



WDC Insights

*providing insights on key issues for  
the Western Region of Ireland*

# The Education Sector in the Western Region

## Regional Sectoral Profile

January 2019

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## 1.0 Introduction

The [Western Development Commission](#) (WDC) is a state agency with responsibility for promoting the economic and social development of the Western Region of Ireland.<sup>1</sup> 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 is the third in 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.<sup>2</sup>

The two-page **WDC Insights: The Education Sector in the Western Region** summarises the main points from this report. It is available [here](#)

### 1.1 The Education Sector

The Education sector plays a vital role in society, educating our young people, providing lifelong learning and personal development opportunities, as well as the necessary skills for the economy. Discussions of the Education sector usually focus on its delivery of these services, rather than its direct contribution as an employer. The main focus of this Regional Sectoral Profile is not on the provision of Education services, rather it considers the role of Education as a key regional employer.

The Education sector is the fourth largest employment sector in the Western Region.<sup>3</sup> It includes all those working in public, private or community/voluntary pre-primary, primary and secondary schools (e.g. teachers, administrative staff, special needs assistants), as well as staff of further and higher education institutions and colleges. The sector also includes other types of educational activity such as music schools, sports coaching, adult education, driving schools and language schools.<sup>4</sup>

There are currently 890 primary schools and 168 post-primary schools located across the seven-county Western Region. These schools are educating 96,919 and 56,863 pupils respectively.<sup>5</sup> In addition there is one university (NUI Galway) and three Institutes of Technology (Galway-Mayo, Sligo and Letterkenny). The Connacht-Ulster Alliance (CUA) was established by the three IOTs in the Western Region to develop a proposal for re-designation as a Technological University (TU) and the CUA has received funding from the Higher Education Authority, most recently in December 2017, to pursue this. A number of Further Education providers such as Donegal, Galway-Roscommon and Mayo-Sligo-Leitrim Education and Training Boards are also based in the region.

The Education sector is widely dispersed geographically and is present in all areas, from city centres to towns and villages, with pre-primary and primary education the most widely dispersed and higher education the most concentrated. The region's age profile is a key determinant of current and future

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<sup>1</sup> Counties Donegal, Sligo, Leitrim, Roscommon, Mayo, Galway and Clare.

<sup>2</sup> The previous Regional Sectoral Profiles examined the Wholesale & Retail and Health & Care sectors and are available here <https://www.wdc.ie/publications/reports-and-papers/>

<sup>3</sup> After Industry, Wholesale & Retail and Health & Care.

<sup>4</sup> It should be noted that where catering, cleaning or building maintenance for schools or colleges is outsourced, people employed by these external contractors would not be counted as working in the Education sector. Such services are mainly covered under the 'Administrative & Support Services' sector.

<sup>5</sup> Department of Education and Skills, Annual Statistical Report 2017/2018

<https://www.education.ie/en/Publications/Statistics/Statistical-Reports/>

demand for Education services, especially at pre-primary, primary and secondary level, while the need for upskilling and lifelong learning are other factors influencing the demand for further and higher education and training.

Following a description of the data that will be used, Sections 2 and 3 of this report outline the current employment and enterprise situation of the Education sector in the Western Region. Key policy issues are examined in Section 4.

## 1.2 Data Used

A number of CSO data sources are used to examine the Education 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.<sup>6</sup> 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.

**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 private college, is only counted once where it is headquartered (often Dublin), individual branches are not counted. Data for the Education sector includes public, private and community/voluntary owned Education entities e.g. schools, universities, driving schools, pre-schools, training centres, that are registered with the Revenue Commissioners.

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<sup>6</sup> 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 Education

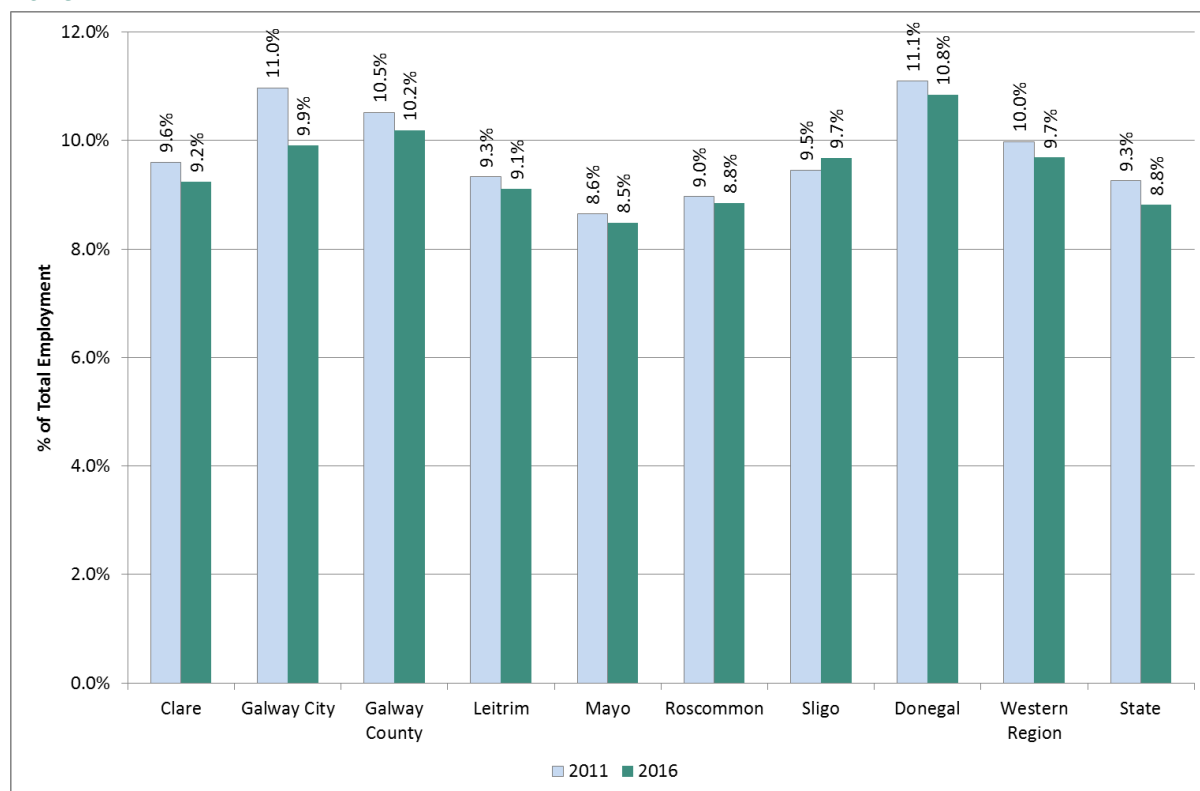
In this section we examine employment over time and by gender, as well as self-employment, in the Education sector in the Western Region, western counties and towns. Employment in specific Education sub-sectors is also set out.

### 2.1 Employment in the Western Region and its counties

According to Census 2016, 32,349 people were employed in the Education sector in the Western Region in 2016. Of everyone working in Education in Ireland, 18.3% of them live in the Western Region. In comparison, the Western Region is home to 16.6% of total employment which means it accounts for a greater share of national Education employment, than it does of total national employment.

Education plays a greater role in the region's labour market than nationally (Fig. 1). In 2016 Education accounted for 9.7% of total employment in the Western Region compared with 8.8% nationally. It is the region's fourth largest employment sector (after Industry, Wholesale & Retail and Health & Care).

**Fig. 1: Percentage of total employment in Education in Western Region and state, 2011 and 2016**



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

Among western counties, Education is most important in Donegal accounting for 10.8% of all employment, followed by Galway County (10.2%), Galway City (9.9%) and Sligo (9.7%). Donegal and Galway County have the highest shares working in Education in the country with Galway City and Sligo fifth and sixth highest nationally. All western counties, except Mayo, have a higher share working in Education than the national average.

The share of total employment that was in Education decreased everywhere, except Sligo, between 2011 and 2016 e.g. from 10% down to 9.7% in the Western Region. While the change was marginal for most counties, Galway City saw the share of people working in this sector decrease from 11% to 9.9%.

Demographic factors influence the size of the Education sector. Within the Western Region, Galway County (29.1%) and Donegal (28.8%) had the highest share of people aged 0-19 years in their population, reflected in their high share of Education employment. NUI Galway, GMIT and Letterkenny IT would also increase employment in the sector in these counties, while for Donegal, cross-border commuting to Derry City would also be a factor. While Galway City has the smallest share of young residents (23.1%), the presence of NUIG and GMIT increases Education employment in the city. Mayo, which has the next lowest share of young people in the region (26.7%), had the lowest share working in Education.

Education's significant role in the employment profile of most western counties is also partly due to the lower level of activity in some other sectors e.g. financial services, ICT, which leads to lower economic diversity and greater reliance on public sector employment, especially for professional careers in more rural areas.

### 2.1.1 Change in employment in the Western Region and its counties

The number of people working in Education in the Western Region grew by 4.4% between 2011 and 2016 (Table 1) and the region experienced weaker growth than nationally (5.7%). The population in the 0-19 years age group grew by 3.7% nationally in this period, compared with just 0.4% growth in the Western Region, contributing to its slower growth in Education employment.

**Table 1: Number employed in Education in Western Region and state, and percentage change 2011-2016**

County	Education Sector			Total Employment % Change 2011-2016
	2011	2016	% Change 2011-2016	
Clare	4,380	4,579	4.5%	8.6%
Donegal	5,910	6,328	7.1%	9.5%
Galway City	3,463	3,465	0.1%	10.8%
Galway County	7,278	7,652	5.1%	8.5%
Leitrim	1,117	1,159	3.8%	6.3%
Mayo	4,244	4,365	2.9%	4.8%
Roscommon	2,187	2,284	4.4%	5.9%
Sligo	2,405	2,517	4.7%	2.2%
<b>Western Region</b>	<b>30,984</b>	<b>32,349</b>	<b>4.4%</b>	<b>7.5%</b>
<b>State</b>	<b>167,290</b>	<b>176,855</b>	<b>5.7%</b>	<b>11.0%</b>

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

Growth in Education employment in the region was also considerably lower than the growth of total employment (7.5%), explaining the decline in the sector's relative importance from 10% to 9.7% of total employment (see Fig. 1). All counties, except Sligo, experienced lower growth in Education employment than in total employment, again explaining the decline in the sector's relative importance. Sligo, the only county where Education's role increased (see Fig. 1), saw growth of 4.7%

in Education employment compared with only 2.2% growth in total employment.

Donegal and Galway County, where Education plays its biggest role, also saw the strongest growth in Education employment in the region during 2011 to 2016 (7.1% and 5.1% respectively). Galway City saw the smallest growth in Education (0.1%) but the largest growth in total employment (10.8%) explaining the substantial decline in the role played by this sector for Galway City residents. Some of the growth in Galway County could have been due to people moving from the City to live in the County.

Section 2.2 examines employment by Education sub-sector which illustrates which elements of Education drove growth in different counties.

## 2.2 Employment in Education sub-sectors

Census data on employment in the Education sector is sub-divided into five separate activities.<sup>7</sup> Almost a third of those working in Education in the Western Region are employed in 'Primary Education' and it accounts for a larger share in the region than nationally (32.2% v 30.3%) (Fig. 2). At a quarter of all Education employment, 'Secondary Education' is next largest and again the share is somewhat higher in the region (25% v 23.3%).

The region has a lower share employed in the other three sub-sectors. 'Higher Education' which includes universities, Institutes of Technology and also Further Education providers, employs 15.2% of those working in Education in the region compared with 16.8% nationally. 15% are working in 'Other Education' (e.g. adult education centres, computer training, music schools, driving schools, sports coaching), again lower than the 16.5% nationally. It may be that there are fewer such education institutions, especially more specialised ones, in the region.

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<sup>7</sup> Appendix 1 provides detailed data for all five activities for all western counties.

**Fig. 2: Percentage of total Education employment in each sub-sector in Western Region and state, 2016**



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

The biggest variation across counties is in ‘Higher Education’. 36.7% of Galway City residents who work in Education are employed in ‘Higher Education’. The role of NUI Galway is very evident here. Commuting into the city for work at NUIG or GMIT is also likely to be a key influence on the 18.2% of Galway County residents working in ‘Higher Education’.

IT Sligo has a strong influence with 18.1% of Education employment in Sligo in ‘Higher Education’. The difference between the share working in ‘Higher Education’ in Sligo and Galway City shows the direct employment impact of a university. All other western counties have a share working in ‘Higher Education’ below the national average. Commuting to University of Limerick and Limerick IT are likely important for county Clare, while both Athlone and Sligo IT would influence ‘Higher Education’ employment in county Roscommon. Despite the presence of Letterkenny IT, ‘Higher Education’ does not account for a particularly high share of Education employment in Donegal, while the Castlebar campus of GMIT does not appear to have a strong impact on ‘Higher Education’ employment in Mayo.

Mayo however has the highest share employed in ‘Primary Education’ at 36%, other large rural counties (Roscommon and Donegal) have the next largest shares with their rural settlement patterns requiring a large number of primary schools to serve the population. Similarly for ‘Secondary Education’ the rural counties of Leitrim, Roscommon and Donegal have the largest shares. This is both to serve their rural population distribution and, in the case of Leitrim and Roscommon, the absence of a Higher Education institution increases the relative importance of the other sub-sectors.



The share working in 'Pre-primary Education' ranges from 17.2% in Sligo to only 7.5% in Galway City. This was the sub-sector which showed the greatest change in recent years.

### 2.2.1 Change in employment in Education sub-sectors

For the Western Region, 'Pre-primary' saw by far the strongest growth in employment between 2011 and 2016, increasing by 44.8%, with 38% growth nationally (Table 2). This period coincided with the introduction of the Early Childhood Care and Education (ECCE) Scheme providing a free pre-school place to all children for one year (this has since been extended to two years). The impact of the ECCE Scheme on employment in Pre-primary education is very striking and a clear indication of the direct impact which a Government policy, though introduced for other reasons, can have on employment.

For every county, 'Pre-primary' was the sub-sector with the strongest employment growth ranging from 78.4% in Donegal (to 801 persons employed) to 17.5% growth in Leitrim (to 134 people). It should be noted that 'Pre-primary Education' is counted in Education, whereas childcare is counted in the Health & Care sector. As some childcare facilities also offer 'Pre-primary' services, whether an individual working in such a facility is assigned to Education or to Health & Care, depends on how they describe their job on their Census form.

**Table 2: Percentage change in employment in Education sub-sectors in Western Region and state, 2011-2016**

County	% Change in Employment 2011-2016					
	Pre-primary	Primary	Secondary	Higher	Other Education	Total
Clare	50.9%	0.6%	-8.4%	9.8%	2.3%	4.5%
Donegal	78.4%	1.8%	-2.7%	-0.5%	9.3%	7.1%
Galway City	23.1%	7.2%	-15.6%	-3.9%	13.3%	0.1%
Galway County	24.1%	7.2%	-7.5%	1.9%	16.5%	5.1%
Leitrim	17.5%	3.7%	-1.4%	-9.8%	14.1%	3.8%
Mayo	54.9%	-0.2%	-10.7%	-11.0%	16.8%	2.9%
Roscommon	20.6%	8.3%	-1.4%	0.9%	-2.9%	4.4%
Sligo	71.1%	7.3%	-6.4%	-11.1%	-4.9%	4.7%
<b>Western Region</b>	<b>44.8%</b>	<b>3.8%</b>	<b>-7.0%</b>	<b>-1.6%</b>	<b>9.4%</b>	<b>4.4%</b>
<b>State</b>	<b>38.0%</b>	<b>7.2%</b>	<b>-5.0%</b>	<b>-1.3%</b>	<b>8.2%</b>	<b>5.7%</b>

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

For several counties (all except Clare, Roscommon and Sligo) the 'Other Education' sector had the next highest growth, growing quite strongly in Mayo (16.8% to 680 people) and Galway County (16.5% to 1,158 people). Sligo and Roscommon however saw declines in this area with Sligo also experiencing declines in both 'Higher Education' and 'Secondary Education'. In fact every western county had a fall in the number working in 'Secondary Education', highest in Galway City (-15.6%) and Mayo (-10.7%). Galway City and Mayo had very low growth in the number of secondary school

pupils during 2011-2016 at 1.3% and 1.7% respectively, compared with a Western Region average of 3.9%.<sup>8</sup>

‘Higher Education’ employment also fell in many counties, down 11.1% in Sligo and 11% in Mayo, both counties with a higher education institution/campus. Clare however saw strong growth (9.8%) in the number of its residents working in ‘Higher Education’, as mentioned above, commuting to UL may be a strong factor here. ‘Primary Education’ increased in all counties except Mayo which had a marginal decline. Mayo had the smallest growth in the number of primary school pupils across all western counties during 2011-2016, just 0.5% compared with a Western Region average of 4.3%.<sup>9</sup>

### 2.3 Employment in western towns

In 2016 there were 40 urban centres with a population over 1,500 in the Western Region. The relative importance of the Education sector varies across these towns. It is the largest employment sector for one town – Moycullen, Co Galway.<sup>10</sup> 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. In the case of Moycullen, where nearly 1 in 5 working residents work in Education (142 people), it is likely that many are commuting into Galway City, especially to NUIG or GMIT. Moycullen has the highest share of residents working in Education among Ireland’s 200 towns and cities.

There is no clearly discernible pattern in the relative importance (as a percentage of total employment) of the Education sector across the 40 towns, ranked by descending size (Fig. 3). Factors such as proximity to a Higher Education institution, age profile, diversity of the local economy and alternative job options combine to determine the role played by the sector in a town.

As with Moycullen, the influence of Galway City is clear for Bearna, which has the second highest share working in Education in the region (13.3%, 119 people). For Strandhill (12.2%, 97 people), Carndonagh (11.9%, 95 people) and Buncrana (11.5%, 275 people), commuting to IT Sligo and Letterkenny IT respectively would be important as well as local Education provision. In the case of Carndonagh and Buncrana cross-border commuting from Inishowen to Derry City could also be a factor.

Among the region’s six largest urban centres (10,000+), Letterkenny (11.4%, 883 people) has the highest share of employment in Education due to the presence of Letterkenny IT and also the fact that Industry plays a considerably smaller role in Letterkenny’s employment profile compared with the other large towns<sup>11</sup> therefore increasing the relative importance of other sectors such as Education.

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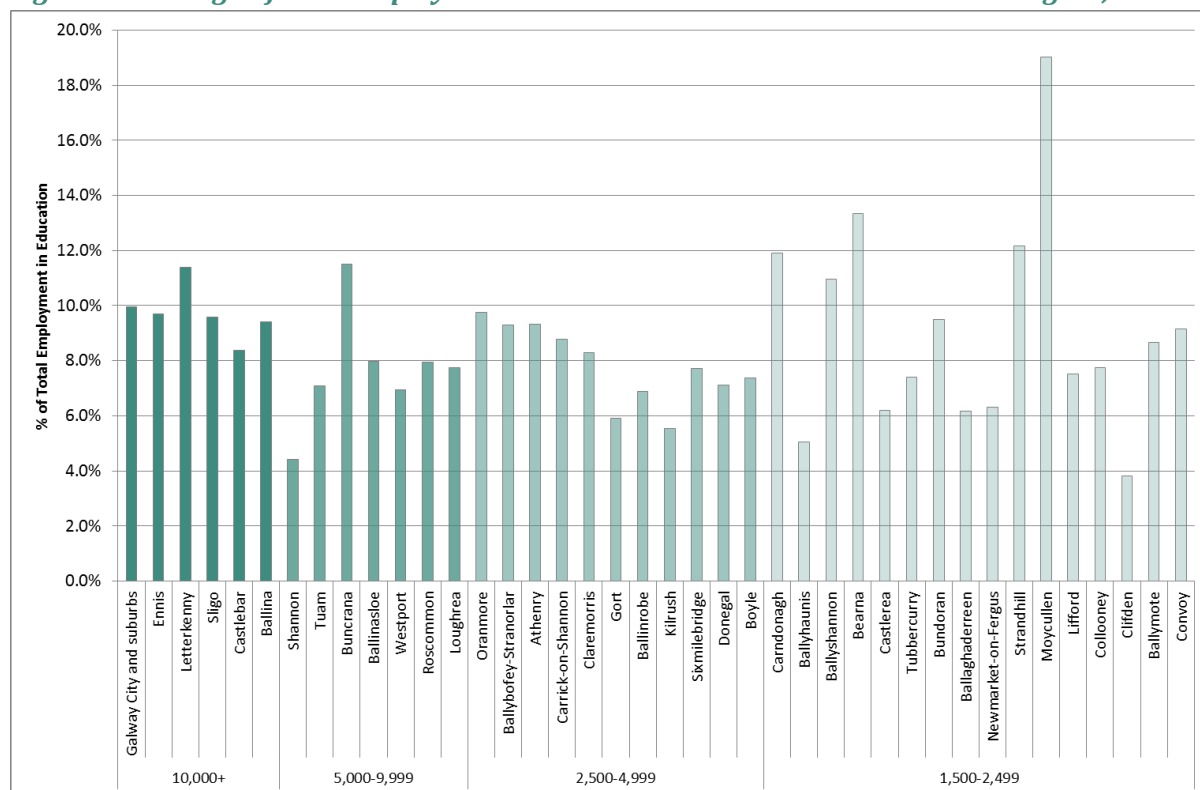
<sup>8</sup> Department of Education and Skills <https://www.education.ie/en/Publications/Statistics/Statistical-Reports/Other-Statistical-Reports.html>

<sup>9</sup> *ibid*

<sup>10</sup> See Appendix 2 for more detailed data on Education employment in towns.

<sup>11</sup> 6.3% of Letterkenny residents work in Industry compared with 12.7% in Sligo and 15% in Ennis.

**Fig. 3: Percentage of total employment in Education 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

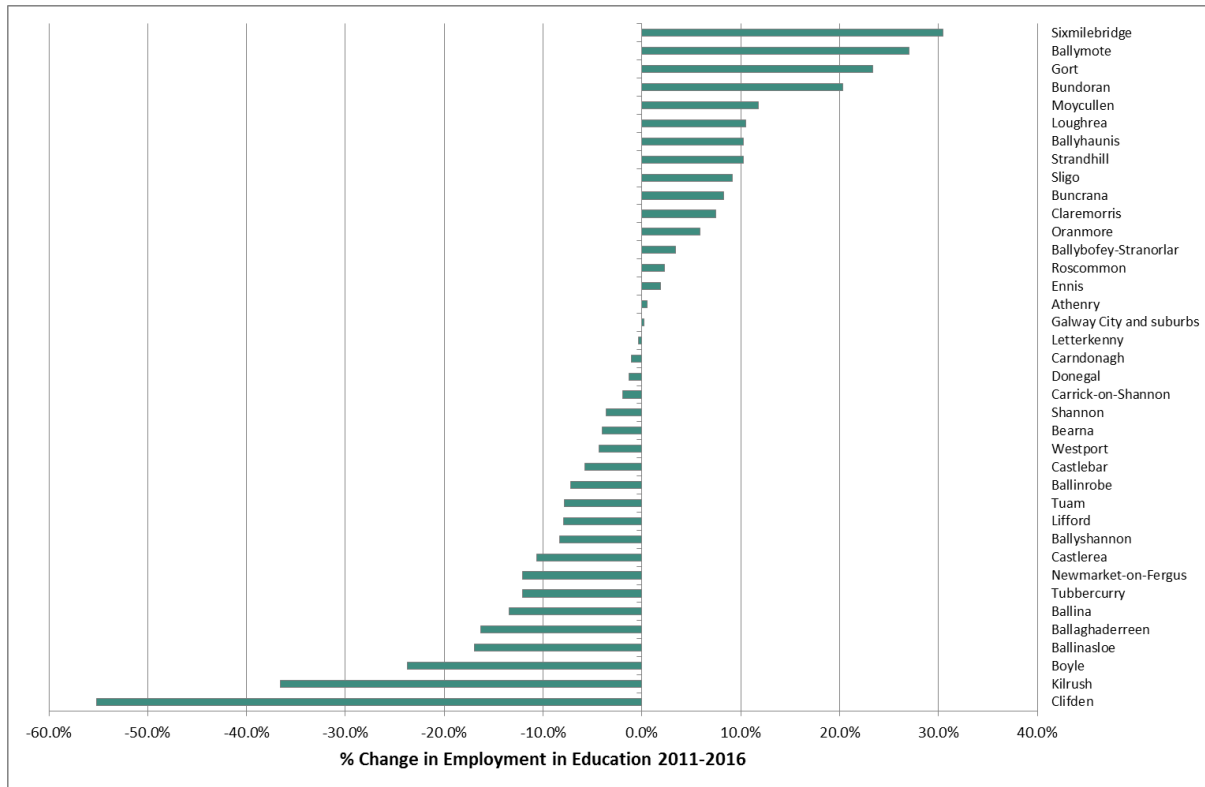
There are 38 towns in the Western Region which had a population above 1,500 in both 2011 and 2016.<sup>12</sup> Of these, 21 towns experienced decline in the number of people working in Education between 2011 and 2016 and 17 had an increase (Fig. 4).

Sixmilebridge in Co Clare (30.4%, +21 people), Ballymote in Co Sligo (27%, +10 people) and Gort in Co Galway (23.3%, +14 people) had the most substantial percentage growth. Towns such as Sixmilebridge, Ballymote, Gort, Moycullen and Loughrea, which are in commuting distance of large urban centres, saw strong growth both because of commuting to work in Education institutions in these centres and also because of increased demand for Education in these fast-growing and relatively young commuter towns. For example 33.9% of the population of Sixmilebridge is aged under 18 years.

More towns experienced a fall in Education employment than growth however. Clifden which had the largest decline (-55.2%, -32 people) also suffered the largest population decline of all western towns, partly due to the closure of a Direct Provision Centre in 2012 which likely also impacted on employment in the Education sector. Just 21.7% of Clifden’s population is aged 0-18 years. The other towns with large declines, Kilrush (-36.6%, -26 people), Boyle (-23.8%, -14 people) and Ballinasloe (-17%, -37 people) also tend to have smaller shares of young people.

<sup>12</sup> 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.

**Fig. 4: Percentage change in employment in Education 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*.

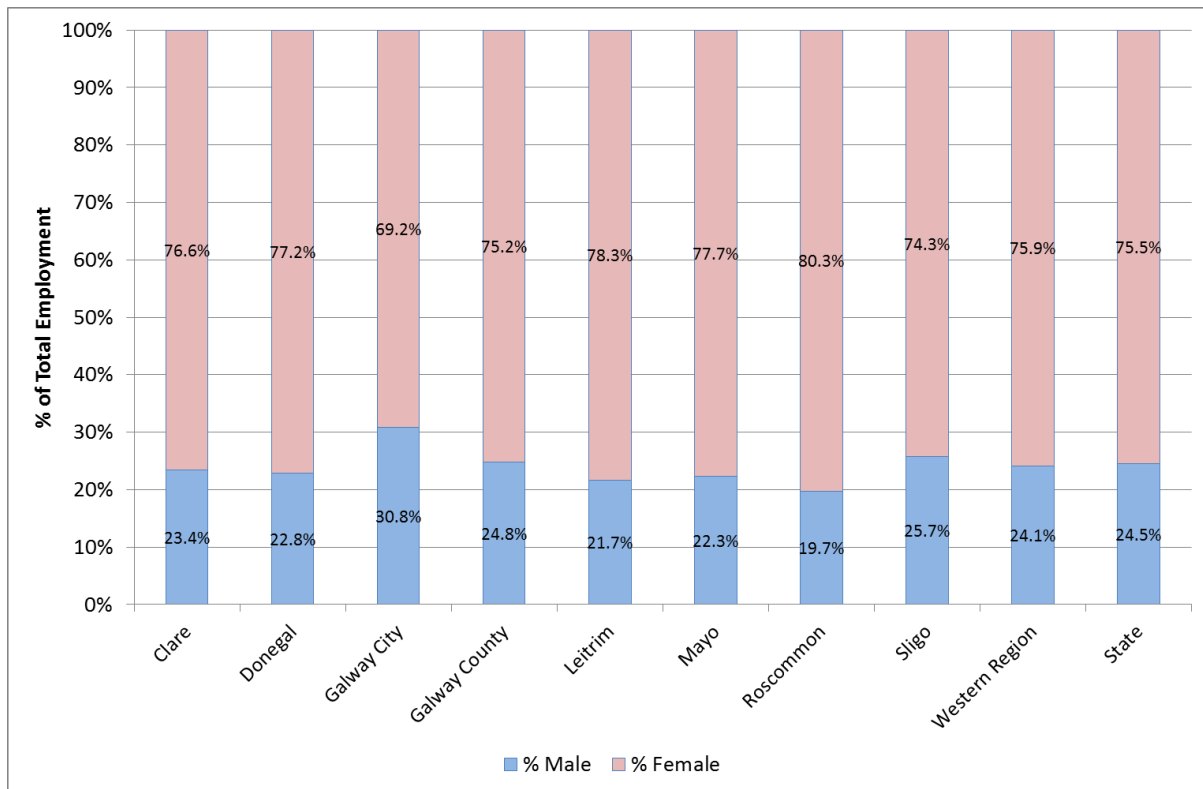
Note: In the case of Ballina, a significant town boundary change reduced its population and the actual decline in employment in this sector is likely less than it appears in Fig. 4.

## 2.4 Employment by gender

In the Western Region 75.9% of people working in the Education sector are female, almost the same share as nationally (Fig. 5). The female share increased slightly since 2011, when it was 75% in the region and 74.8% nationally.

Women account for a large majority in all western counties, with Galway City (69.2%) having the lowest female share and Roscommon and Leitrim (80.3% and 78.3% respectively) the highest. While data is not published on employment by gender for the Education sub-sectors, the fact that these two counties do not have a Higher Education institution, indicates that the other elements of the Education sector are more strongly female-dominated.

**Fig. 5: Percentage of total employment in Education in Western Region and state by sex, 2016**



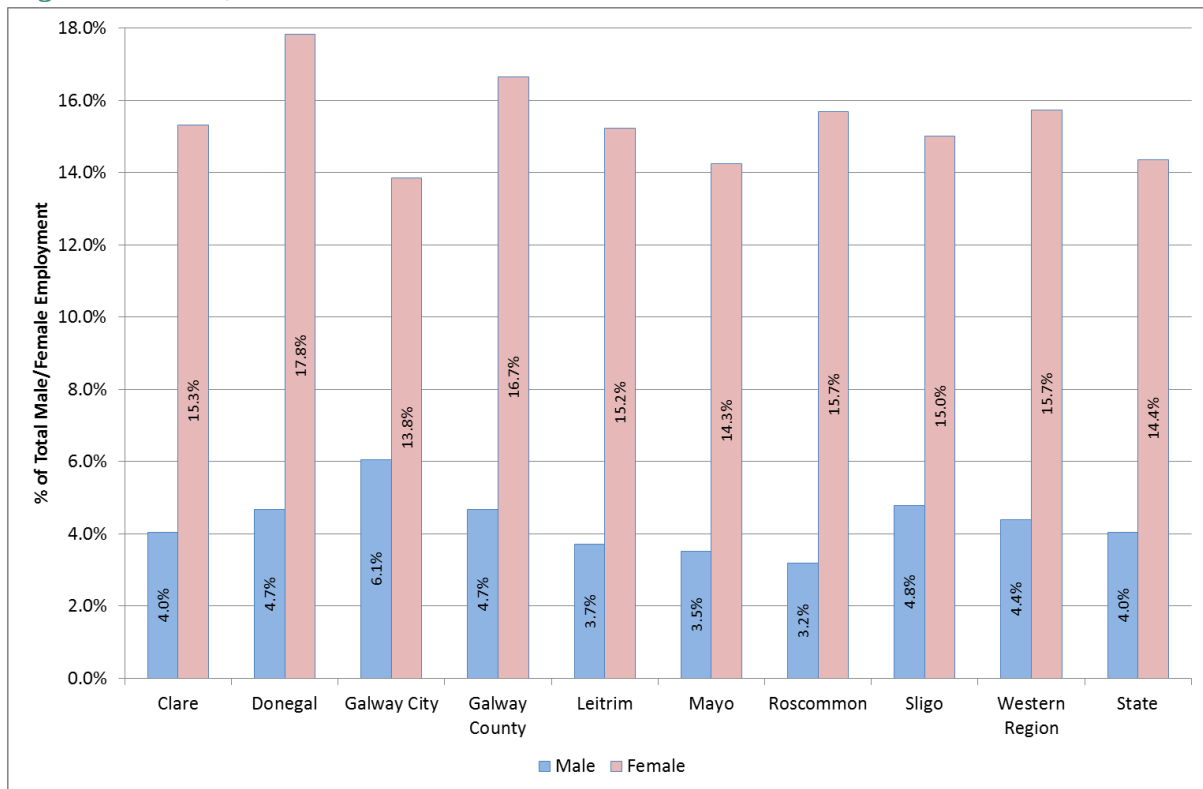
Source: CSO, Census 2016: Summary Results Part 2, Table EZ011

In terms of the sector’s relative importance to male and female employment (Fig. 6), 15.7% of all working women and 4.4% of all working men in the Western Region work in Education. The sector plays a more significant role in both female and male employment in the region than nationally.

As with total employment in Education, Donegal is where Education plays the largest role in women’s work accounting for 17.8% of total female employment. Galway County and Roscommon have the next highest shares. More limited options for alternative professional career opportunities, particularly in more rural areas, would likely increase the role of Education for women’s employment.

For male employment, Galway City is where Education is most important with 6.1% of working men working in Education. As noted above, Galway City has by far the greatest share working in ‘Higher Education’ again indicating that third level education has a greater degree of male employment than the other Education sub-sectors. Galway City is also where the sector is least important for female employment at 13.8%. This also reflects greater diversity in professional job options and lower reliance on the public sector.

**Fig. 6: Percentage of total male and female employment that is in Education in Western Region and state, 2016**



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

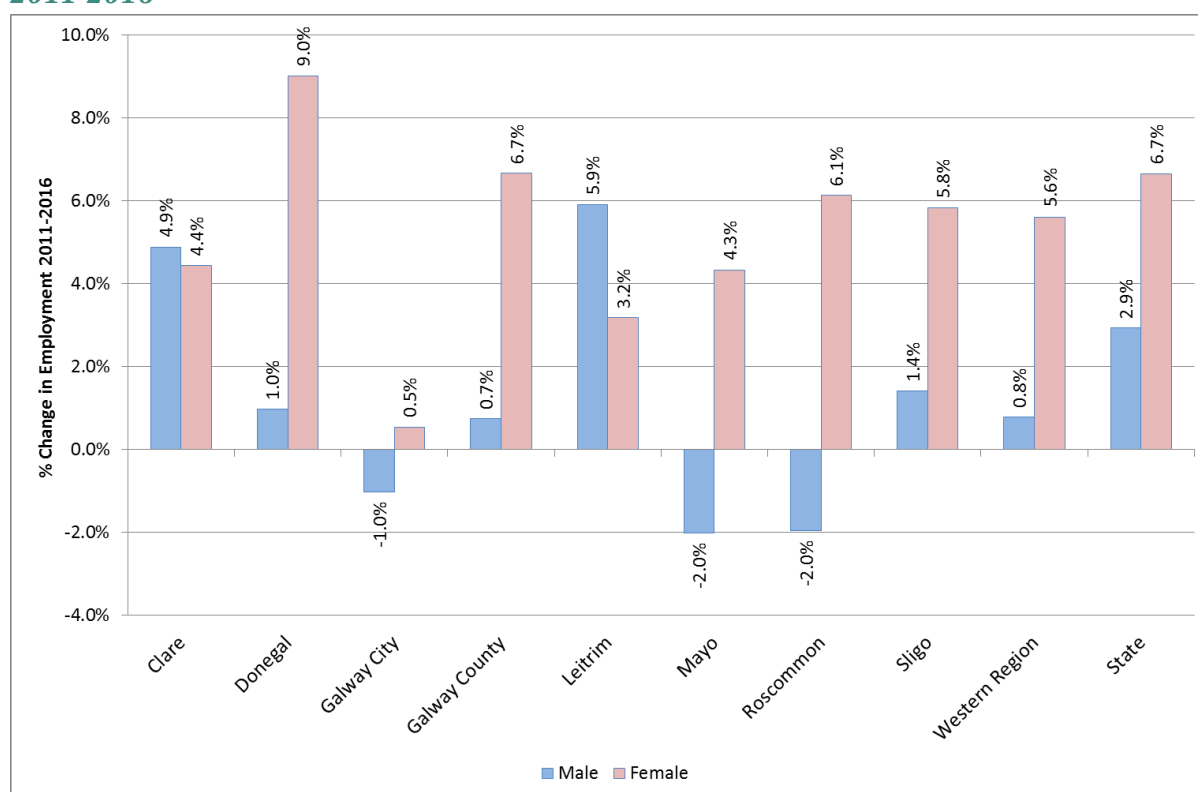
### 2.4.1 Change in employment by gender

The period 2011 to 2016 saw female employment in Education grow 5.6% in the Western Region, while male employment grew marginally (0.8%) (Fig. 7). As noted in Section 2.2.1, ‘Pre-primary Education’, which has a very high proportion of female involvement, was the strongest growing sub-sector in the region which helps explain the stronger performance of female employment. The region had notably lower growth in both male and female employment than the national average.

All western counties, except Leitrim and Clare, experienced considerably stronger female than male jobs growth in this period. Donegal, which had the highest growth in ‘Pre-primary Education’, also had the highest growth in female employment. Mayo, Roscommon and Galway City actually saw a decline in the number of men working in Education. In the case of Mayo and Galway City declines in ‘Higher Education’ (see Table 2) could be a factor.

Leitrim, where male employment out-performed female, had the smallest growth in ‘Pre-primary’ in the region which restricted the growth of female employment. Clare, the only other county with stronger male employment growth, had the highest growth in ‘Higher Education’ which has greater male involvement.

**Fig. 7: Percentage change in employment in Education in Western Region and state by sex, 2011-2016**



Source: CSO, Census 2016: Summary Results Part 2, Table EB027

## 2.5 Self-employment in Education

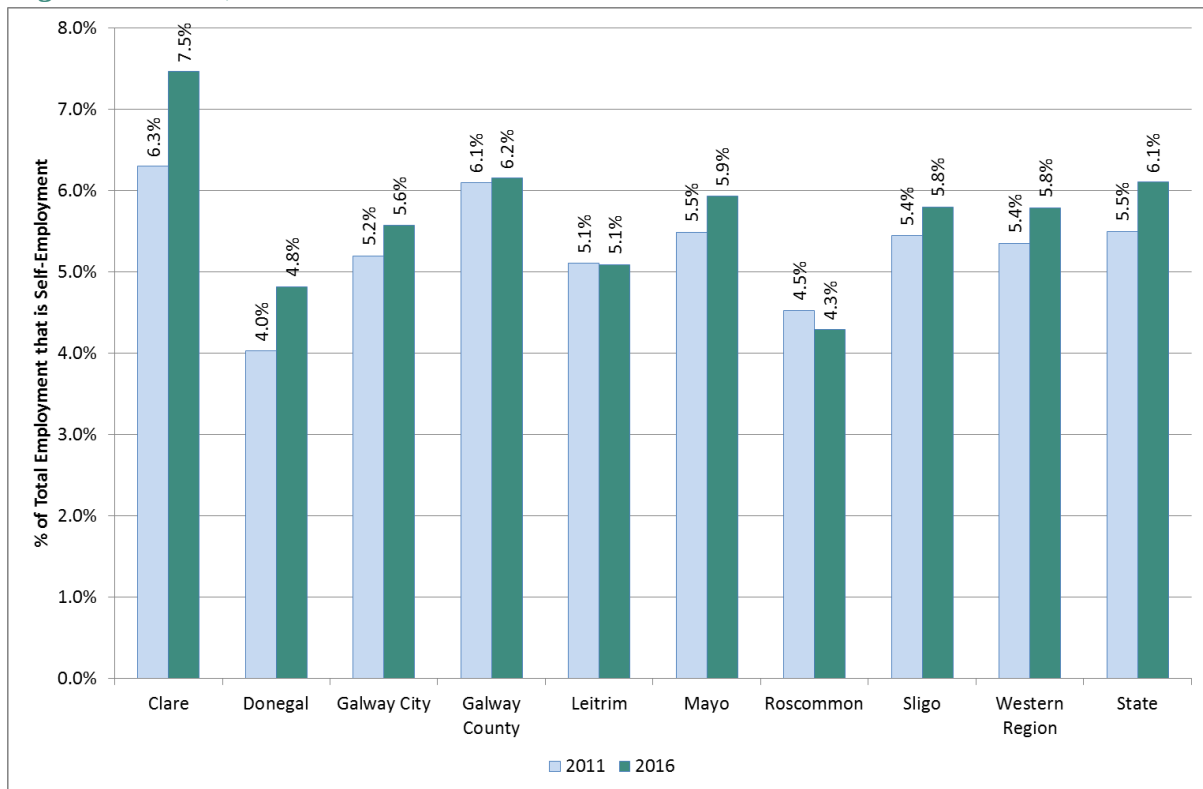
Of the 32,349 people working in Education in the Western Region, 5.8% (1,873 people) are self-employed (employer or own account worker). The Western Region is characterised by slightly lower self-employment in Education than the national average (6.1%) (Fig. 8). Given the dominant role of the public sector in Education, self-employment is considerably less common than generally across the economy.<sup>13</sup> While data is not available on self-employment in the sub-sectors, it is likely to be more common in 'Other Education' (e.g. driving schools, music schools, gym instruction etc) and 'Pre-primary' than in other Education activities.

At 7.5%, Clare had by far the highest level of self-employment in 2016, followed by Galway County (6.2%). This indicates greater private sector involvement in Education in these areas and perhaps greater diversity in Education provision. In contrast, with under 5% self-employment, the public sector seems to be particularly dominant in Roscommon and Donegal. Section 3.2 examines enterprise numbers in the Education sector and shows a similar pattern.

Between 2011 and 2016 the share of all employment that was self-employment increased or was unchanged in all counties except Roscommon. The increase in the share was particularly significant in Clare from 6.3% to 7.5%. While it also had the highest share in 2011, the gap between it and the next highest grew considerably.

<sup>13</sup> 18.3% of all employment in the Western Region is self-employment, compared with 5.8% in Education. In the state, 15.6% of all employment is self-employment compared with 6.1% in Education.

**Fig. 8: Percentage of total employment in Education 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.

### 2.5.1 Change in self-employment

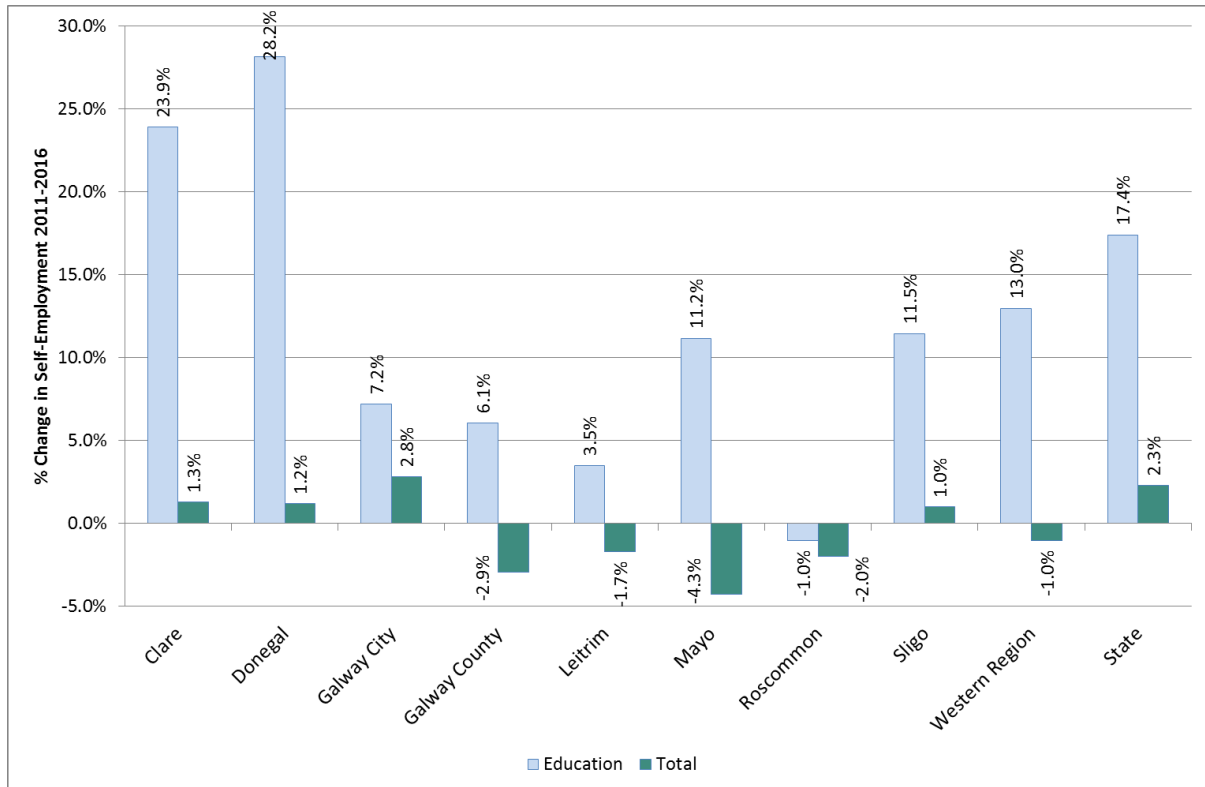
In the Western Region, the number of self-employed people working in Education grew by 13% between 2011 and 2016 (Fig. 9). This compares with 1% decline in total self-employment over the same period, indicating that self-employment in Education grew considerably more strongly than in other areas, though from a quite low base.

One trend influencing this growth could be the move towards more people being employed as ‘self-employed contractors’ rather than as employees in certain activities, in both the private and public sector. The increase in self-employment in Education in the region (13%) was considerably below the national growth of 17.4%. This may indicate that this trend is less common in the region, as well as pointing to lower private sector activity. As noted in Section 2.2, the Western Region has a smaller share of employment in ‘Other Education’ activities where self-employment may be most prevalent.

In every county, self-employment in Education out-performed total self-employment. Counties Donegal and Clare had the strongest growth in self-employment in Education. Roscommon was the only county with a decline, likely influenced by the fact it had a decline in employment in ‘Other Education’ where self-employment would be more common.



**Fig. 9: Percentage change in self-employment in Education sector 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.

### 3.0 Education Enterprises

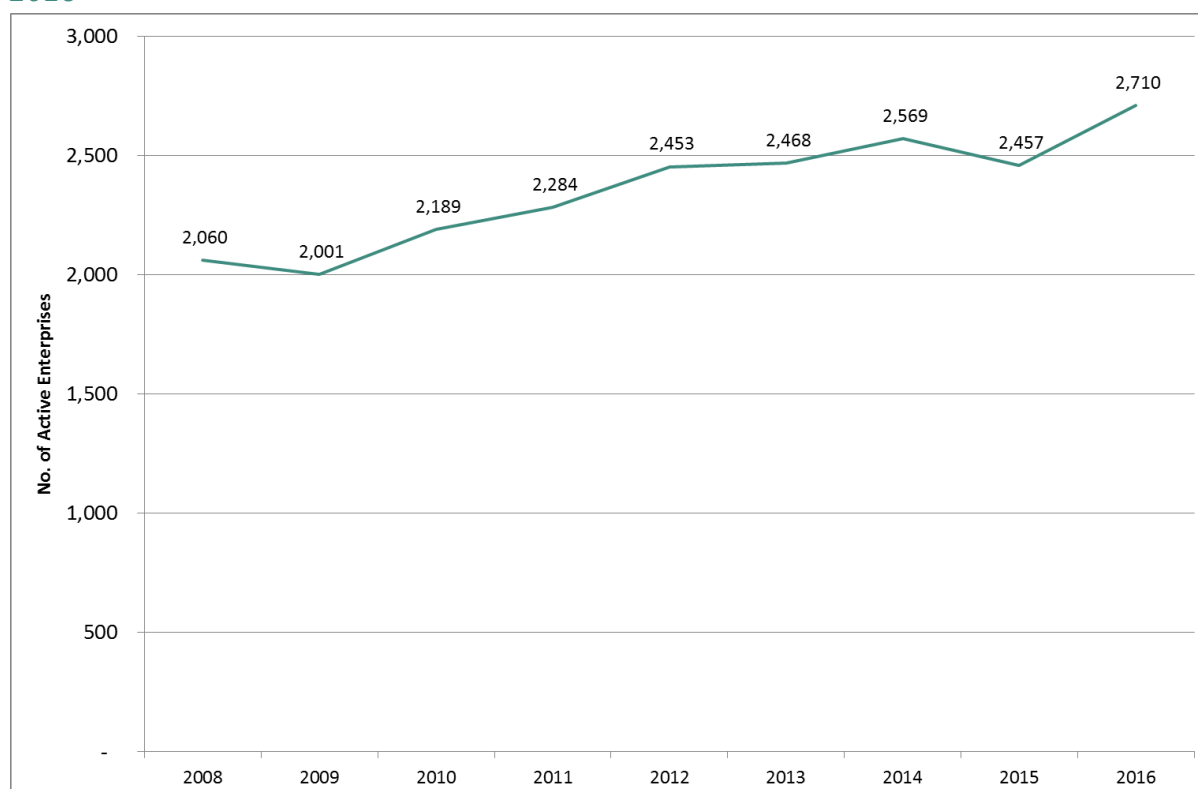
In this section we examine enterprise numbers in the Education sector in the Western Region and counties. This data is from the CSO Business Demography and includes all Education entities such as primary and secondary schools, training colleges, driving schools, third level colleges etc. which are in public, private or community/voluntary ownership and which have a registration address (with the Revenue Commissioners) located in the Western Region.

#### 3.1 Number of Education Enterprises in the Western Region

In 2016 there were 2,710 Education enterprises registered in the Western Region (Fig. 10) which would include the 890 primary and 168 secondary schools in the region. There has been relatively steady growth in the number of Education enterprises over the 2008-2016 period with a low point in 2009 when there were 2,000. While there is no data on the type of Education enterprises, employment data indicates growth in the number of pre-primary and 'other education' enterprises. The growth in the number of enterprises is consistent with the earlier finding of increasing self-employment in the sector (see Section 2.5).

In 2016, the Western Region was home to 19.8% of all Education enterprises in the state.

**Fig. 10: Number of active Education enterprises registered in the Western Region, 2008-2016**



Source: CSO, Business Demography 2016, Table BRA18.

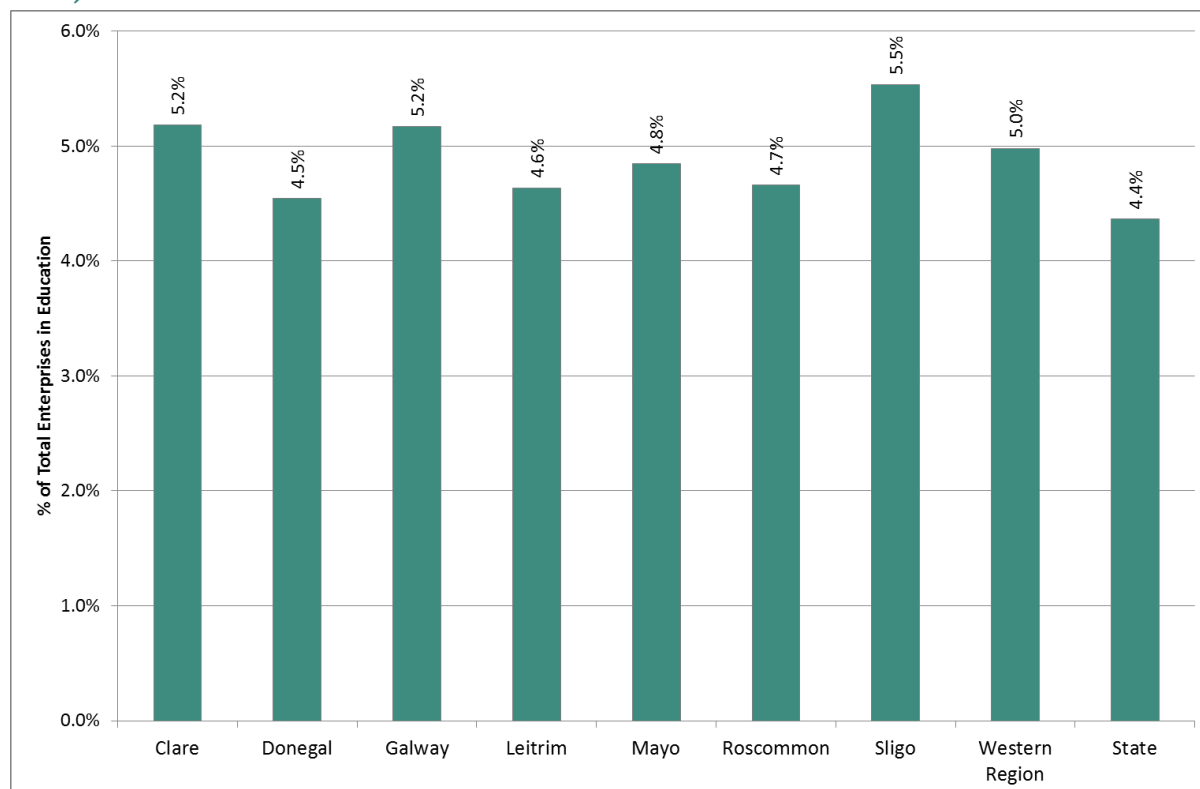
#### 3.2 Share of Education Enterprises

5% of all enterprises registered in the Western Region in 2016 were in the Education sector (Fig. 11). This was above the 4.4% share nationally, again reinforcing the finding from the employment data that Education plays a more significant role in the regional economy. This is partly due to a less diverse enterprise mix in the region with fewer enterprises involved in other areas such as

knowledge intensive services (e.g. IT, professional and financial services) which in turn increases the relative importance of other sectors such as Education.

Education’s share of all enterprises (5%) in the region is considerably below its share of all employment in the region (9.7%). This is because the sector is characterised by some very large entities e.g. secondary schools, IoTs, which would only count as one enterprise but would employ a large number of people.

**Fig. 11: Education enterprises as a percentage of total enterprises in Western Region and state, 2016**



Source: CSO, Business Demography 2016, Table BRA18.

Sligo is where the sector accounts for the largest share of enterprises (5.5%) with Clare and Galway<sup>14</sup> next highest (5.2%). As noted in Section 2.5, Clare and Galway have the highest shares of self-employment in Education perhaps indicating greater private sector involvement in the sector in these counties.

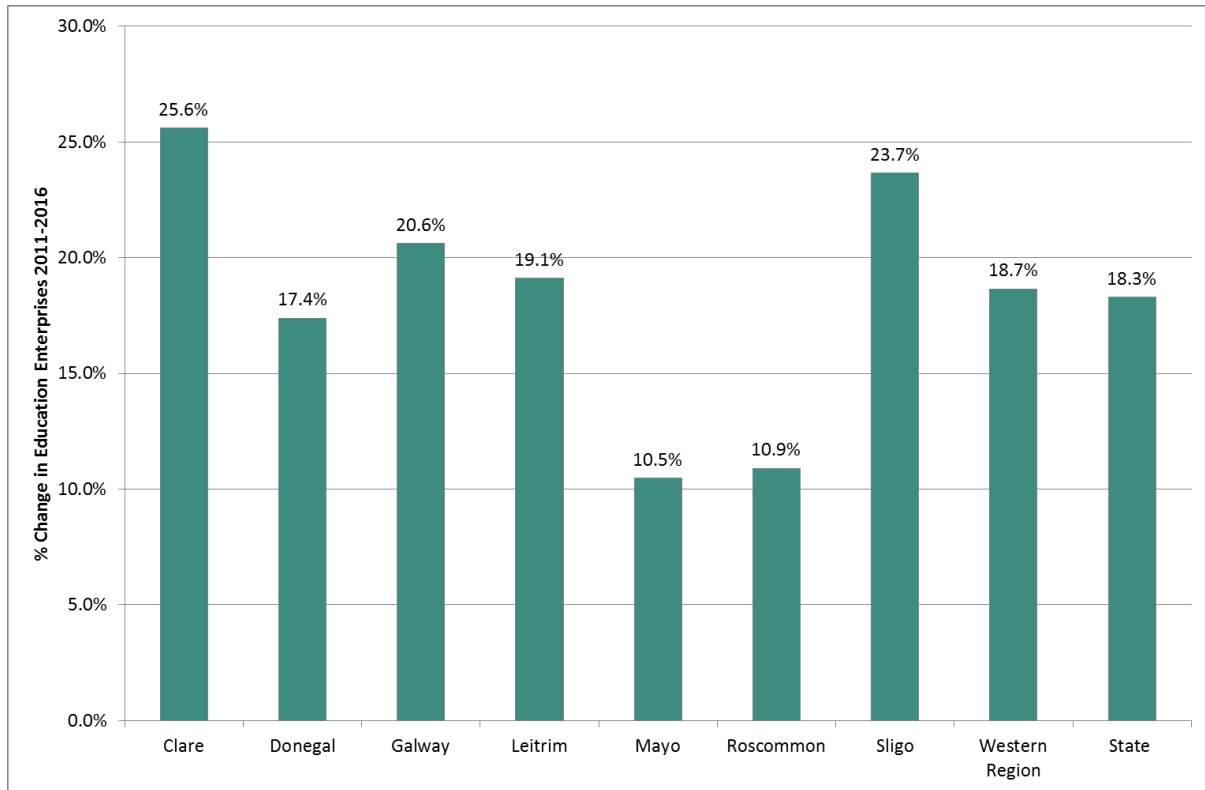
Donegal, where Education is most important as an employer (10.8% of all employment) is where it is least important as a share of all enterprises (4.5% of all enterprises). Residents of Donegal who commute to work in Education in Northern Ireland or Sligo would be counted in Donegal’s employment figures but the Education institutions they work for would not be counted in Donegal’s enterprise numbers.

The number of Education enterprises in Clare grew by a quarter between 2011 and 2016 (Fig. 12), the strongest growth in the region and considerably above the national average (18.3%). Sligo had

<sup>14</sup> Business Demography data does not distinguish between Galway City and Galway County.

the next highest growth (23.7%) contributing to the current high share of its enterprises that are in Education (see Fig. 11). While all western counties saw strong growth in the number of Education enterprises, Mayo and Roscommon had the weakest performance indicating less private sector activity and less diversity in Education provision.

**Fig. 12: Percentage change in the number of Education enterprises registered in Western Region and state, 2011-2016**



Source: CSO, Business Demography 2016, Table BRA18.

## 4.0 Key Policy Issues for the Western Region's Education Sector

As the fourth largest employer in the Western Region the Education sector plays a central role in the regional economy, in addition to its role in providing vital services. Some of the key issues for the Western Region's Education sector are discussed below.

### Higher reliance on the Education sector in the Western Region

Education is a more significant employer in the Western Region than nationally. Donegal and Galway County have the highest shares working in Education in the country. Education plays a critical role in providing professional career opportunities, including in more rural areas where there may be fewer alternatives. This higher reliance means that developments, such as the moratorium on recruitment in the public sector from 2009 onwards, had a greater economic impact in the region than elsewhere. While the main focus for Education policy must be on the provision of quality services, the sector's parallel role as a provider of jobs, particularly in the Western Region, should also be a factor in policy decisions.

### Central role in female employment

3 in 4 people working in the Education sector in the Western Region are female and Education plays a more significant role in female employment in the region than nationally. Galway City has the lowest female share, and Roscommon and Leitrim have the highest, indicating that Higher Education has lower female involvement than other Education sub-sectors. More limited alternative professional career opportunities, particularly in more rural areas, increases the role of Education for women's employment. Women's employment in this sector can also help maintain the viability of farming households.<sup>15</sup> Any future development in this sector will have a far greater impact on female than male employment levels.

### Demographic Factors

The Department of Education and Skills develops projections<sup>16</sup> of future demand for primary, post-primary and third level education, based on demographic trends. Their most recent projections for primary school enrolments is that these will have peaked in 2018. While these projections are not published at regional or county level, nationally primary enrolment is projected to decline by almost 100,000 to 2036.<sup>17</sup> For second level education, the numbers are projected to peak later, in 2024, and decline thereafter. The projected decline in demand for primary and secondary education in the medium-term will impact on future employment trends in the Education sector.

Demand for full-time third level education is more varied than the demand for primary or secondary education. As well as direct transfers of young people from secondary school (the rate of which has been increasing), demand for third level also comes from mature students returning to education and from international students. It is projected that full-time student enrolments for third level education will peak around 2030<sup>18</sup> and decline thereafter.

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<sup>15</sup> CSO (2018), Who Marries Whom? - An Occupational Hazard, states that primary teachers (7%) is the third most common occupation for women married to male farmers.

<sup>16</sup> <https://www.education.ie/en/Publications/Statistics/Statistical-Reports/Other-Statistical-Reports.html>

<sup>17</sup> This is based on the M2F1 migration and fertility scenario which is considered the most likely.

<sup>18</sup> A number of different scenarios of the rate of progression to third level and international student numbers are projected and the year when numbers will peak differs across the scenarios.

All of these projections are based on a number of assumptions and substantial deviation from these assumptions, such as more substantial inward migration or greater emigration than projected, would change the circumstances. The general consensus however is that, in the medium-term, there will be a decline in student numbers limiting job prospects in the sector.

For higher education institutions however staff are engaged in other activities e.g. research, which are separate to student enrolments. Also these projections do not include part-time third level student enrolments which are dominated by mature students (87% of all part-time enrolments in 2017 were mature students) and therefore respond more to changes in the labour market and skill demand than to demographics. For example rising unemployment from 2008 saw a substantial increase in mature students returning to education.

### Lifelong Learning

Recent years have seen an increasing recognition of the importance of lifelong learning. It is acknowledged that Education should not stop when a person leaves school or college but that there is a need to continually update skills, or acquire entirely new skills, to adapt to changing technology and an increasingly flexible labour market with more frequent job changes. As well as the demands of the labour market, lifelong learning is also pursued for leisure and enjoyment. Economic recovery and increasing disposable income, as well as increasing numbers of active retired, increase the demand for this type of learning activity.

There are regional differences however in participation in lifelong learning (Table 3), which impacts on the Education sector as providers. In the Border<sup>19</sup> region, just 5% of adults were engaged in formal education.<sup>20</sup> This was the joint lowest share. In the West region it was 8% while it was highest in Dublin at 12%. A similar pattern exists for non-formal education<sup>21</sup> with the Border (38%) having the lowest share, while it is 49% in the West and 57% for Dublin adults.

Clearly there is considerable potential for increased participation in lifelong learning in both the Border and West regions. The Government's Action Plan for Education 2018<sup>22</sup> sets a target of 10% of adults to be engaged in formal lifelong learning by 2020 and 15% by 2025. Meeting this target, particularly in the Border region, will require a very substantial uplift in participation and this represents an opportunity for further growth and employment in the Western Region's Education sector.

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<sup>19</sup> Note this refers to the revised regional classification which began to be used by the CSO in 2018. The Border region includes Donegal, Sligo, Leitrim, Cavan and Monaghan. Louth, which was previously included in the Border region, is now in the Mid-East region. The West region is unchanged (Mayo, Galway and Roscommon).

<sup>20</sup> Formal education is education provided by an institution with a programme of study recognised by the national authority and lasting at least 6 months.

<sup>21</sup> Non-formal education is organised learning provided by an institution but not leading to a nationally recognised qualification and may last less than 6 months, would include hobbies.

<sup>22</sup> Department of Education and Skills (2018), Action Plan for Education 2018 <https://www.education.ie/en/The-Department/Action-Plan-for-Education-2016-2019/>

**Table 3: Participation by adults (25-64 years) in lifelong learning activities, 2017**

Region*	Persons (25-64) who participated in an educational activity in past 12 months			Persons who wanted to participate more in Lifelong Learning. Selected Difficulties Identified	
	Formal Education (%)	Non-Formal Education (%)	Lifelong learning (Formal + Non-Formal) %	Training took place at a distance hard to reach (%)	No access to a computer or internet for distance learning (%)
Border	5	38	41	20	3
Midland	5	52	55	6	0
West	8	49	53	12	2
Dublin	12	57	63	3	0
Mid-East	5	47	50	7	1
Mid-West	9	50	54	14	1
South-East	8	45	49	7	1
South-West	8	47	51	13	2

Source: CSO, Adult Education Survey 2017

\*These regions are the revised NUTS3 regions. The changes in the revised regions, compared with previous regional classification, are that Louth has moved from the Border region to the Mid-East region and Tipperary South has moved from the South East to the Mid-West region <https://wdcinsights.wordpress.com/2018/07/03/nuts-about-nuts/>

The same CSO Adult Education Survey<sup>23</sup> also asked about the barriers to increased participation. Respondents who said they would like to participate in more lifelong learning, but experienced difficulties, were given a range of 12 options, the results for two of these are given in Table 3. In the Border, distance from training providers was given as a difficulty by 20% of respondents, the highest of all regions. Poor online access for distance education was a barrier for 3% in the Border, again the highest of all regions.

Policy actions to address these barriers to accessing lifelong learning in the Western Region are required in order to meet the Government’s lifelong learning target, to ensure the necessary skills are available within the labour force, to increase demand for lifelong learning services and, most importantly, to improve the employment prospects for the region’s residents.

### Regional Skills

The Education sector is largely responsible for providing skills needed by the regional economy. Skills needs of the region are continually changing to adapt to current and future economic trends. For example strong growth in the Medical Technology sector increases demand for engineering, science and operative skills, while an ageing population increases the demand for qualified care workers.

Provision of regional skills involves a wide range of education providers including the Education and Training Boards, Institutes of Technology, NUI Galway and private sector training providers. Close engagement between the Education sector and regional employers is necessary to ensure skills needed for future growth are present in the region, as well as ensuring that people are equipped

<sup>23</sup> <https://www.cso.ie/en/releasesandpublications/er/aes/adulteducationsurvey2017/>

with skills that are in demand in the labour market. Regional Skills Fora<sup>24</sup> provide a structure where education providers and industry can discuss and agree how future skills needs can be met.

These changing skill demands impact on employment in the Education sector, as these emerging skill needs can only be provided if teachers, lecturers and trainers with expertise in these new areas e.g. artificial intelligence, big data, are available. The recent introduction of new apprenticeship programmes e.g. Laboratory Analyst, Insurance Practice, ICT Network Engineering, to widen the apprenticeship route beyond the traditional construction trades is an example of how the Education system has adapted to meet the skill demands of the labour market and needs of learners.

### Emerging Opportunities

As noted above, the introduction of the ECCE Scheme providing a free pre-school place to all children had a very direct and strong impact on the numbers employed in Pre-primary Education. While the employment impact would not have been a main consideration in the introduction of this initiative, it nonetheless had a large impact.

Other potential opportunities for growth in the Education sector include Brexit. It is estimated that 10,000 students from the Republic of Ireland study in Britain and Northern Ireland. For students in the border counties, study in the Northern Ireland is particularly common. Brexit may make this more difficult and an opportunity exists, for example for Letterkenny IT and IT Sligo, to attract students who may previously have chosen to study in Northern Ireland.

Since Brexit was announced in 2016, the number of Irish students applying to study undergraduate courses in the UK is down 18% indicating that this opportunity is already emerging. In addition, students from EU member states wishing to study abroad in an English-speaking country are more likely to choose Ireland following Brexit. CAO applications from students in other EU countries are up 22% since 2016.<sup>25</sup> Equally, Ireland may be in a position to compete more effectively for non-EU international students after the UK exits the EU. This presents an opportunity for the region's higher education institutions.

Another emerging opportunity is the Western Region's ageing population and growing number of retired people. This group represents potential new demand for Education services. As noted in Section 2.2.1, employment in the 'Other Education' sub-sector, which includes learning for hobbies and leisure, had the second highest growth in the region (after Pre-primary) with demand driven by increased disposable income and also by growing demand from 'active' retired. Given demographic trends of declining demand for primary and secondary education, increased demand for Education services from adults, including retired people, is an area of potential growth.

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<sup>24</sup> <https://www.regionalskills.ie/>

<sup>25</sup> <https://www.irishtimes.com/news/education/what-will-brexit-mean-for-irish-students-1.3513842>



## 5.0 Conclusion

Education is a more important source of jobs in the Western Region than nationally and as employment is quite widely distributed, helps to sustain the regional economy. Recent policy initiatives to increase access to pre-school education had a very clear impact on employment in the sector, clearly demonstrating the potential of Government policy decisions to influence the sector.

Education plays a particularly important role in providing professional career opportunities in more rural areas, where there may be fewer alternatives and is a key employment sector for women.

As well as providing direct employment, the Education sector is responsible for meeting skills needs of the regional economy, with the increasing demand for lifelong learning an area of potential growth for the region's Education sector. At present participation in lifelong learning in both the Border and West regions is behind the Government's target and needs to be substantially increased.

Demographic trends indicate declining demand for all levels of Education in the medium-term. Enrolments in primary education are predicted to have peaked in 2018 and as this cohort of children move through the different stages of the Education system, demand will decline thereafter. This means that future growth opportunities in the Education system lie in other areas such as lifelong learning, upskilling, hobby/leisure education, including among older persons and attracting EU and non-EU international students. For the third level sector, research, engagement with regional industry and other non-teaching activities will also grow in importance with the development of the Connacht-Ulster Alliance and continued expansion of NUI Galway key regional priorities.

Download **The Education Sector in the Western Region: Regional Sectoral Profile** and **WDC Insights: The Education Sector in the Western Region** [here](#)

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**Appendix 1: Population aged 15 years and over by detailed industrial group in the Education sector NACE Rev 2 in Western Region 2011 and 2016**

Detailed industrial group	Clare			Donegal			Galway City		
	2011	2016	% Change	2011	2016	% Change	2011	2016	% Change
Pre-primary education	436	658	50.9%	449	801	78.4%	212	261	23.1%
Primary education	1,537	1,546	0.6%	2,148	2,186	1.8%	751	805	7.2%
Secondary education	1,186	1,086	-8.4%	1,830	1,780	-2.7%	711	600	-15.6%
Higher education	529	581	9.8%	614	611	-0.5%	1,324	1,272	-3.9%
Other education & educational support	692	708	2.3%	869	950	9.3%	465	527	13.3%
<b>Total Education</b>	<b>4,380</b>	<b>4,579</b>	<b>4.5%</b>	<b>5,910</b>	<b>6,328</b>	<b>7.1%</b>	<b>3,463</b>	<b>3,465</b>	<b>0.1%</b>

Detailed industrial group	Galway County			Leitrim			Mayo		
	2011	2016	% Change	2011	2016	% Change	2011	2016	% Change
Pre-primary education	700	869	24.1%	114	134	17.5%	381	590	54.9%
Primary education	2,251	2,414	7.2%	376	390	3.7%	1,574	1,571	-0.2%
Secondary education	1,970	1,822	-7.5%	362	357	-1.4%	1,360	1,215	-10.7%
Higher education	1,363	1,389	1.9%	102	92	-9.8%	347	309	-11.0%
Other education & educational support	994	1,158	16.5%	163	186	14.1%	582	680	16.8%
<b>Total Education</b>	<b>7,278</b>	<b>7,652</b>	<b>5.1%</b>	<b>1,117</b>	<b>1,159</b>	<b>3.8%</b>	<b>4,244</b>	<b>4,365</b>	<b>2.9%</b>

Detailed industrial group	Roscommon			Sligo			Western Region		
	2011	2016	% Change	2011	2016	% Change	2011	2016	% Change
Pre-primary education	247	298	20.6%	253	433	71.1%	2,792	4,044	44.8%
Primary education	749	811	8.3%	646	693	7.3%	10,032	10,416	3.8%
Secondary education	657	648	-1.4%	628	588	-6.4%	8,704	8,096	-7.0%
Higher education	220	222	0.9%	512	455	-11.1%	5,011	4,931	-1.6%
Other education & educational support	314	305	-2.9%	366	348	-4.9%	4,445	4,862	9.4%
<b>Total Education</b>	<b>2,187</b>	<b>2,284</b>	<b>4.4%</b>	<b>2,405</b>	<b>2,517</b>	<b>4.7%</b>	<b>30,984</b>	<b>32,349</b>	<b>4.4%</b>

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

## Appendix 2: Population aged 15 years and over employed in the Education sector 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	3,528	11.0%	3,535	9.9%	0.2%
Ennis	1,006	10.2%	1025	9.7%	1.9%
Letterkenny	886	12.3%	883	11.4%	-0.3%
Sligo	626	8.9%	683	9.6%	9.1%
Castlebar	431	9.1%	406	8.4%	-5.8%
Ballina	394	10.1%	341	9.4%	-13.5%
Shannon	192	4.9%	185	4.4%	-3.6%
Tuam	255	8.5%	235	7.1%	-7.8%
Buncrana	254	12.2%	275	11.5%	8.3%
Ballinasloe	218	9.8%	181	8.0%	-17.0%
Westport	207	8.2%	198	7.0%	-4.3%
Roscommon	176	8.3%	180	8.0%	2.3%
Loughrea	162	8.3%	179	7.8%	10.5%
Oranmore	238	9.5%	252	9.7%	5.9%
Ballybofey-Stranorlar	148	9.7%	153	9.3%	3.4%
Athenry	177	10.5%	178	9.3%	0.6%
Carrick-on-Shannon	157	9.5%	154	8.8%	-1.9%
Claremorris	121	8.6%	130	8.3%	7.4%
Gort	60	5.7%	74	5.9%	23.3%
Ballinrobe	83	7.6%	77	6.9%	-7.2%
Kilrush	71	8.7%	45	5.5%	-36.6%
Sixmilebridge	69	6.7%	90	7.7%	30.4%
Donegal	78	7.8%	77	7.1%	-1.3%
Boyle	80	9.5%	61	7.4%	-23.8%
Carndonagh	96	15.0%	95	11.9%	-1.0%
Ballyhaunis	39	4.7%	43	5.1%	10.3%
Ballyshannon	96	12.2%	88	11.0%	-8.3%
Bearna	124	15.2%	119	13.3%	-4.0%
Castlerea	47	7.3%	42	6.2%	-10.6%
Tubbercurry	58	8.7%	51	7.4%	-12.1%
Bundoran	59	8.4%	71	9.5%	20.3%
Ballaghaderreen	43	8.1%	36	6.2%	-16.3%
Newmarket-on-Fergus	58	7.9%	51	6.3%	-12.1%
Strandhill	88	11.8%	97	12.2%	10.2%
Moycullen	127	18.0%	142	19.0%	11.8%
Lifford	38	8.7%	35	7.5%	-7.9%
Collooney	N/A	N/A	51	7.8%	N/A
Clifden	58	6.5%	26	3.8%	-55.2%
Ballymote	37	6.7%	47	8.7%	27.0%
Convoy	N/A	N/A	44	9.2%	N/A

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