development-matters.org/2017/04/03/unlocking-the-potential-of-smes-for-the-sdgs/>

Figure 4: Disposable income per capita for Galway and the State Average, 2000-2020*

Source: CSO. *2020 is based on an estimate from the CSO

Figure 5: Commercial vacancy rates of the higher-level towns and villages of Galway, December 2021

Source: GeoDirectory⁸

⁸ Data provided by GeoDirectory through a data license agreement with the 3 Regional Assemblies of Ireland

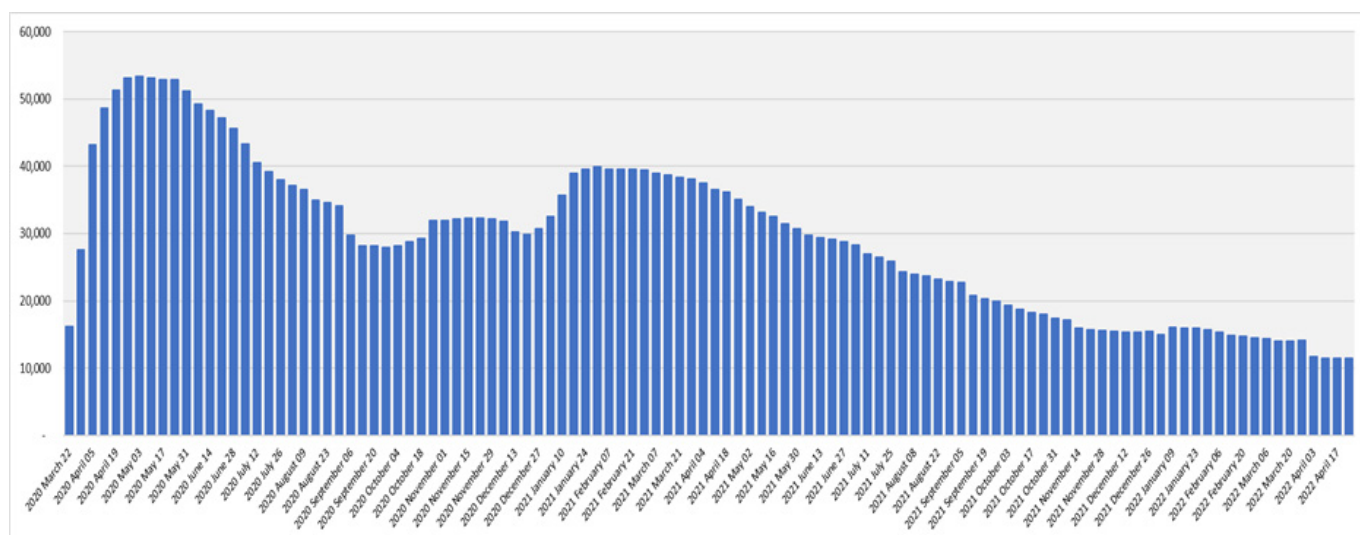
3.3: COVID-19 Employment Impact

As a result of the public health measures needed to control the spread of COVID-19, Ireland's labour market was severely impacted, with the State's unemployment rate rising substantially in a short period of time. Inevitably such developments also severely affected the labour market of Galway.

To evaluate the extent of this impact, Figure 6 shows the number of people in Galway that were either in receipt of the Pandemic Unemployment Payment (PUP), the Temporary Wage Subsidy Scheme (TWSS) or the Employment Wage Subsidy Scheme (EWSS), using CSO data.⁹ The number of residents in Galway in receipt of either the PUP, TWSS or the EWSS peaked at 53,394 as of the 3rd of May 2020, with the number of recipients in Galway progressively falling between February 2021 and April 2022.

The latest available figures show that 11,497 people in Galway were in receipt of either the PUP, TWSS or the EWSS as of the 24th of April 2022.

Figure 6: The number of people in Galway on the Live Register, that were in receipt of the PUP or supported by the TWSS / EWSS, March 2020 – April 2022



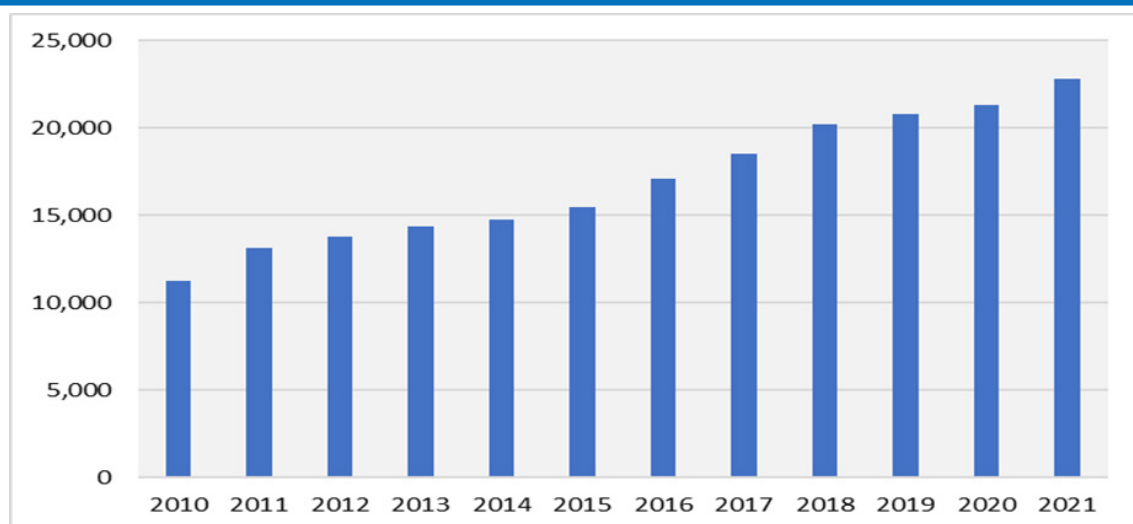
Source: CSO

⁹ <https://data.cso.ie/table/LRW14>

3.4: Employment Supported by Enterprise Agencies

The total number of IDA Ireland client companies based in Galway amounted to 94 in 2021, representing 5.6 per cent of the total stock of IDA Ireland client companies. Over the past decade, the number of IDA Ireland client companies based in Galway has risen from 66 in 2011 to 94 in 2021. In terms of direct employment, IDA Ireland client companies based in Galway employed 22,801 people in 2021, with consistent net job growth recorded over the past decade.

Figure 7: The number of jobs supported from IDA Ireland client companies located in Galway, 2010-2021.



Source: IDA Ireland

Similar trends were also evident with respect to client companies that are supported by Enterprise Ireland. In 2021, a total of 8,122 jobs were supported by Enterprise Ireland client companies that were located in Galway.¹⁰ Following Enterprise Ireland's new strategy, a revision of the population of companies included in the Annual Employment Survey was undertaken, including companies recently acquired or those whose strategy or need to engage with Enterprise Ireland had changed.

As a result of this revision, the changes to the baseline survey population reduced the total employment in client companies supported by Enterprise Ireland in 2021. Due to these changes, the 2021 employment data for client companies supported by Enterprise Ireland was not comparable to the corresponding data in previous years. Nevertheless, direct employment in client companies supported by Enterprise Ireland and based in Galway rose between 2010 and 2020, rising from 6,109 people employed in 2010 to 8,369 in 2020. Furthermore, the number of people employed in client companies supported by the Galway Local Enterprise Office amounted to 1,048 in 2020.¹¹

¹⁰ <https://www.oireachtas.ie/en/debates/question/2022-02-08/175/>

¹¹ <https://www.localenterprise.ie/Portal/Documents-and-Publications/Impact-Reports/Impact-Report-2020-/V4-2021-LEO-Impact-Report-2020-pdf.pdf>

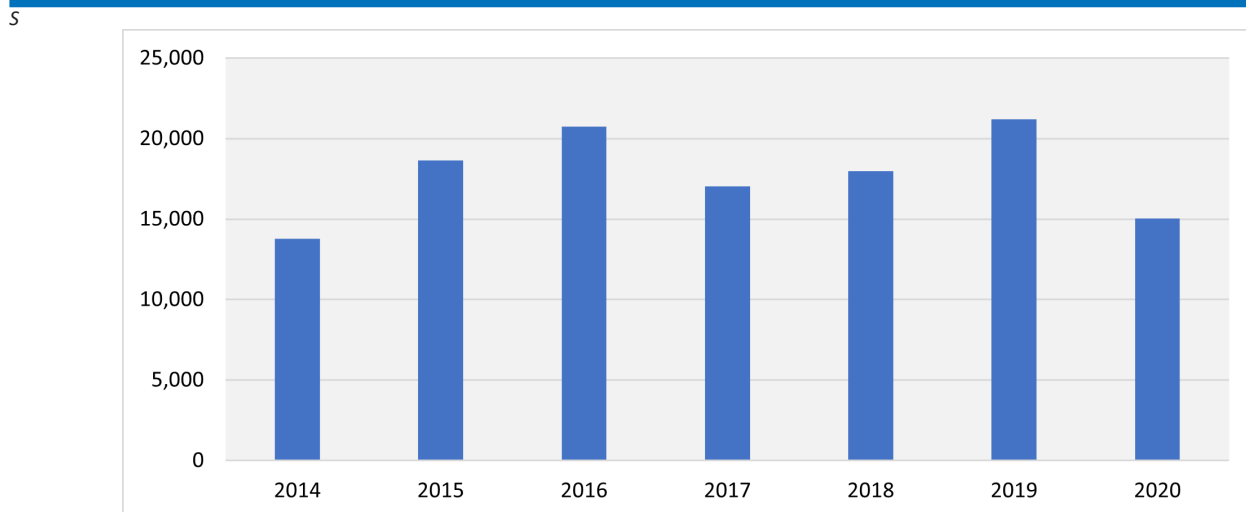
3.5: Human Capital Profile

Human capital is central to Ireland's economic success and social development, with the availability of well-educated, skilled and knowledgeable citizens acting as fundamental drivers of regional economic development and social progress.

Amongst other factors, human capital is generally nurtured through the provision of high quality graduates from Higher Education and Further Education and Training (FET) institutions. According to the Higher Education Authority, a total of 4,769 students – that were originally from Galway – graduated from Higher Education Institutes in Ireland in 2020, which represented an increase of 10.6 per cent relative to the base year of 2018.¹²

In conjunction to this, the Department of Education also provides data on the number of FET beneficiaries¹³ who are enrolled in each Education and Training Board (ETB) in Ireland. Prior to the outbreak of COVID-19, the number of FET beneficiaries registered in the Galway and Roscommon ETB amounted to 21,184 in 2019, with this figure dropping to 15,044 in 2020, with the impact of COVID-19 being credited to this year-on-year decline.¹⁴

Figure 8: The number of FET beneficiaries in the Galway and Roscommon ETB, 2014-2020



Source: Department of Education¹⁵

3.6: Project Ireland 2040 Funds

There are four designated funds that aim to support the implementation of the vision and objectives of Project Ireland 2040, namely:

- The Urban Regeneration Development Fund (URDF)
- The Rural Regeneration Development Fund (RRDF)
- The Climate Action Fund
- The Disruptive Technologies Innovation Fund

In terms of the URDF, a total of €68.8 million has been allocated to Galway under Calls 1 and 2 of the URDF, with the specific projects supported outlined in Table 1. Galway accounted for 4.2 per cent of the national

¹² Access our Data – Graduates | Statistics | Higher Education Authority (hea.ie)

¹³ Beneficiaries metric records an individual learner based on the number of FET courses they have been registered in the declared year.

¹⁴ Consultations with the Department of Education suggest that this decline can be attributed to the fact that some courses simply couldn't be held remotely, or some users didn't want to learn online.

¹⁵ Data provided to the Northern and Western Regional Assembly through a private request to the Department of Education

allocation of the URDF and the county accounted for 32.6 per cent of the Northern and Western Region's total allocation under this fund as of July 2022.

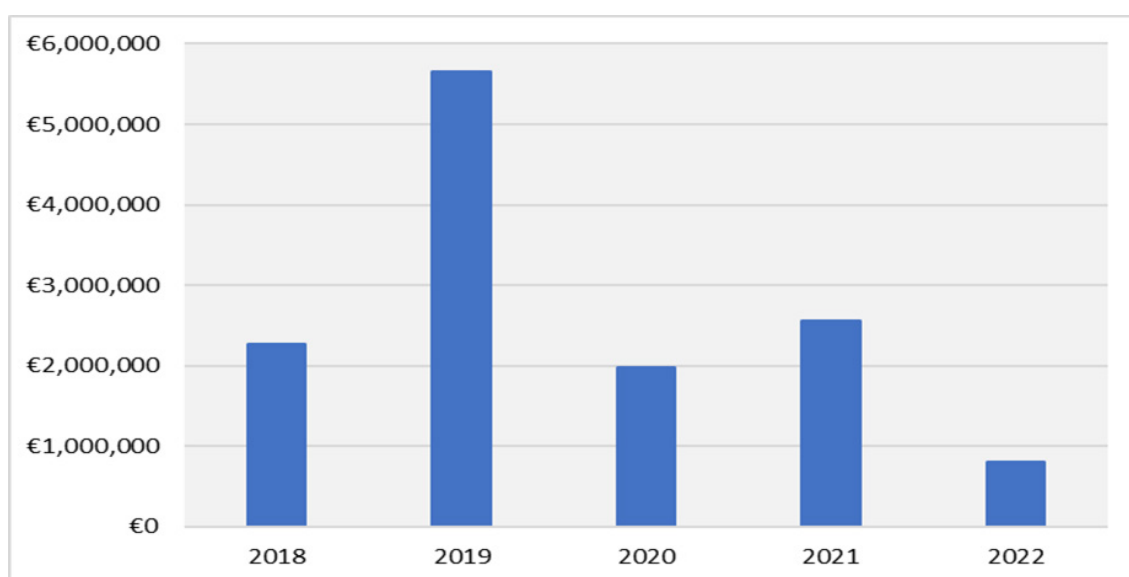
Table 1: Projects located in the area of the Galway MASP that will be supported by the URDF, as of July 2022

Name of the Project	Funding Allocation
Nuns Island Masterplanning	€236,000
Regeneration of Galway City Inner Harbour	€285,000
Ardaun Upgrade of Martin Roundabout	€2,703,000
Sandy Road Liosbán	€187,500
Cycling and Walking Projects	€2,900,000
Oranmore Railway Station	€9,281,250
Galway City Council Transport Connectivity Project	€40,304,000
Galway Public Spaces and Streets project	€8,635,000
Galway – Innovation and Creativity District	€4,300,000

Source: Department of Housing, Heritage and Local Government¹⁶

With respect to the RRDF, €13.3 million has been allocated to projects located in Galway between 2018 and 2022, with a year-on-year breakdown provided in Figure 9. Between 2018 and 2022, Galway accounted for 4.8 per cent of the national allocation under the calls from the RRDF and 11.5 per cent of the Northern and Western Region's total allocation under this fund as of June 2022.

Figure 9: The level of investment provided under the RRDF for projects located in Galway, 2018-2022*



Source: Department of Rural and Community Development.¹⁷ *As of June 2022

At the time of writing, data with respect to the geographical distribution of funding of the Climate Action Fund and the Disruptive Technologies Innovation Fund was not available.

¹⁶ Data provided to the Northern and Western Regional Assembly through a private request to the Department of Housing, Heritage and Local Government

¹⁷ Data provided to the Northern and Western Regional Assembly through a private request to the Department of Rural and Community Development

3.7: Sectoral Specialisms

On a regional level – and based on stakeholder consultations and research involved in the development of the RSES – the key sectors of the Northern and Western Region include:

- Tourism
- Renewable Energy and Low Carbon Economy
- Marine and Blue Economy
- ICT and Life Sciences
- Agri-Tech and Agri-Food
- Retail
- Advance Manufacturing and Engineering

These high-level sectors have an array of assets, skillsets and capabilities which are instrumental to supporting the Northern and Western Region's economy, and whose growth will be key to achieving balanced regional development in line with the NPF and the RSES.

Taking these regional sectoral strengths into account, it is also important to identify and provide more detail on the sub-sectoral specialisms that exist in Galway City. Using Census 2016 NACE Code employment data, and Location Quotients (LQ) scores, this sub-section provides greater detail of the sub-sectoral specialisms that existed in Galway City at the time of Census 2016. It should be noted that LQ scores act as a method in identifying sectors that are specialized in a regional or local economy, relative to the national norm. For example, in this case:

- An LQ score of 1.0 shows that a geographical area has the same proportion of employment involved in a sub-sector, relative to the national norm.
- An LQ score greater than 1.0 shows that a geographical area has an above average proportion of employment involved in a sub-sector, relative to the national norm.
- An LQ score greater than 1.25 shows that a geographical area has a strong specialization in a sub-sector
- A LQ score lower than 1 shows that a geographical area has a below average proportion of employment involved in a sub-sector, relative to the national norm.

Using Census 2016 sub-sectoral employment data, Galway City's LQ Scores that were greater than 1 have been categorised by their respective 1 digit NACE Code and presented in Table 2, thereby showing the sub-sectoral specialisms that existed in the Galway City Council area at the time of the Census. As evident from Table 2, a wide range of sub-sectoral specialisms have been identified across the high-level sectors (1 digit NACE Codes) in Galway City. For example, in the Manufacturing sector, sub-sectoral specialisms that recorded high LQ scores (i.e. greater than 1.25) in Galway City included but were not limited to:

- Manufacture of medical and dental instruments and supplies (LQ Score of 5.96)
- Manufacture of other transport equipment (1.70)
- Manufacture of machinery and equipment n.e.c. (1.62)
- Manufacture of other computer, electronic and optical products (1.54)
- Manufacture of computers and peripheral equipment (1.50)
- All other manufacturing n.e.c. (1.33)

Outside of the Manufacturing sector, other strong specialisms in Galway City were also evident across a wide range sub-sectors as evident from Table 2.

Table 2: LQ Scores of Galway City for the sub-sectors with a score greater than 1, by their appropriate high-level sector (i.e. 1 digit NACE Code), Census 2016

1 Digit NACE Code (sky blue label) and sub-sectors (white label)	LQ Score (Employment)
Strong Sub-Sectoral Specialism (LQ Score greater than 1.25)	
Above Average Sub-Sectoral Specialism (LQ Score greater than 1 but less than or equal to 1.25)	
Mining and quarrying	
Mining support service activities	1.38
Manufacturing	
Processing and preserving of fruit and vegetables	1.07
Manufacture of computers and peripheral equipment	1.50
Manufacture of other computer, electronic and optical products	1.54
Manufacture of machinery and equipment n.e.c.	1.62
Manufacture of motor vehicles, trailers and semi-trailers	1.14
Manufacture of other transport equipment	1.70
Manufacture of medical and dental instruments and supplies	5.96
All other manufacturing n.e.c.	1.33
Wholesale and retail trade; repair of motor vehicles and motorcycles (G)	
Retail sale in non-specialized stores with food, beverages or tobacco pre-dominating	1.02
Retail sale of food, beverages or tobacco in specialised stores	1.12
Retail sale of information and communication equipment in specialised stores	1.15
Retail sale of electrical household appliances in specialised stores	1.24
Retail sale of furniture, lighting equipment and household articles n.e.c.	1.74
Retail sale of cultural and recreation goods in specialised stores	1.67
Retail sale of clothing in specialised stores	1.17
Retail sale of footwear and leather goods in specialised stores	1.00
Retail trade n.e.c.	1.27
Transportation and storage	
Taxi operations	1.31
Accommodation and food service activities	
Hotels and similar accommodation	1.83
Other provision of short-stay accommodation	2.48
Restaurants and mobile food service activities	1.78
Event catering and food service activities	1.61
Beverage serving activities	1.26
Information and communication activities	
Publishing of books, newspapers, magazines, software and other publishing services	1.01
Movie, video and television programme production, sound recording and music publishing activities	1.55
Programming and broadcasting activities	1.00
Computer programming, consultancy and Information service activities	1.55
Financial and insurance activities	
Insurance, reinsurance and pension funding, except compulsory social security	1.09
Professional, scientific and technical activities	
Technical testing and analysis	1.16

Scientific research and development	1.55
Other professional, scientific and technical activities	1.06
Administrative and support service activities	
Services to buildings and landscape activities	1.26
Public administration and defence; compulsory social security	
Defence activities	1.13
Education	
Higher education	2.46
Adult and other education not elsewhere classified	1.03
Human health and social work activities	
Hospital activities	1.56
Medical practice activities	1.31
Residential care and social work activities	1.31
Other human health activities	1.24
Arts, entertainment and recreation	
Creative arts and entertainment activities	1.54
Libraries, archives, museums and other cultural activities	1.05
Sports activities and amusement and recreation activities	1.16
Other service activities	
Repair of computers and personal and household goods	1.25
Washing and dry-cleaning of textile and fur products	1.09
Hairdressing and other beauty treatment	1.04
Other service activities n.e.c.	1.07

Source: Northern and Western Regional Assembly calculations using CSO Census data

The Census 2022 Summary Report will be published in April 2023, with further results expected to be published up to December 2023. These results will examine a range of topics such as population, housing, health, education and employment.

4:

Galway Quality of Life Indicators

Section 4 of the “LECP Briefing Note” analyses quality of life indicators, specifically focusing on trends in the following areas:

- Population growth
- First buyer affordability
- Renter affordability
- New dwelling completions
- Residential vacancy
- Homelessness
- Litter pollution
- Library service usage

4.1: Population Growth

According to the preliminary results of the CSO’s Census of Population 2022,¹⁸ the population of the Galway City Council area amounted to 83,456 people in April 2022, representing a potential increase of around 6.1 per cent relative to the previous Census.

Of the 236 Electoral Divisions that are located in Galway, 201 recorded population growth between 2016 and 2022, with 35 Electoral Divisions either recording a decline or zero growth in population during this time. The Electoral Divisions that recorded the highest population growth rate included Leitir Breacáin (43.2%), Galway Rural (42.3%), Rafood (35.6%), Paróiste San Nicoláis (30%), Kilconierin (24.9%), Mervue (24.3%), Levally (24%), Cappard (23.2%), An Spidéál (22.9%), Doonloughan (20.7%), Headford (20.7%), Cahermore (20.6%), Ballynakill (20.5%), Monivea (20.4%), Craughwell (20.2%) and Loughrea Urban (19.6%). Further detail on the Electoral Divisions of Galway can be found on the CSO’s website.¹⁹

4.2: First-Time Buyer Affordability

Housing affordability research²⁰ recommends that households keep their housing costs to 30 per cent of their net income, as anything above this ratio begins to affect a household’s ability to save and cover other essential costs. By adopting a similar methodology to previous studies on housing affordability,²¹ the Northern and Western Regional Assembly has estimated the average mortgage repayment to net income ratio for first time buyers located in the Northern and Western Region.

The Assembly’s methodology for calculating the average mortgage repayment to net income ratio for first time buyers is outlined in Appendix A. In this regard, Galway recorded an average mortgage repayment to net income ratio for first time buyers of 27 per cent in 2020, which was below the affordability mark of 30 per cent and the corresponding State average of 29 per cent.

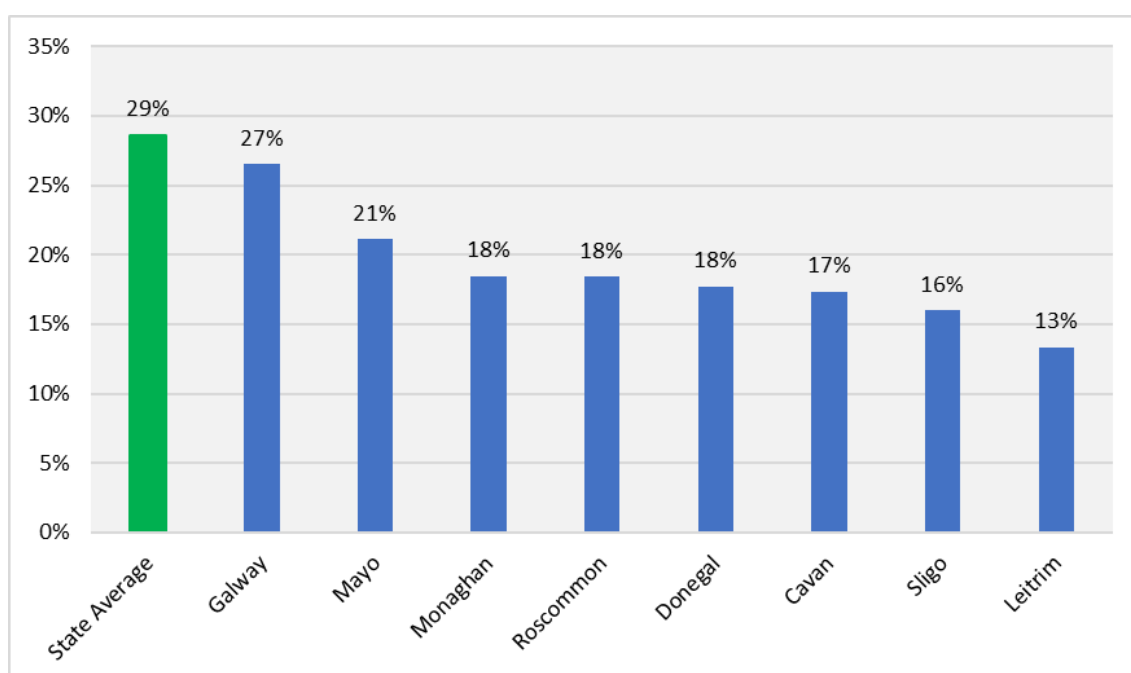
¹⁸ <https://www.cso.ie/en/releasesandpublications/ep/p-cpr/censusofpopulation2022-preliminaryresults/introduction/>

¹⁹ <https://data.cso.ie/table/FP009>

²⁰ https://www.esri.ie/system/files/publications/RN20190402_0.pdf

²¹ https://www.esri.ie/system/files/publications/RN20190402_0.pdf

Figure 10: Average mortgage repayment to net income ratio for first time buyers, for counties based in the Northern and Western Region vs the State Average, 2020



Source: Northern and Western Regional Assembly calculations based on methodology outlined in Appendix A

4.3: Renter Affordability

The provision of affordable rental accommodation will be a key component to supporting the quality of life offering of Galway. The Northern and Western Regional Assembly has estimated the average rental payment to net income ratio for renters located in Galway and the methodology involved in calculating this ratio has been outlined in Appendix A. In this regard, Galway registered an average rental payment to net income ratio for renters of 45 per cent in 2020, which was higher than the standard affordability mark of 30 per cent.

4.4: New Dwelling Completions

The delivery of new housing will be fundamental to enhancing the quality of life offering of Galway. Figure 11 shows the absolute number of new dwelling completions in Galway City area, between 2016 – which represents the base year of the National Planning Framework²² and the Regional Spatial and Economic Strategy²³ of the Northern and Western Region – and 2021, which represents the latest full year dataset.

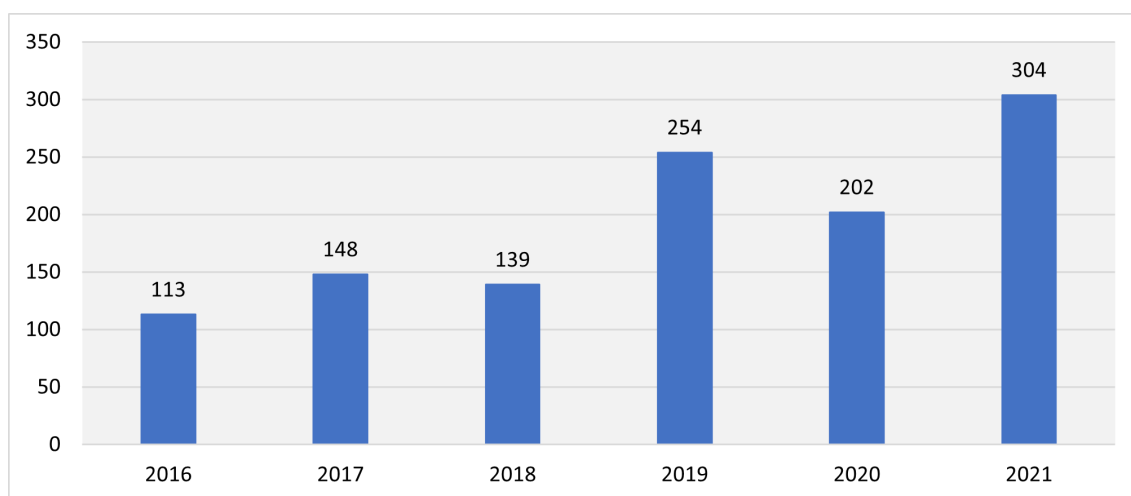
In 2016, 113 new dwellings were completed in the Galway City Council area, with completions rising to a recent high of 304 in 2021, as can be seen from Figure 11. Relative to the previous year, new dwelling completions in the Galway City Council area were up 50.5 per cent relative to the previous year.

Of the 45 CSO defined settlements in Galway, 32 either recorded a decline or zero growth in completions in 2021 relative to the previous year. Only 13 CSO defined settlements in Galway recorded year-on-year growth in new dwelling completions in 2021.

²² <https://nwf.ie/wp-content/uploads/Project-Ireland-2040-NPF.pdf>

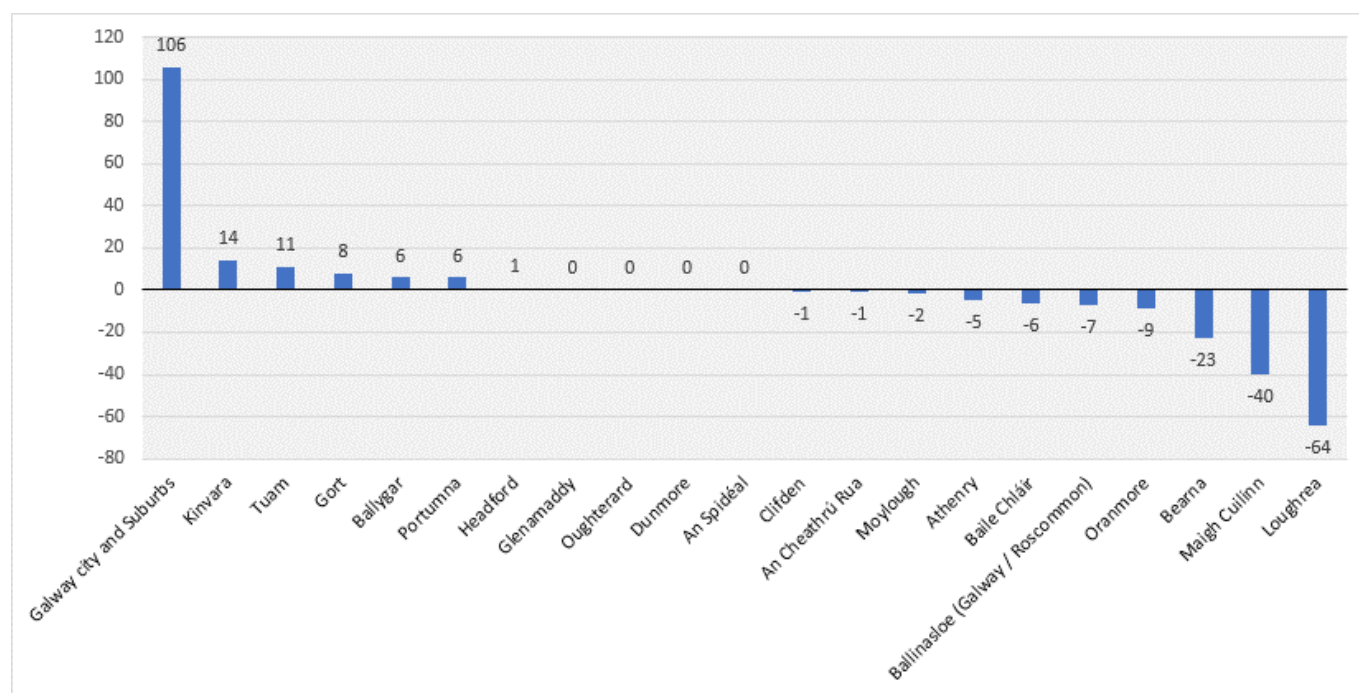
²³ <https://www.nwra.ie/pdfs/NWRA-RSES-2020-2032.pdf>

Figure 11: Absolute number of new dwelling completions in the Galway City Council Area, 2016-2021



Source: CSO²⁴

Figure 12: CSO defined settlements of Galway to record increase in the number of new dwelling completions, 2020-2021



Source: CSO.²⁵

²⁴ <https://data.cso.ie/product/ndc>

²⁵ <https://data.cso.ie/product/ndc>

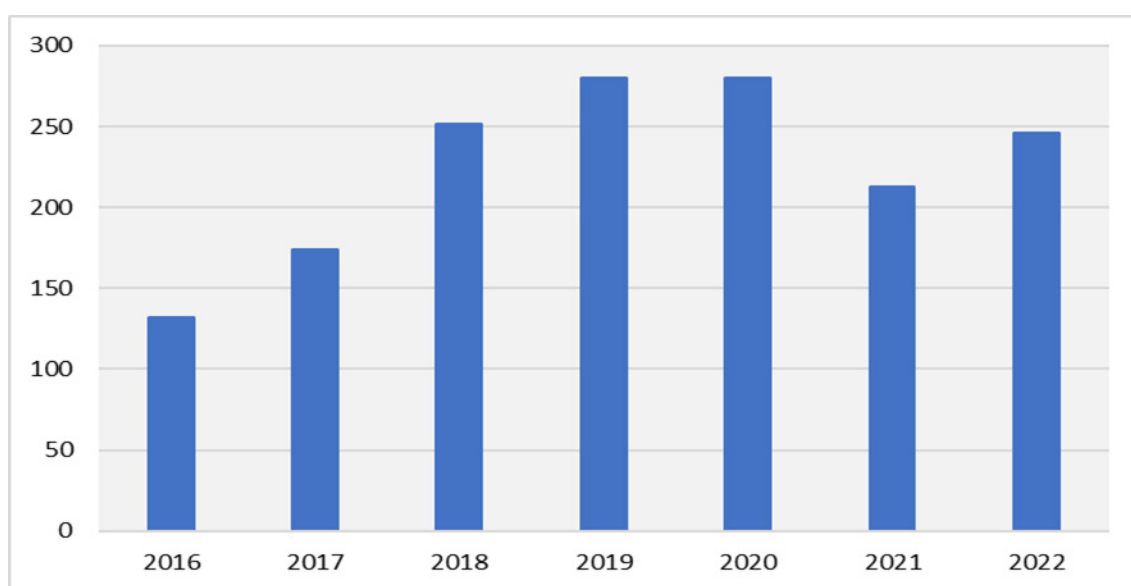
4.5: Residential Vacancy

Residential vacancy rates provide a general indication of the level of housing activity and vibrancy within a geographical area. Based on GeoDirectory data, the residential vacancy and dereliction rate in Galway stood at 6.8 per cent as of September 2020, which was higher than the State average of 4.9 per cent.²⁶ In absolute terms, the number of vacant or derelict residential properties in Galway amounted to 7,376 as of September 2020.

4.6: Homelessness

According to data from the Department of Housing, Local Government and Heritage, the absolute number of adults accessing homeless services in Galway has progressively risen over the past number of years, increasing from 132 in 2016 to a recent high of 280 in 2020.²⁷ As of May 2022, the number of adults accessing homeless services in Galway amounted to 246, representing an annual increase of 15.5 per cent.

Figure 13: Absolute number of adults accessing homeless services in Galway, May 2016-2022



Source: Department of Housing, Local Government and Heritage²⁸

²⁶ Data provided by GeoDirectory through a data license agreement with the 3 Regional Assemblies of Ireland

²⁷ May data (2016-2021)

²⁸ [gov.ie - Homelessness data \(www.gov.ie\)](https://www.gov.ie/en/homelessness-data/)

4.7: Litter Pollution

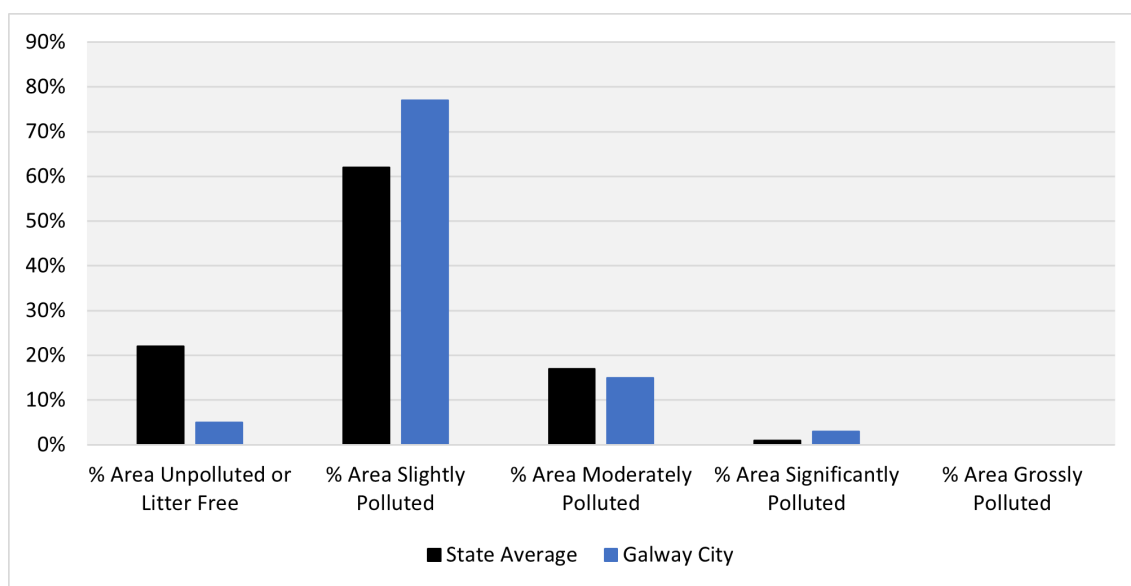
The National Oversight and Audit Commission (NOAC) – through their Local Authority performance indicator report²⁹ – evaluates the environmental performance of Local Authorities by carrying out a variety of surveys. One of these surveys examines the level of litter pollution across each Local Authority area, with the degree of pollution evaluated across five different categorises, namely:

- Unpolluted or litter free
- Slightly polluted
- Moderately polluted
- Significantly polluted
- Grossly polluted.

As evident from Figure 14, the national median figure for areas classified as being unpolluted or litter free was 22 per cent in 2020, with the Galway City Council area recording a ratio of 5 per cent.

The percentage of Galway City Council area that was classified as slightly polluted was 77 per cent in 2020, which was higher than the national median of 62 per cent. Furthermore, the percentage of the Galway City Council area that was considered significantly polluted was 3 per cent, which was higher than the national median of 1 per cent, as evident from Figure 14.

Figure 14: Percentage of Galway and Ireland within the 5 levels of litter pollution, 2020



Source: NOAC. Some percentages shares do not sum to 100% due to rounding issues

4.8: Library Service Usage

According to data from NOAC,³⁰ data was not available for the Galway City Council area at the time of writing.

²⁹ Report for 2020: <https://noac.ie/wp-content/uploads/2021/09/NOAC-Local-Authority-Performance-Indicator-Report-2020.pdf>

³⁰ Report for 2020: <https://noac.ie/wp-content/uploads/2021/09/NOAC-Local-Authority-Performance-Indicator-Report-2020.pdf>

Section 5 of the “LECP Briefing Note” analyses indicators related to the environment and the transition to a low carbon economy, specifically focusing on trends in the following areas:

- Wastewater capacity
- Ecological status of rivers and lakes
- Electrical vehicles
- EV charging infrastructure
- Wind energy
- Building energy ratings
- Afforestation

5.1: Wastewater Capacity

The provision of wastewater infrastructure will be crucial to supporting future population and employment growth in towns and villages across Galway. Based on Irish Water data,³¹ 19 of Galway’s CSO defined settlements either had no public wastewater treatment plant or were operating above its capacity in 2021. In this regard, wastewater capacity and the load that is received is defined in terms of population equivalents.³² Currently 2 of Galway’s CSO defined settlements are not compliant with Waste Water Discharge Licence emission limit values but are capable of achieving at least Urban Waste Water standards.

5.2: Ecological Status of Rivers and Lakes

Amongst other things, the LECPs provide an opportunity for Local Authorities to support projects that can enhance and protect the ecosystem of local communities, with these ecosystems among the most widely applicable, economically viable and effective tools in protecting and growing the biodiversity profile of Galway.

Support in this regard could not be more important as the EPA’s “Water Quality in Ireland 2013-2018”³³ publication found that 53 per cent of river water bodies in Ireland were considered to have a satisfactory ecological status (i.e. high or good river water quality), with a below average ratio recorded for the Galway City Council area (50%). The EPA also monitored the ecological status of monitored lake water bodies between 2013 and 2018, with 50 per cent of lake water bodies in Ireland recording a satisfactory ecological status, with the corresponding ratio for Galway (City and Council) being 79 per cent.

³¹ Data provided to the Northern and Western Regional Assembly through a private request

³² Definition of “Population equivalents” included: <https://www.water.ie/iw-documents/our-projects/WSSP/WSSPGlossaryAppendices.pdf>

³³ <https://www.epa.ie/publications/monitoring--assessment/freshwater--marine/water-quality-in-ireland-2013-2018.php>

5.3: Electrical Vehicles (EVs)

The uptake of EVs will be a major factor in transitioning the Northern and Western Region to a low carbon economy. Based on the latest full year statistics, the absolute number of EVs³⁴ licensed in Galway was 339 in 2021. EVs in Galway accounted for only 4.3 per cent of all new and second-hand private cars licensed for the first time, which was marginally below the national average of 5.3 per cent in 2021.

Between January and May 2022, EVs in Galway accounted for 9.5 per cent of all new and second-hand private cars licensed for the first time, which was below the corresponding State average of 10.2 per cent.

5.4: EV Charging Infrastructure

The availability of EV charging infrastructure in Galway – amongst other things – will support the widespread adoption of EVs in the region. Up-to-date data is available through “Open Charge Map”,³⁵ which provides information on the number of public and private EV bays / stations and through the ESB’s real time map.³⁶

5.5: Renewable Energy

Among the most important measures in the Climate Action Plan³⁷ is to increase the proportion of renewable electricity to up to 80 per cent by 2030, with the uptake of technologies with respect to wind and solar energy considered instrumental to delivering on this target.

At the moment, wind energy is considered the dominant renewable energy source, and Galway had an installed wind energy capacity of 326 MW³⁸ as of October 2021, representing 7.5 per cent of the total installed wind energy capacity in the State, with a total of 8 wind farms located in the county. As a result of this installed capacity, the wind energy sector currently makes a significant contribution to the commercial rates of Galway County Council. Based on data from Wind Energy Ireland, €2.3 million of commercial rates were payable to Galway County Council as a result of the onshore wind energy sector, accounting for 7.3 per cent of total rates accumulated by the County Council³⁹ in 2020.

The generation of renewable energy through solar panel technologies will also be an important element in delivering on the objectives of the Climate Action Plan, however – at the time of writing – data on the level of energy produced by solar panels by county was not available.

5.6: Building Energy Ratings

Assisting households and businesses in improving their Building Energy Ratings (BER) will support the region’s transition to a low carbon economy. Between 2009 and Q1-2022, 21 per cent of the residential dwellings audited in Ireland registered a BER between “A” and “B”.⁴⁰ Of the audited residential dwellings based in the Galway City Council area, 16 per cent recorded a BER between “A” and “B”.

In conjunction to this, between 2009 and Q1-2022, 15 per cent of non-residential dwellings audited in Ireland registered a BER between “A” and “B”.⁴¹ Of the audited non-residential dwellings based in the Galway City Council area, 11 per cent recorded a BER between “A” and “B”.

³⁴ Data sourced privately from the CSO

³⁵ Charge Point Map ([esb.ie](https://www.esb.ie))

³⁶ <https://openchargemap.org/site>

³⁷ <https://www.gov.ie/en/publication/6223e-climate-action-plan-2021/>

³⁸ Data sourced from Wind Energy Ireland

³⁹ Information sourced from Wind Energy Ireland and prepared by Eamon Halpin & Co

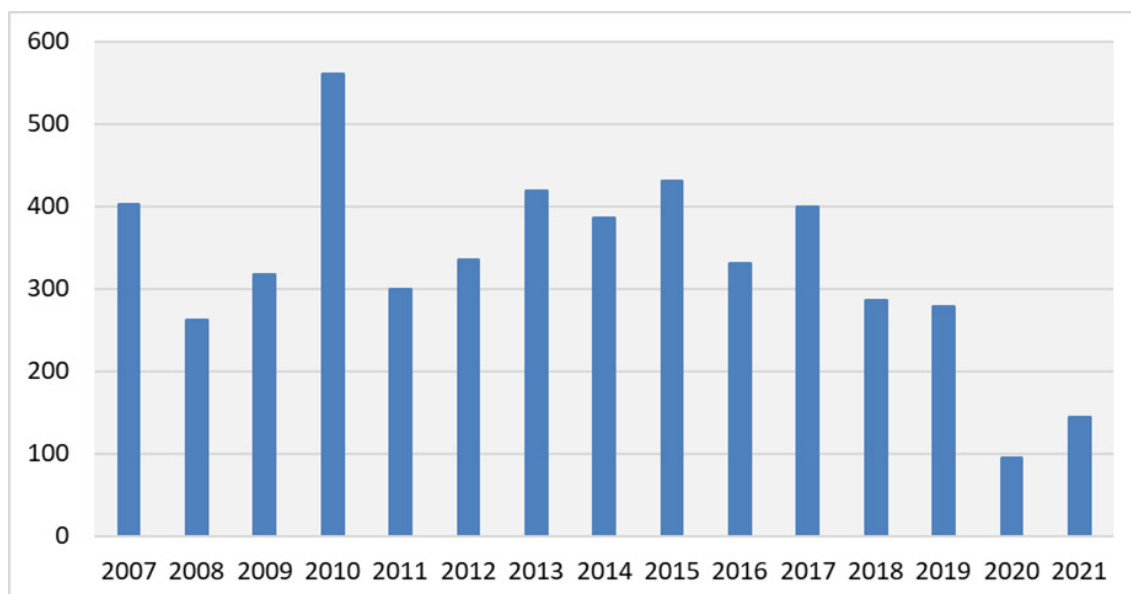
⁴⁰ <https://www.cso.ie/en/releasesandpublications/er/dber/domesticbuildingenergyratingsquarter12022/>

⁴¹ <https://www.cso.ie/en/releasesandpublications/er/ndber/non-domesticbuildingenergyratingsq12022/>

5.7: Afforestation

Figure 15 displays the total afforestation in Hectares (ha) in Galway for each year between 2007 and 2021. Having reached a high of an afforestation area of 561 ha in 2010, the level of afforestation in Galway has fallen notably in recent years, dropping to a recent low of 96 ha in 2020 before rising to 144 ha in 2021.

Figure 15: Total Afforestation (ha) in Galway, 2007 to 2021



Source: CSO⁴²

According to the Department of Agriculture, Food and the Marine, the total amount of forest area in Galway amounted to 63,795 ha in 2022, with forest cover amounting to 10.4 per cent in the county.⁴³

⁴² <https://www.cso.ie/en/releasesandpublications/ep/p-aa/afforestationarea2021/>

⁴³ [gov.ie - Forest Statistics and Mapping \(www.gov.ie\)](https://www.gov.ie/en/forest-statistics-and-mapping/)

6:

Areas of Consideration for the LECP

In preparing the LECP, consideration should be given to the RSES of the Northern and Western Region⁴⁴ which includes a suite of Regional Policy Objectives (RPOs) for the region. Section 6 of this briefing note highlights the RPOs that this LECP could potentially support, with these objectives categorised by the appropriate chapter headings in the RSES, namely:

- Chapter 3 – People and Places
- Chapter 4 – Vibrant Region
- Chapter 5 – Natural Region
- Chapter 6 – Connected Region
- Chapter 7 – Inclusive Region

6.1: People and Places (Chapter 3)

- **RPOs 3.1, 3.2, 3.3.**

In relation to RPOs 3.1, 3.2 and 3.3, how can the Galway City Council LECP enhance

- i. The social, cultural and environmental quality and offering within the Galway MASP area, so that it supports the growth of the built-up footprint of the urban area.

- **RPOs 3.5, 3.6, 3.7, 3.8, 3.10.**

In relation to the above RPOs, how can the LECP deliver on the following:

- i. Help identify 'Vacancy Hotspots' and implement necessary Action Plans in respect of them.
- ii. Increase the percentage of buildings with "A" or "B" Building Energy Ratings.
- iii. Develop green infrastructure

6.2: Vibrant Region (Chapter 4)

- **RPOs 4.3, 4.5, 4.6, 4.7.**

In relation to RPOs 4.3, 4.5, 4.6 and 4.7, how can the LECP support the following:

- i. Preparation and Implementation of Visitor Experience Development Plans (VEPDs) via Failte Ireland.
 - ii. Progress improved Access to Coastal Routes / Walkways / Cycling Routes (WAW)
 - iii. Expand service provision in Tourism Destination Towns, including public realm
- How can the LECP provide for employment opportunities for the increasing population at ratio of 0.66:1

⁴⁴ <https://www.nwra.ie/pdfs/NWRA-RSES-2020-2032.pdf>

6.3: Natural Region (Chapter 5)

- **RPOs 5.1, 5.8, 5.9, 5.18.**

In terms of the above RPOs, how can the LECP deliver on the following:

- i. Implementation of measures within the Local Authority Climate Action Strategy.
- ii. Support provision of Low Cost Work Spaces for the Craft / Cultural Sector.
- iii. Deliver Greenways

6.4: Connected Region (Chapter 6)

- **RPO 6.27: Local Transport Plans.**

With respect to RPO 6.27, how can the Galway City Council LECP influence the implementation of Galway Transport Plan.

- **RPOs 6.41-6.60: Smart Region**

In terms of the above RPOs, how can the LECP deliver a “Smart Region” approach.

6.5: Inclusive Region (Chapter 7)

- **RPO 7.1**

- i. In relation to RPO 7.1, how can the LECP assist in the co-ordination of employment skills and support the alignment of needs as identified by the Regional Skills Fora to include facilities and opportunities for disadvantaged areas and groups in the community.

- **RPO 7.2**

- ii. In terms of RPO 7.2, how will the LECP support disadvantaged communities, facing particular barriers to employment, including actively marketing vacancies that are relevant to them.

- **RPO 7.3**

- iii. With respect to RPO 7.3, demonstrate how the LECP shall promote vocational and occupational programmes and pathways for progression to a career.

- **RPO 7.5**

- iv. Considering RPO 7.5, how can the LECP support the requirements of emerging sectors in terms of skills needs.

- **RPO 7.11**

- v. With respect to RPO 7.11, can the LECP support the objectives of public health policy including Healthy Ireland and the National Physical Activity Plan and the National Obesity Plan

- **RPO 7.13**

- vi. In terms of RPO 7.13, are there any actions that can be taken to make this county an Age-Friendly one, recognising the demographic challenges that it faces.

Appendix A

1: Average mortgage repayment to net income ratio for first time buyers (FTB)

- This metric examines average FTB affordability by NUTS 2 Region, NUTS 3 Region and County, for 2020, with this ratio expressed as a percentage (i.e. average monthly mortgage repayment due on the average FTB priced property as a percentage of the average monthly disposable income of an FTB couple). This percentage should be compared relative to the standard affordability mark of 30% (i.e. housing costs should be below 30% of a household's disposable income)
- By utilising data from the CSO's "County Income and Regional GDP"⁴⁵ publication – which provides average disposable income per capita (excluding rent⁴⁶) by NUTS 2 Region, NUTS 3 Region and County – and the CSO's "Regional Property Price Index"⁴⁷ – which provides the average property price paid by FTBs by NUTS 2 Region, NUTS 3 Region and County⁴⁸ – we can examine average FTB affordability in each of these geographical areas.
- The CSO's "County Income and Regional GDP" publication, provides disposable income per capita (excluding rent)⁴⁹ for each NUTS 2 Region, NUTS 3 Region and County between 2016 and 2020. However, such incomes would reflect net earnings of individuals across a variety of age cohorts and wouldn't solely reflect the incomes of FTBs, which tend to be of a younger demographic. To combat this, disposable incomes levels are adjusted using privately requested data from the CSO's "Survey of Income and Living Conditions (SILC)", which contains information on both income and age, allowing this analysis to proxy FTB average disposable incomes using data on the income of individuals aged 40 or under.⁵⁰ (See 2020 ratios in Table 3 at the end of Appendix). Such ratios are available for each year between 2016 and 2020.
- The income of individuals aged 40 or under were considered appropriate to represent FTB incomes as the average age of FTBs outside and inside Dublin were 34 and 35 years old respectively – according to research by the Central Bank of Ireland⁵¹ – while a similar approach would have been used by the ESRI.⁵² Having adjusted the CSO's average disposable income per capita (excluding rent) data to reflect average income where the individual is aged 40 or less, such figures are then multiplied by two to replicate the joint income earned by a couple per year. This annual figure is then divided by 12 (i.e. 12 months) to obtain the average monthly disposable income of a couple, aged 40 and under; which is a proxy for FTBs.
- The Assembly proceeded to calculate what the average monthly repayment in each NUTS 2 Region, NUTS 3 Region and County for the average FTB priced property in each of these areas. It is important to note that the average property price for FTBs was based on the selection of the CSO tabs "All dwellings statues", "first time buyer households", "mean sales price", "executions" in the CSO table of HPA03 tabs (<https://data.cso.ie/table/HPA03>)
- Considering FTB couples require a 10% deposit, these buyers would have a loan-to-value ratio of 90%,

⁴⁵ <https://www.cso.ie/en/statistics/nationalaccounts/countyincomesandregionalgdp/>

⁴⁶ Rent obtained from landlord activities.

⁴⁷ <https://data.cso.ie/table/HPA03>

⁴⁸ All dwellings' statues, first time buyer households, mean sales price, executions are tabs selected in the attached link: <https://data.cso.ie/table/HPA03>

⁴⁹ As per the County incomes and Regional GDP background notes, it is stated that disposable income is defined as "Total Income minus current taxes on income (e.g. Income taxes, other current taxes) minus social insurance contributions (e.g. Employers, employees', self-employed, etc.)".

⁵⁰ Regional ratios of average disposable income of individual aged 40 or less relative to all individuals was provided by the CSO upon request for the NUTS 2 Regions and NUTS 3 Regions. Corresponding ratios for counties are not available therefore the appropriate NUTS 3 ratio was applied to average disposable income per person for counties based within sub-region in question.

⁵¹ <https://www.centralbank.ie/docs/default-source/publications/household-credit-market-report/household-credit-market-report-2018.pdf?sfvrsn=4>

⁵² https://www.esri.ie/system/files/publications/RN20190402_0.pdf

as per the Central Bank's Macroprudential mortgage rules. By applying the average interest rate as of December of 2020 from the Central Bank of Ireland⁵³ and using a standard 30 year term mortgage – in line with the approach used by the ESRI⁵⁴ – the Assembly calculated the average monthly mortgage repayment in each NUTS 2 Region, NUTS 3 Region and County using the PMT function in Microsoft Excel.

- By combining this information with average monthly disposable income levels (adjusted to reflect individuals under the age of 40) this allowed the Assembly to calculate the Average Mortgage Repayment to Net Income Ratio for First Time Buyers.

2: Average rent to net Income ratio of renters

- This metric examines how affordable the average monthly rent would be for a couple earning the average monthly disposable income of a renter by NUTS 2 Region, NUTS 3 Region and County, for 2020, with this ratio expressed as a percentage (i.e. average monthly rent as a percentage of the average monthly disposable income of renters). This percentage should be compared relative to the standard affordability mark of 30% (i.e. housing costs should be below 30% of disposable income)
- In this regard, the Assembly adjusted the average disposable income per capita (excluding rent) data provided from the CSO's "County Income and Regional GDP" using information from the CSO's "SILC" to reflect the average income of households that are renters. (See 2020 ratios in Table 4 at the end of Appendix A)
- This data is provided at a NUTS 2 and NUTS 3 Regional level. The corresponding ratios for counties are not available, therefore the appropriate NUTS 3 Regional ratio was applied to counties based within the sub-region in question.
- Having adjusted the average disposable income (excluding rent) data to reflect average income where the individuals are renting, such figures are then multiplied by two to reflect the standard household income earned by a couple that are renters.
- We then express the average monthly rental payment in each NUTS 2 Region, NUTS 3 Region and county⁵⁵ as a proportion of the average disposable income of renters in these areas, allowing the Assembly to develop an average rent to net income ratio for couples renting in these areas. The average monthly rental payment in a geographical area is based on the average rent of a 2 bed, across all property types, as per the CSO's RTB data.
- Average disposable income levels are based on the appropriate county data, adjusted using the appropriate ratio in Table 4 below.

⁵³ Table 2-b-1 "House Purchases, o/w new lending ex renegotiations": <https://www.centralbank.ie/statistics/data-and-analysis/credit-and-banking-statistics/retail-interest-rates>

⁵⁴ https://www.esri.ie/system/files/publications/RN20190402_0.pdf

⁵⁵ Provided by the CSO: <https://data.cso.ie/table/RIA02>

Table 3: Ratio of average income of individuals aged 40 or less vs average income of all household types, 2020

	Ratio
State	1.06
Border	1.13
Midlands	1.10
West	1.02
Dublin	0.98
Mid-East	1.00
Mid-West	0.98
South-East	1.35
South-West	1.07
NWR	1.07
SRA	1.12
EMRA	1.00

Source: CSO SILC. Similar ratios are available for 2016-2019. E.g the average income for individuals aged 40 or under in Dublin is around 98% of the average income of all individuals in Dublin

Table 4: Ratio of average income of renters vs average income of all household types, 2020

	Ratio
State	0.75
Border	0.83
Midlands	0.81
West	0.72
Dublin	0.80
Mid-East	0.68
Mid-West	0.74
South-East	0.80
South-West	0.85
NWRA	0.77
SRA	0.82
EMRA	0.79

Source: CSO SILC. Similar ratios are available for 2016-2019. E.g the average income for renters in Dublin is around 80% of the average income of all individuals in Dublin



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