

1. Population: The headline numbers

	South East	Nationally
Current population (2016)	511,000	4,761,900
Projected population (2040)	585,400	5,634,800
Overall Growth Rate	14.6%	18.3%
Annual Growth Rate	0.60%	0.80%

Source (CSO Census 2016 and Morgenroth ESRI, 2018)

Based on Morgenroth's population projections all the regions (except for Dublin and the Mid-East) will experience a growth rate that is below the national average growth rate.

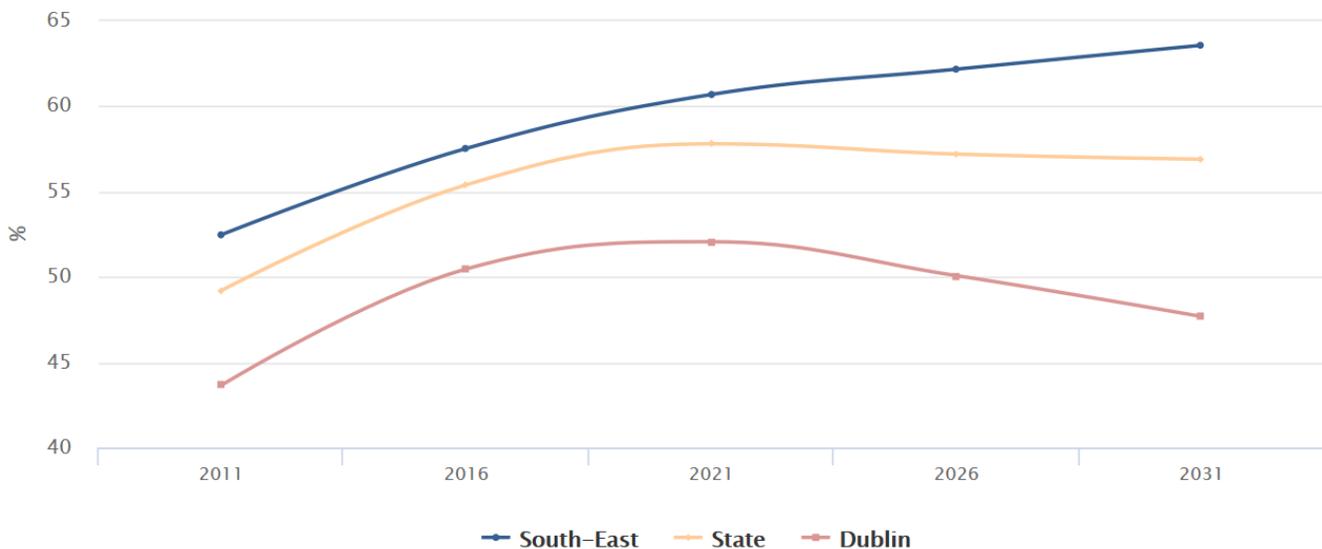
2. Dependency rate

Under Morgenroth's projections, the SE will have a much higher dependency rate than the national average.

	Dependency Ratio		Distribution %	
	South East 2040	Ireland 2040	South East 2040	Ireland 2040
0 to 14	28	26	16.5%	16.0%
15 to 64			58.8%	61.3%
65 to 100+	42	37	24.7%	22.7%
Total	70	63		

Note that Dependency Ratios are usually calculated from 15 to 64 (although 20 to 64 might be more appropriate)

Projected Dependency Ratio 2011-2031 (M2F2 trad)



What does that mean?

By 2040 in the South East there will be over 17,000 more dependents than the national average. That has implications on services (in particular, services for older people).

This is a matter for conjecture and there is no empirical data on an explanation. One view is that the higher education deficit in the region is contributing to this as these are the types of people who leave the region - in the past they probably left the country.

If the SE had the national average profile then it would have:

15,000 extra people between the ages of 20 to 39

11,000 less people over 50

(source: Authors calculation based on CSO Census 2016)

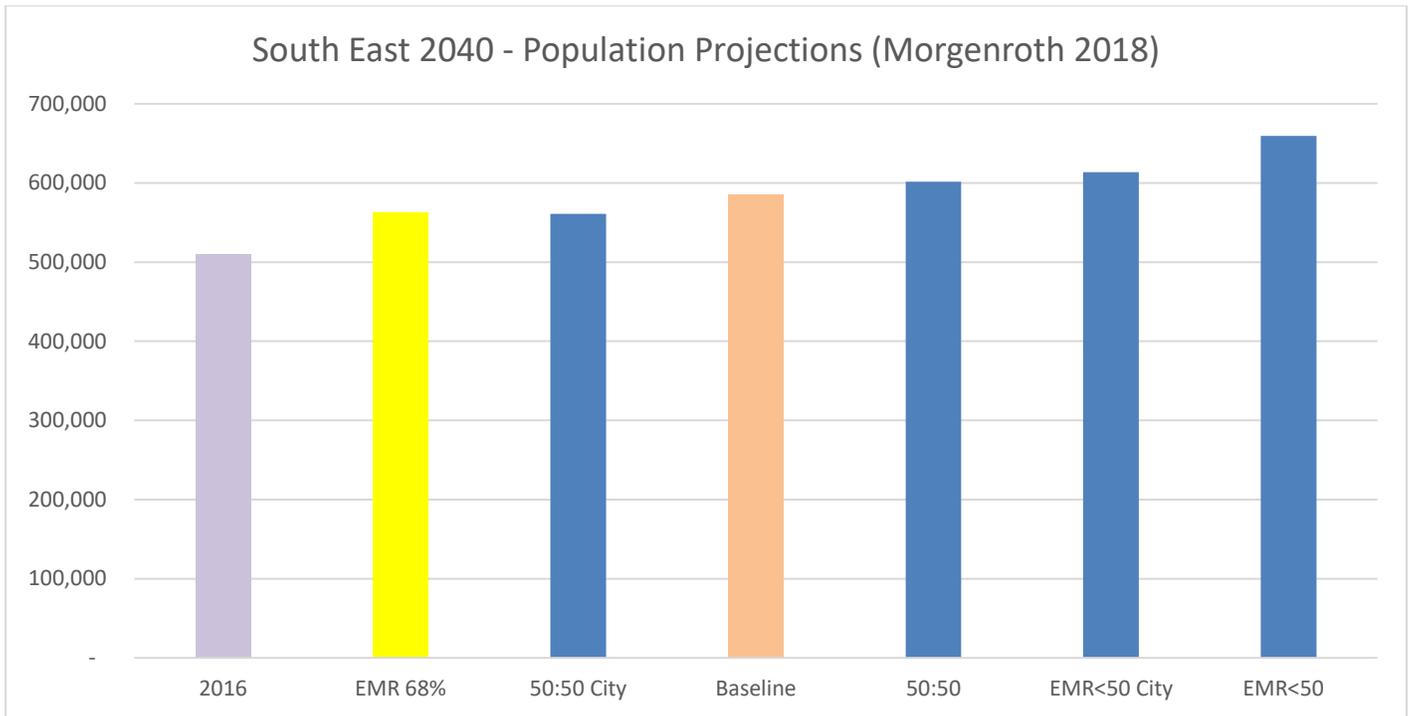
3. Where will these people go (i.e. all the extra people projected by Ireland 2040)?

Waterford to grow by 50% (currently 53,504)	30,000
Kilkenny to grow by 30% (currently 26,512)	8,000
Wexford to grow by 30% (currently 20,188)	6,100
Carlow to grow by 30% (currently 24,272)	7,300
Clonmel to grow by 30% (currently 17,140)	5,100
Tramore to grow by 30% (currently 10,381)	3,100
All urban areas over 10,000 currently (80%)	59,600
Urban areas below 10,000 and rural (20%)	14,800
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	74,400

Given an average household size of 2.75 (Census 2016) this gives a requirement for 27,000 new housing units beyond the normal replacement rate.

4. Other population scenarios

The alternative scenarios all consider the impact of 'Dublin Hegemony'. It is difficult to logically argue for substantial differences in birth, fertility or mortality rates across regions. Thus, the biggest influence on population patterns is likely to be internal migration and international migration. Under the current trends model (see earlier) 58.5% of all the gain in population is to East and Midland Region (NUTS1). A number of other alternatives are presented (by Morgenroth).



Where the East and Midlands Region accounts for 58.% of growth (baseline)

Where the East and Midlands Region accounts for 68% of the growth (this is not off the wall as 68% of the growth between census 2011 and census 2016 was in these counties)

Where the growth is split 50:50 (East and Midlands: All other regions)

Where the growth is split 50:50 City (50:50 and concentrated on the cities)

Where the growth is split EMR<50 (East and Midlands is given less than 50% of the growth)

Where the growth is split EMR<50 City (as above and concentrated on the cities) Source: Morgenroth 2018 ESRI

How likely are these scenarios. EMR 68% is based on the most recent census. However, one of the key drivers of internal migration is house prices (Garcia-Rodriguez and Morgenroth, 2017), they indicate that a 1.5% swing in house prices (i.e. widening the differential with the rest of the country) could result in the 50:50 scenario. But the gap would need to widen 10% beyond the current gap to get to the EMR<50% scenario Morgenroth contends that the 50:50 split is possible (the 50:50 and 50:50 city outcome is policy driven).

Finally, the average annual growth rate under each option is not excessive (except EMR<50)

EMR 68%	0.4%
50:50 City	0.4%
Baseline	0.6%

50:50	0.7%
EMR<50 City	0.8%
EMR<50	1.1%

From Census 2011 to Census 2016 the average annual growth rate of the population of the South East was just 0.5%.

About

SENER aspires to present a selection of key economic indicators for the SE region, to aid understanding and inform decision making. It is prepared by independent, non-politically affiliated academics who are part of the South East Network Social and Economic Research (www.senser.ie), an initiative of AIB CFBR and CEDRE at Waterford Institute of Technology School of Business. All opinions expressed are those of the authors, any errors and omissions are the sole responsibility of the authors; please bring them to the attention of the authors.

Prepared by:

- John Casey, T 353 (0)87 793 6095, E: jc Casey@wit.ie (corresponding)
- Dr Cormac O'Keeffe, T 353(0)86 395 3770, E: cokeeffe@wit.ie
- Dr Ray Griffin, T 353 (0)85 737 3175, E: rgriffin@wit.ie