

GALWAY COUNTY



Economic Baseline Summary Overview

GALWAY COUNTY

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Economic Baseline Summary Overview
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Produced in 2015 by

The Whitaker Institute, NUI Galway in conjunction with Galway City Council and Galway County Council
Further information is available on www.galwaydashboard.ie

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FOREWORD

Galway County is located at the heart of Ireland's Western region, It is an attractive location as a key tourism destination with a unique natural environment and a rich cultural heritage including the Irish language, but is also a County with internationally recognised clusters in medical devices and ICT, a centre for marine research and development and an extensive agricultural sector. There is a strong tradition of entrepreneurship within County Galway and in recent years the food and the creative film sector's have become prominent.

While County Galway is recognised as an attractive location in which people wish to live, work and visit, Galway County Council aims to reinforce this position and enhance the County as a leader in innovation and creativity. We recognise that there is an interdependency between Galway City and County and we are working closely with our colleagues in Galway City Council to stimulate and enable enterprise and innovation in the region.

The Government Policy Document "Putting People First" made a number of significant changes to the structures, operations and functions of local authorities. The Government's vision is that "local government will be the main vehicle for governance at local level" including economic development and recognised that "there is a strong rationale for increased local government involvement in economic development".

This Economic Baseline Study, carried out by The Whitaker Institute in NUI Galway, was commissioned by both Galway County Council and Galway City Council to support the development of an Economic Strategy for Galway City and County. The website www.galwaydashboard.ie, developed as part of the study, will be built upon to increase the visibility of Galway as a location for sustainable economic activity. The Baseline Study provides a snapshot of Galway and its demographic base and gives the clear message that Galway is well positioned to grow economically.

Galway County Council and Galway City Council have recognised that a collaborative effort will deliver better outcomes more efficiently and effectively and seek to work together with both industry representatives and the relevant agencies and the relevant Strategic Policy Committees in the development and implementation of an Economic Strategy, relevant action plans and other economic related initiatives while ensuring that plans and programmes including the Local Economic and Community Plans and the Rural Development Plans are aligned in terms of what they seek to achieve.

This is an exciting and challenging time for Galway and it is a period that offers much potential in a situation where the local authorities and all interested parties work together on identifying and delivering shared objectives and common goals. We welcome feedback from all on the Economic Baseline Study and would ask you to engage with Galway County Council during the development of our Economic Strategy over the coming months.

Kevin Kelly

Chief Executive (Interim)
Galway County Council

ABOUT THE PROJECT

About the Project

Galway City Council and Galway County Council commissioned the Whitaker Institute at NUI Galway to undertake an industrial baseline study to support the development of an economic plan for Galway City and County. Further information is available on the website www.galwaydashboard.ie.

Acknowledgements

The Whitaker Institute wish to acknowledge the support of Liam Hanrahan, Patricia Philbin, Sharon Carroll and Niamh Farrell of Galway City Council and Alan Farrell and Brian Barrett of Galway County Council in preparing this high level summary overview and the sectoral review summaries. Unless otherwise stated, the data in this document is taken from the 2011 Census Central Statistics Office data and other public sources.

Project Remit

The work programme had three elements. First, state of the art white papers on innovation were created that provided a review and syntheses of extant international literature and policies and several innovation indicators. These white papers focused on Innovation; an Innovation and Entrepreneurship Policy Overview for US, EU and Ireland; and Macro and Firm Level Innovation Measurement and Indicators. Second, baseline data and overviews for key sectors within the City and County were collated using publicly available data sources. Third, using publicly available data, mapping and visualisation was carried out of key data points relevant to the development of an economic strategy for the Galway City and County. These white papers and summary overviews are available at galwaydashboard.ie.

The approach for each sectoral overview was to take a global and national perspective on the sector before focusing on the regional and local level. One of the main limitations we faced preparing each sectoral review was the lack of quality and reliable data at the local level. The framing of the global and national level overviews against the available publicly available local data provides a basis and context to consider the future of each sector in Galway City and County. For each sectoral overview we have outlined some future opportunities and recommendations as a guide to be considered during the consultation phase of the economic strategy development.

APPROACH & OBSERVATIONS

To develop this high level summary overview, we have used the most recent Central Statistics Office data and disaggregated this data, where possible, along the five electoral areas in Galway County. We have taken key data points that are relevant to the development of economic and social planning. Galwaydashboard.ie has more data available and enables comparability of data across municipal areas of Galway City and County.

General Observations

- There is a diversified sectoral base in Galway, with a mix of traditional and new sectors.
- Third-level educational institutions and public research organisations, such as Marine Institute and Teagasc, are significant assets in Galway and they provide far-reaching benefits to the City and County.
- Richness of culture and the natural environment, coupled with diversified sectors, are key elements of place-based innovation and they are key assets for future development in Galway.
- There are high levels of educational attainment and skills in Galway.
- A growing and globally recognised creative sector has contributed to the visibility of Galway globally.
- The medical device cluster is one of a rare set of successful international industrial clusters.
- There is a growing interest in entrepreneurship and business start-ups in Galway and this is particularly evident in ICT and food sectors.
- There is an economic interdependency between Galway City and County.

The next steps

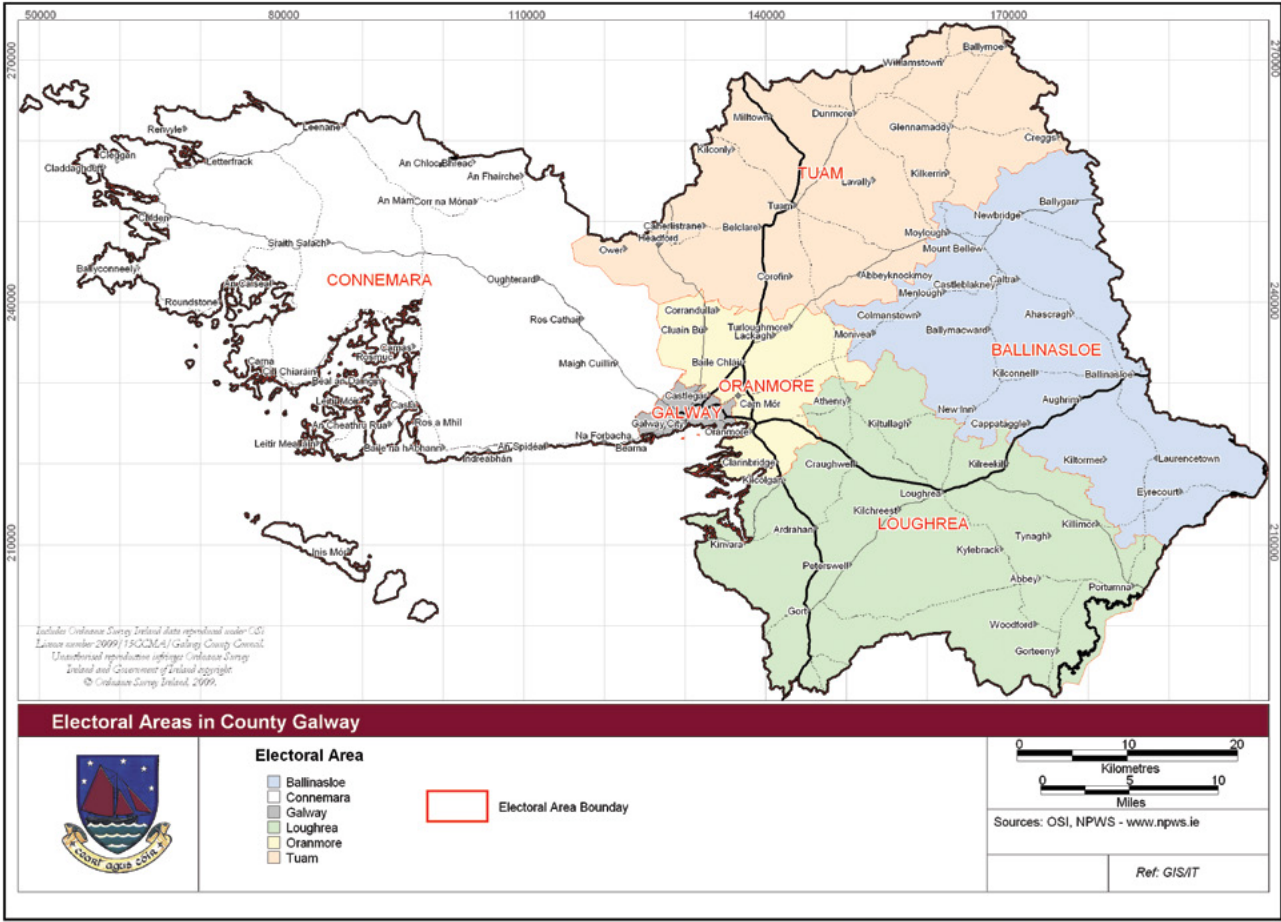
In the next phase of developing an economic plan, careful consideration should be given to:

- Developing sectoral specific plans and supports that contribute to the competitiveness, managerial capability, operational efficiency and effectiveness of all firms.
- Creating a master brand for Galway to illuminate the economic strengths, the rich cultural heritage and the natural environment that contribute to making Galway a unique and great location to live in and to work in.
- Enhancing and developing skills that will be necessary to support and sustain all sectors.
- Creation of new models of engagement and interaction within and between sectors and actors to support learning, knowledge transfer and collaboration that facilitates the growth and development of firms.
- Internationalisation of firms through specific tailored initiatives, including utilisation of existing twinning arrangements and working with existing state agencies.
- Clear sectoral plans to systematically structure, enhance and increase the intensity of collaboration with third level educational institutions to deal with skills development, knowledge transfer, research and development.
- Clear focus on retaining and attracting the best talent to support the development of sectors.

High Level Summary of Galway County

INTRODUCTION

Galway County can be separated into 5 electoral areas; Ballinasloe, Connemara, Loughrea, Oranmore and Tuam. Galway County (excluding the Galway City) has a population of 175,029. 135,345 people in Galway County are over the age of 15 and 17,150 are retired. There are over 77,000 residential dwellings in the area, the majority of which are owner occupied. There are 6,555 commercial organisations spread across the County Galway area, taken from Geodirectory data. According to the most recent CSO data available, there are 69,152 people living in County Galway who are in employment. The Oranmore electoral area includes the large town of Oranmore. The largest town in the Connemara district is Clifden and Loughrea and Gort are the largest towns in the Loughrea electoral area. Tuam is the largest town in County Galway followed by Ballinasloe.



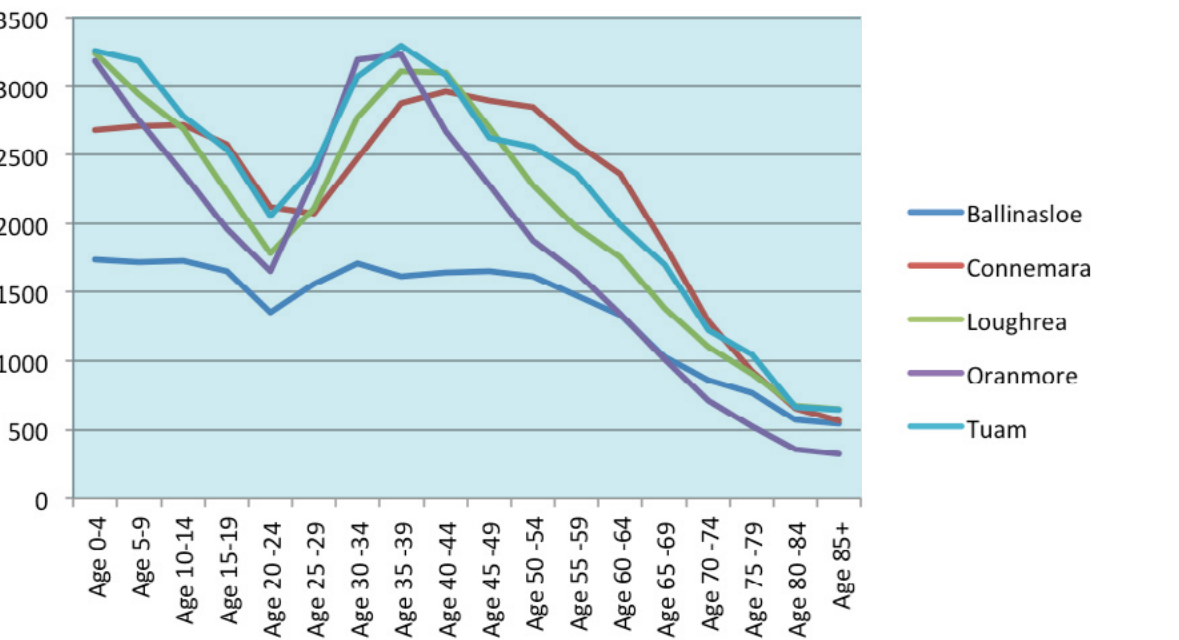
POPULATION

Table 1 Population distribution by small area

	BALLINASLOE	CONNEMARA	LOUGHREA	ORANMORE	TUAM
People living in this area	24,561	39,143	37,416	33,415	40,494
Aged under 15	5,180 21%	8,105 21%	8,876 24%	8,299 25%	9,224 23%
People Aged 65+	3,771 14%	5,281 13%	4,720 13%	2,920 9%	5,286 13%

The electoral area of Tuam has the largest population, with Tuam town the largest town in County Galway. Oranmore has the youngest population, with the highest percentage of people aged 15 years and less (25%) and the lowest percentage of over 65 year olds (9%). Ballinasloe can be seen to have the oldest population, with the highest percentage of people over the age of 65 (14%) and the lowest number of children under 15. Figure 1 shows the spread of ages for each of the five electoral areas. Ballinasloe has the least amount of people between the ages 0 and 60, by some degree. While there is a decrease for all five electoral areas in the number of 15 to 24 year olds, the sharpest decline is in the Oranmore district, followed by Loughrea. Connemara has the largest number of 50 to 65 year olds of the five districts.

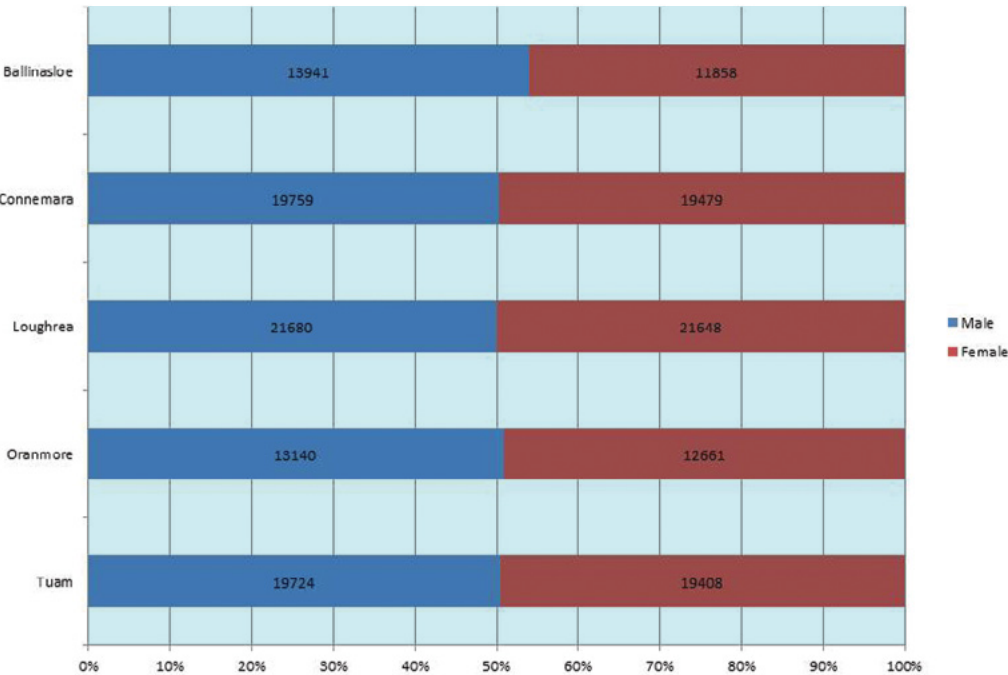
Figure 1 Population distribution by age groups



POPULATION

Figure 2 outlines the gender distribution in County Galway by electoral area.

Figure 2 Breakdown of male and female population by electoral area



Galway County (excluding the Galway City) has a population of 175,029.

POPULATION

Ethnic Background

Tables 2 and 3 below present the ethnic backgrounds and diversity of the five electoral areas. Oranmore has the largest percentage of Polish nationals (3%) and Loughrea has the largest percentage of nationals from outside the EU (3%). Connemara has the largest proportion of residents with the ethnic background ‘White Irish.’

Table 2 Usually resident population by nationality

	BALLINASLOE	CONNEMARA	LOUGHREA	ORANMORE	TUAM
Ireland	25,118 91.6%	34,632 91.4%	38,027 88.6%	22,794 89%	35,490 91.1%
UK	741 2.7%	1,210 3.2%	1,428 3.3%	592 2.3%	1,226 3.1%
Poland	610 2.2%	357 0.9%	802 1.9%	828 3.2%	838 2.2%
Lithuania	151 0.6%	86 0.2%	124 0.3%	99 0.4%	154 0.4%
Other EU 27	222 0.8%	600 1.6%	758 1.8%	440 1.7%	455 1.2%
Rest of World	358 1.3%	689 1.8%	1,401 3.3%	668 2.6%	563 1.4%
Not stated	236	333	373	202	213
Total	27,436	37,907	42,913	25,623	38,939

Table 3 Usually resident population by ethnic or cultural background

	BALLINASLOE	CONNEMARA	LOUGHREA	ORANMORE	TUAM
White Irish	21,492 88.1%	34,517 91.1%	32,400 87.4%	28,669 86.4%	35,757 88.7%
White Irish Traveller	714 2.9%	32 0.1%	418 1.1%	398 1.2%	913 2.3%
Other White	1,558 6.4%	2,361 6.2%	2,895 7.8%	2,797 8.4%	2,792 6.9%
Black or Black Irish	109 0.4%	119 0.3%	204 0.6%	385 1.1%	171 0.4%
Asian or Asian Irish	140 0.6%	264 0.7%	351 0.9%	250 0.8%	237 0.6%
Other	157	203	389	290	188
Not stated	215	411	401	388	233
Total	24,385	37,907	37,058	33,177	40,291

HOUSING

Oranmore has by far the largest percentage of houses built since 2000 (56%), followed by Tuam (34%) and Loughrea (31%). These percentages are calculated using the data for occupied dwellings on census night, as presented in Table 5. Ballinasloe has the largest percentage of houses built before 1970 (31%), as well as the least amount of houses built from 2000 on. 57% of houses surveyed in Oranmore are owner occupied with mortgage, as well as having the highest percentage of private renting of the five districts. Private renting in the other four districts is at 11% on average, with Ballinasloe having just 10% of houses privately rented.

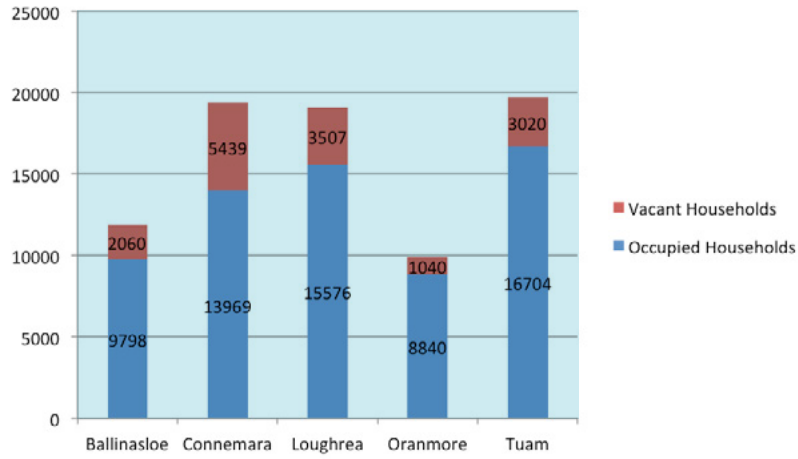
Table 4 Housing and ownership in small areas

	BALLINASLOE	CONNEMARA	LOUGHREA	ORANMORE	TUAM
Built since 2000	2,165 23%	3,568 26%	4,717 31%	4,818 56%	4,757 34%
Built pre 1970s	3,001 31%	3,781 28%	3,432 23%	1,506 18%	4,073 29%
No. of occupied dwellings	9,615	13,604	15,233	8,585	13,989
Owner occupier with mortgage	2,890 30%	4,150 31%	4,871 32%	4,872 57%	5,486 39%
Owner occupier with no mortgage	3,892 40%	6,298 46%	5,323 35%	3,613 42%	6,291 45%
Private renting	954 10%	1,723 13%	1,725 11%	2,168 25%	1,470 11%

House Vacancy Rate

Figure 3 presents the number of occupied and vacant houses from the 2011 census. Connemara has the largest house vacancy rate of 28%, followed by Loughrea (18%), Ballinasloe (17%) and Tuam (17%). Oranmore has the lowest house vacancy rate, at 11%.

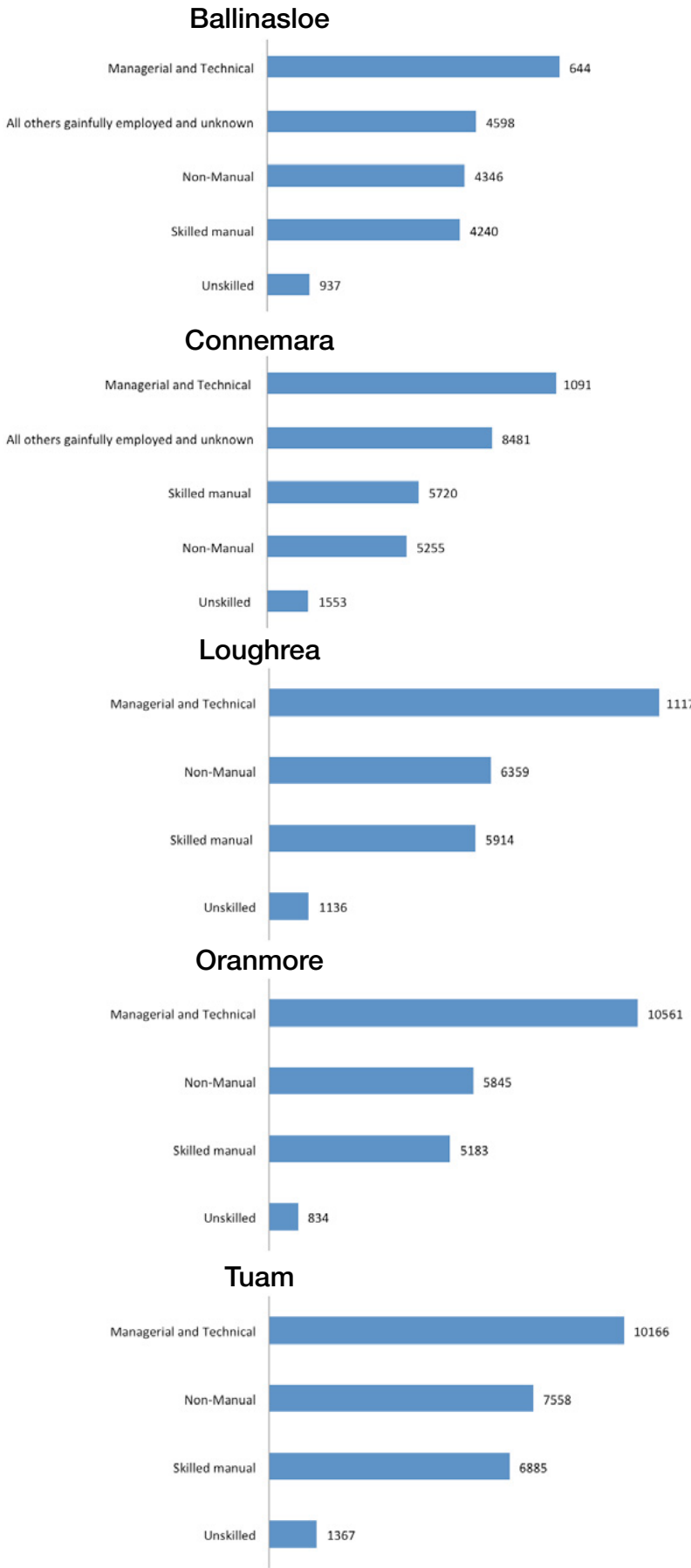
Figure 3 Occupied and vacant houses per small electoral area



SOCIAL CLASS

Figure 4 Social class of populations per local electoral area

The charts shown in Figure 4 present the breakdown in social class of populations in the 5 electoral areas of Galway County. The categories respondents could choose from were professional workers, managerial and technical, non-manual, skilled manual, semi-skilled, unskilled, and all others gainfully occupied and unknown. Managerial and technical were the most common social class categories in all five districts. Ballinasloe and Oranmore have the least amount of unskilled workers.



EDUCATION

12% of the population of Tuam electoral area (of those who responded) ceased their education before the age of 15, compared to 8% in Oranmore and Loughrea. 75% of the Oranmore population were aged 17 and over when their education ceased, compared to only 43% in Ballinasloe. 35% of the Oranmore population stayed in education until they were at least 21, with Connemara (24%) the area with the next highest figure.

Table 5 Population aged 15 years and over by age education ceased

	BALLINASLOE	CONNEMARA	LOUGHREA	ORANMORE	TUAM
Total who answered question	18,622	25,865	28,121	16,396	26,064
Under 15 when education ceased	1,719 9%	2,475 10%	2,184 8%	1,262 8%	3,185 12%
16 or under	4,009 22%	5,698 22%	5,242 19%	3,357 20%	7,297 28%
Aged 17 or over	7,946 43%	12,765 49%	13,053 46%	12,256 75%	14,478 55%
21 and over	2,822 15%	6,132 24%	5,427 19%	5,800 35%	5,128 20%
Not stated	4,658	7,334	6,082	5,648	5,177

25% of Galway's population has a third level education qualification.

COMMUTING

For all electoral areas in Galway County, commuting as the car driver is the primary means of travel to work or school, with Oranmore having the largest percentage of car drivers (64%), as well as the highest percentage of car passengers (27%). On average, 8% of the population in each district travelled to work on foot or by bicycle. The highest percentage of bus or train commuters is in the Oranmore electoral area (12%).

Table 6 Population aged 5 and over by means of travel to work or school

	BALLINASLOE	CONNEMARA	LOUGHREA	ORANMORE	TUAM
Total who answered question	16,516	22,432	27,014	17,593	23,855
Car driver	6,164 37%	9,609 43%	10,412 39%	11,186 64%	10,773 45%
Car passenger	3,265 20%	5,303 24%	5,109 19%	4,819 27%	5,263 22%
On foot or bicycle	1,337 8%	1,933 9%	1,939 7%	1,583 9%	2,020 8%
Bus/Train	1,429 9%	2,236 10%	2,257 8%	2,053 12%	2,671 11%

Of the populations aged 5 and over in the five electoral areas, Connemara had the highest percentage of people leaving home for work between 8.30 and 9am. Tuam electoral area had the highest percentage of people leaving home before 7am (12%), with Connemara having only 7% leaving home before 7am. 41% of the Ballinasloe population have a journey time of under 15 minutes, the lowest of the five districts. Oranmore has the lowest percentage of people having a journey to work or school of over an hour (5%), compared to 7% in Connemara, and 8% in the other three electoral areas.

Table 7 Population aged 5 and over by time leaving home and journey time

	BALLINASLOE	CONNEMARA	LOUGHREA	ORANMORE	TUAM
Total who answered question	13,717	21,491	22,033	21,592	23,493
Time Leaving Home					
8:30-9:00am	3,261 24%	5,760 27%	5,323 24%	4,959 23%	5,865 25%
Between 8:00am and 9:30am	7,757 57%	12,165 57%	12,164 55%	11,433 53%	12,561 53%
Before 7:00am	1,333 10%	1,425 7%	2,253 10%	2,104 10%	2,773 12%
Journey Time					
Under 15 minutes	5,570 41%	7,624 35%	7,948 36%	6,698 31%	8,073 34%
Over 1 hour	1,035 8%	1,466 7%	1,712 8%	1,003 5%	1,945 8%

PCS AND INTERNET ACCESS

Of those who answered the question in the CSO survey on household PC ownership, Ballinasloe had the highest percentage of households with no PC (34%), followed by Connemara (31%) and Tuam (30%). Ballinasloe also had the highest percentage of households with no internet access (36%). Oranmore district had the highest percentage of households with PCs (79%) and internet access of some kind (78%).

Figure 5 Respondents owning a household PC

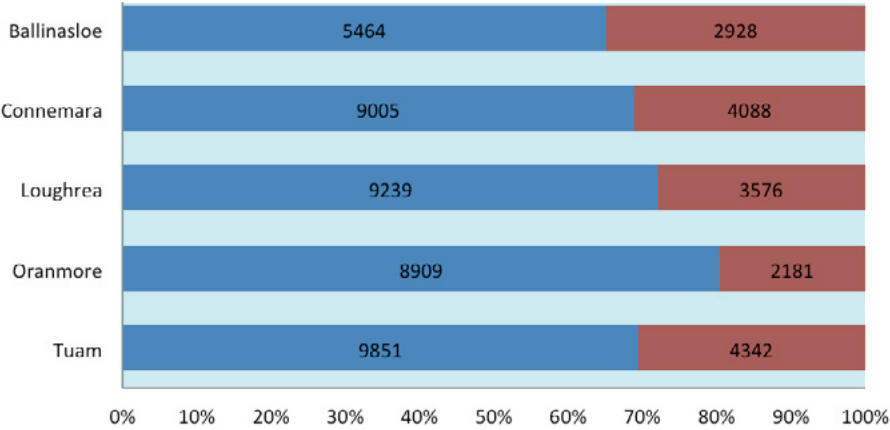


Figure 6 Types of internet access by household

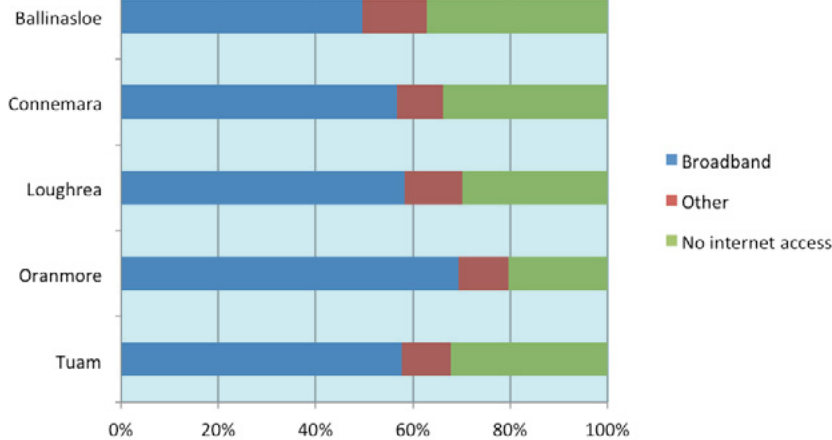


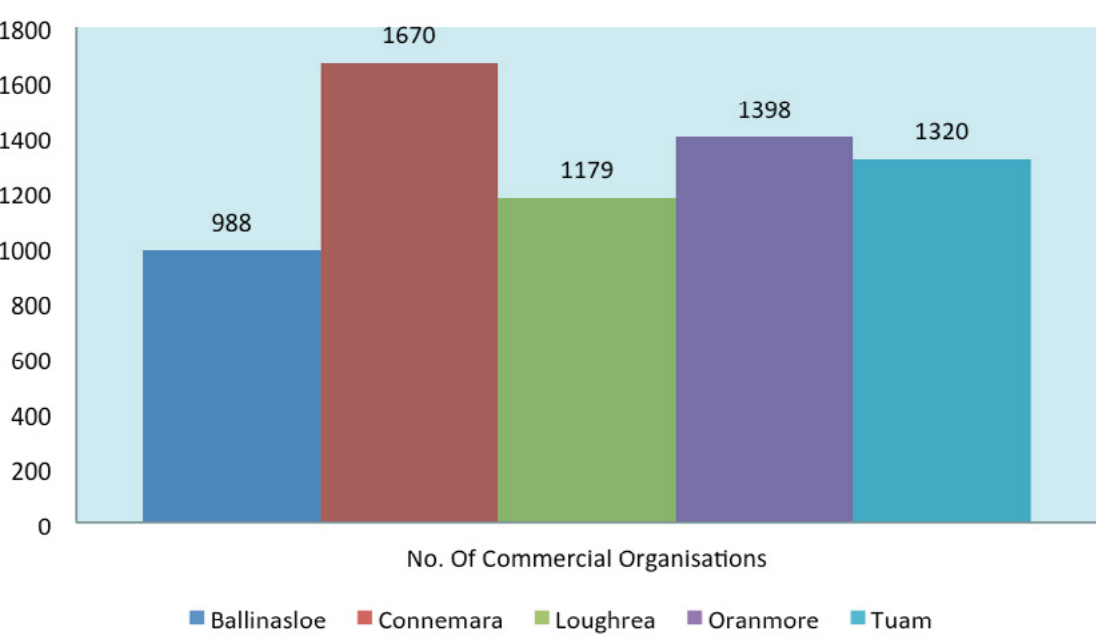
Table 8 PC ownership and internet access

	BALLINASLOE	CONNEMARA	LOUGHREA	ORANMORE	TUAM
Household PC Ownership					
Yes	5,464 64%	9,005 68%	9,239 71%	8,909 79%	9,851 68%
No	2,928 34%	4,088 31%	3,576 27%	2,181 19%	4,342 30%
Internet access					
Broadband	4,146 48%	7,425 56%	7,463 57%	7,675 68%	8,168 57%
Other	1,100 13%	1,226 9%	1,508 14%	1,135 10%	1,439 10%
No internet access	3,100 36%	4,429 33%	3,818 29%	2,255 20%	4,559 32%

INDUSTRIES

Connemara has the largest number of commercial organisations in Galway County, according to Geodirectory data, followed by Oranmore, Tuam, Loughrea and Ballinasloe.

Figure 7 Industry distribution per electoral area



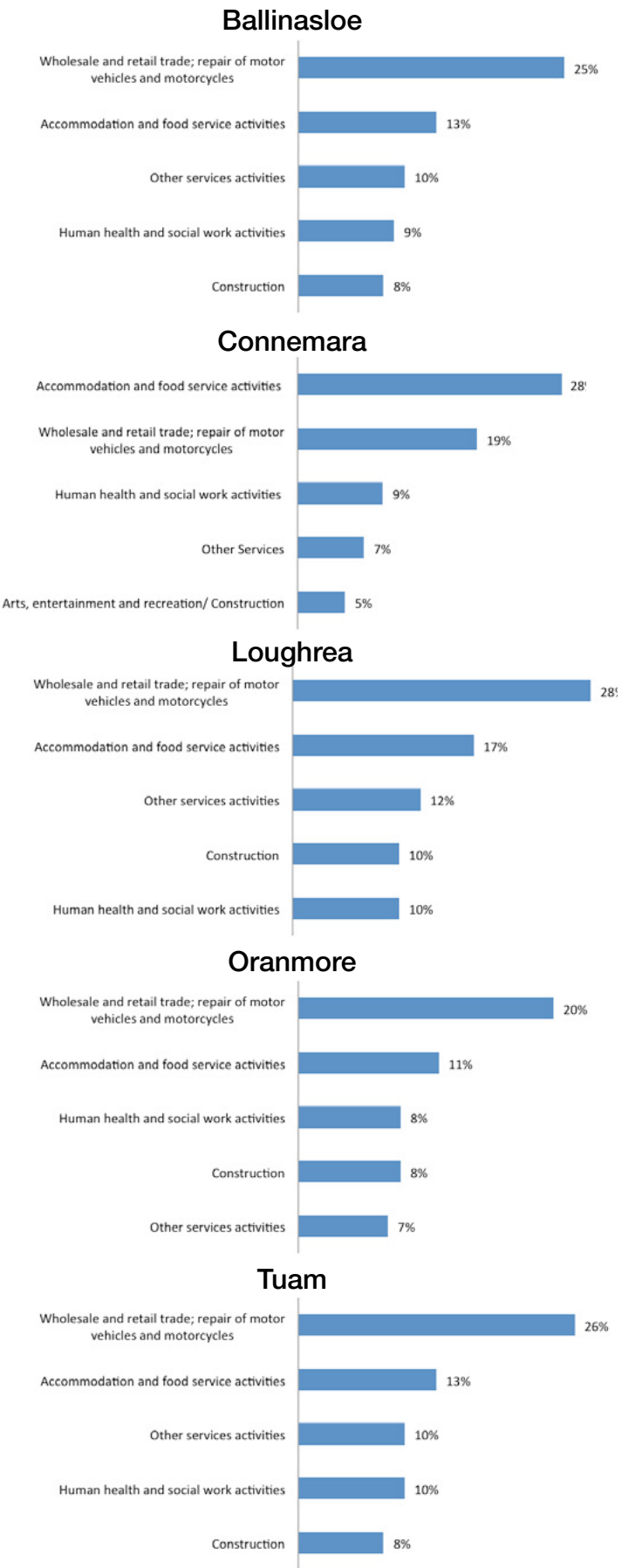
INDUSTRIES

Table 9 Top 5 Industry Categories

	BALLINASLOE	CONNEMARA	LOUGHREA	ORANMORE	TUAM
1	Wholesale and retail trade; repair of motor vehicles and motorcycles n=245 25%	Accommodation and food service activities n=472 28%	Wholesale and retail etc n=327 28%	Wholesale and retail etc n=281 20%	Wholesale and retail, etc n=344 26%
2	Accommodation and food service activities n=129 13%	Wholesale and retail trade; repair of motor vehicles and motorcycles n=314 19%	Accommodation and food service activities n=202 17%	Accommodation and food services n=147 11%	Accommodation and food service n=166 13%
3	Other services activities n=100 10%	Human health and social work activities n=146 9%	Other services activities n=141 12%	Human health and social work activities n=118 8%	Other service activities n=132 10%
4	Human health and social work activities n=90 9%	Other Services n=111 7%	Construction n=121 10%	Construction n=110 8%	Human health and social work activities n=130 10%
5	Construction n=76 8%	Arts, entertainment and recreation/ Construction n=82 5%	Human health and social work activities n=113 10%	Other services activities n=103 7%	Construction n=108 8%

INDUSTRIES

Figure 8 Industry categories per electoral area



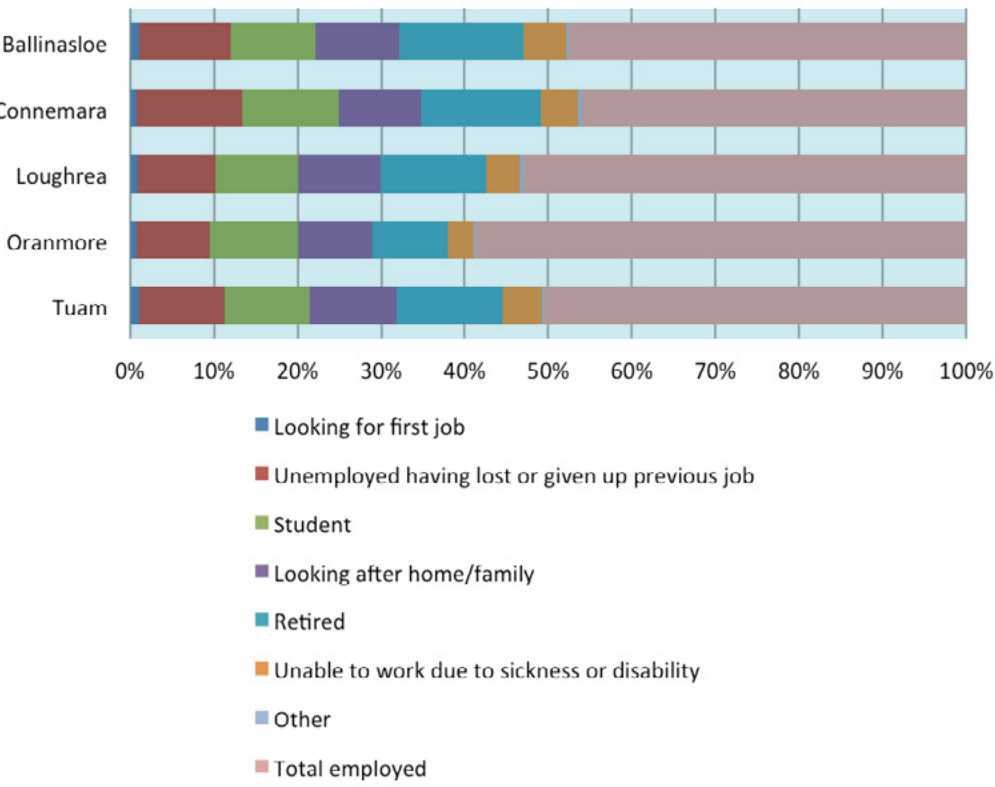
EMPLOYMENT

Table 10 and Figure 9 present the employment details of the population over 15 years of age in the 5 electoral areas. Oranmore has the highest rate of employment (59%), followed by Loughrea (53%) and Tuam (51%). Connemara has the lowest percentage of people employed, according to the 2011 census. Connemara has the highest percentage of students within their population (12%), followed by 11% in Oranmore and 10% in Tuam, Ballinasloe and Loughrea. The percentage of over 65 year olds who are retired is highest in Connemara, followed by Oranmore (78%), Ballinasloe (76%), Loughrea (76%) and Tuam (75%).

Table 10 Employment status of population aged 15+

	BALLINASLOE	CONNEMARA	LOUGHREA	ORANMORE	TUAM
Population aged 15+	19381	31038	28540	25116	31270
Total employed	9205 48%	14299 46%	15139 53%	14728 59%	15781 51%
Unemployed having lost or given up previous job	2119 11%	3290 11%	2674 9%	2183 9%	3214 10%
Retired	2865 15%	4430 14%	3610 13%	2271 9%	3974 13%
People Aged 65+	3771 14%	5281 13%	4720 13%	2920 9%	5286 13%

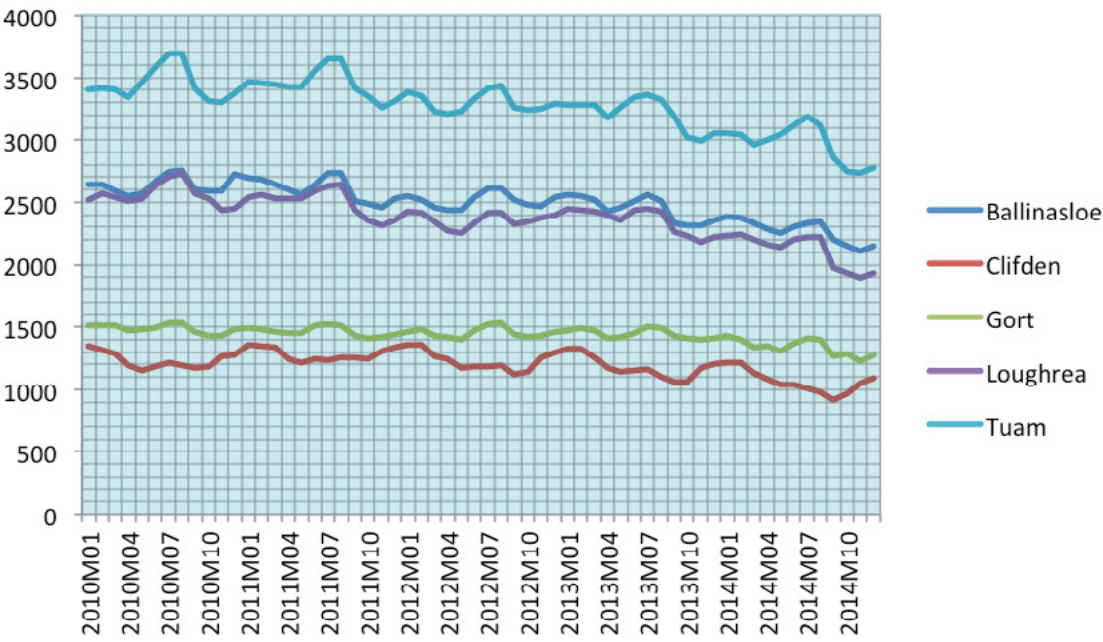
Figure 9 Employment status of population aged 15+



EMPLOYMENT

The graph below presents the number of people on the live register in Galway County social welfare offices by month from 2010 to 2014. The increases and decreases in live register numbers in the different offices in the county happen at approximately the same times, except for Clifden, which is the social welfare office based in Connemara. Gort appears to have the steadiest numbers on their live register, with Ballinasloe the most varied. It should be noted that the Loughrea electoral area has two social welfare offices, Loughrea and Gort, within its boundaries, and that Oranmore doesn't have a social welfare office, so its inhabitants must go their nearest office in another district.

Figure 10 People on Live Register by Month and Social Welfare Office



Source: CSO Live Register data, 2014

Oranmore has the highest rate of employment (59%), followed by Loughrea (53%) and Tuam (51%).

OCCUPATIONS

The tables below outline the most and least common occupation and industry categories people in Galway County work in. The most common occupation category for Ballinasloe, Loughrea and Tuam is skilled services, whereas the top occupation in Connemara and Oranmore is professional occupations. The least common occupation type for Ballinasloe, Connemara and Loughrea is sales and customer services; for Oranmore it is caring, leisure and other services; and for Tuam, the least common occupation category is managers, directors and senior officials. Professional services is the most popular industry area for women in all five electoral areas, with commerce and trade, on average, the most common industry area for men.

Table 11 Occupation of people at work or unemployed

	BALLINASLOE	CONNEMARA	LOUGHREA	ORANMORE	TUAM
Total at work or unemployed					
	11,324	18,222	17,813	16911	18995
Top Three Occupations					
1	Skilled Trades Occupations: 2,735 24%	Professional occupations: 3,354 18%	Skilled Trades Occupations: 3,970 22%	Professional Occupations: 3,385 20%	Skilled Trades Occupations: 4,376 3%
2	Professional Occupations: 1,622 14%	Skilled Trades Occupations: 3,229 18%	Professional Occupations: 3,033 17%	Skilled Trades Occupations: 2,777 16%	Professional Occupations: 2,550 13%
3	Process, Plant and Machine Operatives: 1,017 9%	Professional and Technical Occupations: 1,627 9%	Associate Professional and Technical Occupations: 1,690 9%	Professional and Technical Occupations: 1,879 11%	Process, Plant and Machine Operatives: 2,124 11%
Lowest					
	Sales and customer service 624 6%	Sales and Customer Service Occupations: 901 5%	Sales and customer service 972 5%	Caring, Leisure and Other Service Occupations: 919 5%	Managers, Directors and Senior Officials: 1,191 6%

OCCUPATIONS

Table 12 Industries Top 3 and Lowest per gender

BALLINASLOE	
FEMALES	MALES
Professional Services: 1,819	Agriculture, forestry and fishing: 1,085
Commerce and Trade: 832	Commerce and trade: 874
Other: 637	Manufacturing industries: 865
Lowest Building and construction: 33 Transport and communications: 89	Lowest Public administration: 269 Transport and communications: 284
CONNEMARA	
FEMALES	MALES
Professional services: 2,967	Other: 1420
Commerce and trade: 1,357	Commerce and Trade: 1,282
Other: 1,276	Professional Services: 1,126
Lowest Forestry, fishing: 60 Building and Construction: 80	Lowest Public administration: 442 transport and communications: 742
LOUGHREA	
FEMALES	MALES
Professional services: 2,746	Commerce and Trade: 1,626
Commerce and trade: 1,604	Agriculture, forestry and fishing: 1,457
Other: 973	Manufacturing Industries: 1,377
Lowest Forestry, fishing: 164 Building and Construction: 73	Lowest Public administration: 373
ORANMORE	
FEMALES	MALES
Professional Services: 2,675	Commerce and trade: 1,729
Commerce and Trade: 1,551	Manufacturing industries: 1,583
Manufacturing industries: 970	Other: 929
Lowest Forestry, fishing: 38 Building and Construction: 60	Lowest Public administration: 360
TUAM	
FEMALES	MALES
Professional Services: 2,724	Manufacturing industries: 1,718
Commerce and Trade: 1,592	Commerce and Trade: 1,625
Manufacturing industries: 1,084	Agriculture, forestry and fishing: 1,572
Lowest Forestry, fishing: 133 Building and Construction: 58	Lowest Public Administration: 387

Sectoral Overview Summaries



SUMMARY OVERVIEW OF THE AGRICULTURE SECTOR

Global Overview

- There are 1.5 billion indigenous farmers feeding the world’s population.
- There are more people engaged in farming than any other profession in the world.
- 32 hectares is the average farm size in Europe.
- The global grain market is highly concentrated and dominated by four main companies.
- To meet the estimated crop needs of 2050, global production may need to increase between 60% and 70%.
- The global market for fertilizer is 180 million tonnes with growing industry consolidation.
- The EU accounts for 16% of global meat production and the market is predicted to grow at 14% over the next 10 years due to an increased demand for beef in the Middle East and Asia.
- Some 620 billion litres of milk was produced in 2013, with 10 countries producing 57% of this milk production.
- There is a 5% increase in milk production predicted in the EU by 2024.
- EU policies are focused on minimising market distortions, refraining from the use of export subsidies, sustainability and termination of EU sugar production.

National Overview

- Ireland is the most expensive country in the world to buy farmland.
- The operating surplus increased by 2% in 2013, with milk output increasing by 25.5% and cattle output decreasing by 1.1%.
- Dairy (26%), food processing (15%) and beef (14%) are the top three primary areas of business of Irish agribusinesses.
- 80% of total dairy and beef production is exported, with the UK being the leading export market, accounting for 69% of Ireland’s exports.
- The top 2 cereal productions are spring barley and winter wheat.
- Ireland is the 4th largest beef exporter but the average cattle farm income has declined from €19,183 in 2011 to €15,667 in 2013.
- Some 80% of a 5.4 billion milk pool is processed by five dairy companies and the average dairy income increased by 31% in 2013 compared to 2012.

SUMMARY OVERVIEW OF THE AGRICULTURE SECTOR

13,445
farms
615,877
total hectares
25.8
hectares average farm size

11,247
cattle farms
420,205
cattle
6.3%
of Ireland’s cattle

65%
for beef production

24,928
dairy cows
2.3%
of Ireland’s dairy cow stock
151
milk producers

380
farms produce cereals
280
farms producing spring barley

3,916
sheep farms
576,463
sheep

810
poultry farms
60
pig farms
19
farmers markets

Regional and Local Overview

- There are 13,445 farms in Galway, 14,730 average work units of labour units, €13,852 of average labour output and 615,877 total hectares.
- Galway has the highest number of farms in the West of Ireland with an average farm size of 25.8 hectares.
- There is a trend in the number of large farms increasing while the number of small farms is decreasing.
- 65% of farms in Galway are for beef production.
- There has been a 55% decrease in specialist dairy farms since 2000 and 33% decrease in mixed grazing livestock farms.
- The average output of farms in Galway (€13,852) is 54% less than the State’s average output (€30,726) in 2010.
- The largest cohort of farm holders are over 65 years old and 34% of farm enterprises do not generate sufficient income.
- Economically viable farms increased from 27% in 2010 to 35% in 2011.
- Some 380 farms produce cereals with 280 farms producing spring barley.
- Fertilizer spreading costs is greater in Galway than other counties.
- There were 11,247 cattle farms in 2010, with 420,205 cattle and 24,928 dairy cows in County Galway.
- Galway has 6.3% of total cattle stock in Ireland, 2.3% of Ireland’s dairy cow stock and has the most cattle in the State after Cork.
- After Donegal, Galway has the most sheep in the State at 576,463 sheep.
- Galway has the most goats in the State.
- There are 3,916 sheep farms, 60 pig farms and 810 poultry farms (largest number after Cork in the State).
- There are 151 milk producers in County Galway and the sixth largest number of dairy cows in the sector.
- There are 19 farmers’ markets in County Galway and 4 farmers’ markets in Galway City.
- Agricultural education has been provided in Mountbellew Agricultural College since 1904.

SUMMARY OVERVIEW OF THE AGRICULTURE SECTOR

Future Opportunities and Recommendations

- County Galway has the sixth largest number of dairy cows in the country. With the abolishment of milk quotas, opportunities exist for higher levels of milk production and for the use of milk in developing new food products.
- Given the age profile of farm holders in County Galway, support needs to be given to new farm holders and those considering leaving farming to ensure long-term sustainability and viability of farm holdings.
- With the diversity of cereal production farms, opportunities should be explored relating to the development of value added products for industrial and consumer markets.
- Given the size and number of cattle, sheep, pigs, goats and poultry, real opportunities exist to create and support the development of added value production to the primary production within the City and County.
- The 110 hectare state support organic farm in Athenry provides opportunities to support the development of organic food producers.
- With the scale and diversity of primary agriculture, the growth of farmer markets and increasing customer demand for quality and artisan foods, consideration should be given to creating a master food brand which includes primary producers. The Fuschia Brand in West Cork is an exemplar of this concept.
- Development of specialised skills and early adoption of new technologies need to be continuously encouraged and supported for primary producers.
- The location of educational training (Mountbellew) and state sectoral support and research (Teagasc Athenry) in Galway is a significant asset to the sector within the County and opportunities for more embedded collaboration between these institutions, primary producers and food companies needs to be supported through formal and informal sectoral networks.
- Development of more knowledge transfer networks among and between primary producers and food producers.

SUMMARY OVERVIEW OF THE CREATIVE SECTOR

Global Overview

- World exports of creative goods and services reached €624 billion in 2011.
- The creative industry of the EU accounts for 3.3% of GDP and employs 6.7 million people.
- Arts and crafts account for 6% of global value of creative goods market in 2011.
- The global music industry has been in decline for 14 years and total music sales for 2013 were down 3.9% from 2012.
- Global sales for visual arts reached \$65.4 billion in 2014, up 8% from 2013.
- India was the leading film producing country in 2013 with 1,325 films. Ireland produced 22 films in 2014.
- Major drivers of the global creative sector are technology, demand for creative goods and tourism.

National Overview

- The creative sector for Ireland is worth €4.6 billion, composing approximately 2.8% of GDP.
- Employment created by the creative industries amounts to 76,862 in Ireland.
- 3.7m overseas visitors engage in cultural and historical cultural activities.
- The performing arts sector of Ireland engages with 2.3 million Irish citizens a year, which is 66% of the adult population.
- The audio visual sector is estimated to be worth €550 million employing over 6,000 people in over 560 SMEs.
- The design sector is valued at €465 million employing 5,100 people, with 37% of SMEs employing between 2 and 5 people.
- The animation sector generated €326.8 million in 2011 while employing 2,321 people.
- The Irish music industry decreased by €79 million between 2005 and 2010.
- Tax incentives and art promotion charters are productive policies enhancing the sector.

SUMMARY OVERVIEW OF THE CREATIVE SECTOR

Regional and Local Overview

- The West of Ireland has 2,466 creative companies.1 in every 33 jobs in the Western Region is in the creative economy.
- 3,878 people are employed in Galway in the creative sector, accounting for 3.4% of total employment in the County.
- Some 12% of businesses in the creative sector have more than 10 employees, 49% have between 2 and 10 employees and 39% are sole traders.
- Creative technology companies account for 7% of total number of business, 25% of turnover and 15% direct employment.
- The audio visual sector is worth €72 million employing over 600 people and the employment rate is growing at 24.5%.
- Connemara has a cluster of audio visual companies with the success of TG4 influencing the establishment of 40 companies.
- There are 162 design and craft businesses in Galway with the greatest concentration in textile making, wood working and jewellery.
- There are 35 heritage sites, 32 museums and 10 art galleries in the City and County.
- There were 83 festivals and events hosted in Galway in 2012, bringing in an estimated €62 million in expenditure.
- The estimated economic value of the Irish language is over €136 million, of which €59 million accrues to Galway City.
- 25,000 domestic and foreign students attend Irish colleges in the Galway Gaeltacht each summer and contribute €24.3 million in added value to GNP each year.
- Traditional Irish music is part of Galway’s cultural identity.
- There is the potential for Galway to become the national flagship for contemporary visual arts.
- Galway is a UNESCO Creative City having been designated a UNESCO City of Film in 2014.
- The sector generates an annual turnover of €534 million and contributes 3% towards employment within Galway.

Future Opportunities and Recommendations

- This sector has significant potential to grow within Galway City and County and to further increase the visibility of Galway as one of the major global hubs for creative industries.



SUMMARY OVERVIEW OF THE CREATIVE SECTOR

- UNESCO City of Film international designation further validates the strength and potential of the creative sector.
- A successful European Capital of Culture 2020 bid would further enhance the creative economy and provide a unique platform to showcase the array of talent, capabilities and dynamism within this sector.
- For the craft sector, GMIT’s Letterfrack National Centre for Excellence in Furniture and Design Technology is a unique asset for Galway.
- With the size and distribution of heritage sites, museums and art galleries, there is potential to create innovative cultural and educational products that appeal to local, regional, national and international visitors and groups. For example, the creation of a mini ‘Atlantic Way’ product that provides a cultural trail that links these sites could be explored.
- Creative technologies companies have the potential to grow and expand in the City and County and such an expansion needs to be supported through appropriate educational provision and promotion at existing festivals.
- Supporting the international scaling and orientation of the creative sector, as well as supporting the business development aspects, is critical to the long-term development of creative companies and individuals. The Creative Momentum project that involves NUI Galway and Western Development Commission with international partners can contribute to supporting strengthening and internationalising the creative sector.
- The sustaining and growth of the Irish language is critical and integral to the identity of Galway.
- Education provision needs to be in place to match the growth and opportunities within the sector and a retention strategy should be put in place, in collaboration between industry and education providers, to retain the best talent within Galway.
- Galway has the potential to become a leading national location for visual arts.
- The audio-visual cluster needs to be promoted explicitly, nationally and internationally, to support the evolution and growth of the cluster. Different aspects of the audio-visual cluster should be replicated to support the development of sub-sector clusters within the creative sector.
- A growing concentration of textile making, wood working and jewellery exists within Galway and these craft businesses have the opportunity for incremental growth and development around niche markets. This will require different types of business supports.
- Festivals contribute significantly economically and socially to Galway City and County and it is important that they maintain novelty and originality, as well as being innovative in the manner they engage audiences. More awareness of the variety, number and quality of festivals, as well as their importance, should be communicated more systematically and form part of the unique selling points of Galway as a place. In addition, festivals are possible business-to-business events that provide for structured business development with national and international firms and buyers.
- Creative spaces and hubs for individuals and start-up businesses using public and private premises should be developed. This concept was piloted successfully in Northern Ireland in multiple locations as part of the Creative Edge project lead by NUI Galway and funded by the Northern Peripheries Programme.
- Learning and knowledge transfer networks and community fora should be created to explore new ideas, collaborations and networking, as well as knowledge acquisition and development.

SUMMARY OVERVIEW OF THE EDUCATION SECTOR

Global Overview

- Each €1 spent on education gives rise to between €10 and €15 in economic growth over a person's lifetime in the form of higher earnings and wages.
- Global education expenditure is €4,450.9 billion. It has a compound annual growth rate of 7% between 2012 and 2017.
- Some €2,227 billion was spent on primary school education (K-12) globally which is the highest percentage of global education expenditure.
- There are 608.1 million potential students worldwide of age for third level education.
- Western Europe has 24.9 million students of age for primary education, 33.8 million for secondary and 25.5 million potential students of age for third level education.
- An average of 82% of students within OECD countries complete secondary education over their lifetime.
- Only nine of the top global universities are not located within the United States, only three within the top 20.
- The largest university in the world, according to enrolment, is the Allama Iqbal Open University in Pakistan with 1.9 million student enrolments.
- E-learning is worth €56.2 billion with corporations considering it to be the second most valuable training method.
- International student growth grew at a rate of 6.6% per annum between 2009 and 2011 to 3.04 million.
- China aims to host 500,000 international students by 2020, up from the current level of 260,000.



SUMMARY OVERVIEW OF THE EDUCATION SECTOR

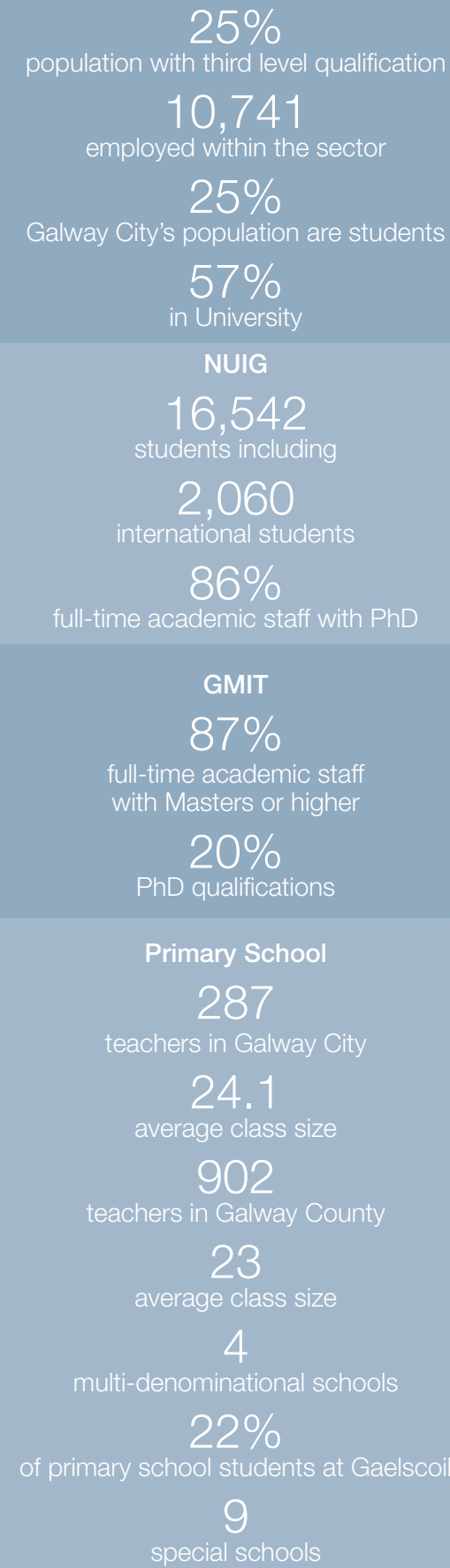
National Overview

- Approximately 40 higher education institutions cater for a student population of 200,175, which is forecast to rise to over 250,000 by 2020.
- There are 3,300 primary schools that cater for 520,444 students and 700 secondary schools that cater for 360,567.
- The strongest growth in the sector is among primary and nursery school teachers where the number increased by 9,115 to 39,998 between 2006 and 2011.
- Secondary school teachers account for 31,829, up by 2,178. Third level teaching staff increased from 10,831 in 2006 to 12,729 in 2011.
- The number of caretakers, labourers and clerks all decreased, with the number of filing and other clerks decreasing by 38%.
- International student numbers in third level colleges grew by 2% to 32,000 in 2012.
- International education is valued at €1 billion to the Irish economy.
- Ireland has a goal to raise the number of international students to 52,000 by 2015 and English language students to 125,000.
- Expenditure per student in Ireland increased to €6,272 (16.4%) per student over the period 2003-2012.
- Expenditure per student in secondary schools has increased by 11.6% over the period 2003-2012.
- In reading literacy, Ireland had the second highest score in 2012 among participating EU countries.
- Ireland had the 8th highest mathematical literacy for 15 year old students in secondary schools among participating EU countries in 2012.
- Ireland ranked sixth highest among EU countries for scientific literacy with a score of 522.
- The proportion of students aged 18-24 who left school with, at most, lower secondary education in Ireland was 9.7% in 2012.
- In relation to third-level students, there was a decrease of 20.1% in expenditure per student over the period 2003 to 2012.
- The number of full-time third-level students increased by 24.1% between 2003 and 2012, while the number of part-time students increased slightly by 0.3%.
- There are 45,373 pupils attending Irish-medium schools outside of the Gaeltacht.
- A reform of the Junior Certificate seeks to promote active learning, creativity and innovation.
- By 2016, full equality of provision and support will have been achieved in higher education for all learners.

SUMMARY OVERVIEW OF THE EDUCATION SECTOR

Regional and Local Overview

- 25% of Galway City’s population are students indicating a high level of education within the City.
- There are 10,741 individuals employed within the education sector of Galway.
- 62,389 people in Galway have a third level qualification, meaning that a quarter of Galway’s population has a third level education qualification.
- In Galway, 57% of third level students were in a university, which is 4.6% higher than the national average.
- NUIG has 16,542 students including 2,060 international students from 92 countries, with 2,002 staff of which 86% are full-time academic staff with PhD qualification.
- NUIG was the only Irish university to have increased its position in the QS World University Rankings 2014/2015, rising four places to 280th.
- Some 87% of staff employed in GMIT are full-time academic staff with Masters or higher, while some 20% have PhD qualifications.
- Coláiste na Coiribe is currently under construction with a total investment of €16 million.
- The largest vocational school in Galway City is Galway Technical Institute (GTI) which has 1,175 pupils.
- Yeats College in Galway City was recently ranked as Ireland’s highest achieving school, sending 100% of pupils to third level courses.
- NUIG has in excess of 2,000 international students, accounting for 15% of the student population which is the highest number of international students out of all Irish Universities.
- In Galway County, the number of secondary school pupils has decreased by 162 during the period 2007 to 2014.
- Galway City had an early school leaver percentage of 3.6% compared to 2.2% in Galway County.
- Galway City has 287 primary school teachers with an average class size of 24.1 pupils and Galway County has 902 teachers teaching an average class size of 23 pupils.
- There are four multi-denominational schools in Galway.



SUMMARY OVERVIEW OF THE EDUCATION SECTOR

- Some 22% of primary school students in Galway attend a Gaelscoil.
- Since the establishment of DEIS, literacy and numeracy rates in primary schools have been improving steadily and secondary attainment levels are improving. Attendance, participation and retention levels have also improved.
- There are 9 special schools in Galway with Rosedale School being the largest, catering for 67 pupils.

Future Opportunities and Recommendations

- The education sector is a significant contributor to the local economy.
- Currently, there is a variety of educational provision at all levels and this needs to be maintained and developed further to meet future needs.
- The School Investment Programme has seen construction of five new schools, as well as a range of school extensions.
- The presence of a growing and vibrant third level sector is a significant asset for Galway.
- The further enhancement of teaching and research programmes that support and underpin the future development of key sectors within the City and County is critical.
- The level of collaboration between all sized firms in different industry sectors and the third level sector should be increased, with respect to job placement, joint research programmes and participation in national and European public funding programmes, such as Horizon 2020 and Irish Research Council Employment Based Schemes.
- Technology transfer from the third level sector and public research organisations can support firm level research and development within in the City and County.
- The usage of public research equipment infrastructure by firms within the City and County should be increased.
- A webportal for firms and researchers that provides industry specific information in relation to R&D capabilities, equipment and facilities and professional development opportunities should be created. Metric Ireland is an example of this which is focused on the medical device sector.
- Opportunities exist for the sector to grow the international student market and to further enhance sectoral skills based through niche programmes and learning approaches.
- Innovative retention approaches should be considered to ensure the retention of highly skilled graduates within Galway. This will contribute to the growth and future development of key sectors.
- Apprenticeships, training opportunities and mentoring should be used to ensure employment pathways for early school leavers.
- Training and development support should be provided for different sectors. Consideration should be given to utilise the existing education infrastructure to maximise participation and reach throughout the City and County.

SUMMARY OVERVIEW OF THE FOOD SECTOR

Global Overview

- Global food retail sales are approximately \$4 trillion annually and are expected to reach \$5.3 trillion by 2017.
- Supermarkets and hypermarkets account for half of annual food sales.
- Food retailing accounts for nearly 40% of all global retail sales.
- The top 15 global supermarket companies account for over 30% of world supermarket sales.
- Fresh food and agriculture produce accounts for 52.6% of the \$4 trillion and packaged foods accounts for 47.4%.
- Milk and rice are the most important food commodities with their productivity value in international dollars being \$187bn and \$186bn respectively, followed by meats, beef, pork and chicken.
- The top 10 food and drink manufacturers in the world have a combined revenue of \$438.7 billion and employ almost 1.3 million people.
- 13% of household spending in the US was on food, compared to 23% for households in Asia, 11.5% in Britain and 16 % in Ireland.
- The global market for organic produce in 2012 was nearly €64 billion with a total of 1.9 million organic producers with approximately 80% of these producers being located in developing countries.
- The global organic market in North America is expected to grow at a compound annual growth rate (CAGR) of 12% up to 2015 while Europe is also expected to grow at 12% owning the largest market share, valued at \$28 billion.
- There is a combined total of 37.5 million hectares of organic farmland as of 2012, which is an increase of 200,000 hectares from 2011.
- The traceability and ingredient origin of products influence the purchasing decision making of today's consumers.
- Although health and welfare are driving consumer spending habits, the global fast food industry is valued at \$551 billion with an annual growth rate of 3.5%, employing over 12 million people.
- China is on track to becoming the largest food and grocery market in the world by 2018, with 32% of the global share of food and grocery retailing.
- An estimated 1.3 billion tonnes of food is wasted annually or 30% of global food production which is enough food to feed 2 billion people.
- The top three key changes in the business structure of global food manufacturers are the addition of new products and services, improving operational efficiency of manufacturers and expansion into emerging markets.

SUMMARY OVERVIEW OF THE FOOD SECTOR

National Overview

- The food and drinks industry of Ireland generates a turnover of almost €24 billion, contributing to 230,000 jobs.
- The speciality food sector was valued at approximately €615 million in 2012 with about 350 producers employing more than 3,000 people.
- The value of food and drink exports in Ireland is valued at approximately €10 billion, representing a 40% increase since 2009 with revenues €3 billion higher.
- Ireland's most valuable food exports are meat and meat preparations, valued at €1.6 billion, and dairy products and bird's eggs, valued at €901 million.
- For the Irish food sector, 42% of food and drink exports, worth €4.1 billion, go to the UK.
- Exports to other EU markets increased by 11% in 2013 to €3.2 billion, with Germany, France and the Netherlands recording double digit growth.
- Irish households are spending €6,812 annually on food, accounting for 16% of their spending.
- Some 1.3% of Irish land is farmed organically while the E.U. average is 5.4%.
- €2.38 billion is spent annually on fast food which is 38% of the Irish 'eating out' budget. In contrast only €687 million is spent in full service restaurants annually accounting for 11% of Irish people's 'eating out' budget.
- Surplus food or 'food waste' costs the Irish economy €4 billion annually.

SUMMARY OVERVIEW OF THE FOOD SECTOR

Regional and Local Overview

- Galway City and County have a variety of farmers markets, food festivals and other food promotion activities to benefit companies working in the food sector in Galway.
- There are 30 market locations in Galway City and County where food is being sold. There are 19 Galway County farmers’ markets and 4 in Galway City.
- Growing Galway Food is a new initiative aimed at developing the food sector in Galway. The project identified 320 small food producers and 332 small food buyers.
- 53% of these companies employ between 1 and 2 people, including the founder/owner.
- 40% of food producers run their production from home.
- 70% of Galway food buyers surveyed by Growing Galway Food actively source local produce.
- There are 3,762 food and drink processing jobs based in the western region.
- The first state backed organic farm is located in Athenry, it is 110 hectares in size.
- There are 356 restaurants located in Galway City, the third highest concentration after Dublin and Cork.
- Galway has Fáilte Ireland nominated food ambassadors.
- 16 food festivals are held in Galway City and County annually.
- In conjunction with Bord Bia, training programmes, grants and the development of a strong food infrastructure and culture within Galway supports the development and success of new food producers.
- 12 nominations for Ireland’s best artisan food and greengrocers came from Galway in 2014.



SUMMARY OVERVIEW OF THE FOOD SECTOR

Future Opportunities and Recommendations

- The sector offers significant future growth prospects for Galway and, combined with a vibrant primary agricultural sector, provides a strong basis for its future development.
- The state supported organic farm in Athenry a significant asset for food producers.
- Tailored supports need to be put in place to support the development of the 320 small food producers, with respect to product development, international expansion and business management.
- Tailored education and training is required to enhance and to grow the skills base within the sector and to support its future development.
- A Galway food brand/label, similar to the Fuchsia brand for West Cork, should be created. This would enhance the promotion of small food producers and give visibility to local buyers and local food produce. Such branding should also include primary producers in the agricultural sector.
- Shared food production facilities should be established so small food producers have access to state of the art facilities to produce and scale production, as well as getting access to expert advice and support. An exemplar of such an approach is the Ferbane Food Campus.
- Opportunities to collectively promote Galway food products at international fairs should be systematically sought, as well as collaborations with key stakeholders in bringing international food buyers on an annual basis to Galway for selected food festivals and other creative economy based festivals.
- Additional supports should be put in place to promote, expand and enhance the farmers market experience. Creation of farmer market trails, coupled with primary production offerings, can further enhance the sector and its visibility locally, nationally and internationally.
- The Connemara Food Trail model could be replicated in other parts of the City and County to support primary production, food producers and restaurants.
- Distinctly Galway food product(s), such as the Blaa in Waterford, could be created and promoted.
- Learning and knowledge transfer networks and community fora should be created to explore new ideas, collaborations and networking, as well as knowledge acquisition and development, particularly between food producers, food processors and buyers.



SUMMARY OVERVIEW OF THE ICT SECTOR

Global Overview

- €3.3 trillion is the value of the global ICT industry.
- The forecasted global ICT revenue for 2016 is €3.663 trillion with a combined average growth rate of 5.3%.
- There are over 3 billion internet users, of which two thirds are from developing countries.
- The number of global mobile broadband subscriptions was expected to reach 2.3 billion by the end of 2014, with 55% of subscriptions coming from developing countries.
- Some 44% of global households have internet access at home, with 31% of households in developing countries have access to the internet at home, compared to 78% in developed countries.
- There is almost the same number of mobile subscriptions as there are people on earth.
- The global cloud computing market is forecasted to reach US\$210 billion by 2016, with a growth rate five times that of the global IT industry as a whole.
- The global market for Big Data is estimated to have a value of \$28.5 billion.
- Every minute, the world generates 1.7 million bytes of data.
- Software providing companies are dominating the top 15 ICT companies globally list.

SUMMARY OVERVIEW OF THE ICT SECTOR

National Overview

- Ireland has one of the highest concentrations of ICT activity and employment within the OECD.
- Over 105,000 individuals are employed within the ICT sector of Ireland with roughly 75% employed in multinational companies.
- 4 out of 5 of the top exporters in Ireland are technology companies.
- There are currently 5,000 job vacancies in Ireland's ICT sector.
- With every job that is filled in ICT, a further five jobs are generated in the local economy in areas such as retail and services.
- At the end of March 2014, there were 1,701,714 broadband subscribers.
- Approximately 56.7% of broadband speeds in Ireland have speeds greater than 10Mbps, while 37.7% were above 30Mbps.
- Mobile phone usage in Ireland is one of the largest in Europe per head of population.
- The average number of call minutes per customers is 35% more than the European average.
- 38% of Irish SMEs use the cloud to reduce costs and improve the efficiency of information access.
- In the period up to 2020, it is estimated that 21,000 potential job vacancies could arise comprising of 3,630 deep analytical roles and 17,470 big data roles, with a further 8,780 potential job openings for supporting technical staff.
- Ireland is home to 10 of the top 10 global ICT companies and 9 of the top 10 software companies as well 4 of the top 5 semiconductor firms and 4 of the top 5 technology hardware companies.

SUMMARY OVERVIEW OF THE ICT SECTOR

Regional and Local Overview

- There are 196 ICT organisations in Galway.
- Galway is home to 4 of the top 5 ICT companies - IBM, SAP, Oracle and Cisco.
- There are 90 ICT organisations in Galway City, as categorised by NACE (Rev.2) Codes, with a further 106 ICT companies based in County Galway.
- Growing indigenous SME ICT companies have real potential to grow a vibrant ICT cluster.
- There were 2,229 science, research, engineering and technology professionals in Galway City and County in 2011.
- There were 917 science, engineering and technology associate professionals in Galway City and County in 2011.
- The highest concentration of science, research, engineering and technology professionals and science, engineering and technology associate professionals in 2011 were in Oranmore and Tuam.
- Some 72.8% of households in Galway City have broadband connectivity compared to 63.8% nationally.
- County Galway has a lower percentage of households with broadband, compared to County Dublin and County Cork.
- Galway has a foothold in the growing cloud computing market through SMEs.
- The expiration of The National Broadband Scheme means that there are no longer minimum service standards, minimum speeds, orders and installation standards, fault restoration times, engineer visits or service rebates. This will have an impact on County Galway.
- There is significant ICT research infrastructure in the Galway, including INSIGHT at NUI Galway.
- There is an array of ICT education provision and incubation support in Galway.



SUMMARY OVERVIEW OF THE ICT SECTOR

Future Opportunities and Recommendations

- With the combination of top tier multinational companies, indigenous ICT firms, a growing start-up culture and significant research capability in the third level sectors, Galway has the potential to be an international niche ICT hub.
- A skills shortage could impede the development of the sector.
- There is a need to deepen the collaboration between the ICT sector and the third level institutions with respect to research and development, technology transfer, talent development and skills enhancement.
- There is a need to ensure that there is an alignment between future skills requirement and provision of educational and training offerings.
- The interest and success of CoderDojo throughout Galway highlights the interest in acquiring skills and knowledge that are relevant to the sector. This model of engagement could be replicated around key technologies.
- Emphasis should be placed on strengthening the bottom-up initiatives that are emerging in support of start-ups and this should be broadened to support the further internationalisation of established firms.
- The creation of a proposed Innovation District in Galway City has the potential to attract further activity, investment and talent for the ICT in Galway.
- The first phase of the proposed Innovation District, the Portershed, is a model that can be replicated in other locations and, also, for other sectors. It is a model that can be used for creating synergies between sectors and supports for firms at different stages of growth.
- The cloud computing investment being made by HP, combined with start-ups in the space and supported by existing third level teaching and research programmes, means that Galway has the potential to become a significant location for cloud computing.
- Open public data sector is growing internationally and Galway has the necessary mix of actors and expertise to be a test bed for this growing sector.
- Low broadband speeds could become an inhibitor to future growth of this sector.

SUMMARY OVERVIEW OF THE MARINE SECTOR

Global Overview

- \$1.2 trillion is the estimated worldwide economic value of marine goods and services.
- The weakness of fisheries governance is considered to be the main problem behind overfishing and stock decline.
- It is estimated that 52% of global fisheries are being fished at their maximum limit, 24% are overfished, depleted or recovering.
- Marine and coastal tourism is one of the fastest growing areas within the global marine industry.
- Approximately 9.2 billion tonnes of goods were loaded into ports worldwide. Crude oil, petroleum products and gas accounts for one third of these while two thirds are dry-cargo shipments fuelled by growing Asian demand for iron ore and coal.
- Off-shore wind industry is the most mature of the ocean based energy sources, with a global installed capacity of over 6 GW with estimates of growth to 175 GW by 2035.
- Tidal barrages and wave power are still at the demonstration stage.
- Oil is predicted to remain the dominant fuel through to 2035.
- Aquaculture, with extensive growth in Asia, is expected to grow 33% to 79 million metric tons by 2021 while capture fisheries are expected to grow by only 3%.
- Marine Biotechnology industries are estimated at approximately \$2.8 billion and expected to grow to \$4.6 billion by 2017.



SUMMARY OVERVIEW OF THE MARINE SECTOR

National Overview

- The latest estimated economic value of Ireland's ocean economy, as of 2007, is €1.44 billion or 1% GDP, providing employment for 17,000 people.
- Emerging activities consist of renewable ocean energy, marine commerce, high-tech services and marine biotechnology.
- Some 99% of Ireland's total imports and exports are transported by sea. Sea-based shipping is the second largest provider in terms of turnover, value add and employment within the established marine sector.
- Ireland's water-based tourism and leisure industry generated €453 million gross value added to the economy, employing 5,800 people in 2007.
- 190 cruise liners docked in Ireland in 2012, carrying 162,797 passengers.
- There are 2,125 registered fishing vessels currently on the Irish Fishing Boat Register, representing 2% of the European fishing fleet.
- The volume and value of fish landed by Irish vessels in home ports for 2012 amounted to 280,000 tonnes, valued at €270 million.
- Ireland has the 7th largest aquaculture sector in the EU, producing 48,350 tons of aquaculture in 2007.
- The Irish seafood market is valued at €830 million with shellfish exports valued at €172 million due to an increasing demand for Irish oysters, crab and mussels.
- Oil and gas provide over 80% of Ireland's primary energy supply with €1.5 billion expected to be spent on oil and gas exploration over the next 3 years.
- In 2007, marine manufacturing accounted for approximately €265 million, with exports accounting for €12 million.
- High-tech marine products and services had a turnover of €43.6 million in 2007, employing 350 people.
- Marine commerce produces the highest turnover within the emerging marine activities.
- Marine biotechnology accounted for a turnover of €18 million in 2007, employing 185 people.
- Due to the EU target of reducing CO₂ emissions by 20% by 2020, the government has set a target of generating 40% of electricity from renewable sources.

SUMMARY OVERVIEW OF THE MARINE SECTOR

Regional and Local Overview

- There are 114 agriculture, forestry and fishing industries in Galway City and County, employing 5,908 people.
- In 2012, Galway produced 2,742 tonnes of salmon, accounting for 23% of the total nationwide production and 33% of the nationwide production of edulis oysters.
- In 2012, Galway produced 1012 tonnes of rope mussels and 15 tonnes of freshwater trout.
- Rossaveal is the main port in the west of Ireland (4kt per year, 31 vessels) and receives a mix of pelagic, demersal and shellfish species.
- In 2013, Rosaveel ranked 4th in the top 20 Irish ports in terms of monetary value of yearly haul.
- Bord lascaigh Mhara lists 11 seafood processors in County Galway, with four of these based in Galway City.
- There are 17 aquaculture and fishing companies in Galway.
- Galway has the best marine manufacturer to population ratio.
- 8 cruise ships docked in Galway Harbour in 2014, with the same number expected to dock in Galway in 2015.
- There are currently 7 blue-flag beaches in Galway, 2 within the City.
- Active water-based activities in Galway include sea angling, pleasure boating, windsurfing, scuba-diving, canoeing and water-skiing.
- There were 35 companies involved in water-based leisure activities in 2010 in Galway.
- 319 registered vessels on the Irish Boat Register are owned by people living in Galway, out of a total 2,125.
- The Corrib gas project has provided benefits to Galway, connecting four towns in Galway to the national gas network.
- There are 10 angling clubs and related services in the Galway.
- There are 9 sailing clubs and related services in Galway.
- A recent discovery of 61 tonnes of bullion from a British cargo ship that sank in 1941, 300 miles off the coast of Galway, underlines the potential for deep sea exploration.
- There is significant research infrastructure in the Galway City and County.

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7
blue-flag beaches in Galway

35
water-based leisure
activities companies

10
angling clubs

9
sailing clubs

SUMMARY OVERVIEW OF THE MARINE SECTOR

Future Opportunities and Recommendations

- The marine sector is a significant contributor to the local economy and offers real potential for future sustainable growth.
- The Marine Institute and the significant marine research expertise in the third level organisations, such as the Ryan Institute and SEMRU at NUI Galway, are significant assets to the future development of the sector. Closer collaborations can be developed between the research infrastructure, capabilities and expertise and the various marine sub-sectors.
- The proposed redevelopment of Galway Harbour will be transformative for Galway City and can provide significant direct and indirect economic and societal benefits, as well a supporting the increasing number of cruise ships that dock in Galway on an annual basis.
- Opportunities exist to support, market and brand systematically the existing marine tourism activities as well as expanding the product offering in this sub-sector of the marine sector.
- It is important that the number of blue flag beaches is maintained and, possibly, increased.
- Opportunities exist to support existing seafood producers enhance their value adding activities through targeted supports in collaboration with other private and state stakeholders. The monetary value of yearly fish hauls in Galway ranks it in the top tier nationally and pilot schemes could be implemented to explore how additional value added activities could be developed around fish species and for food production.
- Marine manufacturing, while a small sector, has the potential to grow and expand in niche markets. The traditional boat building (Galway Hooker and Currachs) has the potential to contribute more economically to this sub-sector. Specific developments around traditional boat building can support the retention and development of new skills, the recruitment of new talent into the sector and contribute to the tourism sector. Different models have been pursued in the UK to support old steam trains and railways and aspects of these operations could be replicated in Galway. Moreover, traditional boats are synonymous with the identity of Galway nationally and internationally.

SUMMARY OVERVIEW OF THE MEDICAL DEVICE SECTOR

Global Overview

- The current global market is valued at \$228 billion, up from \$164 in 2010 and projected to reach \$440 billion by 2018.
- The global market is growing at approximately 4.4% compound annual growth rate per year.
- The US market value is 38% of the global total and China has become the third largest medical device market valued at \$48 billion.
- Johnson and Johnson, GE and Medtronic are the top 3 medical device companies.
- There are 7,000 medical device companies in the US and the market is anticipated to grow at 6.1% compounded annual growth rate.
- Some 400,000 individuals are directly employed and 2 million indirectly employed in the US with Massachusetts generating the most revenue.
- Western Europe represents approximately 25% of the global medical device market, with Germany leading the market followed by France, the UK and Italy.
- In Western Europe, 3.7% is the current compounded annual growth rate for the sector and Northern Europe is forecast to have a 5.1% compounded annual growth rate in the next five years.
- There is a 20% average annual growth rate for the Chinese medical device market.
- Hospitals account for the largest distribution channel for medical devices in the Chinese market at 79% followed by pharmacies at 17%.
- Diagnostic imaging devices has 40% market share.
- Cost containments, pricing and reimbursement controls and regulatory issues are key drivers for the medical device sector.

SUMMARY OVERVIEW OF THE MEDICAL DEVICE SECTOR

National Overview

- Export value is €10.6 billion, up 8% since 2011.
- Medical devices and diagnostic products represent 8.5% of Ireland’s total merchandise exports.
- There have been 338 notifications to the Irish Medicines Board to their medical device register relating to class 1 in-vitro diagnostic and custom made devices.
- There were 48 new medical device manufacturers registered in 2012 with the Irish Medicines Board.
- 15 of the top 20 global medical device companies have operations in Ireland.
- There are 300 medical device companies in Ireland employing more than 25,000.
- 90% of companies in this sector are SMEs.
- 94% of Irish medical device companies are expressing confidence about their business.

SUMMARY OVERVIEW OF THE MEDICAL DEVICE SECTOR

Regional and Local Overview

- Galway employs one third of the country's 25,000 medical device employees and the West accounts for 39% of regional distribution of medical devices.
- There is a significant cluster of medical device companies, with Medtronic and Boston Scientific being the largest employers.
- Boston Scientific Ireland Ltd employs 2,800 individuals and Medtronic Vascular Galway Ltd. employs 1,882 individuals.
- The medical devices cluster in Galway occurs through university-industry linkages, a continuous development of a skilled labour pool, international reputation through the success of Boston Scientific and Medtronic, the growth of supplier firms and knowledge transfers establishing new start-ups.
- The medical device companies within this cluster are supported by such organisations as Enterprise Ireland, IDA Ireland, Údarás na Gaeltachta, Local Enterprise Office Galway, GMIT and NUI Galway.
- Galway has become recognised for its specialisation in coronary devices.
- The Department of Mechanical and Biomedical Engineering in NUI Galway has given rise to an average of 22 graduates per year since 2003.
- A BioInnovate team recruited in Galway and focusing on cardiovascular disease identified the need for a vascular support device and technology to improve vascular embolism.
- REMEDI, in NUI Galway, has recently received €47 million in funding grants for pioneering research initiatives for 36 research projects involving over 200 researchers.
- GMedTech, in GMIT, has obtained over €3.5 million worth of funding for an applied biomedical research project and has developed three cardiovascular type simulators for assessing heart attacks, stroke and aortic aneurysms.

1/3
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SUMMARY OVERVIEW OF THE MEDICAL DEVICE SECTOR

Future Opportunities and Recommendations

- The Medical Device Sector is a significant contributor to employment and economic activity in Galway.
- Galway is one of a rare set of successful international industrial clusters.
- The business and revenue model for the sector globally is going through a period of disruptive change.
- Galway was recently named as one of the 7th most important medical device clusters in Europe.
- There is evidence of serial entrepreneurship emerging within the Galway cluster.
- US medical device firms actively seek to locate operations in Europe and to pursue CE regulation.
- The creation of the National Centre for Medical Devices (CURAM), led by NUI Galway, provides a significant locus of future R&D to support the scaling and diversification of the sector in Galway across all firm sizes.
- Significant cluster of large multi-national companies, indigenous companies as well as growing number of startup firms and of serial entrepreneurs.
- Research infrastructure, capabilities and talent have been scaled in the third level educational institutions and this contributes to supporting the development of the sector.
- There is a danger of technological lock-in to specialised domains and a need to support further diversification of specialised domains.
- Opportunities exist to create convergent technology products and services within the ICT sector to create niche, born global products and services.
- There is a need to ensure that there is an alignment between future skills requirement and provision of educational and training offerings.

SUMMARY OVERVIEW OF THE RETAIL SECTOR

Global Overview

- The global retail industry should reach \$20,002 billion by 2017 with a compound annual growth rate of 3.9%.
- The industry faced a decline during the global economic crisis affecting the market in which the Top 250 retailers operate.
- The advancements in mobile phone technology have developed m-commerce, such as faster payments, one-click purchases and social retailing.
- In 2013, 43% of global shoppers bought products using a smartphone.
- Nearly one-third of company sales were e-commerce for the e-50 companies.
- A European Retail Action Plan has been launched to grow the retail sector, employ more people and to provide even better value for customers.



SUMMARY OVERVIEW OF THE RETAIL SECTOR

National Overview

- The Irish retail industry accounts for over 10% of GDP and employs over 275,000 individuals.
- Over 100,000 new jobs have been added to the sector since a low point in Q1 2012.
- The volume of sales was 5.1% higher, year-on-year, during December 2014 and up 0.5% when compared to November 2014.
- Pharmaceuticals, medical and cosmetic items saw the largest monthly increase in volume, up 4.5%, while hardware, paint and glass sales rose by 3.9%.
- Motor sales and fuel saw an increase of 7.9% in sales volume.
- The Irish motor industry contributed €965 million in new and used car sales for the exchequer in 2014 and generated an extra 3,800 jobs.
- Nationally, there are 119 retail chains with a minimal of 5 stores or with a minimal €3 million turnover in Ireland.
- Approximately €4 billion out of Ireland's annual €35 billion retail spending is on online purchases but 75% of these purchases went through foreign companies, equating to €98 per second lost from the Irish economy.
- Some 55% of retailers in Ireland have made a large investment in their business over the last three years.
- Some 56% of retailers are offering more discounts and promotions compared to 2013.
- Irish retail vacancy rates have soared due to a series of high-profile closures.
- The black market is a serious issue for Irish retail and costs the economy an estimated €1.5 billion annually.
- Upward only rent review provisions in commercial leases entered into after 28 February 2010 is an issue of concern for Irish retailers.
- Aldi and Lidl control over 15% share of the Irish market as 'deal-hunting' becomes the norm.
- As much as 71% of new car purchases are being financed via Personal Contract Plans (PCP).
- The Government aims to reduce the fiscal deficit to below 3% by 2015, signalling to consumers that economic recovery is underway and that spending can take place.

Made in Galway is a Galway County Council led initiative that creates closer linkages between producers in Galway and consumers. Over 200 businesses operating from Galway showcase their quality produce through the website www.madeingalway.ie.

SUMMARY OVERVIEW OF THE RETAIL SECTOR

Regional and Local Overview

- The drop in the unemployment rate in Galway from 14.4% in 2012 to 11.9% in 2013 has had a positive impact on customer spending.
- The Eyre Square Centre incorporates over 60 local and national shops and attracts approximately 185,000 visitors per week.
- In 2014, Galway’s retailers experienced a more profitable year than 2013.
- Galway County has a retail vacancy rate of 15.1%.
- The Galway Continental Market has proven to be an attraction for shoppers with 607,000 visitors to the market over its 32 days duration in 2013.
- Galway City has 3,115 commercial address points, with a vacancy rate of 16.5%, down 0.5% from last year.
- Galway City is above the national average regarding services, health and social, construction and financial units.
- Shop Street in Galway City had the lowest vacancy rate at 3.0%.
- Some 49,954 people passed through Shop Street December 15th 2012.

11.9%
unemployment rate in Galway in 2013

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SUMMARY OVERVIEW OF THE RETAIL SECTOR

Future Opportunities and Recommendations

- The retail sector in Galway has begun to recover slowly, particularly with increasing short term leasing within shopping centres.
- Retail vacancy rates in Galway remain higher than the national average and will take time to reduce further.
- Initiatives and supports to support pop-up shops in vacant building should be developed.
- Consideration needs to be given to retailing mixes and what incentives can be put in place to encourage growth in the sector.
- Retailing experiences are influenced by access and environmental factors and, where feasible, these should be improved to enhance the consumer retail experience.
- Local buying campaigns could be promoted using data to reinforce the contribution sourcing locally makes to the local community in terms of jobs and money to the local economy. Such Buy Galway campaigns, such as designated days, fortnights and footpath campaigns will also promote local businesses.
- Pilot schemes could be implemented to support imaginative shop displays and this could involve public participation and the creative sector to enhance shop fronts and build footfall.
- Where appropriate, retailers should be supported to build online presence to promote their businesses and to sell goods and services online.
- Learning and knowledge transfer networks and community for a should be created to explore new ideas, collaborations and networking, as well as and knowledge acquisition and development.
- Training and development for the sector is vital to support critical activities, such as customer services and lean operational efficiency

SUMMARY OVERVIEW OF THE TOURISM SECTOR

Global Overview

- International tourism arrivals have increased by 5% since 2013, with destinations worldwide receiving 517 million international tourists in the first half of 2014.
- It is forecast that international tourism arrivals will increase to 1.8 billion by 2030.
- 1 in 11 jobs worldwide are tourism related.
- Europe comprises 42% of the world's tourism receipts and generated the highest earnings of \$489 billion in 2013.
- 52% of inbound tourism travel purpose in 2013 was leisure, recreation and holidays.
- There was a 2.5% growth in revenue in 2014 for the global hotel and resorts industry.
- Key drivers of growth are economic, globalisation, demographic and technology, as well as emerging market growth.
- EU policy aims to promote tourism so as to maintain it as a leading destination



SUMMARY OVERVIEW OF THE TOURISM SECTOR

National Overview

- Ireland has experienced an increase of 12.3% in inbound visitors to 2,126,600 within the first half of 2014.
- Great Britain, Other European and North America were the top three inbound tourists to Ireland in 2014.
- There was a 5.2% increase in domestic trips in first six month 2014, resulting in 4.6 million bed night with an average stay of 2.6 nights.
- 7.1 million domestic trips were taken by Irish residents in 2013 with a total expenditure of €1.3 billion.
- One sixth of domestic trips were to the West of Ireland with an average length of stay by Irish resident of 3.3 nights, which is the second longest after South West.
- It is estimated that there was €265 million expenditure by Irish residents on domestic travel in the West in 2013.
- 8 out of 10 Irish hotels expect to increase their volume of business in 2015, with 63% of guesthouses expecting increased volumes and 66% of B&Bs anticipating increased business.
- Ireland was named by the Lonely Planet as one of the top five countries in the world to visit.
- There was a 45% increase in number of visitors arriving by air into Ireland from 2000 to 2012, from 8.1 million to 11.9 million. The increased air traffic into Ireland has positively influenced and improved levels of tourism in Ireland.
- Dublin Airport saw over 20 million passengers in 2013 and Shannon saw 1.28 million passengers with Cork achieving 1.25 million in 2012.
- Nearly 7 million overseas visitors came to Ireland in 2013 from all across the world.
- In the West of Ireland, an average of €317 is generated per visitor. This is the third highest revenue in the State.
- 30% of expenditure relates to bed and board with 20% spent on other food and drink by overseas visitors to the State in 2013.
- 2.5 million tourists visited cultural and historical sites in 2013.
- Ireland has set targets for 50,000 extra jobs to be created in tourism and hospitality and €1.7 billion more in annual revenue in the new Tourism Policy.

SUMMARY OVERVIEW OF THE TOURISM SECTOR

Regional and Local Overview

- Galway accounted for 15.8% of total overseas visitors coming into Ireland in 2014.
- Galway’s inbound overseas visitors increased at a higher rate than Ireland at 10.3% between 2013 and 2014.
- Galway experienced the third highest number of overseas visitors after Dublin and then Cork in 2012 and 2013, growing at a rate of 6.2%.
- Mainland Europe accounts for a large proportion of overseas visitors into Galway. 30% of visitors come from North America.
- In 2013, Galway attracted 199,000 British tourists, an increase of 11.8%.
- Galway generated €253 million in revenue from overseas visitors in 2012, with 38% of Galway total revenue being generated by North American visitors.
- Galway attracts 10.4% of Ireland’s total domestic visitors.
- 739,000 Irish residents travelled to Galway in 2013.
- Galway generated €148 million from domestic spending in 2013.
- Galway is showing positive RevPAR growth with Galway’s RevPAR up 6% to €45.02 with an occupancy percentage of 67.4% as of 2013.
- The reduced VAT rate has resulted in creating an additional 1,203 new direct jobs in Galway within the tourism, food and hospitality sector.
- Galway airport has recently reopened to commercial flights with the first commercial jet, under the new licence, arriving on the 13th January 2015 from Stuttgart in Germany.
- Galway is famous for being the festival capital of Ireland, hosting 122 festivals and events for the year 2015.
- Some 25% or 87,962 passengers from Shannon Airport visited Galway. Of these, 48% stayed in a hotel, 16% stayed in a B&B, 7% stayed in self-catering accommodation and 39% went to stay with friends or relatives.
- There are 35 heritage sites, 31 museums and 10 art galleries in Galway City and County.
- Some 167,464 overseas tourists visited Connemara National Park in 2012.
- 689 kms of Galway’s coastline runs through the Wild Atlantic Way.



SUMMARY OVERVIEW OF THE TOURISM SECTOR

Future Opportunities and Recommendations

- Tourism is a significant contributor to the local economy in Galway City and County.
- Growth trends are emerging for revenue from overseas and domestic visitors.
- Britain, Mainland Europe and North America are key markets for overseas revenue generation.
- Festivals and events create direct and indirect contribution to the local economy.
- Galway has a significant range of cultural assets in the form of heritage sites, museums and art galleries.
- Tourist attractions, natural environment, culture and language give Galway natural visibility.
- Ease of access to and from Galway is critical to grow both the domestic and overseas tourist visitors.
- There is a need to support the sector in the development of new products to enhance the tourist offering in Galway and to extend the tourist season as far as possible.
- Opportunities exist through co-operative activities to create cultural trails using the cultural assets, such as heritage sites. Such trails could be combined with the food, creative and agricultural sectors to create truly unique and authentic experiences for domestic and overseas tourists.
- Continuous innovation is required for festival formats, themes and focus to protect, build and develop Galway’s reputation for innovative festivals and festival experiences.
- Existing international twinning arrangements should be utilised as a mechanism to attract tourists and, possibly, to co-create tourist products and services.
- There is a need to consider and refine what is the ‘Galway’ tourist experience, given the changes in profile of tourists, demands, preferences and lengths of stay.
- Information about tourism products and experience should be made available in multiple languages and the multilingual skills of the sector should be developed.
- There is a need to develop the skills, competencies and capabilities of the sector through professional development provision.
- There is a need to examine supports and opportunities for seasonal workers in this sector, both to retain them within the sector and to provide them with the necessary skills to work in other sectors during the off peak season.
- GMIT, with its strengths in tourism and hospitality, is a significant asset to the sector. Greater collaboration could enhance and underpin new developments within the sector.
- Marketing and branding of Galway in a systematic way through traditional and new media is essential to supporting the sector in national and international markets. This could be done through a master brand for Galway.

