WDC Insights

providing insights on key issues for the Western Region of Ireland

Administrative, Entertainment & Other Services in the Western Region

Regional Sectoral Profile

May 2019

Contents

1.0 Introduction

The Western Development Commission (WDC) is a state agency charged with promoting the economic and social development of the Western Region of Ireland.[1] To effectively deliver this remit the WDC carries out detailed analysis of a range of socio-economic issues of relevance to the region to inform policy debate and formulation.

This report forms part of a series of 'Regional Sectoral Profiles' analysing the most recent employment and enterprise data for the Western Region on specific economic sectors and identifying key policy issues.[2]

The two-page ***WDC Insights*: Administrative, Entertainment & Other Services in the Western Region** summarises the main points from this report. It is available here.

1.1 Administrative, Entertainment & Other Services

Administrative, Entertainment & Other Services is the Western Region's seventh largest employment sector.[3] It includes three broad sub-sectors which provide services to both businesses and individuals. 'Administrative & Support Services' primarily provide 'outsourced' type services to businesses (property management and landscaping, contract cleaning, 'back office' business processing/call centres, recruitment, leasing and security) but also includes travel agents and tour operators. 'Arts, Entertainment & Recreation' (creative arts, cinemas, gyms, sports activities, amusements, museums and gambling) and also 'Other Services' (hairdressing and beauty, laundry, repair services, funeral services, unions and business groups and domestic staff) mainly provide services to individuals and households.

A common feature across the sector is that these activities are highly sensitive to changes in the overall level of economic activity. During economic downturns the demand from businesses for the type of 'outsourced' services provided by the sector can be considerably reduced, at the same time lower disposable income reduces demand for personal and leisure services. Conversely improved economic conditions, disposable income and tourism activity can greatly increase demand for such services.

Compared with other sectors, Administrative, Entertainment & Other Services is characterised by relatively low pay.[4] Within the broad sector, those activities providing personal and leisure services are also characterised by low average weekly hours worked, with many part-time and seasonal jobs.[5] Aspects of this sector e.g. recreation activities, can be an important source of employment for young people, as well as those with lower skill levels or experience. At the same time, it offers a range of positions requiring high skill levels e.g. recruitment specialists, artists, security experts, and is characterised by considerable self-employment and a high level of entrepreneurship.

[1] Counties Donegal, Sligo, Leitrim, Roscommon, Mayo, Galway and Clare.
[2] Previous Regional Sectoral Profiles are available here https://www.wdc.ie/publications/reports-and-papers/
[3] After Industry, Wholesale & Retail, Health & Care, Education, Accommodation & Food Service and Agriculture, Forestry & Fishing.
[4] At €17.13, €18.00 and €18.57 per hour, 'Other Services', 'Arts, Entertainment & Recreation' and 'Administrative & Support Services' have the second, third and fourth lowest average hourly earnings of all economic sectors. CSO, Earnings, Hours and Employment Costs Survey Q4 2018, Table EHQ03
[5] At an average of 26.7 hrs per week, 'Other Services' has the second lowest average number of hours of all sectors, at 29.3 hrs per week, 'Arts, Entertainment & Recreation' is fourth lowest. CSO, Earnings, Hours and Employment Costs Survey Q4 2018, Table EHQ03

Following a description of the data that will be used, Section 2 outlines the current employment situation and employment trends in the Administrative, Entertainment & Other Services sector followed in Section 3 by a focus on agency assisted jobs. Section 4 outlines data on enterprise numbers in the sector, with key policy issues outlined in Section 5.

1.2 Data used

A number of data sources are used to examine the Administrative, Entertainment & Other Services sector in the region.

Census of Population: The Census provides comprehensive data on employment by sector at both county and town level. No other data source provides this level of geographic breakdown. However there are a number of issues to bear in mind:

1. Most recent Census data is 2016.
2. Census data refers to where a person lives which may not be the same as where they work.[6] Data presented here on the number of people working in a sector in a specific county/town refers to the number of residents of that county/town working in the sector, even if they work elsewhere.
3. Census data does not give an indication of whether employment is full or part-time. Each person who works in the sector, regardless of how many hours per week they work, is counted the same. It only counts people who reported their main job as working in this sector.

Business Demography: Business Demography data gives the number of enterprises in each sector in each county. An enterprise is assigned to the county where it is registered with the Revenue Commissioners. Therefore a business with multiple locations e.g. a betting office chain, cinema group, recruitment agency, is only counted once where it is headquartered (often Dublin), individual branches are not counted. As this data measures enterprises registered in a county, they may have stronger ties to the area.

Department of Business, Enterprise & Innovation (DBEI), Annual Employment Survey: Each year DBEI conducts a survey of all firms in Ireland who have ever received support from IDA Ireland, Enterprise Ireland or Udarás na Gaeltachta. These are referred to as agency assisted companies and are limited to companies involved in manufacturing or internationally traded services who are exporting or have the potential to export. The main benefits of using employment data from the Annual Employment Survey is that it differentiates between foreign and Irish ownership and also between permanent full-time jobs and other jobs (temporary, contract or part-time). The latest data is from 2017 and a special data run was obtained from DBEI for the Western Region.

[6] See WDC (2018), Travel to Work and Labour Catchments in the Western Region: A Profile of Seven Town Labour Catchments 2018, for an analysis of travel to work patterns in the region.

2.0 Employment in Administrative, Entertainment & Other Services

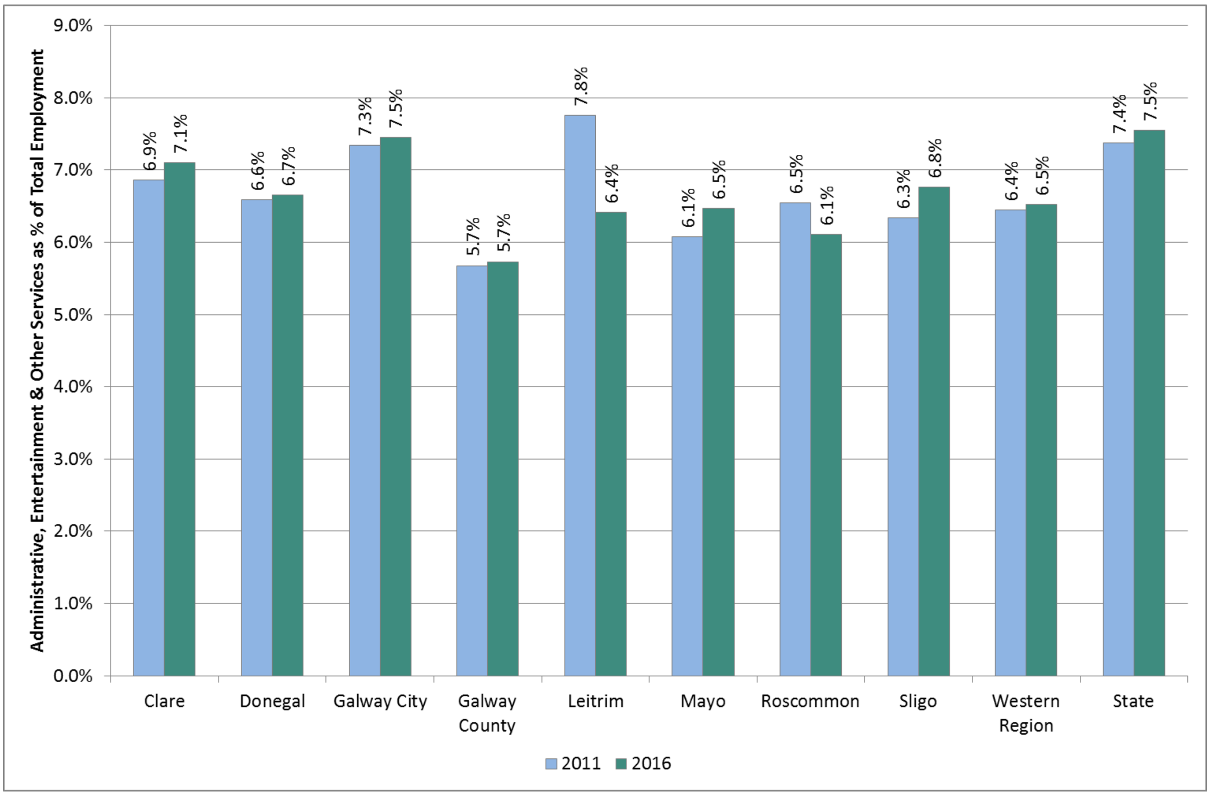
In this section we examine employment over time and by gender, as well as self-employment, in Administrative, Entertainment & Other Services in the Western Region, western counties and towns. Employment in specific sub-sectors and activities is also set out.

2.1 Employment in the Western Region and its counties

According to Census 2016, 21,789 people were employed in Administrative, Entertainment & Other Services in the Western Region. Of everyone working in this sector in Ireland, 14.4% of them live in the Western Region. In comparison, the Western Region is home to 16.6% of total employment which means the region accounts for a smaller share of jobs in this sector than of jobs generally.

Administrative, Entertainment & Other Services plays a smaller role in the region's labour market than nationally (Fig. 1). In 2016 it accounted for 6.5% of total employment in the Western Region compared with 7.5% nationally. It is the region's seventh largest employment sector.

Fig. 1: Percentage of total employment in Administrative, Entertainment & Other Services in Western Region and state, 2011 and 2016



Source: CSO, Census 2016: Summary Results Part 2, Table EZ011

Among western counties, in 2016 the sector was most important in Galway City accounting for 7.5% of all employment, followed by Clare (7.1%), Sligo (6.8%) and Donegal (6.7%). Galway City, Ennis, Sligo and Letterkenny's roles as regional service centres, as well as Shannon Free Zone in Clare influence the pattern. Except for Galway City, all western counties have a below average share working in this sector.

Fig. 1 also shows that the share of total employment accounted for by this sector increased in all western counties, except for Leitrim and Roscommon, between 2011 and 2016. The large decline in the sector's importance in Leitrim was mainly due to the scaling back of a large call centre (see Section 2.2 and 2.3 for more). In the Western Region as a whole, the sector's share of employment remained unchanged over the period.

A sector's share of total employment is determined both by the number of people actually working in the sector and total employment levels in the economy. If the number working in the sector did not change but total employment grew or fell dramatically e.g. during the construction boom and bust, then its share of total employment would still change. The next section looks at changes in the actual number working in Administrative, Entertainment & Other Services.

2.1.1 Change in employment in the Western Region and its counties

The number of people working in Administrative, Entertainment & Other Services in the Western Region grew by 8.9% between 2011 and 2016 (Table 1), lower than the 13.6% growth nationally, illustrating a somewhat poorer performance for the sector in the region compared with elsewhere. As this sector relies heavily on the level of activity in the wider economy e.g. demand from businesses and disposable income of consumers, it very much follows the trend of the economic cycle. The fact that economic recovery in the Western Region lagged that occurring nationally,[7] influenced the performance of this sector.

Growth in the sector was somewhat greater than overall jobs growth (7.5%) in the region however, showing it was one of the sectors contributing to the overall jobs recovery experienced in this period.

Table 1: Number employed in Administrative, Entertainment & Other Services in Western Region and state, and percentage change 2011-2016

County	Administrative, Entertainment & Other Services			Total Employment
	2011	2016	% Change 2011-2016	% Change 2011-2016
Clare	3,130	3,515	12.3%	8.6%
Donegal	3,513	3,883	10.5%	9.5%
Galway City	2,318	2,605	12.4%	10.8%
Galway County	3,928	4,303	9.5%	8.5%
Leitrim	929	817	-12.1%	6.3%
Mayo	2,980	3,329	11.7%	4.8%
Roscommon	1,596	1,577	-1.2%	5.9%
Sligo	1,611	1,760	9.2%	2.2%
Western Region	**20,005**	**21,789**	**8.9%**	**7.5%**
State	**133,306**	**151,401**	**13.6%**	**11.0%**

Source: CSO, Census 2016: Summary Results Part 2, Table EZ011

Galway City and Clare, where the sector is most important to total employment, also experienced the strongest employment growth at over 12% (see Section 2.2 for detail on which activities drove this growth). In these counties, as well as Donegal, Mayo, Galway County and Sligo, growth in this sector exceeded overall jobs growth.

[7] WDC (2018), *WDC Insights*: What's happening in our regional economies? Growth and Change in Regional GVA

Leitrim in contrast experienced a 12.1% fall in the number of people working in this sector, with Roscommon also seeing a fall in numbers, in both cases considerably worse than their general jobs performance.

The next section examines employment in Administrative, Entertainment & Other Services sub-sectors which illustrates which activities drove these changes in different counties.

2.2 Employment in Administrative, Entertainment & Other Services sub-sectors

The Administrative, Entertainment & Other Services sector is composed of three broad sub-sectors further broken down into 19 separate activities[8] as follows:

1. **Administrative and Support Service Activities** (primarily services for business clients): Renting and leasing; Employment activities (recruitment agencies); Travel agency, tour operator and reservation services; Security and investigation; Services to buildings and landscape activities (property management, contract cleaning, garden and landscaping); Office administrative, office support and other business support activities (call centres, business processing).
2. **Arts, Entertainment and Recreation** (primarily services for individuals): Creative, arts and entertainment; Libraries, archives, museums and other cultural activities; Gambling and betting activities; Sports activities, amusement and recreation activities.
3. **Other Service Activities** (primarily services for individuals): Activities of membership organisations (e.g. unions, golf clubs, business groups); Repair of computers, personal and household goods; Washing and (dry-)cleaning of textiles; Hairdressing and other beauty treatment; Funeral and related activities; Activities of physical well-being institutes; Activities of households as employers of domestic personnel; Activities of extraterritorial organisations and bodies (e.g. embassies).

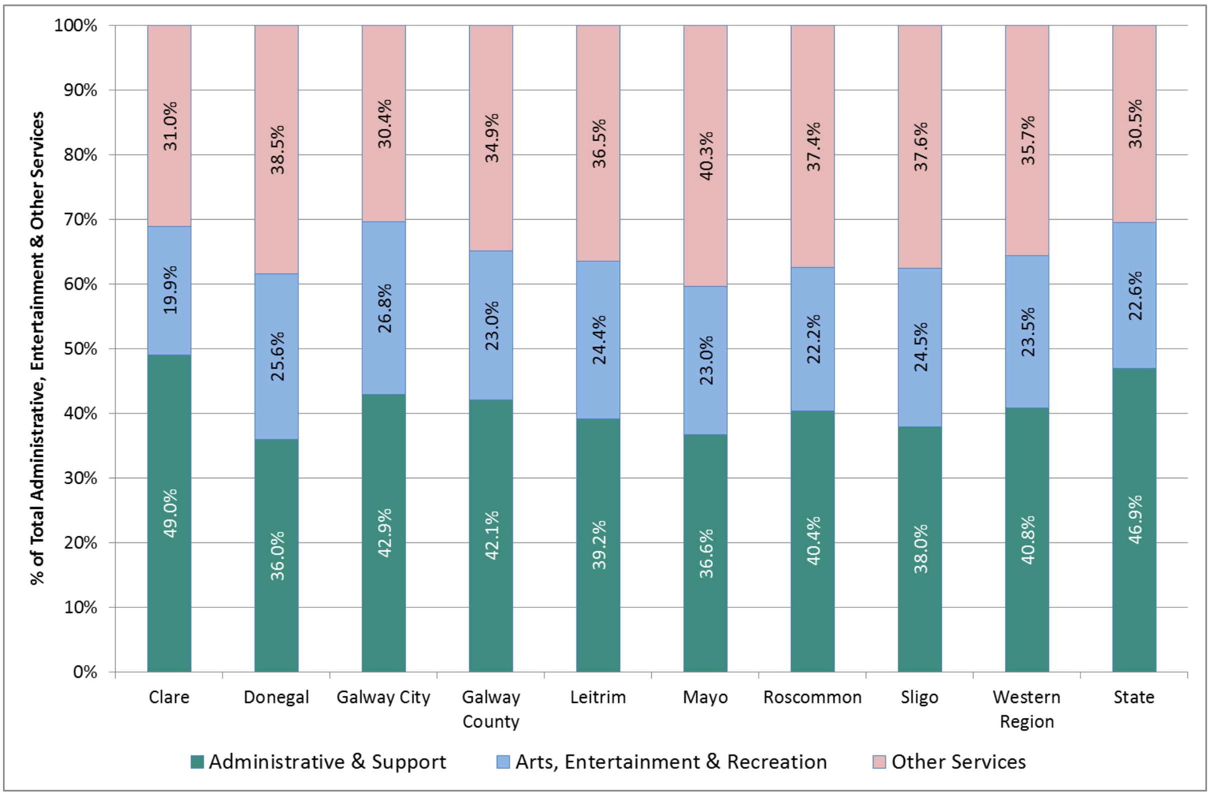
Firstly considering the three broad sub-sectors, 40.8% of total employment in Administrative, Entertainment & Other Services in the Western Region is involved in 'Administrative & Support Services' (Fig. 2). Its share is considerably lower in the region than nationally (46.9%) reflecting lower demand from business clients in the region and less activity in internationally traded business services (see Section 3).

The second largest employment sub-sector is 'Other Services' which accounts for a notably greater share in the region than nationally (35.7% v 30.5%). These are primarily personal services which rely on local demand and tourism and tend to be provided at the same location as they are consumed e.g. hairdressers, dry-cleaners, undertakers, so play an important role in local economies.

A relatively similar share of employment is engaged in 'Arts, Entertainment & Recreation' in the region and nationally. These activities would be particularly important in certain locations e.g. Bundoran, Strandhill, Galway City and again are generally supplied and consumed at the same location.

[8] Appendix 1 provides detailed data for all activities for all western counties.

Fig. 2: Percentage of total Administrative, Entertainment & Other Services employment in each broad sub-sector in Western Region and state, 2016



Source: CSO, Census 2016: Summary Results Part 2, Table EZ011

At 49%, Clare has the highest share engaged in 'Administrative & Support Services' in the region, strongly influenced by leasing and business process operations based in the Shannon Free Zone. It is the only western county with a share in this sub-sector above the national average. Galway (City and County) have the next highest in the region, with greater demand for these business services likely in the city. The more rural counties of Donegal and Mayo have the smallest shares.

Mayo and Donegal however are the two counties where 'Other Services' are most important and account for a significantly higher share than the national average, illustrating the importance of these locally provided, personal services to employment in more rural counties.

'Arts, Entertainment & Recreation' is most important in Galway City and Donegal which are the areas with the highest employment in hospitality[9] clearly showing the importance of the tourism industry, both overseas and domestic, in driving demand for these activities.

2.2.1 Change in employment in Administrative, Entertainment & Other Services sub-sectors

The 'Arts, Entertainment & Recreation' sub-sector had the strongest jobs growth in the region over the 2011-2016 period at 13.6% (Table 2) growing more strongly in the region than nationally. As noted above, tourism is an important source of demand and this period saw strong growth in tourism activity. 'Other Services' had the next highest growth and, given its dependence on local

[9] WDC (2019), Accommodation & Food Service Sector in the Western Region: Regional Sectoral Profile

demand and disposable income, the general upturn in economic activity would have boosted demand.

The region differed from the national pattern most significantly for 'Administrative & Support Services' with only 5.2% growth in the region compared with 17.1% nationally, where it was the strongest growing sub-sector. This lower growth reinforced the pattern of a lower level of activity in this sub-sector. The region's lower growth was influenced by the loss of employment in two counties.

Table 2: Percentage change in employment in Administrative, Entertainment & Other Services sub-sectors in Western Region and state, 2011-2016

County	% Change in Employment 2011-2016			
	Administrative & Support	Arts, Entertainment & Recreation	Other Services	Total
Clare	20.0%	-0.1%	10.0%	12.3%
Donegal	14.4%	7.1%	9.4%	10.5%
Galway City	7.1%	28.4%	8.1%	12.4%
Galway County	6.6%	15.8%	9.3%	9.5%
Leitrim	-34.0%	15.0%	10.0%	-12.1%
Mayo	7.4%	14.1%	14.5%	11.7%
Roscommon	-18.1%	25.4%	9.5%	-1.2%
Sligo	1.8%	18.7%	11.7%	9.2%
Western Region	**5.2%**	**13.6%**	**10.4%**	**8.9%**
State	**17.1%**	**11.4%**	**10.1%**	**13.6%**

Source: CSO, Census 2016: Summary Results Part 2, Table EZ011

For Galway City and County, Leitrim, Roscommon and Sligo, 'Arts, Entertainment & Recreation' had the strongest employment growth, highest in Galway City and Roscommon at over 25%. This sector grew strongly in all western counties except Clare.

For Clare and Donegal, 'Administrative & Support Services' had the strongest growth with the 20% increase in Clare contributing to the sector's significant role in the county's employment profile. Leitrim and Roscommon both had large declines in this sub-sector which led to both counties having an overall fall in employment in Administrative, Entertainment & Other Services. In the case of Leitrim, the scaling back of a large call centre operation in Carrick-on-Shannon was the main contributor, this would have also impacted on Roscommon given the town's location at the boundary between the two counties.

All counties saw growth in 'Other Services' and for Mayo it was the strongest growing sub-sector, with Sligo also seeing substantial growth. Recovery in local demand and income would have been a factor in this growth.

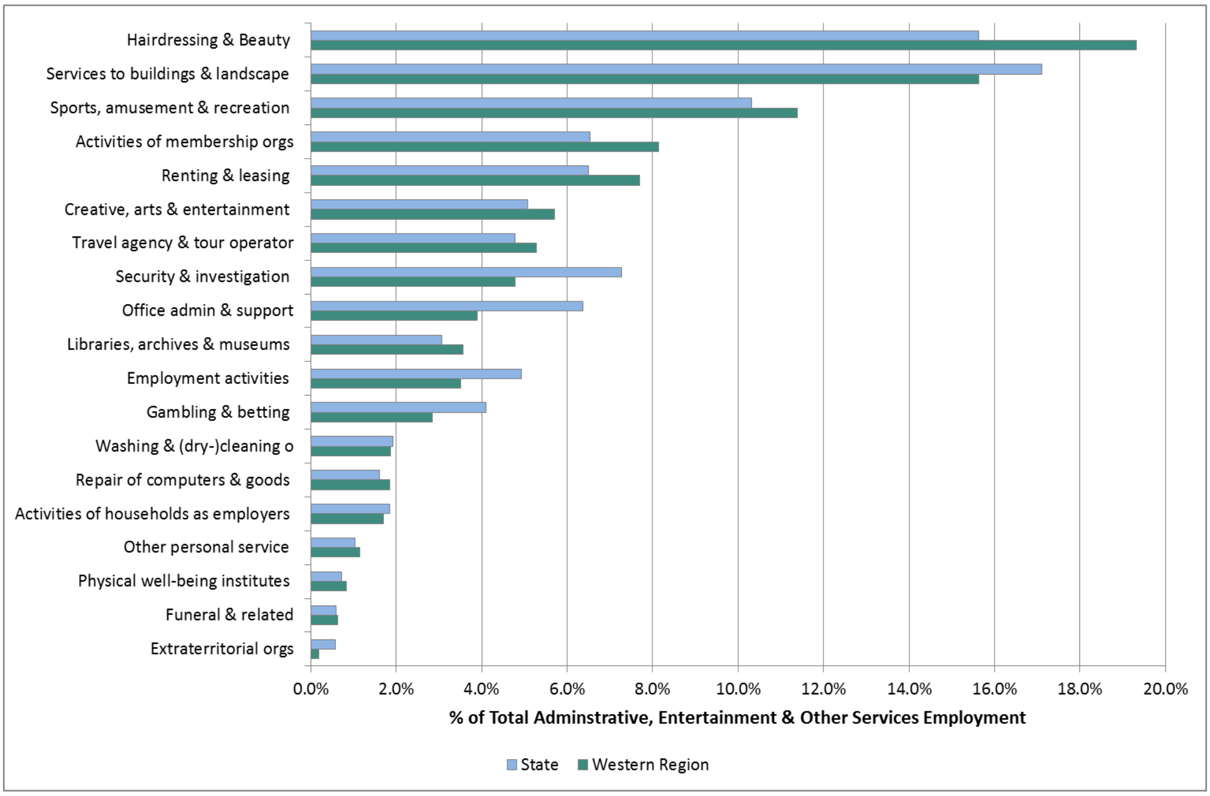
2.2.2 Employment in detailed Administrative, Entertainment & Other Services activities

Given the breadth of activities covered by these three sub-sectors, it is useful to also briefly examine employment at a more detailed activity level. Fig. 3 shows that the largest employer in this sector is 'Hairdressing & Beauty' accounting for 19.3% of all employment in the Administrative, Entertainment & Other Services sector in the region. This is a significantly higher share than nationally (15.6%) pointing to the greater role of locally traded personal services in the region. The next largest employer is 'Services to buildings & landscape' which is somewhat less important in the region. This is primarily a business service including property management.

Among the activities which are more important as employers in the region are 'Sport, amusement & recreation', 'Activities of membership orgs', 'Renting & leasing', 'Creative, arts & entertainment' and 'Travel agency & tour operator'. Again this points to the importance of locally provided personal services and tourism activity for regional employment.

Areas which are significantly less important include 'Security & investigation', 'Office admin & support', 'Employment activities' and 'Gambling & betting'. These are primarily 'outsourced' services supplied to businesses and in the case of 'Gambling & betting' is increasingly an online and internationally traded activity.

Fig. 3: Percentage of total Administrative, Entertainment & Other Services employment in each detailed activity in Western Region and state, 2016



Source: CSO, Census 2016: Summary Results Part 2, Table EZ011

2.2.3 Change in employment in detailed Administrative, Entertainment & Other Services activities

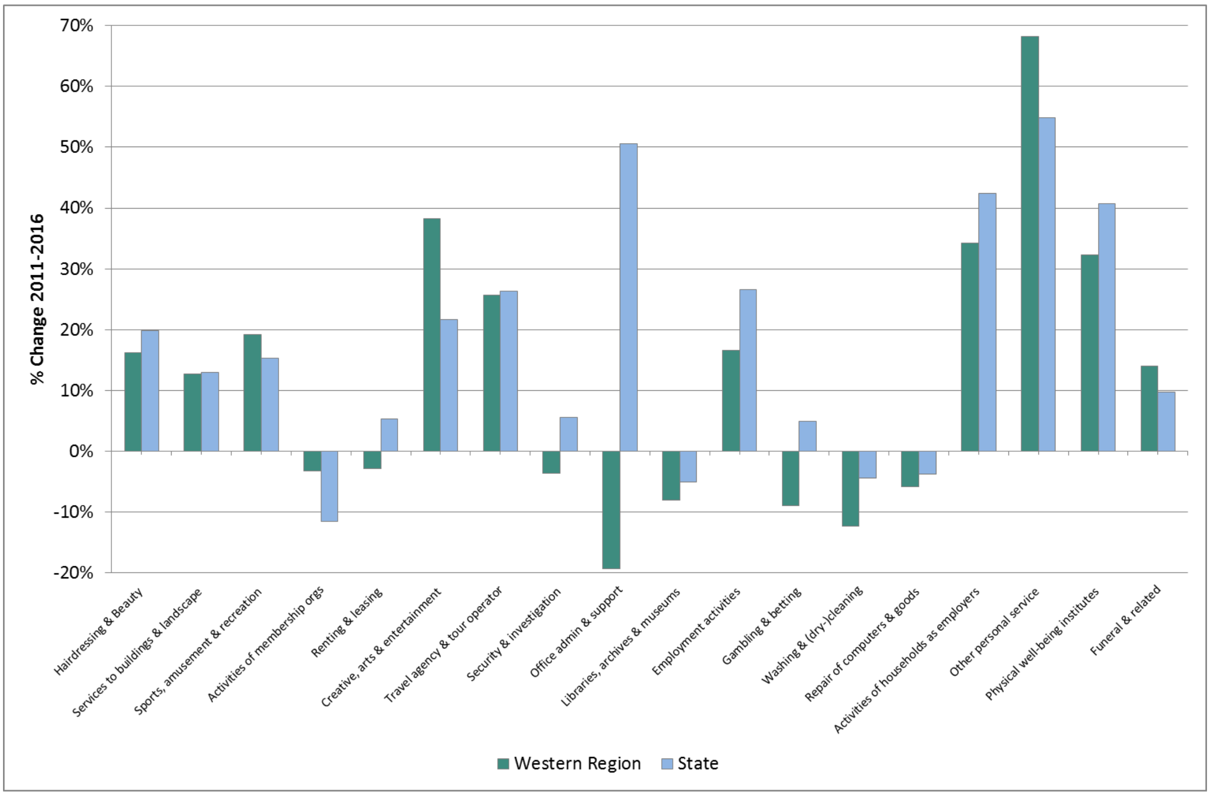
The three largest employment activities all experienced jobs growth during 2011-2016 (Fig. 4) with lower growth in the region in 'Hairdressing & Beauty' and higher in 'Sport, amusement & recreation'. The region also had considerably stronger growth in 'Creative, arts & entertainment' showing the growing importance of the creative and cultural industries.

A number of business services – 'Office admin & support', 'Renting & leasing' and 'Security &

Investigation' – all saw jobs decline in the Western Region in contrast to growth nationally. This was particularly evident for 'Office admin & support' (call centres, business operations processing) which is often an internationally traded business service (see Section 3).

A number of locally provided personal services (laundry, repairs) declined both regionally and nationally which may have local employment impacts. While the smallest activities saw the strongest growth, given their scale this would have little impact.

Fig. 4: Percentage change in employment in Administrative, Entertainment & Other Services detailed activities in Western Region and state 2011-2016



Source: CSO, Census 2016: Summary Results Part 2, Table EZ011

Note: The smallest activity 'Activities of extraterritorial organisations and bodies' is excluded as its growth of 223.1% in the region would skew interpretation of the chart but in actual terms only amounted to 29 people in the region (growth from 13 people to 42).

2.3 Employment in western towns

In 2016 there were 40 urban centres with a population over 1,500 in the Western Region. When considering towns, commuting can be particularly important and it must be remembered that this data refers to residents of the towns, although some may work elsewhere.

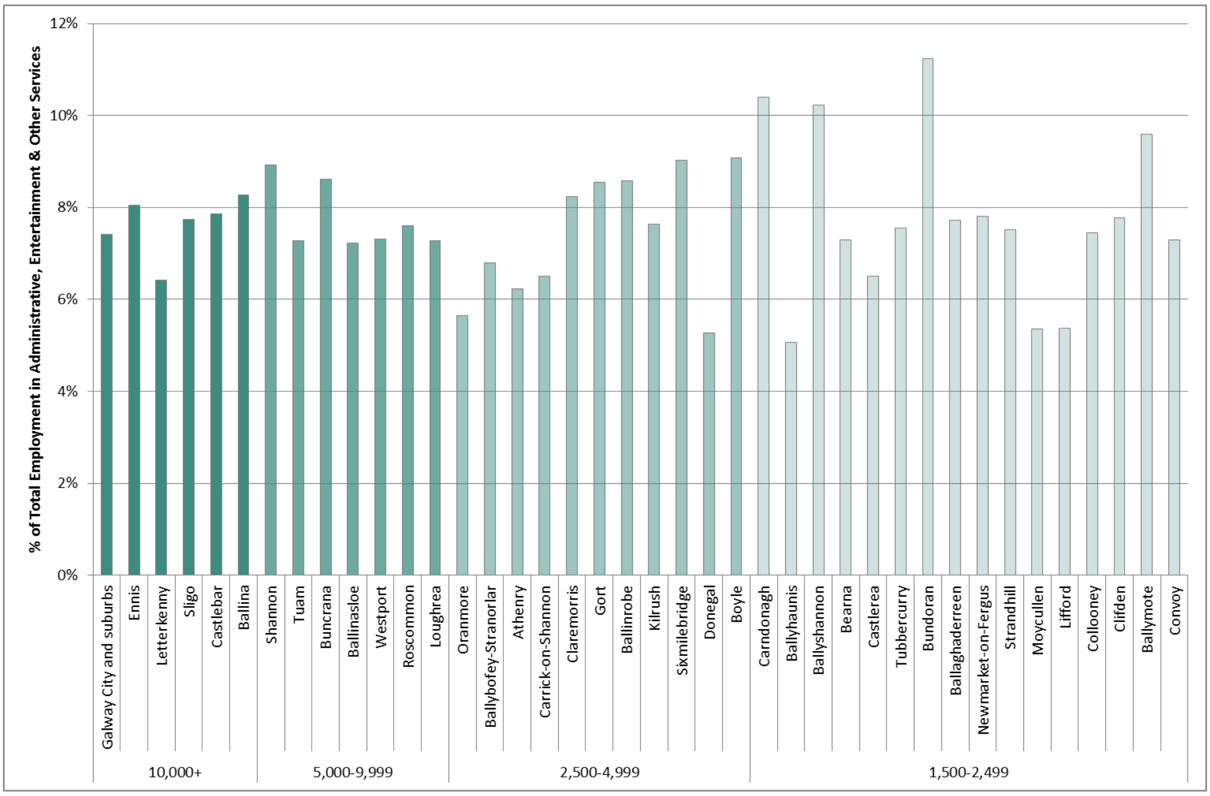
The relative importance of Administrative, Entertainment & Other Services varies across towns (Fig. 5).[10] Three Donegal towns are where the sector is most important – Bundoran (11.2%, 84 people), Carndonagh (10.4%, 83 people) and Ballyshannon (10.2%, 82 people). All three are in the top 10 towns in Ireland in terms of the share of employment in this sector. In fact, Bundoran has the highest share working in this sector of Ireland's 200 towns and cities (1,500+ population), largely due to entertainment/recreation activities. Bundoran has the highest share working in 'Arts,

[10] See Appendix 2 for more detailed data on Administrative, Entertainment & Other Services employment in towns.

Entertainment & Recreation' in Ireland and the high share in neighbouring Ballyshannon is likely to include some commuting to Bundoran.

Administrative, Entertainment & Other Services is also an important employer for Ballymote (9.6%, 52 people), Boyle (9.1%, 75 people), Sixmilebridge (9.0%, 105 people) and Shannon (8.9%, 374 people). For the last two, considerable employment in administrative services (leasing, business operations etc.) in the Shannon Free Zone would be a key influence, with Shannon having the second highest share working in 'Administrative & Support Services' in Ireland.

Fig. 5: Percentage of total employment in Administrative, Entertainment & Other Services in towns in the Western Region, 2016



Source: CSO, Census 2016: Profile 11 – Employment, Occupations and Industry, Table EB030

2.3.1 Change in employment in western towns

There are 38 towns in the Western Region which had a population above 1,500 in both 2011 and 2016.[11] Of these, 26 towns experienced an increase in the number of people working in Administrative, Entertainment & Other Services between 2011 and 2016, eleven had a decline, with one unchanged (Fig. 6).

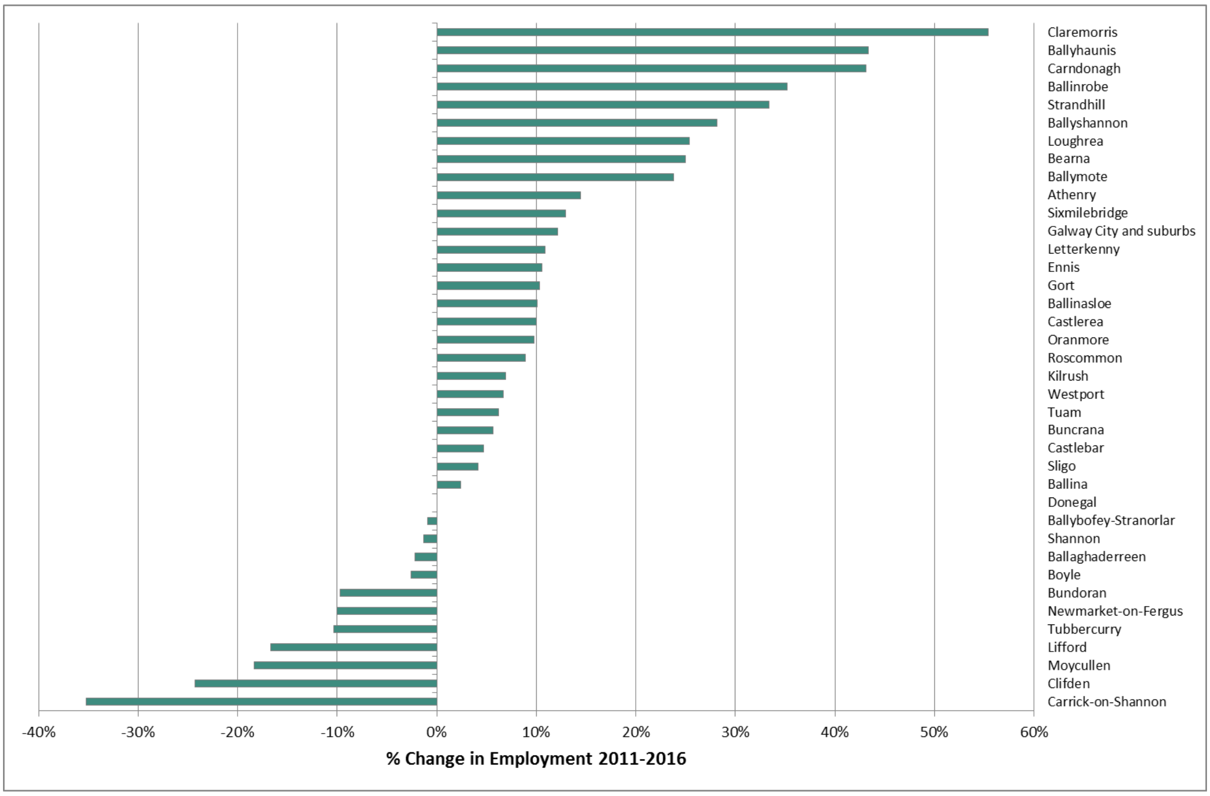
Claremorris (55.4%, +46 people), Ballyhaunis (43.3%, +13 people), Carndonagh (43.1%, +25 people) and Ballinrobe (35.2%, +25 people) had the most substantial percentage growth. These are mainly medium-sized towns serving wide rural catchment areas and growth in the sector was likely due to recovery in local spending and income. Indeed, small and medium-sized towns performed most

[11] Two towns with a population above 1,500 in 2011 (Portumna and Bunbeg-Derrybeg) dropped below in 2016. Two towns (Collooney and Convoy) rose above the 1,500 threshold in 2016. There were also town boundary changes between 2011 and 2016 for 15 of the 40 towns in the Western Region which has an impact when considering change over time. For most towns the impact was relatively minor, however there was a quite substantial change for Ballina.

strongly, with the larger urban centres (e.g. Ballina, Sligo, Castlebar, Buncrana, Tuam) having relatively low growth in this sector.

The large decline in Carrick-on-Shannon (-35.2%, -62 people) was likely due to the contraction of a large call centre in the town, while the decline in Clifden (24.3%, -17 people) is consistent with the fact that it had the region's largest population decline over this period.

Fig. 6: Percentage change in employment in Administrative, Entertainment & Other Services in towns in the Western Region, 2011-2016



Source: CSO, Census 2016: Profile 11 – Employment, Occupations and Industry, Table EB030; CSO, Census 2011: Profile 3 – At Work, Table CD320.

Note: In the case of Ballina, a significant town boundary change reduced its population and the actual change in employment in this sector is likely less than it appears in Fig. 6.

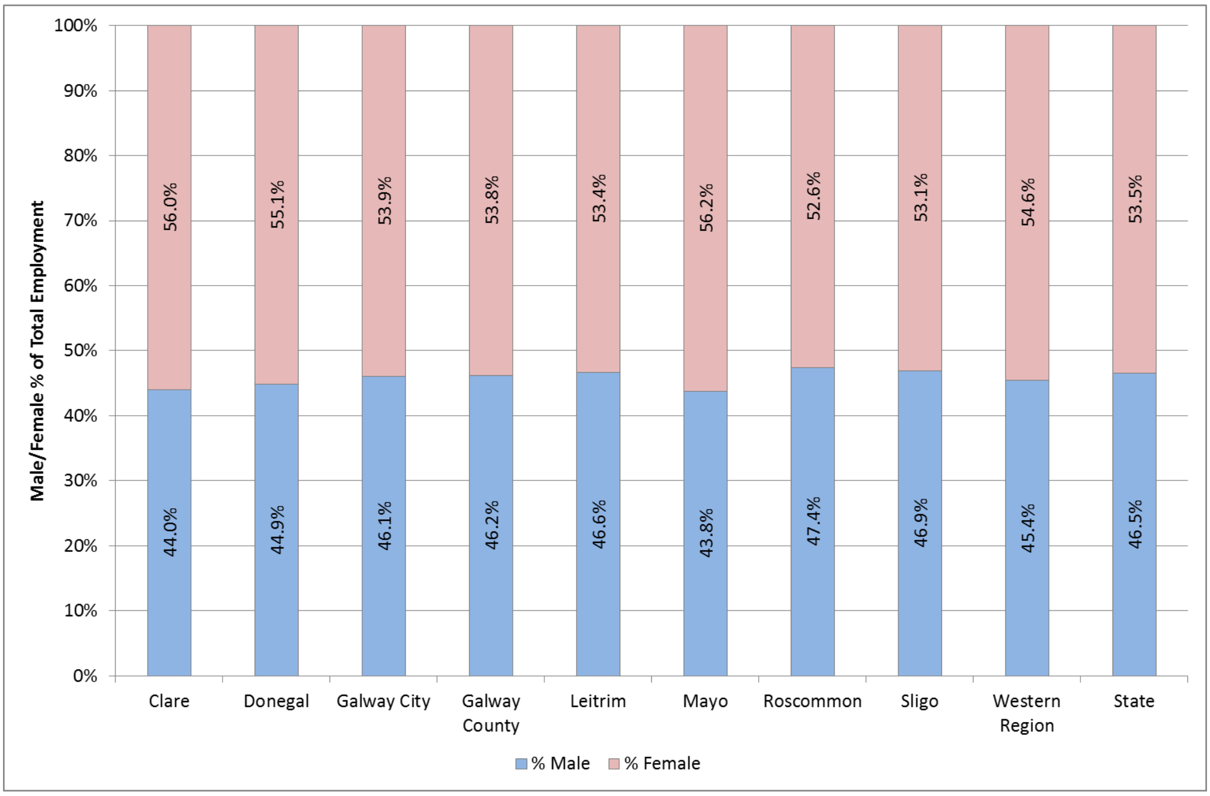
2.4 Employment by gender

Employment in this sector is relatively gender-balanced with women being in the slight majority. In the Western Region 54.6% of people working in Administrative, Entertainment & Other Services are female, a slightly higher share than nationally (53.5%) (Fig. 7).

There is some variation across sub-sectors however with a male majority in both 'Administrative & Support Services' (56.9% of employment in the Western Region is male) and 'Arts, Entertainment & Recreation' (55.7% male). 'Other Services' meanwhile is highly female dominated (73.5% female). The fact that hairdressing and beauty treatment is the largest activity would influence this gender profile.

Women account for a majority of the Administrative, Entertainment & Other Services workforce in all western counties with Mayo (56.2%), Clare (56%) and Donegal (55.1%) the highest.

Fig. 7: Percentage of total employment in Administrative, Entertainment & Other Services in Western Region and state by sex, 2016



Source: CSO, Census 2016: Profile 11 – Employment, Occupations and Industry, Table EB027

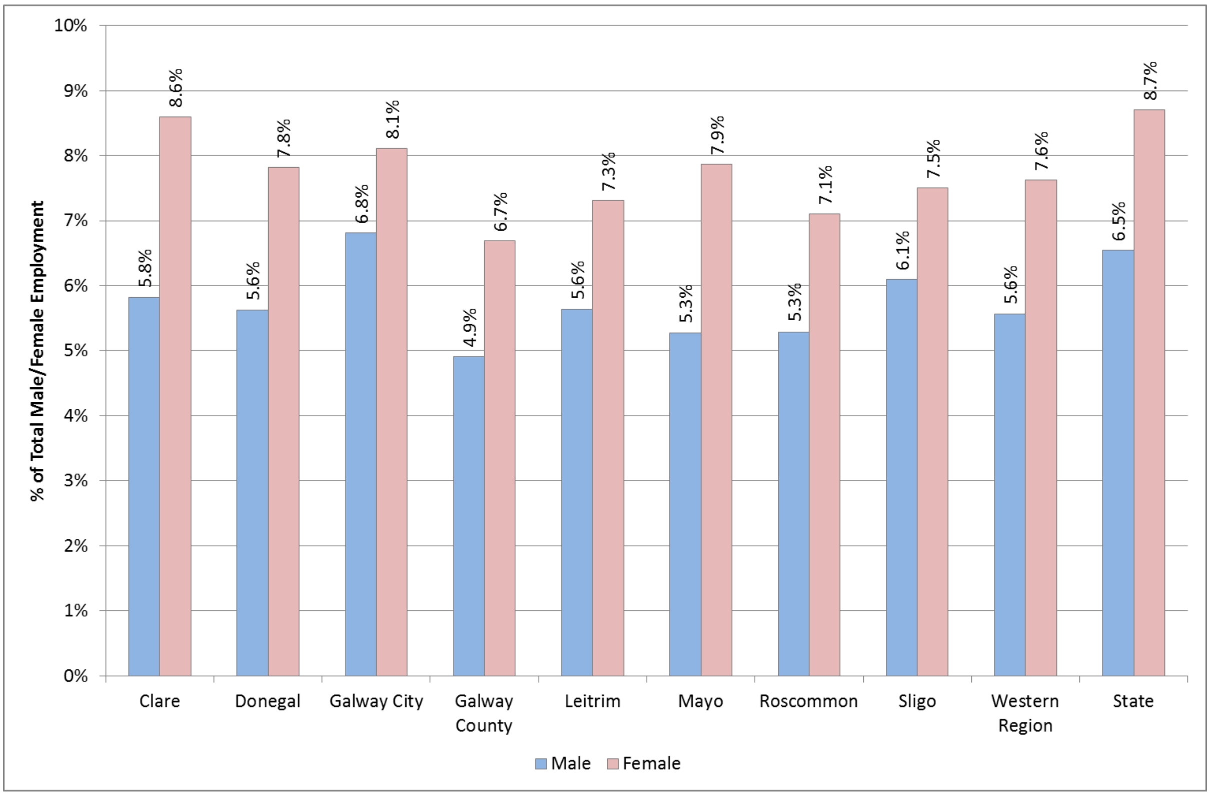
In terms of the sector's relative importance to total male and female employment (Fig. 8), 7.6% of all working women and 5.6% of all working men in the Western Region work in Administrative, Entertainment & Other Services. The sector plays a notably less significant role in both female and male employment in the region than nationally.

The sector plays a larger role in female employment than male in all counties and the difference is particularly notable in Clare and Mayo. The sector's share of men's and women's jobs is more even in Galway City and Sligo indicating greater gender balance.

Clare (8.6%) and Galway City (8.1%) is where the sector is most important for female employment, Galway City is also where it is most important for male employment (6.8%) followed by Sligo (6.1%).

The largely rural counties of Galway County, Mayo and Roscommon is where it is least important for men's jobs and, in the case of Galway County and Roscommon, also least important for women's.

Fig. 8: Percentage of total male and total female employment that is in Administrative, Entertainment & Other Services in Western Region and state, 2016



Source: CSO, Census 2016: Profile 11 – Employment, Occupations and Industry, Table EB027

2.4.1 Change in employment by gender

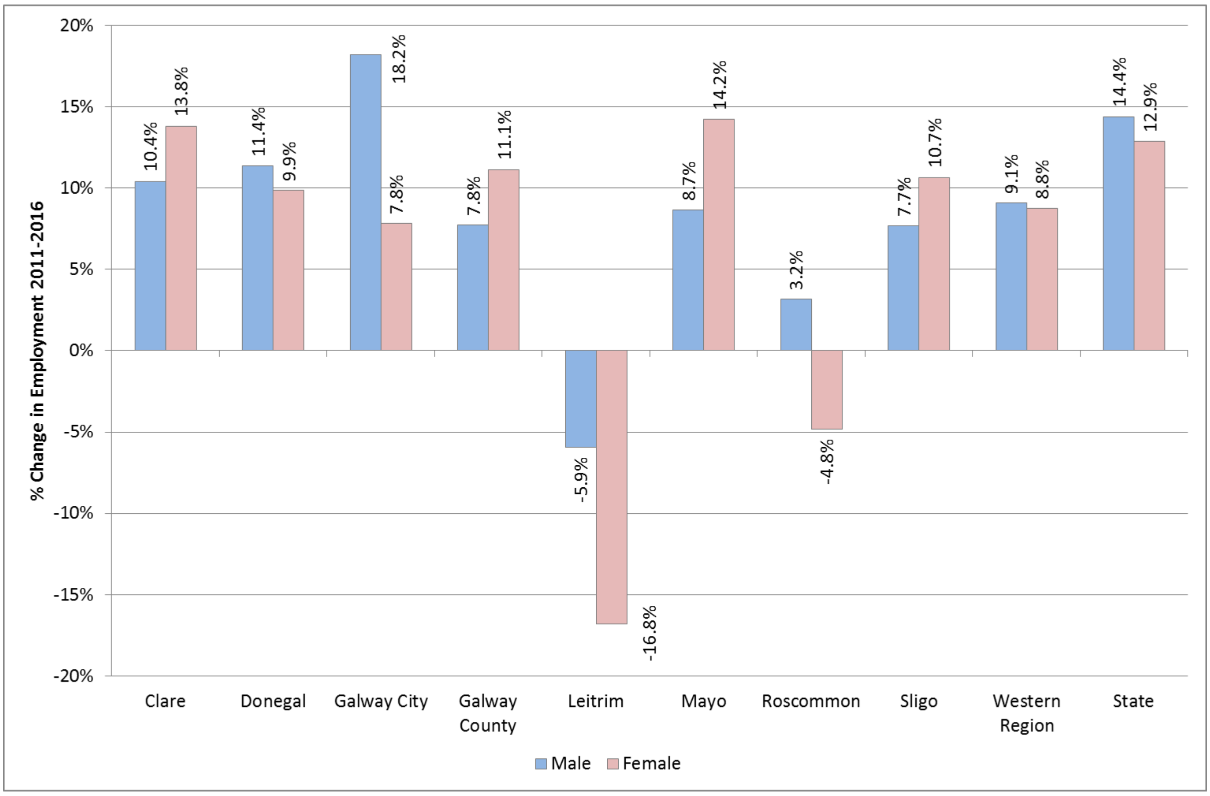
The period 2011 to 2016 saw similar growth in both male (9.1%) and female (8.8%) employment in Administrative, Entertainment & Other Services in the region (Fig. 9). The region had lower growth than nationally for both. Nationally male employment outperformed female far more than it did in the region, likely due to 'Administrative & Support Services', which has a male majority, being the strongest growing sub-sector in the state (see Table 2).

The pattern varied across the western counties. Mayo, Clare, Galway County and Sligo had quite strong growth in both female and male employment, with women's jobs increasing even more strongly particularly in Mayo and Clare contributing to the high female shares in these counties (see Fig. 7).

Galway City in contrast had far stronger growth in male employment, at 18.2% the strongest in the region, with Donegal also seeing stronger male than female jobs growth. Roscommon also had a stronger performance for male jobs, with 4.8% decline in female employment leading to the county's marginal overall decline in the sector (see Table 1).

County Leitrim's large decline in this sector (see Table 1) resulted from losses in both male and female employment, but most strongly female (88 fewer women in Leitrim were working in this sector in 2016 than in 2011). The decline in this sector was entirely due to 'Administrative & Support Services' as both male and female employment in the other two sub-sectors grew in the county.

Fig. 9: Percentage change in employment in Administrative, Entertainment & Other Services in Western Region and state by sex, 2011-2016



Source: CSO, Census 2016: Profile 11 – Employment, Occupations and Industry, Table EB027

2.5 Self-employment in Administrative, Entertainment & Other Services

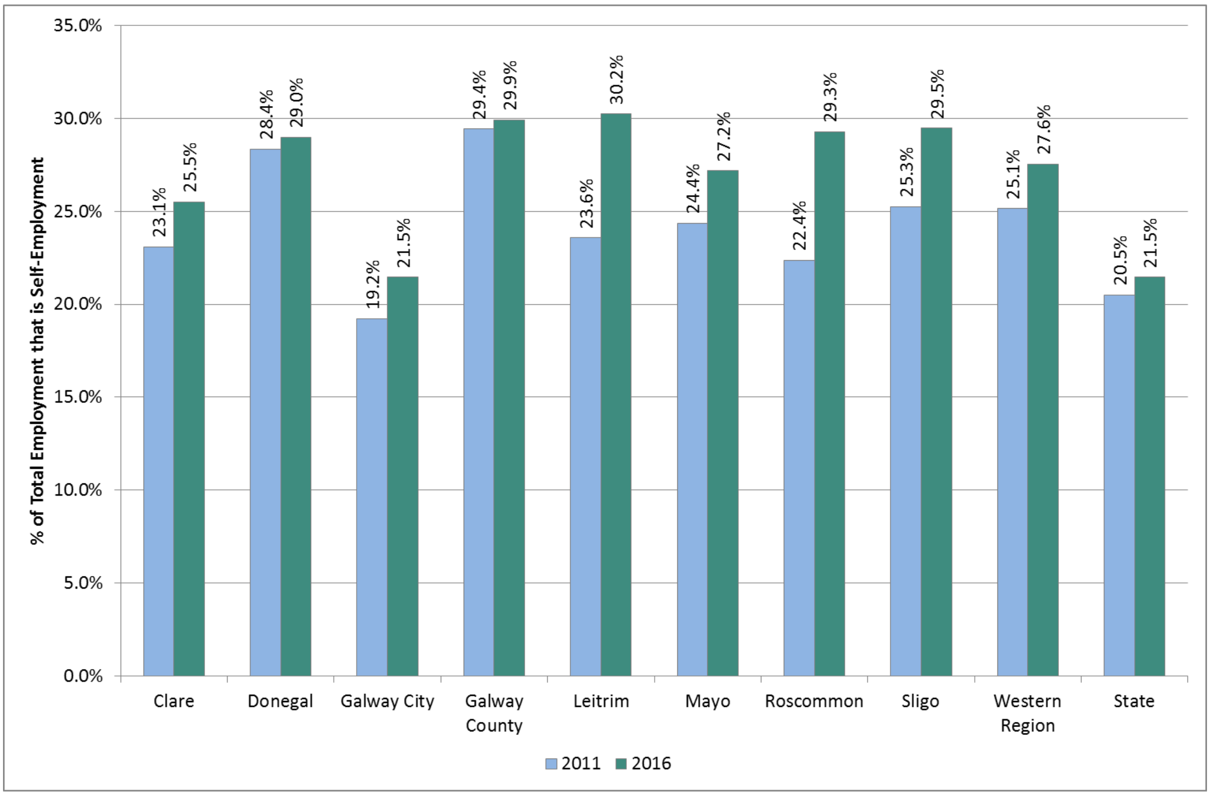
Of the 21,789 people working in Administrative, Entertainment & Other Services in the Western Region in 2016, 27.6% (6,003 people) were self-employed (employer or own account worker). This places it among the sectors with the highest rates of self-employment (after agriculture, construction and professional services).

There is variation across the broad sub-sectors however with very high self-employment (38.1%) in 'Other Services' with these types of local personal services often supplied by sole traders or micro-enterprises. The next highest is 'Arts, Entertainment & Recreation' (26.7%) with 'Administrative & Support Services' having the lowest share of self-employment (18.8%) as this would include some larger scale operations e.g. call centres, tour operators.

The Western Region has a considerably higher incidence of self-employment in Administrative, Entertainment & Other Services than the national average (27.6% v 21.5%) (Fig. 10). This is also true across all three sub-sectors indicating that such operations in the Western Region tend to be smaller in scale with fewer employees and that sole traders or owner/family-run businesses are more common in the region.

The share of employment that was self-employment increased in the Western Region from 25.1% in 2011 to 27.6% in 2016 showing a substantial increase in the incidence of the self-employment in the sector. The share also rose nationally, but not as much.

Fig. 10: Percentage of total employment in Administrative, Entertainment & Other Services that is self-employment in Western Region and state, 2011 and 2016



Source: CSO, Census 2016: Profile 11 – Employment, Occupations and Industry, Table EB033. Special run from CSO.

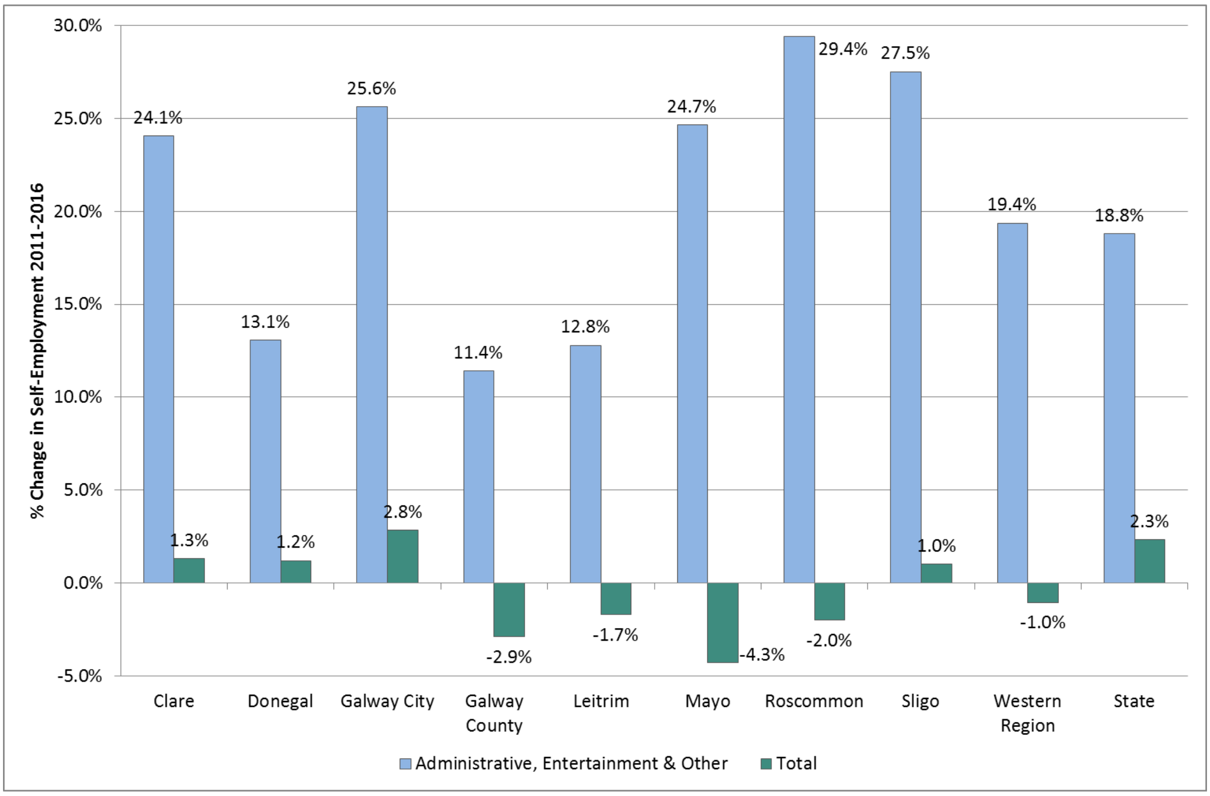
At 30.2%, self-employment in this sector is most common in Leitrim and it became substantially more common there between the two periods. This is influenced by the fact that Leitrim saw a large decline in 'Administrative & Support Services' were self-employment is least common but growth in the other sub-sectors. Roscommon also saw strong growth in the share of self-employment for a similar reason.

There was 29+% self-employment in Galway County, Sligo, Roscommon and Donegal again showing the importance of self-employment in the locally traded services in more rural counties, while the lowest self-employment was in Galway City and Clare where 'Administrative & Support Services' are most important. All counties saw some growth in the share of self-employment.

2.4.1 Change in self-employment

In the Western Region, the number of self-employed people working in Administrative, Entertainment & Other Services grew very substantially between 2011 and 2016 by 19.4% (Fig. 11). This was the highest growth in self-employment across all economic sectors and compares with a 1% decline in total self-employment over the same period, indicating that this sector differed from the general self-employment trend in the region. As noted in Section 2.2, the 'Arts, Entertainment & Recreation' and 'Other Services' sub-sectors had the strongest employment growth in the region, activities with high self-employment.

Fig. 11: Percentage change in self-employment in Administrative, Entertainment & Other Services and self-employment in total employment in Western Region and state, 2011-2016



Source: CSO, Census 2016: Profile 11 – Employment, Occupations and Industry, Table EB033. Special run from CSO.

Self-employment growth in this sector far out-performed total self-employment in all western counties. Roscommon, Sligo and Galway City saw the strongest growth in the number of self-employed working in this sector. All three also saw strong jobs growth in those sub-sectors with higher self-employment (see Table 2), mainly local personal and leisure services which responded strongly to growing demand driven by rising income levels.

3.0 Agency Assisted Jobs in Business & Other Services

Each year DBEI conducts a survey of all firms in Ireland who have ever received assistance from IDA, EI or Udarás na Gaeltachta. These are referred to as agency assisted companies and are limited to Industry or internationally traded services. Unlike Census data, which is based on where a person lives, Annual Employment Survey (AES) data is based on where the company is located, so is the location of the job, even if the person travels from another county.

In this section we examine agency assisted jobs in Business Services[12] and Other Services for the Western Region including the type of jobs and ownership of the company (foreign or Irish). County level data is not available for these detailed sectors.[13]

3.1 Trends in assisted jobs in Business & Other Services in the Western Region

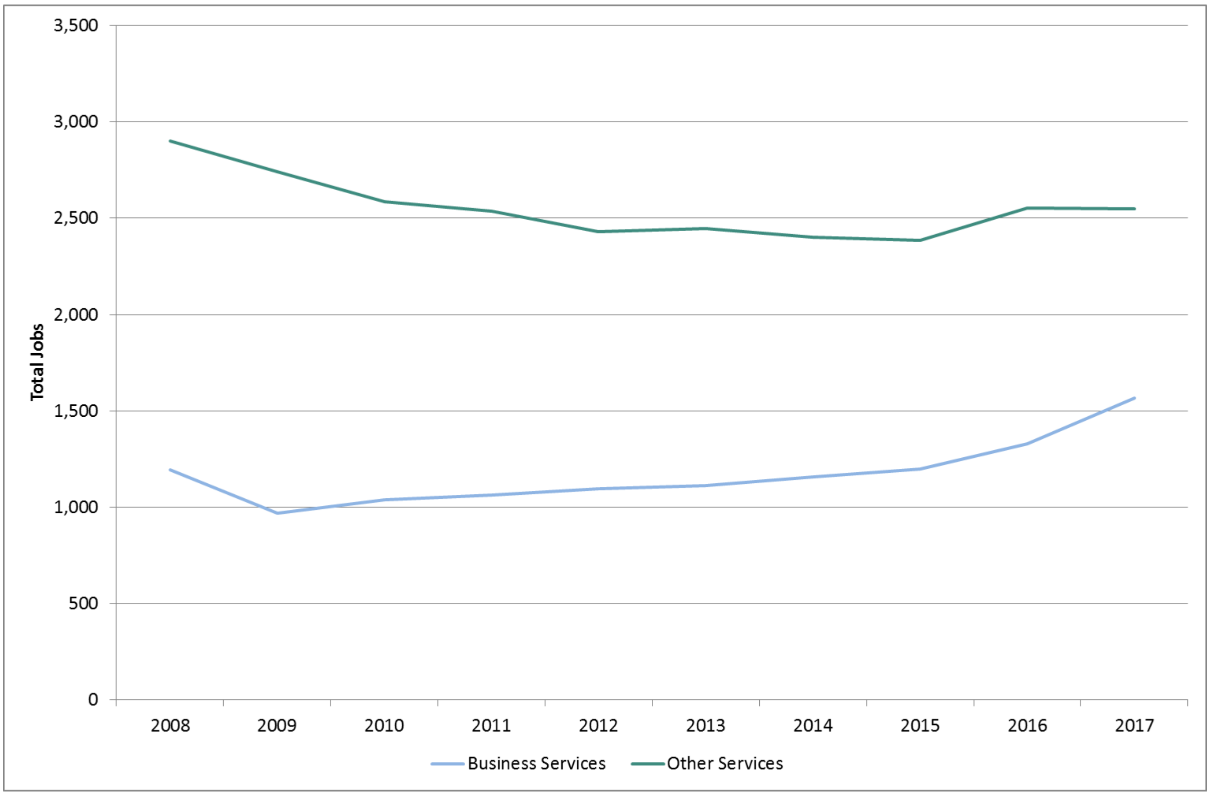
In 2017, there were 1,565 agency assisted jobs in Business Services and 2,548 assisted jobs in Other Services based in the Western Region (Fig. 12). It is important to remember that these are only jobs in companies which have received state assistance and therefore are trading (or have the potential to trade) internationally. As noted previously, many operations in Administrative, Entertainment & Other Services mainly service the local economy and would not be included here explaining why assisted job numbers are substantially lower than total employment in these sectors.

While consistently the larger of the two, assisted jobs in Other Services declined steadily in the region over most of the decade though showing some recovery from 2015. In contrast, Business Services have experienced consistent growth, accelerating considerably since 2015.

[12] Business Services would include many of the activities of the 'Administrative & Support Services' sector but may also include activities included under 'Professional, Scientific & Technical'. Therefore it is not directly comparable with 'Administrative & Support Services' but is the closest category within the AES data.

[13] County data is only available for the combined sector of 'Business, Financial & Other Services'.

Fig. 12: Total assisted jobs in Business Services & Other Services in Western Region, 2008-2017



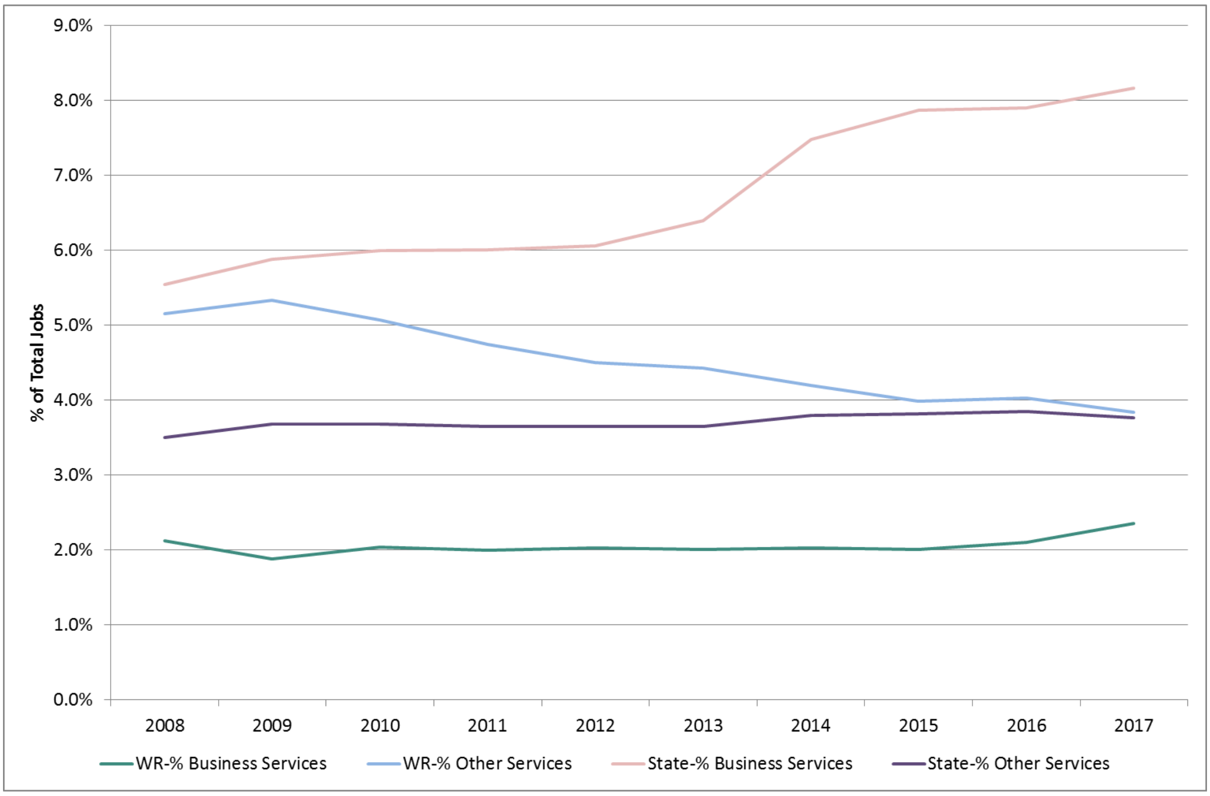
Source: Department of Business, Enterprise & Innovation (2018), Annual Employment Survey 2017, special run

In 2017, Other Services accounted for 3.8% of total assisted jobs in the Western Region, the same share as nationally (Fig. 13). The trend over the preceding decade differed however, with Other Services declining steadily in the region from a high point of 5.3% of total assisted jobs in 2009 down to 3.8% by 2017. Nationally however its share remained very stable.

Business Services however is where the region differs most significantly from the state. In 2017, only 2.4% of total assisted jobs in the Western Region were in Business Services compared with 8.2% nationally. In the region, despite growth in the actual number of assisted jobs in Business Services (see Fig. 12), its share of total jobs remained very stable at 2% only showing any real increase in 2017. Nationally the picture was very different with the share of all assisted jobs accounted for by Business Services increasing very substantially, particularly since 2012. The gap between the region and state widened from 4.1 percentage points in 2012 to 5.8 percentage points by 2017.

The difference in the role of internationally traded Business Services contributes to the lower share of total employment in the Western Region accounted for by Administrative, Entertainment & Other Services (see Fig. 1) as well as the smaller share engaged in the 'Administrative & Support Services' sub-sector in particular (see Fig. 2).

Fig. 13: Business Services & Other Services as a percentage of total assisted jobs in Western Region and state, 2008-2017



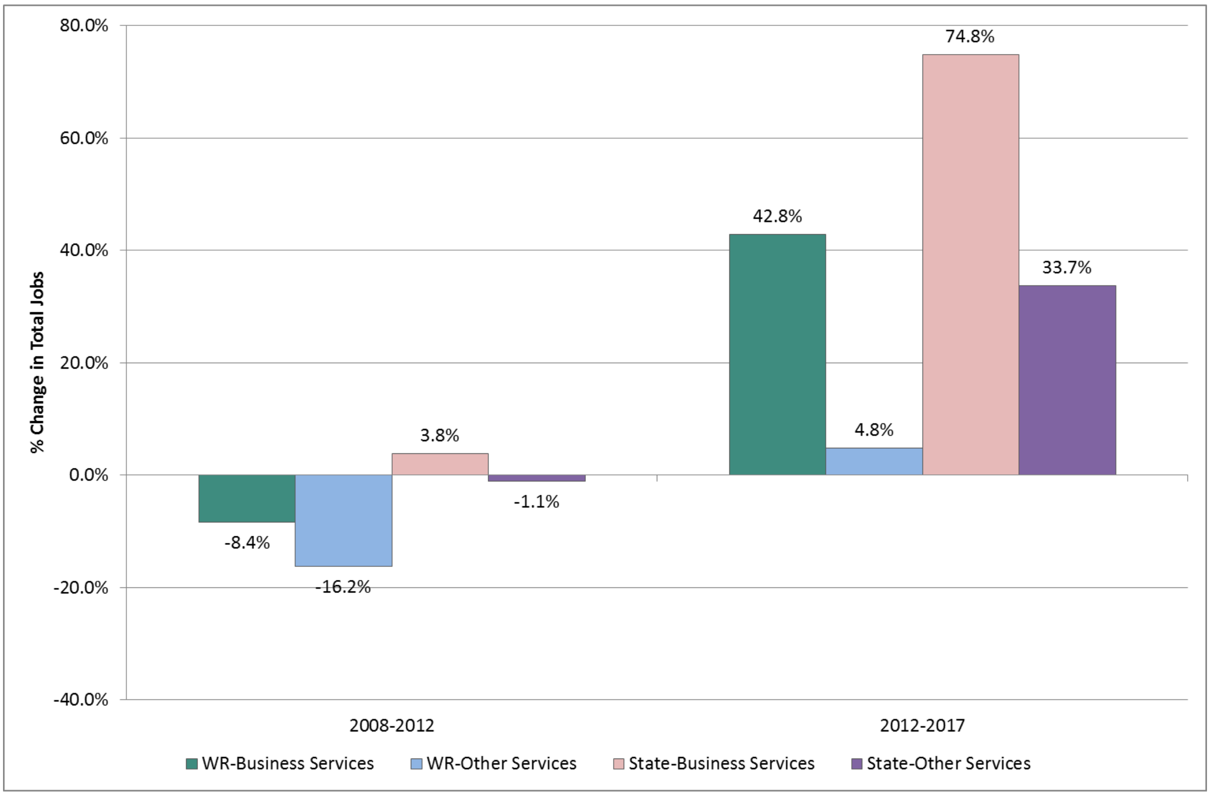
Source: Department of Business, Enterprise & Innovation (2018), Annual Employment Survey 2017, special run

3.1.1 Change in assisted jobs in Business & Other Services

The change in the number of assisted jobs in both Business Services and Other Services was very different in the two periods 2008-2012 (recession) and 2012-2017 (recovery). During 2008-2012 the Western Region saw substantial job losses in both sectors (Fig. 14). Nationally there was actually some increase in Business Services employment even in this recessionary period and only a marginal decline in Other Services. These activities in the region seem to have suffered greater job losses during the recession than nationally.

During 2012-2017, the 74.8% growth in assisted Business Services jobs in the state drove the increase in its share of total agency assisted jobs (see Fig. 13) and shows the significant increase in its economic importance. It also implies that this sector was a contributor to the overall strong jobs recovery in this period. Business Services also grew strongly in the region over this period (42.8%), though not to the same extent. Other Services performed far more poorly in the region than nationally, contributing to the shrinking role of this activity in overall assisted jobs in the region and the convergence between the share in the region and the share in the state (see Fig. 13).

Fig. 14: Percentage change in total assisted jobs in Business Services & Other Services in Western Region and state, 2008-2012 and 2012-2017



Source: Department of Business, Enterprise & Innovation (2018), Annual Employment Survey 2017, special run

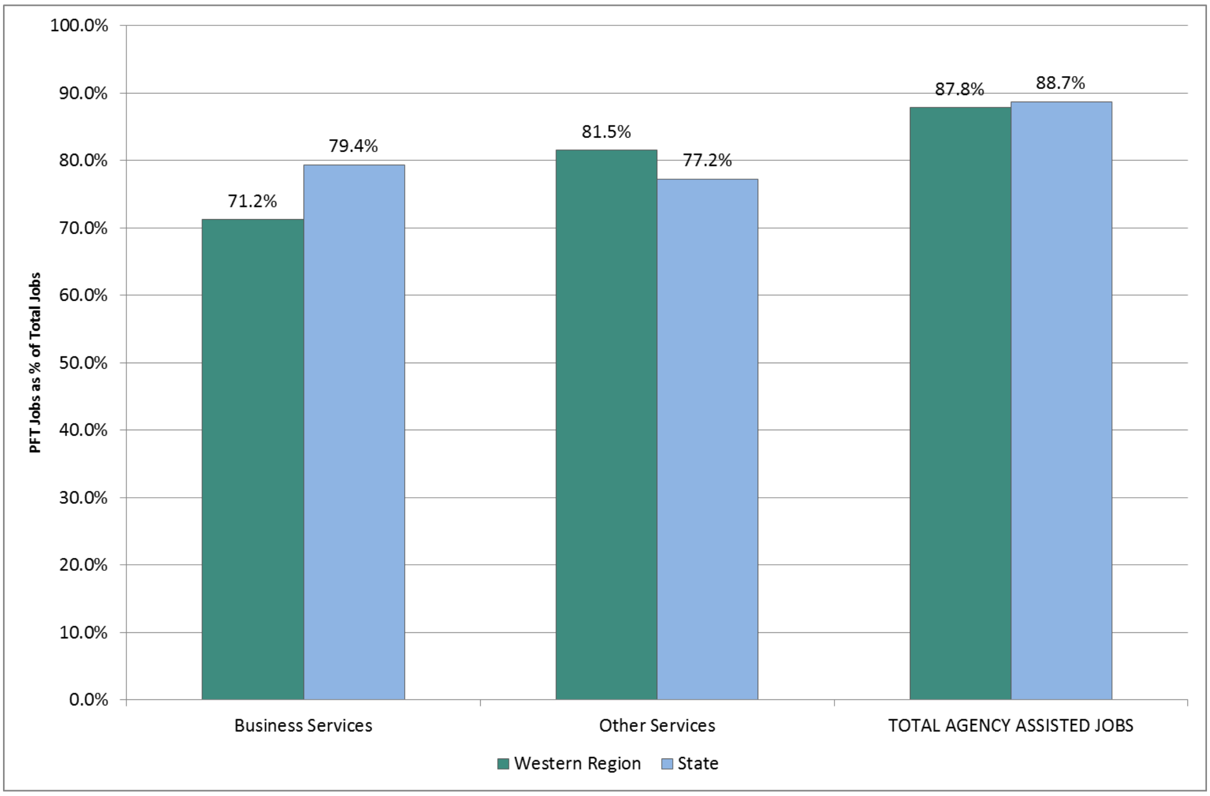
3.2 Assisted jobs in Business Services & Other Services by type and ownership

Data on total assisted jobs is divided into Permanent Full Time Jobs (PFT) and Other Jobs (temporary, part-time or contract). In 2017 71.2% of all assisted Business Services jobs and 81.5% of all assisted Other Services jobs in the Western Region were PFT (Fig. 15). While PFT jobs were less common in the region than nationally for Business Services, they were more common for Other Services. The substantially lower share of PFT jobs in Business Services in the Western Region may indicate the nature of this sector in the region differs from that elsewhere and may raise some concerns over the quality of jobs in the sector in the region.

In both the region and nationally, PFT jobs were less common in both Business Services and Other Services than generally across all assisted companies. Enterprises engaged in these activities seem more likely to employ people on a temporary, contract or part-time basis than assisted companies in general e.g. 87.6% of assisted Industry jobs in the Western Region were PFT.

Over the decade, the share of PFT jobs decreased substantially in the region for Business Services (87.2% in 2008 to 71.2% in 2017) but increased for Other Services (75.6% in 2008 to 81.5% in 2017) indicating that the nature of employment within both sectors over the period was changing, but in opposite directions. For Other Services it may indicate that the profile of internationally trading companies in the region is becoming higher value and higher skilled.

Fig. 15: Percentage of total assisted jobs in Business Services & Other Services that are Permanent Full Time in Western Region and state, 2017

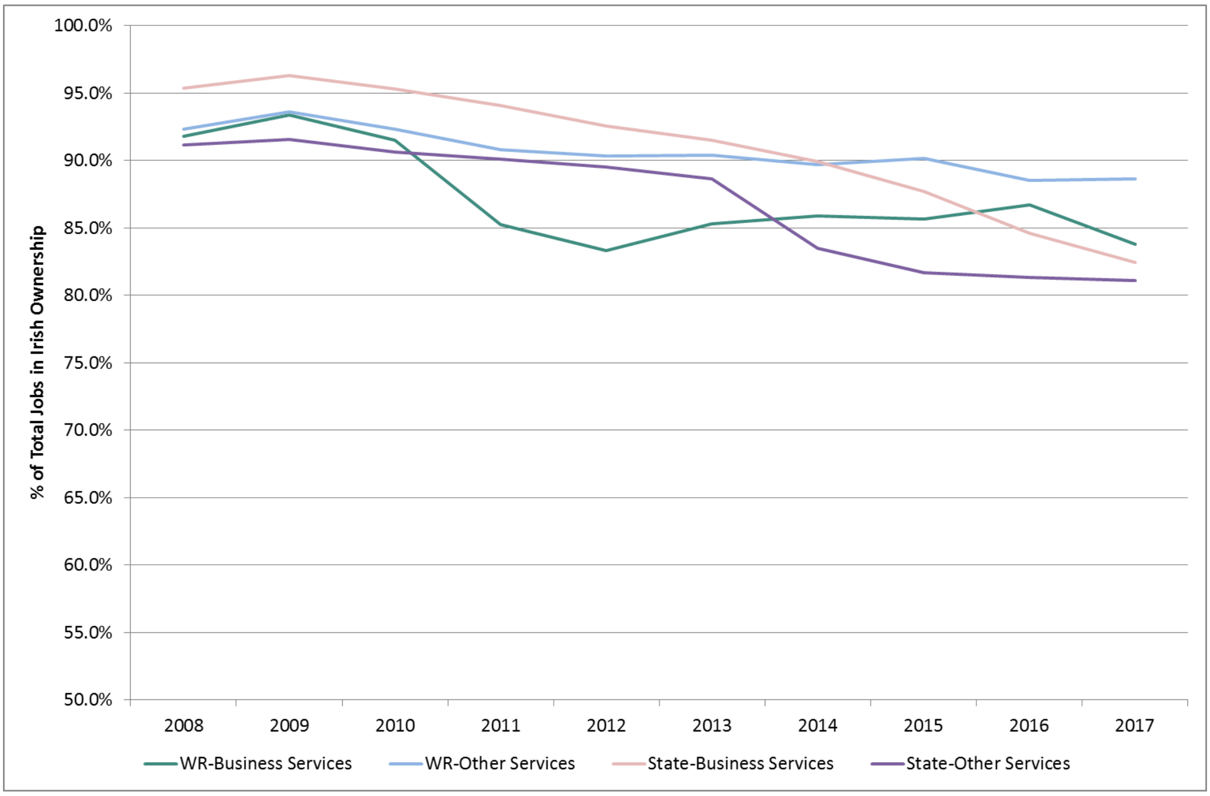


Source: Department of Business, Enterprise & Innovation (2018), Annual Employment Survey 2017, special run

Of total assisted Business Services jobs in the Western Region in 2017, 83.8% were in Irish owned companies and for Other Services the Irish owned share was even higher at 88.7% (Fig. 16). These are among the highest shares of Irish ownership across all economic sectors indicating high levels of Irish business involvement. This is even more so in the region as it has a higher Irish owned share than the state for both, especially for Other Services.

While there remains high Irish involvement, there has been a generally downward trend over the past decade. For Other Services in the Western Region the Irish owned share has declined gradually but remains at a high level, in contrast, Irish involvement in Other Services nationally has dropped significantly and particularly since 2013 with growing involvement by foreign-owned companies, as that sector expanded (see Fig. 14).

Fig. 16: Percentage of total assisted jobs in Business Services & Other Services in Irish owned companies in Western Region and state, 2008-2017



Source: Department of Business, Enterprise & Innovation (2018), Annual Employment Survey 2017, special run
Note: For ease of interpretation the vertical axis starts at 50%.

Irish ownership of Business Services jobs in the region fluctuated over the period, falling notably during the recession. The Irish owned share grew however from 2012 until 2016 indicating that Irish owned companies were largely responsible for driving the jobs recovery in this sector over that period. The drop in the Irish owned share in 2017 may point to increasing activity in the foreign-owned sector in the region. This would be consistent with the national picture throughout the period where the Irish owned share dropped substantially from 95.4% in 2008 down to 82.4% by 2017. This coincided with strong jobs growth in the sector which seems to have been largely driven by the foreign owned sector.

It should be noted that when an Irish owned company is sold to a foreign company (or vice versa), jobs in that company are reassigned from being Irish owned to foreign owned and historic data is backdated. Ownership data provided in the 2017 AES report for each year 2008-2017, reflects the ownership of those jobs at the time of the 2017 survey.[14]

[14] See Appendix C of Annual Employment Survey 2017

4.0 Administrative, Entertainment & Other Services Enterprises

In this section we examine enterprise numbers in Administrative, Entertainment & Other Services in the Western Region and counties. This data is from the CSO Business Demography and includes all Administrative, Entertainment & Other Services enterprises such as tour operators, aircraft leasing operations, call centres, gyms, cinemas, hairdressers, undertakers etc. which have a registration address (with the Revenue Commissioners) located in the Western Region. While data on 'Administrative & Support Services' and 'Arts, Entertainment & Recreation' enterprises is available for the period 2008 to 2016, data on 'Other Services' is only available for 2015 and 2016.

4.1 Administrative, Entertainment & Other Services enterprises

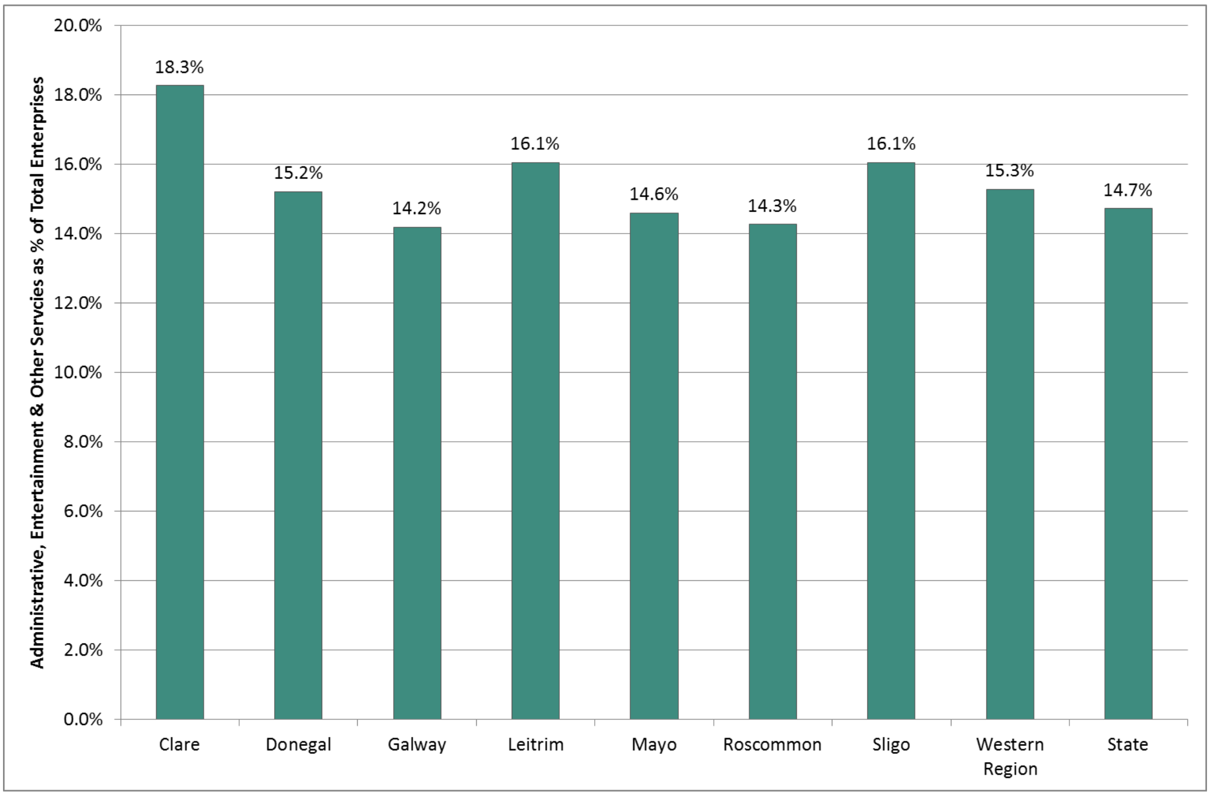
In 2016[15] there were 8,316 Administrative, Entertainment & Other Services enterprises registered in the Western Region. The region was home to 18% of all such enterprises in the state, which was slightly higher than the region's share of total enterprises nationally (17.4%).

In the Western Region 15.3% of total enterprises[16] in 2016 were engaged in Administrative, Entertainment & Other Services (Fig. 17). This was somewhat greater than the 14.7% of enterprises the sector accounted for nationally. Again this differs from the employment pattern where the sector accounted for a smaller share of total employment in the region than in the state (see Fig. 1). This could be due to a less diverse enterprise mix in the region with fewer enterprises involved in other areas (e.g. knowledge intensive services), which in turn increases the relative importance of other sectors as well as smaller scale operations in the region, each employing fewer people.

The sector's share of total enterprises in the region (15.3%) is higher than its share of all employment in the region (6.5%, see Fig. 1) due to a large number of quite small operations.

[15] Most recent data available.
[16] Total enterprises includes all 'business economy' enterprises plus Health & Social Work, Education, Arts, Entertainment & Recreation and Other Services.

Fig. 17: Administrative, Entertainment & Other Services enterprises as a percentage of total enterprises in Western Region, 2016



Source: CSO, Business Demography 2016, Table BRA18.

At 18.3%, Clare has by far the highest share of its total enterprises in this sector, consistent with the earlier findings on the importance of this sector to employment in Clare. Sligo and Leitrim is where it is next most important to the enterprise profile.

While Galway City had the highest share of employment in this sector, Galway[17] has the lowest share of enterprises. This is likely due to larger scale operations (employing more people) in the city, as well as a more diverse enterprise mix reducing the relative importance of the sector.

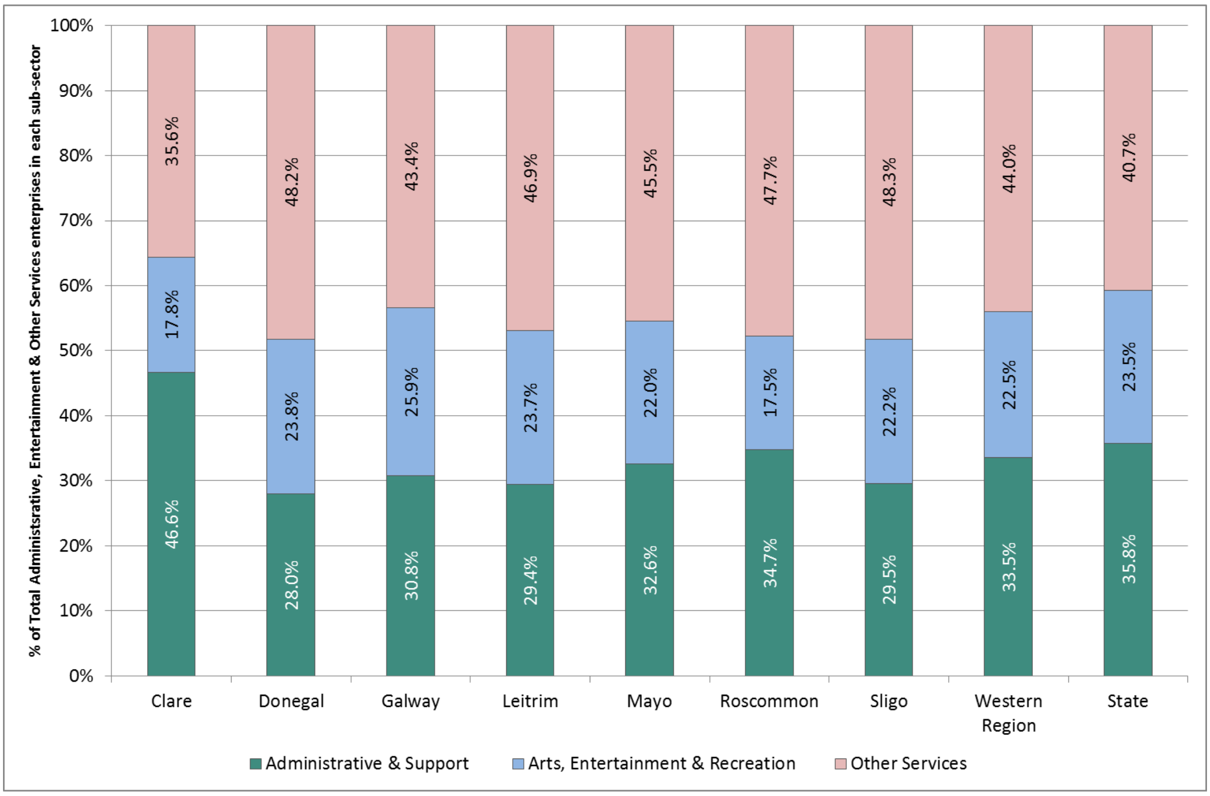
4.1.1 Enterprises in Administrative, Entertainment & Other Services sub-sectors

The largest sub-sector in terms of enterprises is 'Other Services' accounting for 44% of all Administrative, Entertainment & Other Services enterprises in the region (Fig. 18). This is a higher share than nationally (40.7%). As noted previously, this sector is characterised by personal services which are mainly provided locally e.g. hairdressers, dry cleaners, so would involve a large number of small businesses which are registered locally. This sub-sector is the largest in terms of enterprises, but not in terms of employment (see Fig. 2).

'Administrative & Support' is next largest for enterprises (33.5%) with a lower share in the region than nationally. This lower share is influenced both by the lower level of activity in this sub-sector in the region and also the fact it includes some larger businesses with multiple locations e.g. recruitment agencies, which would only be counted once where they are headquartered e.g. Dublin.

[17] Business Demography data does not distinguish between Galway City and Galway County.

Fig. 18: Percentage of total Administrative, Entertainment & Other Services enterprises by sub-sector in Western Region and state, 2016



Source: CSO, Business Demography 2016, Table BRA18.

Consistent with other findings, Clare is where 'Administrative & Support Service' is most important at 46.6% of all enterprises, the only county where it is the largest enterprise sub-sector. For all other counties 'Other Services' is the main sub-sector and is particularly dominant in Sligo, Donegal and Roscommon. Rural counties in particular have a high share of enterprises in these locally trading activities.

'Arts, Entertainment & Recreation' is most important in Galway, Donegal and Leitrim, consistent with the important role of the cultural and creative sector in these areas, as well as tourism.

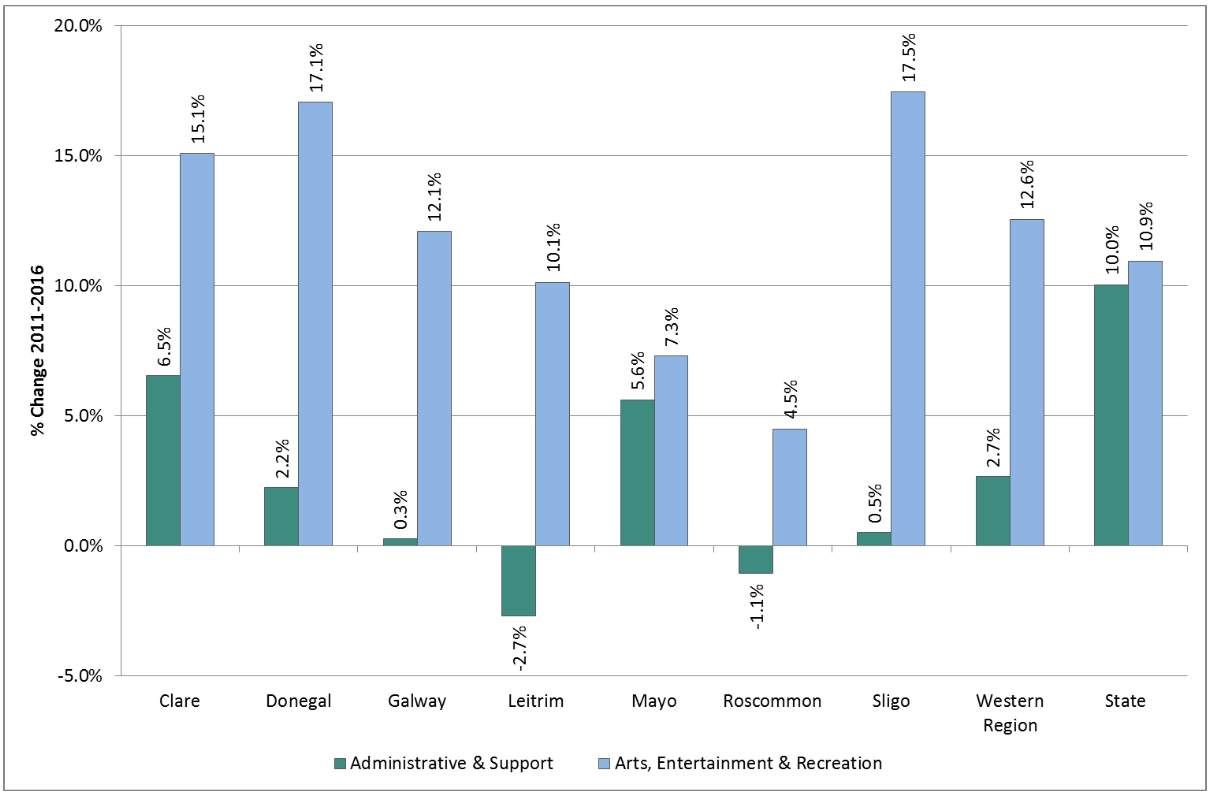
4.2.1 Change in enterprises

As noted above, data on 'Other Services' enterprises is only available for the two years 2015 and 2016. Therefore to examine change over the 2011-2016 period, we only consider the two other sub-sectors.

Between 2011 and 2016 the number of 'Arts, Entertainment & Recreation' enterprises in the region grew strongly (12.6%) and higher than nationally (10.9%) showing the strengthening of the sector in the region driven by both local and tourism demand and the expanding creative and cultural industries sector (Fig. 19). It was also the strongest growing sub-sector for employment.

'Administrative & Support Services' enterprise numbers also grew but only by 2.7% in the region, considerably lower than nationally (10%), again supporting the finding that this sector is far less developed in the region.

Fig. 19: Percentage change in the number of 'Administrative & Support' and 'Arts, Entertainment & Recreation' enterprises in Western Region and state, 2011-2016



Source: CSO, Business Demography 2016, Table BRA18.
Note: Data for Leitrim for 2011 is suppressed by the CSO for confidentiality reasons. For Leitrim therefore the figure for 2012 is used instead of 2011, so the change shown is for 2012-2016. The Western Region figure for 2011 uses the 2012 data for Leitrim.

Sligo, Donegal and Clare had the strongest growth in 'Arts, Entertainment & Recreation' enterprises at over 15% again linked to the growing creative and cultural sector as well as increased tourism activity. Roscommon had the lowest growth in this sector.

There was a mixed experience for 'Administrative & Support Services' across counties, but in all cases its performance was far weaker than 'Arts, Entertainment & Recreation'. Clare and Mayo had the strongest growth at 6.5% and 5.6% respectively. In the case of Clare this coincided with strong employment growth in this sub-sector (20%) (see Table 2) indicating some of these new enterprises were likely large employers. For Mayo however, jobs growth in the sub-sector was 7.4% which indicates that the new enterprises tended to be smaller in scale.

Consistent with employment trends, Leitrim[18] and Roscommon both saw a decline in 'Administrative & Support Services' enterprises, with Galway and Sligo only experiencing marginal growth.

[18] Note, this is the change for 2012-2016 as the 2011 data for Leitrim is suppressed.

5.0 Key Policy Issues for the Western Region's Administrative, Entertainment & Other Services Sector

Some of the key issues for the region's Administrative, Entertainment & Other Services sector are:

Sector plays a smaller role in Western Region's labour market and its structure differs

Administrative, Entertainment & Other Services account for a smaller share of total jobs in the region than nationally and the region also experienced lower growth than elsewhere (2011-2016). Nevertheless as this sector grew more than employment overall, it did make a contribution to the region's jobs recovery.

The structure of the sector in the region differs from the national picture, with a greater role for the mainly locally traded elements and less activity in the internationally traded sector. This means it relies more heavily on local demand and disposable income.

Smaller scale operations and high self-employment

Administrative, Entertainment & Other Services enterprises in the Western Region tend to be smaller in scale than the national average and this is particularly the case for locally provided services in more rural areas. Smaller businesses can often offer a more personal and distinctive service, however they may also find it more difficult to adapt to emerging trends e.g. digital transformation, though a recent study on micro-businesses found surprisingly high adaptation of digital technologies among micro-businesses such as online/app booking for hair or beauty appointments.[19]

The sector in the region is characterised by high self-employment, both compared with elsewhere and with other sectors. This is particularly the case in more rural counties and for locally provided services with many sole traders and owner/family run operations. The recent economic recovery has seen strong growth in self-employment, with this sector having the highest increase in the number of self-employed across all sectors. Increasing disposable income and tourism drove demand for local personal and recreation services, while improved trading conditions increased demand for business outsourcing. Many individuals have responded by setting up small scale service businesses (e.g. gyms, nail bars, HR services, cleaning, landscaping).

As noted previously, this sector is characterised by quite low average pay and weekly hours. The quality and viability of some self-employment in this sector and its ability to sustain a person's livelihood is an issue of concern. It is also important to note that some of this self-employment may involve a person working on a self-employed basis but for a single employer e.g. in some hair salons each hairdresser is self-employed and they 'rent the chair' from the salon, in some gyms the trainers are self-employed.

Continuation of existing, and the development of new initiatives and soft supports, to support self-employment including addressing issues of viability, as well as for succession planning for family-run businesses, is important particularly in smaller urban centres and rural areas where self-employment can be a key pathway to work.

[19] Cork University Business School (2019), Micro-Businesses in Ireland: From Ambition to Innovation

'Administrative & Support' less developed in the Western Region but has growth potential

Within the Western Region, the 'Administrative & Support Services' sub-sector, primarily providing 'outsourced' services to businesses, accounts for a lower share of total employment and enterprises. It also experienced lower growth than nationally. This is partly due to limited local demand from businesses in the region for such services, as well as fewer internationally trading enterprises. There is an opportunity to further grow and develop this sector in the region in response to the growing trend towards outsourcing of business processes as well as strong national growth in global business services activity.

For assisted jobs in internationally traded 'Business Services' the region has an even lower share than for the sector in general, pointing to a particular opportunity to expand international activity. The period since 2015 has seen the first notable jobs growth in this sector in the region over the past decade and, given the very strong growth experienced nationally in this activity, it is important that the Western Region is well positioned to take advantage through high quality telecommunications infrastructure, improved accessibility and the availability of suitable talent.

Business Services in the region is characterised by higher levels of Irish ownership in comparison with other internationally trading sectors and compared with the state. The Irish-owned sector was the main driver of growth in Business Services in the region in recent years, though 2017 saw the foreign-owned share increase notably. Nationally there has been a steady increase in foreign ownership and this trend may be emerging in the region also.

This sector in the region is also characterised by a higher level of 'non-permanent' jobs, a trend that has increased considerably in recent years, raising some concern over the nature of employment within the region's internationally traded Business Services sector. Elements of this sector are characterised by relatively low pay levels and some repetitive administrative tasks are among the occupations considered at high risk of automation.[20] Future development of this sector in the region should aim to target higher skill and higher value activities where possible.

The Shannon Free Zone (SFZ) area is a key regional asset

In terms of both employment and enterprise, Clare differs from the rest of the region with regard to the importance of 'Administrative & Support Services' and is well ahead of the national average. Employment in 'Administrative & Support Services' in Clare grew 20% between 2011 and 2016. The history of attracting FDI to the SFZ, initially through tax free status and latterly by offering high quality property solutions, international accessibility and proximity to a cluster of international firms, means the SFZ is now a nationally significant location for global business services (e.g. aircraft leasing, e-commerce outsourcing).

Sustaining and further expanding and evolving this cluster, primarily engaged in international trading, must be a key regional priority. Adapting to technological changes, digital transformation and evolving global business models; meeting emerging skill needs including enabling local operations to re-position themselves in their company's global structure; ensuring high quality

[20] SOLAS and National Skills Council (2018), Digital Transformation: Assessing the Impact of Digitalisation on Ireland's Workforce

infrastructure and property solutions; and facilitating collaboration between MNCs, SMEs and higher education are among the actions needed to support this key regional asset.

Local 'Other Services' more important for Western Region and in particular for rural counties

The primarily locally provided 'Other Services' sector is more important for the Western Region than elsewhere both in employment and enterprise terms. These services largely rely on local demand and respond strongly to disposable income levels. They are often consumed at the same location as they are supplied (e.g. hairdressing, dry-cleaning, phone repair) and therefore are more geographically dispersed than many other sectors. As such they play a particularly important role in the local economy of towns and villages and account for a higher share of employment in more rural counties.

This sector however is generally quite low paid. At €17.13 per hour 'Other Services' has the second lowest average hourly earnings of all economic sectors.[21] It is also characterised by considerable part-time working having the second lowest average number of hours worked per week (26.7 hrs). The greater importance of this sub-sector in the employment profile of the region reduces the overall economic benefit – direct, indirect and induced – of the Administrative, Entertainment & Other Services sector to the regional economy.

Role of 'Arts, Entertainment & Recreation' in the regional economy is growing

'Arts, Entertainment & Recreation' is the sub-sector that experienced the strongest employment and enterprise growth in the region, in both cases expanding more than nationally. This sector is highly responsive to local disposable income (as many of its activities can be considered discretionary spending rather than necessities). Tourism is also a key driver. Recent growth in the sector is both a response to recovery in local spending and increased tourist visitor numbers. Certain locations in the region e.g. Bundoran, Strandhill, Clifden, have particularly high shares working in this area, often associated with tourist demand.

Similar to 'Other Services', many of these activities are delivered and consumed at the same location e.g. museums, gyms, cinemas, and therefore play an important role in local economies. It is however also characterised by relatively low paid jobs (third lowest average hourly earnings).

The Western Region is recognised as having a strong creative and cultural industries sector and, while 'Arts, Entertainment & Recreation' is only a partial aspect of the overall creative industries (which also includes film, games, photography, graphic design, etc), its growth in the region nevertheless points to positive developments in the creative sector. The WDC has supported the creative sector's development through a range of initiatives[22] and the recently announced Regional Enterprise Plan for the West region[23] includes the strategic objective to 'Build on the West's unique creative assets to realise increased employment and investment in the sector'. Adopting a coordinated approach, including tourism, is critical to help realise its growth potential.

[21] Only 'Accommodation & Food Service' is lower. CSO, Earnings, Hours and Employment Costs Survey Q4 2018, Table EHQ03

[22] See https://www.wdc.ie/regional-development/creative-economy/

[23] Department of Business, Enterprise & Innovation (2019), Regional Enterprise Plan to 2020: West Region

Important contribution to town centre renewal

Towns of all sizes are having to adapt to a changing function as their traditional role as retail centres is reduced. As online retailing grows, the reason for them to visit their local city or town centre is increasingly to access services which have to be consumed in person. Taking a broad approach to town centre renewal, addressing issues of accessibility, attractiveness of the public realm, safety and local distinctiveness is critical to making towns more attractive as service destinations for local residents and tourists alike. A Framework for Town Centre Renewal sets out an Action Plan for Town Centre Renewal particularly targeting towns which have experienced increasing vacancy or a shift of economic activity out of the town centre and are struggling to reverse this trend.

The availability and range of choice of local personal and recreational services is central to attracting people to visit and remain in town centre locations. Facilitating the establishment and sustainability of such services, many of which are provided by sole traders and micro-enterprises, is an important element in the future viability of town centres and should be integral to any strategies or local plans for town centre renewal.

6.0 Conclusion

Administrative, Entertainment & Other Services play an important role in the Western Region's economy, in terms of its employment profile and enterprise base, though less so than elsewhere. As it is quite widely dispersed, particularly local personal and recreation services, it helps to sustain the local economy including in rural areas and town centres. The administrative services element, mainly providing outsourced services to businesses, is however less developed in the region with the exception of Shannon which is a key national cluster and also Galway City.

This sector is highly sensitive to changing economic conditions which influence both the level of disposable income of local residents and tourists, as well as demand from business clients. The recent economic recovery has seen growth in the sector, with self-employment growing particularly strongly due to the nature of the sector with many sole traders and micro-businesses. There is a high level of Irish and local ownership which increases its economic contribution to the regional economy.

While international trading activity is currently considerably lower in the region, there have been signs of recent strengthening of the sector and potential exists to further grow internationally trading Business Services from the region. The creative industries is another area with strong regional growth potential with 'Arts, Entertainment & Recreation' employment and enterprise numbers expanding substantially in the region.

Download **Administrative, Entertainment & Other Services in the Western Region: Regional Sectoral Profile** and ***WDC Insights*: Administrative, Entertainment & Other Services in the Western Region** here

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Appendix 1: Population aged 15 years and over by employed in Administrative, Entertainment & Other Services by detailed industrial group NACE Rev 2 in western counties 2011 and 2016

Detailed industrial group	Clare			Donegal		
	2011	2016	% Change	2011	2016	% Change
Administrative and Support Service Activities	1,437	1,724	20.0%	1,220	1,396	14.4%
Renting and leasing activities	305	327	7.2%	278	273	-1.8%
Employment activities	112	174	55.4%	74	82	10.8%
Travel agency, tour operator and other reservation service and related activities	245	325	32.7%	122	159	30.3%
Security and investigation activities	214	226	5.6%	94	101	7.4%
Services to buildings and landscape activities	445	547	22.9%	433	478	10.4%
Office administrative, office support and other business support activities	116	125	7.8%	219	303	38.4%
Arts, entertainment and recreation	701	700	-0.1%	927	993	7.1%
Creative, arts and entertainment activities	120	136	13.3%	179	226	26.3%
Libraries, archives, museums and other cultural activities	144	109	-24.3%	194	154	-20.6%
Gambling and betting activities	95	98	3.2%	155	114	-26.5%
Sports activities and amusement and recreation activities	342	357	4.4%	399	499	25.1%
Other service activities	950	1,007	6.0%	1,307	1,412	8.0%
Activities of membership organisations	271	245	-9.6%	378	361	-4.5%
Repair of computers and personal and household goods	56	67	19.6%	79	60	-24.1%
Washing and (dry-)cleaning of textile and fur products	59	46	-22.0%	73	53	-27.4%
Hairdressing and other beauty treatment	503	569	13.1%	712	845	18.7%
Funeral and related activities	14	15	7.1%	16	26	62.5%
Activities of physical well-being institutes	21	19	-9.5%	23	32	39.1%
Other personal service activities n.e.c.	26	46	76.9%	26	35	34.6%
Activities of Households as Employers	41	79	92.7%	56	66	17.9%
Activities of extraterritorial organisations and bodies	1	5	400.0%	3	16	433.3%
Total Administrative, Entertainment & Other Services	**3,130**	**3,515**	**12.3%**	**3,513**	**3,883**	**10.5%**

Detailed industrial group	Galway City			Galway County		
	2011	2016	% Change	2011	2016	% Change
Administrative and Support Service Activities	1,043	1,117	7.1%	1,700	1,812	6.6%
Renting and leasing activities	82	58	-29.3%	392	373	-4.8%
Employment activities	94	119	26.6%	179	154	-14.0%
Travel agency, tour operator and other reservation service and related activities	74	108	45.9%	200	254	27.0%
Security and investigation activities	171	164	-4.1%	243	233	-4.1%
Services to buildings and landscape activities	552	568	2.9%	582	632	8.6%
Office administrative, office support and other business support activities	70	100	42.9%	104	166	59.6%
Arts, entertainment and recreation	543	697	28.4%	853	988	15.8%
Creative, arts and entertainment activities	145	206	42.1%	188	230	22.3%
Libraries, archives, museums and other cultural activities	69	85	23.2%	130	148	13.8%
Gambling and betting activities	92	90	-2.2%	121	123	1.7%
Sports activities and amusement and recreation activities	237	316	33.3%	414	487	17.6%
Other service activities	699	756	8.2%	1,312	1,435	9.4%
Activities of membership organisations	155	163	5.2%	305	308	1.0%
Repair of computers and personal and household goods	56	53	-5.4%	93	89	-4.3%
Washing and (dry-)cleaning of textile and fur products	54	55	1.9%	67	58	-13.4%
Hairdressing and other beauty treatment	384	430	12.0%	771	860	11.5%
Funeral and related activities	8	9	12.5%	23	29	26.1%
Activities of physical well-being institutes	18	17	-5.6%	19	38	100.0%
Other personal service activities n.e.c.	24	29	20.8%	34	53	55.9%
Activities of Households as Employers	29	30	3.4%	61	59	-3.3%
Activities of extraterritorial organisations and bodies	4	5	25.0%	2	9	350.0%
Total Administrative, Entertainment & Other Services	**2,318**	**2,605**	**12.4%**	**3,928**	**4,303**	**9.5%**

Detailed industrial group	Leitrim			Mayo		
	2011	2016	% Change	2011	2016	% Change
Administrative and Support Service Activities	485	320	-34.0%	1,136	1,220	7.4%
Renting and leasing activities	114	81	-28.9%	313	326	4.2%
Employment activities	23	32	39.1%	75	88	17.3%
Travel agency, tour operator and other reservation service and related activities	24	39	62.5%	132	127	-3.8%
Security and investigation activities	15	34	126.7%	158	112	-29.1%
Services to buildings and landscape activities	84	117	39.3%	408	490	20.1%
Office administrative, office support and other business support activities	225	17	-92.4%	50	77	54.0%
Arts, entertainment and recreation	173	199	15.0%	672	767	14.1%
Creative, arts and entertainment activities	49	69	40.8%	96	168	75.0%
Libraries, archives, museums and other cultural activities	45	42	-6.7%	137	126	-8.0%
Gambling and betting activities	20	16	-20.0%	90	83	-7.8%
Sports activities and amusement and recreation activities	59	72	22.0%	349	390	11.7%
Other service activities	265	285	7.5%	1,130	1,267	12.1%
Activities of membership organisations	73	63	-13.7%	326	333	2.1%
Repair of computers and personal and household goods	13	17	30.8%	64	50	-21.9%
Washing and (dry-)cleaning of textile and fur products	28	10	-64.3%	97	112	15.5%
Hairdressing and other beauty treatment	130	167	28.5%	583	691	18.5%
Funeral and related activities	4	10	150.0%	25	26	4.0%
Activities of physical well-being institutes	7	7	0.0%	23	25	8.7%
Other personal service activities n.e.c.	10	11	10.0%	12	30	150.0%
Activities of Households as Employers	5	13	160.0%	42	71	69.0%
Activities of extraterritorial organisations and bodies	1	-	-100.0%	-	4	N/A
Total Administrative, Entertainment & Other Services	**929**	**817**	**-12.1%**	**2,980**	**3,329**	**11.7%**

Detailed industrial group	Roscommon			Sligo		
	2011	2016	% Change	2011	2016	% Change
Administrative and Support Service Activities	778	637	-18.1%	656	668	1.8%
Renting and leasing activities	138	143	3.6%	102	95	-6.9%
Employment activities	53	42	-20.8%	46	74	60.9%
Travel agency, tour operator and other reservation service and related activities	62	66	6.5%	58	74	27.6%
Security and investigation activities	84	86	2.4%	104	88	-15.4%
Services to buildings and landscape activities	240	270	12.5%	278	305	9.7%
Office administrative, office support and other business support activities	201	30	-85.1%	68	32	-52.9%
Arts, entertainment and recreation	279	350	25.4%	363	431	18.7%
Creative, arts and entertainment activities	39	61	56.4%	84	148	76.2%
Libraries, archives, museums and other cultural activities	57	56	-1.8%	70	58	-17.1%
Gambling and betting activities	63	60	-4.8%	46	37	-19.6%
Sports activities and amusement and recreation activities	120	173	44.2%	163	188	15.3%
Other service activities	518	566	9.3%	570	631	10.7%
Activities of membership organisations	146	137	-6.2%	176	162	-8.0%
Repair of computers and personal and household goods	35	38	8.6%	31	28	-9.7%
Washing and (dry-)cleaning of textile and fur products	45	40	-11.1%	42	34	-19.0%
Hairdressing and other beauty treatment	261	301	15.3%	280	347	23.9%
Funeral and related activities	15	10	-33.3%	16	13	-18.8%
Activities of physical well-being institutes	8	19	137.5%	17	23	35.3%
Other personal service activities n.e.c.	8	21	162.5%	8	24	200.0%
Activities of Households as Employers	19	22	15.8%	22	29	31.8%
Activities of extraterritorial organisations and bodies	2	2	0.0%	-	1	N/A
Total Administrative, Entertainment & Other Services	**1,596**	**1,577**	**-1.2%**	**1,611**	**1,760**	**9.2%**

Detailed industrial group	Western Region			State		
	2011	2016	% Change	2011	2016	% Change
Administrative and Support Service Activities	8,455	8,894	5.2%	60,716	71,076	17.1%
Renting and leasing activities	1,724	1,676	-2.8%	9,327	9,829	5.4%
Employment activities	656	765	16.6%	5,891	7,454	26.5%
Travel agency, tour operator and other reservation service and related activities	917	1,152	25.6%	5,724	7,231	26.3%
Security and investigation activities	1,083	1,044	-3.6%	10,433	11,013	5.6%
Services to buildings and landscape activities	3,022	3,407	12.7%	22,931	25,893	12.9%
Office administrative, office support and other business support activities	1,053	850	-19.3%	6,410	9,656	50.6%
Arts, entertainment and recreation	4,511	5,125	13.6%	30,663	34,165	11.4%
Creative, arts and entertainment activities	900	1,244	38.2%	6,324	7,698	21.7%
Libraries, archives, museums and other cultural activities	846	778	-8.0%	4,874	4,631	-5.0%
Gambling and betting activities	682	621	-8.9%	5,912	6,204	4.9%
Sports activities and amusement and recreation activities	2,083	2,482	19.2%	13,553	15,632	15.3%
Other service activities	6,751	7,359	9.0%	39,140	42,489	8.6%
Activities of membership organisations	1,830	1,772	-3.2%	11,189	9,892	-11.6%
Repair of computers and personal and household goods	427	402	-5.9%	2,530	2,434	-3.8%
Washing and (dry-)cleaning of textile and fur products	465	408	-12.3%	3,041	2,907	-4.4%
Hairdressing and other beauty treatment	3,624	4,210	16.2%	19,757	23,679	19.9%
Funeral and related activities	121	138	14.0%	827	908	9.8%
Activities of physical well-being institutes	136	180	32.4%	789	1,110	40.7%
Other personal service activities n.e.c.	148	249	68.2%	1,007	1,559	54.8%
Activities of Households as Employers	275	369	34.2%	1,969	2,803	42.4%
Activities of extraterritorial organisations and bodies	13	42	223.1%	818	868	6.1%
Total Administrative, Entertainment & Other Services	**20,005**	**21,789**	**8.9%**	**133,306**	**151,401**	**13.6%**

Source: CSO, Census 2016: Summary Results Part 2, Table EZ011

Appendix 2: Population aged 15 years and over employed in Administrative, Entertainment & Other Services in western towns 2011 and 2016

Towns	2011		2016		% Change 2011-2016
	No. Employed	% of Total Employment	No. Employed	% of Total Employment	
Galway City and suburbs	2,349	7.3%	2,634	7.4%	12.1%
Ennis	769	7.8%	850	8.0%	10.5%
Letterkenny	449	6.2%	498	6.4%	10.9%
Sligo	530	7.5%	552	7.7%	4.2%
Castlebar	364	7.7%	381	7.9%	4.7%
Ballina	293	7.5%	300	8.3%	2.4%
Shannon	379	9.6%	374	8.9%	-1.3%
Tuam	227	7.5%	241	7.3%	6.2%
Buncrana	195	9.4%	206	8.6%	5.6%
Ballinasloe	149	6.7%	164	7.2%	10.1%
Westport	195	7.7%	208	7.3%	6.7%
Roscommon	158	7.5%	172	7.6%	8.9%
Loughrea	134	6.9%	168	7.3%	25.4%
Oranmore	133	5.3%	146	5.6%	9.8%
Ballybofey-Stranorlar	113	7.4%	112	6.8%	-0.9%
Athenry	104	6.2%	119	6.2%	14.4%
Carrick-on-Shannon	176	10.6%	114	6.5%	-35.2%
Claremorris	83	5.9%	129	8.2%	55.4%
Gort	97	9.3%	107	8.5%	10.3%
Ballinrobe	71	6.5%	96	8.6%	35.2%
Kilrush	58	7.1%	62	7.6%	6.9%
Sixmilebridge	93	9.0%	105	9.0%	12.9%
Donegal	57	5.7%	57	5.3%	0.0%
Boyle	77	9.1%	75	9.1%	-2.6%
Carndonagh	58	9.1%	83	10.4%	43.1%
Ballyhaunis	30	3.6%	43	5.1%	43.3%
Ballyshannon	64	8.2%	82	10.2%	28.1%
Bearna	52	6.4%	65	7.3%	25.0%
Castlerea	40	6.2%	44	6.5%	10.0%
Tubbercurry	58	8.7%	52	7.6%	-10.3%
Bundoran	93	13.3%	84	11.2%	-9.7%
Ballaghaderreen	46	8.7%	45	7.7%	-2.2%
Newmarket-on-Fergus	70	9.5%	63	7.8%	-10.0%
Strandhill	45	6.1%	60	7.5%	33.3%
Moycullen	49	6.9%	40	5.4%	-18.4%
Lifford	30	6.9%	25	5.4%	-16.7%
Collooney	-	N/A	49	7.4%	N/A
Clifden	70	7.8%	53	7.8%	-24.3%
Ballymote	42	7.6%	52	9.6%	23.8%
Convoy	-	N/A	35	7.3%	N/A

Source: CSO, Census 2016: Profile 11 – Employment, Occupations and Industry, Table EB030