

Travel to Work and Labour Catchments in the Western Region

A Profile of Seven Town Labour Catchments



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Foreword

The WDC is delighted to publish this report, *Travel to Work and Labour Catchments in the Western Region: A Profile of Seven Town Labour Catchments*. Based on Census of Population 2016 (POWSCAR) data it provides unique insights into the key labour market centres in the Western Region based on the travel to work patterns of workers living in the Region.

The Western Development Commission (WDC) aims to promote economic and social development in the Western Region (counties Donegal, Sligo, Leitrim, Roscommon, Mayo, Galway and Clare) through;

- Analysis of economic and social trends and identifying policy recommendations;
- promoting the Western Region through the LookWest.ie campaign;
- supporting the rural economy through facilitating strategic initiatives; and
- providing risk capital to businesses through the WDC Investment Fund.

This report is a WDC Insights publication, produced by the WDC Policy Analysis team who conduct analyses of regional issues of relevance to the Western Region and provide a regional perspective on national policy objectives.

This work is particularly timely given developments in government policy such as the recently launched Project Ireland 2040 which sets out regional targets for where population and jobs growth should occur and the National and the Regional Action Plans for Jobs which aims to support employment retention and creation.

At a regional level, the identification of the key employment centres in the Western Region and the potential labour supply available for future growth should provide important insights for policymakers, nationally and regionally.

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This report also examines the changes that have occurred over the last 10 years. The WDC commissioned analysis of travel to work patterns in the Region drawn from Census of Population 2006. This current report is based on the same methodology and therefore changes over the ten year period can be observed.

The Western Development Commission wishes to thank Justin Gleeson at AIRO who worked with us in undertaking this original research. The WDC is also grateful to the Central Statistics Office for making the POWSCAR data available.

Foreword

The WDC regularly publishes reports and commentary relevant to its remit, particularly in supporting balanced regional development and providing a sound foundation for evidence-based policy formulation (see www.wdc.ie). We will continue to analyse critical issues facing our Region and its future development and hope that this report, along with the WDC's other outputs, provides valuable insights for those working for the betterment of our Region.

A handwritten signature in black ink, reading "Deirdre Garvey". The signature is written in a cursive, flowing style with a small dot at the end.

Dr. Deirdre Garvey.
Chairperson
Western Development Commission
May 2018

Executive Summary

Introduction

The WDC commissioned AIRO to undertake analysis of the Census 2016 POWCAR dataset. This was to provide a detailed understanding of the travel to work patterns of workers living in the Western Region. The study was also asked to examine the changes in the travel to work patterns that have occurred since the WDC produced the original report a decade earlier, based on Census 2006 data.

A series of maps were produced to define and illustrate the labour catchments of all towns with a population greater than 1,000 in the Western Region as of April 2016. The final list of catchments and underlying statistical analysis were then used to examine in detail the travel to work patterns of seven towns; Galway, Sligo, Ennis, Letterkenny, Castlebar, Carrick-on-Shannon and Roscommon. Except for Letterkenny, each are the administrative centres of the seven counties in the Western Region. The methodology employed to define the town labour catchments is detailed in the Appendix.

This report provides a profile of the labour catchment of the largest town in each of the seven counties which comprise the Western Region. This will provide information for prospective employers and development agencies. These data can also be used in determining catchments for various services including transport, which will be of interest to transport providers, planners and local authorities. The outputs of the report will also be a useful evidence base for researchers and planners engaged with the Regional Spatial and Economic Strategies (RSES) for both the Northern and Western Regional Assembly (NWRA) and the Southern Regional Assembly (SRA) and also for the wider National Planning Framework (NPF).

Key Findings

This report identifies 42 labour catchments in the Western Region (April 2016), illustrated on Map 2.1. The geographic size of the labour catchments varies considerably, ranging from Galway city with over 70,000 resident workers, to centres with fewer than 1,000 resident workers.

Analysis of the profile of the labour catchments of the principal town in each county in the Western Region highlights the labour supply available. All the town labour catchments reviewed have significantly more people at work than the Census population at work for that town and have therefore access to a larger labour supply. For example, Galway city labour catchment has a population at work more than double the Census population of resident workers, while Carrick-on-Shannon labour catchment has a population at work approximately 4.6 times the Census population of resident workers.

Compared to a decade earlier, there has been little change in the geographic and population size of the labour catchments. The seven county town labour catchments account for an increase of only 0.5% in the total share of the total population at work and residing in the Western Region. This shows the limited change that has occurred over a long period and the need for very strong policy intervention to effect change.

In terms of ranking, the Sligo town labour catchment (21,834) is now slightly larger than the Ennis labour catchment (21,409), ranked second and third respectively in the number of resident workers in 2016.

Nationally and across the Western Region the age profile of the working population has been increasing and there has been a decrease in the rate of young workers (aged less than 30 years). Within the county

Executive Summary

town catchments, both Letterkenny (17%) and the Galway City (16.8%) catchment have by far the highest rates of young workers while Carrick-on-Shannon catchment recorded the lowest rate of workers aged less than 30 years (12.8%).

One of the most significant changes in the socio-economic profile of workers over the last decade is the rate of third level educational attainment. Within the seven county town catchments, Galway City has by far the highest rate at 61.3%, up from 49% in 2006. The Roscommon town catchment recorded the lowest rate in 2016 – 49%, up from 32.9% a decade earlier.

While the presence of a higher education institution is a factor in relatively higher rates of third level educational attainment, it is by no means the only factor. For example the Galway, Sligo and Ennis labour catchments have a rate of third level educational attainment of 54% or higher. The catchments of Castlebar (50.4%) and Letterkenny (51.6%) have lower rates, indicating that the range and quality of employment opportunities is also a key factor.

Employment by industrial group in each of the seven labour catchments shows some similarities and differences compared to the national average. Within the Western Region, both the 'Wholesale, Retail Trade'¹ (25.8%) and 'Education, Human Health and Social Work Activities' (25.4%) are the largest employers. The third most important sector is 'Manufacturing Industries'² (15.9%).

Across the State the most important sectors in terms of the share employed are 'Wholesale, Retail & Trade etc'³ (25.7%), followed by 'ICT and Professional Services etc' (20.3%) and then 'Education, Human Health and Social Work Activities' (22.8%).

The industry of employment trend in the Western Region is broadly reflected across the seven county labour catchments with the top three employers similar to the regional average. Of particular interest are the much lower rates employed in the 'ICT and Professional Services'⁴ sector across the Western Region, compared to nationally where significant growth in employment occurred between 2011 and 2016 in Ireland (CSO Census 2016). The only exception to this is in the Letterkenny labour catchment where the 'ICT and Professional Services' sector is the third largest employer.

The 'Education, Human Health and Social' sector is the largest employer in the Galway City, Sligo town, Letterkenny, Castlebar⁵ and Roscommon town labour catchments. This is in part due to the presence of third level institutions and hospitals in each of these towns, but is also likely to reflect the relative weakness of the commerce and manufacturing sectors in terms of employment. It also highlights the relative importance of public sector employment.

The socio-economic group (SEG) is determined by occupation and employment status and aims to classify those on the basis of comparable skill and educational levels. This is useful indicating the type of employment and skills available within labour catchments and is particularly informative when compared to the national socio-economic structure.

1 Wholesale, Retail etc = Wholesale, Retail Trade, Transportation and Storage, Accommodation and Food Service Activities

2 Manufacturing Industries = Manufacturing, mining and quarrying, Electricity, Gas, Water supply and Waste Management

3 Wholesale, Retail etc = Wholesale, Retail Trade, Transportation and Storage, Accommodation and Food Service Activities

4 ICT and Professional Services = Information and Communication, Financial, Real Estate, Professional, administration and support service activities

5 Joint with Wholesale, Retail etc.

Executive Summary

The socio-economic structure of the seven labour catchments is broadly similar to that of the State and are ranked in the following order of importance; Non-manual, Lower Professional, Employers & Managers, Semi-skilled and Higher Professionals.

North-east Donegal is strongly linked to Northern Ireland. This 'Derry Rural' labour catchment is the 13th largest in the Western Region and accounts for 5,056 resident workers an increase of approximately 10% (476), since 2006. This region will be most impacted by BREXIT, whichever form it takes, therefore policy needs to be developed and implemented to mitigate the impacts.

The analysis of the seven labour catchments in the Western Region has highlighted the importance of rural areas (centres with less than 1,000 persons) as employment locations. Depending on the location of the county town and the proximity of nearby urban areas, a large proportion of the labour catchment residents are in fact employed in rural areas. In general, this rate is in excess of 22% with the exception being in the Sligo town labour catchment where only approximately 17% are employed in rural areas. Interestingly, the Ennis labour catchment has the highest level of rural employment with 26.9% employed in the Clare rural area, reflecting the low number of urban settlements (>1,000 population) within Clare.

1. Travel to Work and Labour Catchment Analysis

1.1 Introduction

As part of its remit in promoting the economic and social development of the Western Region, the WDC is interested in examining the nature and extent of economic and labour market activity at the regional and sub-regional level.

In 2007, the CSO released data from the Census of Population 2006 on where people live and work, and what they work at, at a detailed geographic level (electoral division, ED). Known as the Place of Work Census of Anonymised Records (POWCAR), this dataset allows for analysis of commuting patterns and other labour market characteristics. These data provide for a much better understanding of what work people do and where they do it, at a level that can better inform policy for enterprise, education, training and transport. Since then, the CSO have released two subsequent POWCAR datasets based on the results from Census 2011 and Census 2016. This dataset is now regularly used by national, regional and local authorities as well as many State agencies for the spatial analysis of commuting patterns in Ireland.

Following the release of POWCAR 2006 the WDC commissioned the National Institute for Spatial and Regional Analysis (NIRSA) at NUI Maynooth to examine in detail the commuting patterns of those at work in the Western Region. Based on this research, the WDC published the 'Travel to Work and Labour Catchments in the Western Region - A Profile of Seven Town Labour Catchments' report in 2009. This report provided important research insights into the commuting patterns within the Western Region in 2006 which:

1. showed where people were employed, the profile of employment as it existed in April 2006 and provided a baseline for future research;
2. illustrated the possible likely geographic spread of future employment activity, though the sectoral composition is likely to be somewhat different; and
3. highlighted the various policy implications of where people live and work, from transport to employment and education.

With the publication of POWCAR 2016 it is now possible to review the previous analysis and provide an update on the travel to work and labour catchments that are in place within the Western Region in 2016. To undertake this process the WDC have commissioned the All-Island Research Observatory (AIRO) at Maynooth University to produce and update this important piece of research. The following sections will provide some background on the Census POWCAR dataset, the methodology, scope and use of the report and its structure and layout.

1.2 The Census POWCAR dataset

In 2007, the CSO compiled and made available a dataset from the 2006 Census of Population, which is referred to as the Place of Work Census of Anonymised Records (POWCAR). This dataset contains a complete count of all residents over the age of 15 years who travelled to work in April 2006, along with details of their place of residence and place of work at ED level. In 2011 and 2016 the CSO published new datasets that also included details on the movements of students to schools or colleges - the Place of Work, School or College Census of Anonymised Records (POWSCAR). This report uses the results from the work based trips as recorded in Census 2016. The location of the place of work was coded for each person on the basis of the reply to Question 34 on the Census Form. The address of the place of work was matched against

1. Travel to Work and Labour Catchment Analysis

addresses on the An Post GeoDirectory. Approximately 80.7% (1.58m) of the total 1.97m work trips in POWCAR 2016 were coded with an accurate location, the remaining 19.3% (381k) were classed as either 'mobile' workers (no fixed place of work) or 'blank' as they did not have a codable address (See Appendix for more detail).

The analysis of data from POWCAR in this report identifies the geographic extent of travel to work patterns for various towns which allows us to build a picture of each town's labour catchment. With these data we can identify the numbers commuting to and from various destinations as well as key characteristics such as their age, education and employment profile.

1.3 Method, scope and use of the report

A detailed analysis of the POWCAR data was carried out by the research team at AIRO and a series of maps were produced to define and illustrate the labour catchments of all towns with a population greater than 1,000 in the Western Region as of April 2016. The final list of catchments and underlying statistical analysis were then used to examine in detail the travel to work patterns of seven towns; Galway, Sligo, Ennis, Letterkenny, Castlebar, Carrick-on-Shannon and Roscommon. Except for Letterkenny, each are the administrative centres of the seven counties in the Western Region. The methodology employed to define the town labour catchments is detailed in the Appendix.

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1.4 Structure and Layout

In Section 2, we present an overview of all 42 labour catchments in the Western Region with subsequent sections focusing on the main seven towns' catchments. The layout of each of these sections is as follows:

1. Both the travel to work patterns (commuting flows) and the overall labour catchment of the town is graphically illustrated.
2. Once the spatial extent of each labour catchment is defined, there is then a detailed discussion of the labour market characteristics of all the people at work who are living in that labour catchment.
3. Each town labour catchment profile concludes with details on the changes that have taken place since 2006 and a final summary of key points.

Section 10 provides a cross-catchment comparison, Section 11 sets out some conclusions and implications and, finally, the Appendix provides detail on the methodology with additional details on POWCAR.

It is assumed that many readers will only consult particular sections as they may have an interest in a particular town, rather than read the entire report. Therefore it was considered important to explain each section in full. As a result, there may be some repetition for those reading the full report.

2. Labour Catchments in the Western Region

2.1 Introduction

In this section, 42 labour catchments across the Western Region are identified and considered. Employment in each of the town's labour catchments is reviewed and recent population trends in the seven labour catchments profiled in this report, are examined.

Map 2.1 shows the 42 labour catchments within the Western Region; 41 urban centres and a residual rural catchment¹. These are the labour catchments of towns in the Western Region with a population greater than 1,000 persons in 2016. The town labour catchments show the geographical area from which a town draws most of its labour supply – each catchment is based on the inclusions of Electoral Divisions (EDs) that are assigned to a town based on maximum flows (see Appendix for more detail on this). For the purposes of this report, towns with a labour catchment of less than three EDs were also re-assigned to the next most dominant town. This is described in more detail in Appendix.

The geographic scale of each of the labour catchments varies enormously, with the Galway City labour catchment by far the largest. Other geographically large catchments are Ennis, Sligo, Letterkenny, Castlebar, Carrick-on-Shannon and Ballina. The centre of the region, in areas such as east Mayo and west Roscommon, contains many small towns and this is evident in the numerous small labour catchments around towns such as Claremorris, Boyle, Swinford, Ballyhaunis and Ballaghaderreen.

The map shows that the vast majority of EDs in the Western Region were linked to towns within the Western Region with the exception of a number of EDs along the southern and eastern border of the Western Region. These were primarily linked to employment destinations such as Limerick City, Athlone, Longford Town and Derry (county). A smaller number of external flows are also linked to employment destinations in Cavan and Tullamore.

Seven of these 42 labour catchments are examined in detail in this report. These are the catchments of the largest town in each of the seven counties which comprise the Western Region – Galway City, Sligo Town, Ennis, Letterkenny, Castlebar, Roscommon Town and Carrick-on-Shannon.

2.2 Employment in each Labour Catchment

Table 2.1 shows the number employed and living in each of the 42 labour catchments. Each labour catchment includes all those living in the catchment and at work, regardless of where they work². As discussed, the labour catchment of a town is that area from which a town draws most of its workforce.

According to POWSCAR 2016, there were a total of 260,261³ people living within the Western Region and at work. This figure has increased by 6% (+14,712) from the total of 245,549 outlined within POWSCAR 2006. Interestingly, the 2006 figure was almost identical to that identified within POWSCAR 2011 when there was a total of 245,505 people living within the Western Region and at work. It should be noted that in 2011 the average unemployment rate in the Western Region (census based) was 20.1% whereas the rate in 2006 was less than half that rate at only 9% – as such the total numbers at work in 2011 were much lower.

1 One ED within the region did not record any commuting flows to a town. As such, this has been classed as 'rural'.
2 The place of work may be either (i) in the town, (ii) outside the town, but within the catchment or (iii) outside the catchment.

3 This figure relates to those with a known work destination and includes those who work from home. However, it does not include those with a 'blank' destination or those classed as being 'mobile' workers.

2. Labour Catchments in the Western Region

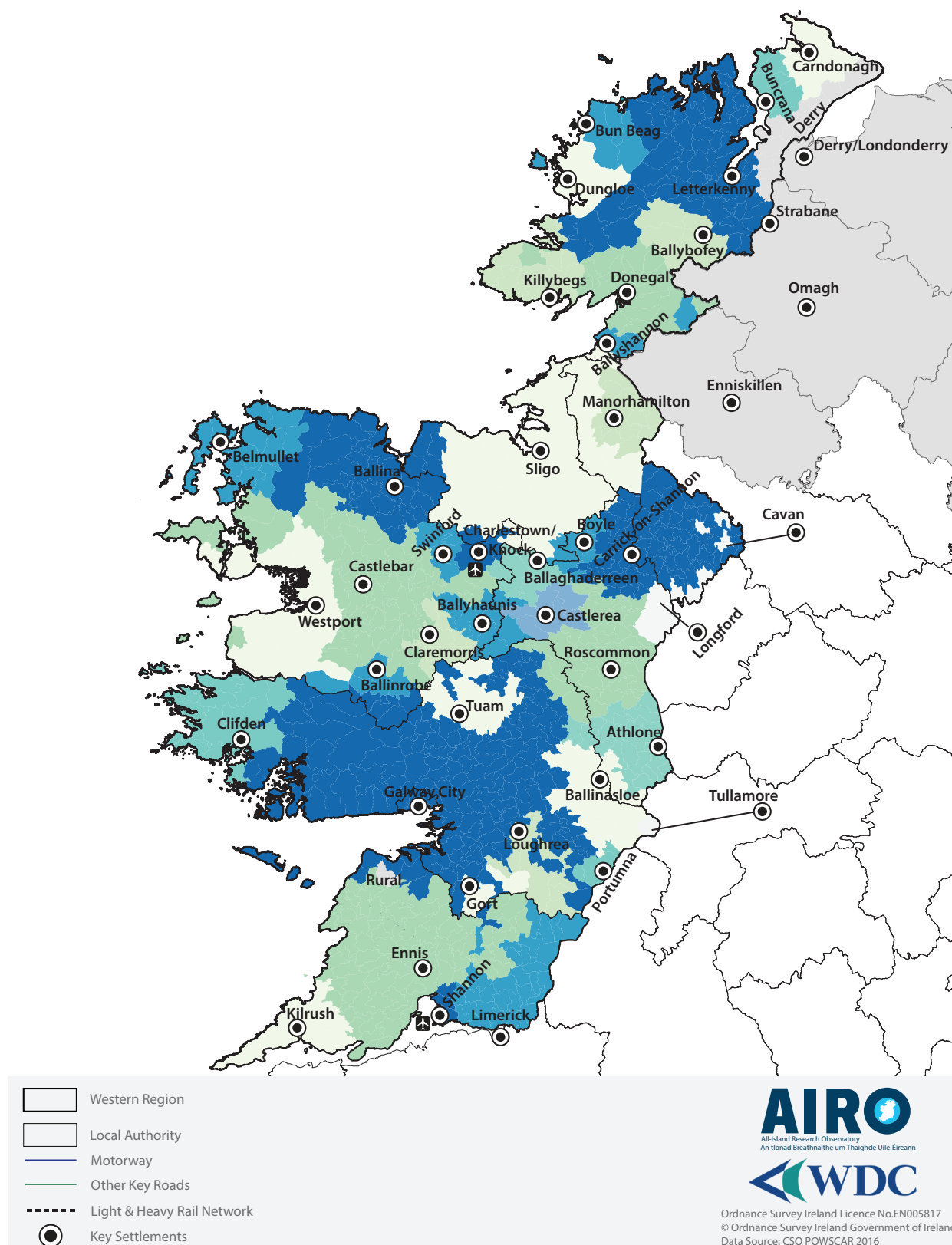
As with the results from the 2006 POWSCAR analysis, the Galway City labour force catchment is by far the largest with 70,170 people living within the catchment and at work (55.3% actually employed within Galway City). This catchment accounts for 26.96% of the total population at work and residing within the Western Region and is larger than the labour catchments of Sligo, Ennis and Letterkenny combined. In a slight change from the 2006 results, Sligo now has the second largest catchment in the Western Region with a population at work of 21,834 which is marginally higher than Ennis (21,409). In general, and detailed in Table 2.1, the largest labour force catchments are all based on the county towns within each local authority area. The exception to this are the labour catchments of Limerick City (9,647) and Ballina in Mayo (9,034) which are the seventh and eight largest catchments in the region and marginally larger than Carrick-on-Shannon and Roscommon town.

A number of general observations can be made in relation to the town catchments in the Western Region:

1. Travel distances are an important determinant of commuting patterns. As would be expected, the extent of commuting declines the further the distance, so that places far away from a town will have fewer residents commuting to that town to work.
2. The size of a particular labour catchment is determined by its population and town characteristics. The employment opportunities in other centres within commuting distance may also have an impact. For example, more people living in parts of Achill work in Castlebar than in Westport, and so a proportion of Achill is assigned to the Castlebar labour catchment rather than the Westport labour catchment, even though Achill is further away from Castlebar.
3. The geographic spread of each of the labour catchments varies enormously, as shown in Map 2.1. There is also a wide variation in the numbers of people at work in each labour catchment, as shown in Table 2.1. The Galway City labour catchment accounts for 26.96% of all workers within the Western Region – and the next four largest labour catchments (Sligo, Ennis, Letterkenny and Castlebar) account for a further 29.54% combined. Some other labour catchments cover geographically large areas, but have relatively small working populations, e.g. Kilrush (2,871) and Belmullet (1,859).
4. Generally, the larger the town and its catchment, the greater the proportion of residents who work within the catchment. Larger urban centres can be described as self-contained or highly contained labour catchments as most workers living there also work in the same area, and most people who work there also live there. This is discussed in later sections.
5. The relative proximity of some of the selected towns also plays a role in determining the spatial extent of a labour catchment. For example, Castlebar, Westport and Ballina are relatively close to each other and so limit the geographic extent of their respective labour catchments. In contrast to this, Ennis and Kilrush are further apart and as such Ennis has a far more extensive western catchment. Therefore, the closer a town is to another, the less extensive its labour catchment will be, as one town's labour catchment will provide the boundary for the other.
6. In general, there has been little change between the size, relating to both percentage of overall population and geographic extent, and overall ranking order of the labour catchments between 2006 and 2016. In fact, in 2016 the seven county town labour catchments account for an increase of only +0.5% from the overall proportional share of the total population at work and residing within the Western Region in 2006.

2. Labour Catchments in the Western Region

Map 2.1: Labour Catchments of 42 Towns in the Western Region, 2016 (Source: AIRO & CSO POWCAR)



2. Labour Catchments in the Western Region

Table 2.1: Population at work and living in each catchment in the Western Region, 2016 and 2006 (Source: AIRO & CSO POWCAR)

Labour Catchment (see Notes below)	Total at Work and living in each Labour Catchment, 2016		Total at Work and living in each Labour Catchment, 2006		Overall ranking (# of resident workers)	
	Number	%	Number	%	2016	2006
Galway City (Section 3)	70,170	26.96%	64,455	26.25%	1	1
Sligo (Section 4)	21,834	8.39%	20,321	8.28%	2	3
Ennis (Section 5)	21,409	8.23%	21,333	8.69%	3	2
Letterkenny (Section 6)	19,717	7.58%	17,886	7.28%	4	4
Castlebar (Section 7)	13,931	5.35%	13,757	5.60%	5	5
Limerick City*	9,647	3.71%	8,866	3.61%	6	6
Ballina	9,034	3.47%	8,823	3.59%	7	7
Carrick-on-Shannon (Section 8)	7,785	2.99%	6,632	2.70%	8	9
Roscommon (Section 9)	7,235	2.78%	7,306	2.98%	9	8
Westport	6,380	2.45%	4,854	1.98%	10	11
Athlone*	5,506	2.12%	4,584	1.87%	11	12
Tuam	5,454	2.10%	3,015	1.23%	12	17
Derry Rural*	5,056	1.94%	4,581	1.87%	13	13
Ballinasloe*	4,804	1.85%	5,135	2.09%	14	10
Shannon	4,718	1.81%	4,470	1.82%	15	14
Donegal	3,908	1.50%	3,487	1.42%	16	16
Loughrea	3,070	1.18%	2,311	0.94%	17	21
Ballybofey-Stranorlar	2,969	1.14%	3,520	1.43%	18	15
Buncrana	2,948	1.13%	2,995	1.22%	19	18
Claremorris	2,871	1.10%	2,553	1.04%	20	20
Kilrush	2,750	1.06%	1,911	0.78%	21	26
Ballyhaunis	2,601	1.00%	2,227	0.91%	22	22
Killybegs	2,352	0.90%	2,653	1.08%	23	19
Carndonagh	2,299	0.88%	1,737	0.71%	24	29
Clifden	2,100	0.81%	1,845	0.75%	25	28
Ballinrobe	1,859	0.71%	1,593	0.65%	26	31
Belmullet	1,751	0.67%	1,924	0.78%	27	25
Dungloe	1,686	0.65%	1,210	0.49%	28	37
Ballaghaderreen	1,632	0.63%	1,707	0.70%	29	30
Bunbeg	1,493	0.57%	1,939	0.79%	30	24
Boyle	1,452	0.56%	1,964	0.80%	31	23
Castlerea	1,448	0.56%	1,587	0.65%	32	32
Longford*	1,329	0.51%	1,897	0.77%	33	27
Manorhamilton	1,290	0.50%	1,234	0.50%	34	36
Gort	1,270	0.49%	1,505	0.61%	35	33
Ballyshannon	1,188	0.46%	1,409	0.57%	36	34
Swinford	1,118	0.43%	1,085	0.44%	37	40
Charlestown-Bellahy	962	0.37%	1,100	0.45%	38	38
Portumna*	892	0.34%	1,090	0.44%	39	39
Cavan*	256	0.10%	NA	NA	40	NA
Tullamore*	61	0.02%	77	0.03%	41	44
Rural	26	0.01%	25	0.01%	42	45
Total	260,261	100%	245,549	100%		

*Note: The labour catchments measured here are composed of the EDs that are located within the Western Region only, as depicted in Map 2.1. Those labour catchments which are partly located outside the border of the Western Region are highlighted in Table 2.1 with an asterisk (Athlone, Derry, Portumna, Limerick City etc)

** In 2006, a number of other towns such as Tubbercurry and Kilkee were included in the overall catchment list. However, demographic changes in towns with populations now below 1,000 in 2016 (Kilkee) and aggregated labour catchments with less than 2 EDs have resulted in these towns being eliminated from the final analysis.

Galway City Labour Catchment



3. Galway City Labour Catchment

Introduction

Galway City and suburbs had a resident population of 79,934 persons recorded in the 2016 Census. Of the five main cities in Ireland, Galway is the fourth most populated and higher than Waterford City. Since 2006, the population residing within Galway City and suburbs has increased by 9.9% (+7,205). In the five years since Census 2011, the population in the city has increased by 4.1% (+3,156) – this is the third highest rate of all Irish cities with both Dublin City and Cork City increasing by 5.6% and 5.1% respectively.

According to POWSCAR 2016, the total number of jobs located within Galway City was 44,376 and accounts for 18.3% of all jobs located within the Western Region. The number of jobs located within Galway City is almost identical to that of Limerick City (44,625), less than half of the total in Cork City (43% or 102,139) and less than a tenth of all jobs located within Dublin City and suburbs (8.7% or 512,449). It should be noted that the above job numbers relate to those within the city and suburb boundaries as defined by the CSO and do not include jobs located in industrial parks or smaller towns in close proximity to the city boundary. For instance, the Galway City job numbers do not account for employment in the Oranmore Business Park or even a portion of the Parkmore West Business Park in the north-east of the city.

3.1 The importance of Galway City as a place of work

Map 3.1 shows the extent of commuting flows to Galway City for employment opportunities. The colours represent the different proportions of people who live in each ED and travel to work in Galway City. The map shows every ED (within the frame) by commuting flow to Galway City. EDs with commuter numbers linked to Galway City between one and four (trips) have been set to a value of one¹.

As would be expected, the EDs closest to Galway City have the highest proportion working in the city, and this is indicated by the darker shades of blue in and around the city perimeter. Beyond these areas, the proportion travelling to the city gradually decreases. The map shows the declining proportion of those living in each ED and commuting to Galway City, graduating from the dark blue where in excess of 60% of people living in those EDs work in Galway city, through to medium green where between 5 and 15% living in those EDs commute to work in Galway City – this stretches to Ballinrobe, Claremorris and Ballyhaunis to the north, Gort to the south and Ballinasloe and Portumna to the east. In general, the Galway City labour catchment is predominantly contained within the Galway City and County local authority areas though extends beyond it in parts in areas such as North Clare and South Mayo. Low levels of interaction (0.1% to 5%) are visible in locations to the north, south and east of the Galway border although the actual number of trips within these locations would be extremely low in most areas (less than 5).

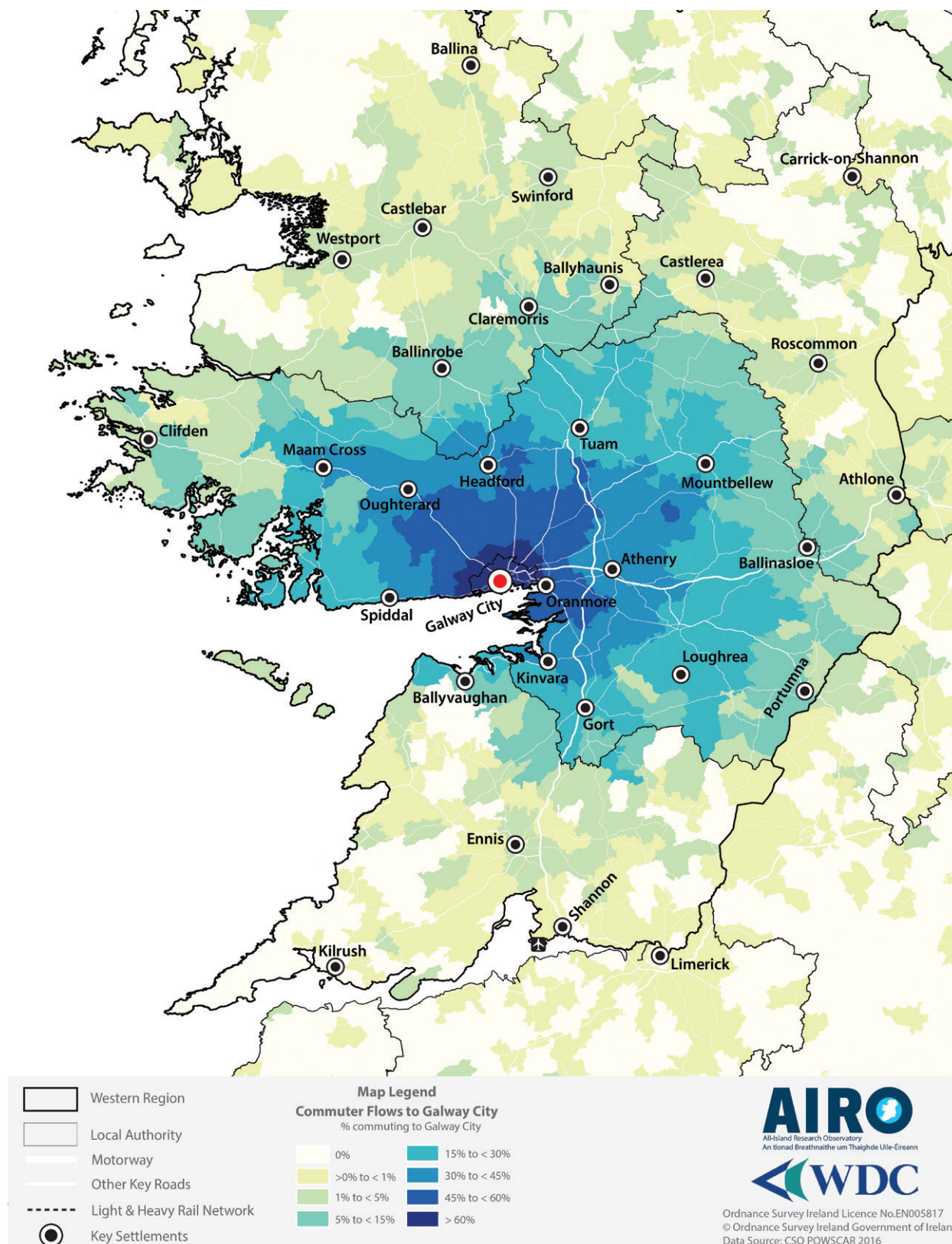
3.2 The Galway City Labour Catchment

While Map 3.1 shows every ED from where even one person commuted to Galway City, all of these EDs are not included in the Galway City labour catchment. The Galway City labour catchment, is made up only of those EDs for which Galway City is the most popular work destination for those living there. Other EDs, whose commuters travel in greater numbers to other towns are assigned to the catchments of these other towns. Map 3.2 shows the Galway City labour catchment, depicted by the dark blue colour.

The profile of the Galway City labour catchment is considered below. This will show the extent of the Galway City labour catchment and will set out the key labour catchment characteristics of those living there.

¹ This is due to data confidentiality protocols related to access to the POWCAR 2016 dataset.

Map 3.1: Percentage of persons commuting to Galway City, 2016 (Source: AIRO & CSO POWCAR)

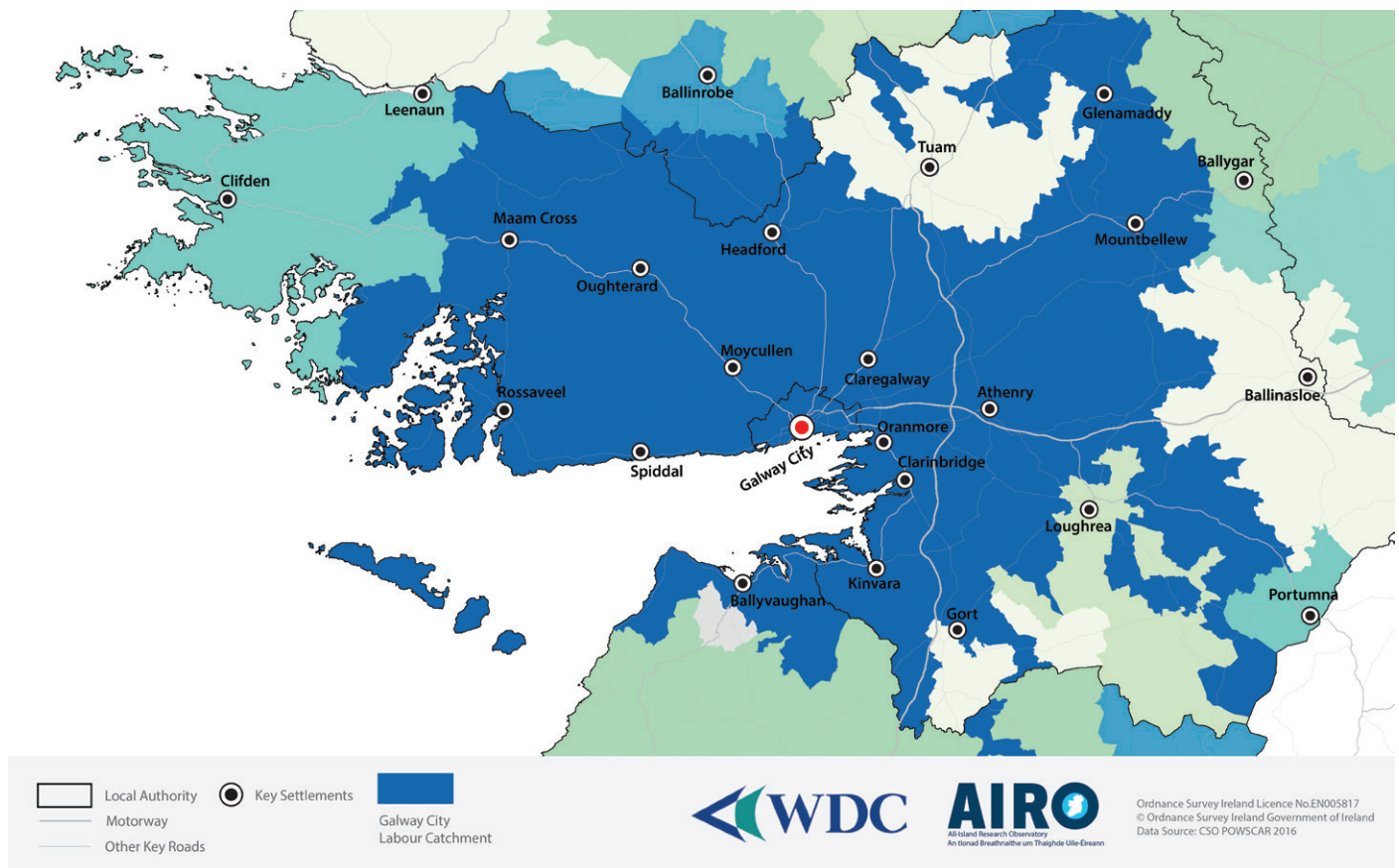


3. Galway City Labour Catchment

The data presented in Map 3.2 show that Galway City's influence as a place of work extends over a very large area, and into other counties, for example into county Clare to the south and into county Mayo to the north. The labour catchment for Galway City extends to most of county Galway. In fact, the entire Galway City labour catchment is far larger than the number of resident workers in the city at its core. Galway City labour catchment has a population at work more than double the census population of resident workers in Galway City, (70,170 and 34,085 (including blank and mobile workers) respectively).

Map 3.2 clearly shows the smaller labour catchments embedded within or adjacent to the larger Galway City labour catchment. The towns of Tuam, Ballinasloe, Loughrea and Gort have their own labour catchments, though they are relatively small. For residents of these four smaller labour catchments, Galway City is an important, but secondary employment destination. This is discussed in more detail in Section 3.4.

Map 3.2: Galway City Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)



3. Galway City Labour Catchment

3.3 Profile of the Galway City Labour Catchment

Map 3.2 identified the Galway City labour catchment (in dark blue). In the following section we examine the socio-economic characteristics of all those living in this labour catchment and at work, even though they may not all have been working in Galway City in April 2016. We do this because although some may not be working in Galway City they are living in the catchment from which Galway City's labour supply is drawn and including them provides a more complete assessment of the potential labour supply for Galway City. The Galway City labour catchment is therefore separated into those who live in the catchment and are employed in the following; 'Inside' the city or 'Outside' the city i.e., elsewhere in the catchment or locations such as Tuam, Athlone, Dublin etc. This profile is further supported by an analysis of changes in the catchment between 2006 and 2016, both in terms of geography and socio-economic characteristics (3.4), a comparison matrix of town and non-town workers (3.6) and an overall comparison matrix for all seven labour catchments (10.1).

3.3.1 Place of Work

The Galway City labour catchment can be seen to include most of county Galway and to extend beyond the county boundary, to the north and south as depicted in Map 3.2. In 2016, there were 70,170 people classified as at work, living within the Galway City labour catchment (+8.8% from 64,455 in 2006). In Figure 3.1 and Table 3.1 the main work locations for those who live in the Galway City labour catchment are set out.

Figure 3.1: Place of work of those living in the Galway City Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

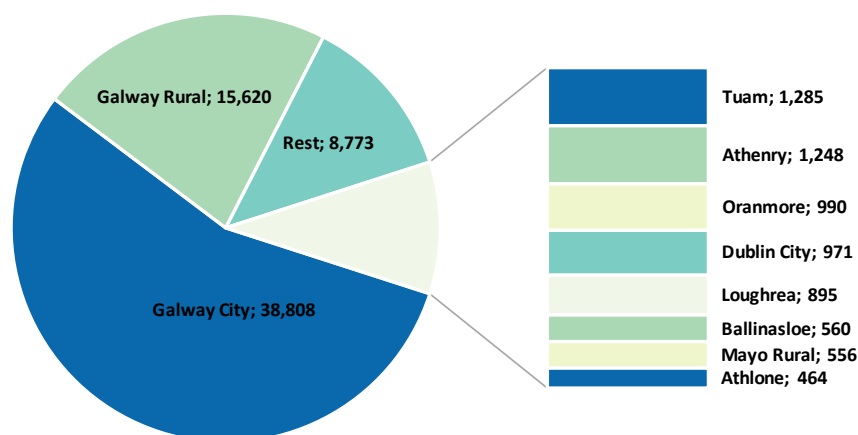


Table 3.1: Place of work of those living in the Galway City Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

Labour Catchment	Number	%
Galway City	38,808	55.3%
Galway Rural	15,620	22.3%
Other	8,773	12.5%
Tuam	1,285	1.8%
Athenry	1,248	1.8%
Oranmore	990	1.4%
Dublin City	971	1.4%
Loughrea	895	1.3%
Ballinasloe	560	0.8%
Mayo Rural	556	0.8%
Athlone	464	0.7%
Total	70,170	100%

3. Galway City Labour Catchment

Not surprisingly, Galway City is the principal place of employment, accounting for 38,808 (55.3%) of all employment. Galway Rural County (15,627) is the next most popular destination, being the work location for 22.3% of all those living in Galway City labour catchment. The city's outer suburbs (outside of the city boundaries and therefore categorised as being in Galway Rural County) host large industrial parks with major employers and it is likely that many of those categorised as working in Galway Rural County are actually working on the fringes of the city. The large proportion of residents who find work within the city is consistent with the pattern in other large urban centres and can be described as a self-contained or highly contained labour catchment.

The other large employment destinations for residents within the Galway City labour catchment are primarily towns in close proximity to Galway City (Tuam, Athenry, Oranmore etc). The exception to this is the inclusion of Dublin City and Suburbs as the sixth highest employment destination for Galway labour catchment residents. Recent changes to the motorway network, reduced travel times and more flexible working arrangements are certainly contributory factors to this. It should also be noted that the travel to work data from the CSO does not necessarily mean that commuters make daily trips and is more an identification of the main place and location of employment.

3.3.2 Travel Departure Times

In a change from the previous two POWCAR publications (2006 and 2011), the latest results from the 2016 Census only provide commuting details on the travel time departure of resident workers and not distance travelled. Results from distance travelled variables have included a large element of 'noise' with a documented low level of correlation between recorded 'distance travelled' and actual physical home to work distances. As such, the new travel indicator is based on the travel departure times of resident workers. Figure 3.2 below details the overall 'travel time departure' distribution of all Galway City Labour Catchment resident workers.

The most common travel time departures are within '07:31-08:00' and '08:01-08:30' band with both accounting for 35.5% of all resident workers. In comparison to the State average, the Galway City labour catchment resident workers have a lower proportion leaving for work in the three early bands pre '07:30' with rates of 31.3% and 28.8%, respectively.

A comparison of the 'travel-time departures' of those working in Galway City and those working elsewhere details that Galway City bound workers tend to have earlier departure times than other workers residing with the overall labour catchment. This is as expected due to the wide spatial commuting pattern that is evident for Galway City and also due to the well documented congestion issues for those commuting into the city on a daily basis. A total of 29.6% of Galway City bound workers residing in the labour catchments depart for work pre '07:30', marginally higher than the rate for workers with other destination (27.7%). It is important to note that a large number of the Galway City catchment labour catchment also commute to other destinations outside the overall catchment boundary: Ballinasloe (560), Athlone (464), Mayo Rural (556) and importantly Dublin City (971).

3. Galway City Labour Catchment

Figure 3.2: Time of Departure of those living in the Galway City Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

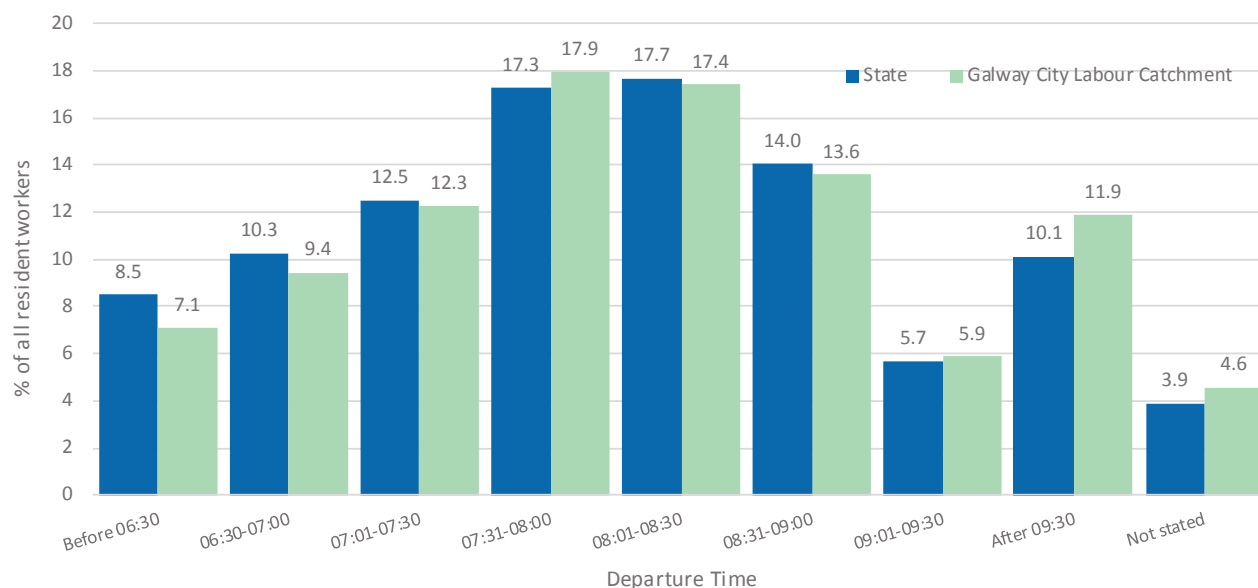


Table 3.2: Time of Departure of those living in the Galway City Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

	Before 06:30	06:30-07:00	07:01-07:30	07:31-08:00	08:01-08:30	08:31-09:00	09:01-09:30	After 09:30	Not stated	Total
Galway City Labour Catchment (Total)	4,969	6,628	8,596	12,591	12,209	9,526	4,113	8,327	3,211	70,170
Working inside Galway City	2,613	3,834	5,048	7,382	7,091	4,876	2,123	4,891	950	38,808
Working outside Galway City	2,356	2,794	3,548	5,209	5,118	4,650	1,990	3,436	2,261	31,362
State	135,187	163,290	199,035	274,425	281,003	223,164	90,521	160,901	62,111	1,589,637
Galway City Labour Catchment (Total)	7.1%	9.4%	12.3%	17.9%	17.4%	13.6%	5.9%	11.9%	4.6%	100%
Working inside Galway City	6.7%	9.9%	13%	19%	18.3%	12.6%	5.5%	12.6%	2.4%	100%
Working outside Galway City	7.5%	8.9%	11.3%	16.6%	16.3%	14.8%	6.3%	11.0%	7.2%	100%
State	8.5%	10.3%	12.5%	17.3%	17.7%	14.0%	5.7%	10.1%	3.9%	100%

3.3.3 Gender

The gender composition of residents in the Galway City labour catchment is shown below. Within the Galway labour catchment, female workers account for a larger proportion of the total workforce than their male counterparts with rates of 51.1% and 48.9% respectively. The national picture is slightly different with males (50.1%) accounting for a marginally higher rate than females (49.9%).

3. Galway City Labour Catchment

There is a variation between men and women in terms of the location of their work. More women than men work in the city, 54.9% and 45.1% respectively. Outside of Galway City destinations, male employment is higher than female employment with 53.5% of those employed outside the city being males. This reflects traditional employment patterns where agricultural employment in rural areas in part accounts for a higher male employment rate outside of the city. In contrast, employment sectors which are perceived as traditionally female are concentrated in the city, for example retail, banking, finance, public administration and tourism.

Table 3.3: Gender Profile of those living in the Galway City Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

	Female	Male	Total
Galway City Labour Catchment (Total)	35,873	34,297	70,170
Working inside Galway City	21,304	17,504	38,808
Working outside Galway City	14,569	16,793	31,362
State	793,196	796,441	1,589,637
Galway City Labour Catchment (Total)	51.1%	48.9%	100%
Working inside Galway City	54.9%	45.1%	100%
Working outside Galway City	46.4%	53.6%	100%
State	49.9%	50.1%	100%

An important point to note here is the fact that this analysis excludes all workers who do not have a fixed place of employment i.e., those with a blank or un-codable place of work and those with a place of work classed as 'mobile' (See Appendix). For instance, an analysis of the gender balance of all workers (including blank and mobile) reveals that 53.7% of all workers are male and 46.3% are female (State average). The rate in the Western Region is broadly similar with males accounting for 53.3% and females accounting for 46.7% of all workers. As such, the gender figures detailed and discussed in the above section should be treated with caution as the underlying worker population does not represent the complete population.

3.3.4 Age

The age profile of those at work and over 15 years who live in the Galway City labour catchment is shown in Table 3.4. The age profile of the Galway City labour catchment is the second youngest of all the labour catchments in the Western Region with 16.8% of residents workers aged less than 30 years. Furthermore, the workforce within the city itself is far younger than those working outside of it.

This is not surprising, given that cities often have a younger workforce than smaller towns and rural areas. This relates to life-cycle choices and employment opportunities. Out-migration of younger people from rural areas to participate in third-level education and to take up employment opportunities leads to a younger age profile within larger centres, while at the same time resulting in an older age profile in rural areas.

3. Galway City Labour Catchment

This is evident in the data presented in Table 3.4 below. A total of 18.8% of all Galway City labour catchment workers employed in Galway City are aged 'less than 30 years' whereas the rate for non-Galway City workers is only 14.3%.

Relative to the other four main cities in Ireland (Dublin, Cork, Limerick and Waterford), the age profile of those undertaking jobs within Galway City is the second youngest. A total of 66.4% of all Dublin City jobs are undertaken by a population less than 45 years, this rate is marginally higher than the rate in Galway City (66%) and Cork City (65%). In contrast, the worker age profile (less than 45 years) in Limerick City and Waterford City is older with a rate of 63% and 60.7% respectively.

Table 3.4: Age Profile of those living in the Galway City Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

	<30 years	30 to 44 years	45 to 64 years	65+ years	Total
Galway City Labour Catchment (Total)	11,798	31,350	25,158	1,864	70,170
Working inside Galway City	7,310	18,089	12,824	585	38,808
Working outside Galway City	4,488	13,261	12,334	1,279	31,362
State	278,647	694,783	575,181	41,026	1,589,637
Galway City Labour Catchment (Total)	16.8%	44.7%	35.9%	2.7%	100%
Working inside Galway City	18.8%	46.6%	33%	1.5%	100%
Working outside Galway City	14.3%	42.3%	39.3%	4.1%	100%
State	17.5%	43.7%	36.2%	2.6%	100%

3.3.5 Education

Table 3.5.1 shows a higher than average educational profile among those living in the Galway City labour catchment with 61.3% having completed third level education compared to 56.1% nationally. Again, it is important to note that this is based on workers with a known work destination only and excludes those with Blank or Mobile work destination (32.4% of those coded blank or mobile in the State have third level qualifications).

There is also a very large difference between the education attainment of those who are employed within Galway City and those employed outside the city. A total of 65.3% of labour catchment workers employed within the city have a third level qualification in comparison to a rate of 56.4% for those employed elsewhere. In all cases (total, in-town and outside town), those with second level qualifications only is approximately 42% or lower. As a whole, overall education levels in Ireland have increased dramatically since the early 1990's with the proportion of the population with a third level qualification increasing from 13.6% in 1991 to 42% in 2016.

3. Galway City Labour Catchment

Those living in the Galway city labour catchment are also considerably better educated than the other six main labour catchments analysed in this report reflecting good employment opportunities for graduates within industry in the area (IDA Business Parks, Hospitals etc), as well as the presence of two third level education institutions, NUIG and GMIT, which themselves are significant employers of graduates. The data in Table 3.5.2 also show differences in the educational profile of those employed inside and outside the relative towns.

Table 3.5.1: Education Profile of those living in the Galway City Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

	Secondary Level	Third Level	Not Stated	Total
Galway City Labour Catchment (Total)	26,147	43,033	990	70,170
Working inside Galway City	12,901	25,334	573	38,808
Working outside Galway City	13,246	17,699	417	31,362
State	670,114	891,660	27863	1,589,637
Galway City Labour Catchment (Total)	37.3%	61.3%	1.4%	100%
Working inside Galway City	33.2%	65.3%	1.5%	100%
Working outside Galway City	42.2%	56.4%	1.3%	100%
State	42.2%	56.1%	1.8%	100%

Table 3.5.2: % of Labour Catchment by Destination with 3rd Level Education, 2016 (Source: AIRO & CSO POWCAR)

	Working in Town	Working outside Town	Total
Galway	65.3%	56.4%	61.3%
Ennis	50.3%	57.2%	54.5%
Sligo	59.2%	51.7%	55.5%
Letterkenny	57.3%	46.4%	51.6%
Castlebar	50.3%	50.4%	50.4%
Roscommon	46.5%	50.3%	49.0%
Carrick-on-Shannon	47.8%	53.4%	51.9%
State			56.1%

The high skilled and highly educated nature of jobs within Galway City is further supported by a comparison of education attainment rates with the other four cities in Ireland. The percentage of workers employed in the cities and having third level qualifications are as follows: Dublin City (65.6%), Galway City (65.5%), Cork City (62.6%), Limerick City (60.8%) and Waterford City (55.1%).

3. Galway City Labour Catchment

3.3.6 Employment by Industrial Group

Analysis of the profile of employment by industry group provides an indication of the structure of the local economy and the type of employment it sustains as well as the skills profile of the area. It is particularly instructive to compare the profile of a region or local area to that of the State average as it can highlight differences at the local level. Employment by industrial group of all those living in the Galway City labour catchment is shown in Figure 3.6. The 'Education, Human Health and Social' sector is the most important employer (26.6%) and along with 'Wholesale, Retail Trade and Commerce' (23.3%) account for approximately half of all employment of those residing within the Galway City Labour Catchment. 'ICT and Professional Services' (15.85%) and 'Manufacturing Industries' (18.3%) are the next biggest employers for the labour catchment with all other sectors accounting for less than 5% each.

Relative to the national picture, 'Manufacturing Industries' and 'Education, Human Health and Social' sectors play a more important role in the overall employment base – the 'Manufacturing Industries' share of employment is over 5 percentage points higher than the State average and the 'Education, Human Health and Social' sector is almost 4 percentage points higher. As a result of this, all other sectors of employment for Galway City labour catchment residents are below the State average. Of particular interest is the much lower rates in the 'ICT and Professional Services' sector – this is notable as the largest growth in industry between 2011 and 2016 in Ireland has been in employment related to IT with an additional +21,262 jobs now available (CSO Census 2016). It is also interesting to note that employment in 'Residential Care' has increased +19,775 between 2011 and 2016 in Ireland and may be a factor in the 'Education, Human Health and Social' sector now becoming the largest employer within the labour catchment – overtaking the 'Wholesale, Retail Trade and Commerce' sector which was the largest in 2006.

Figure 3.6: Industry Profile of those living in the Galway City Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

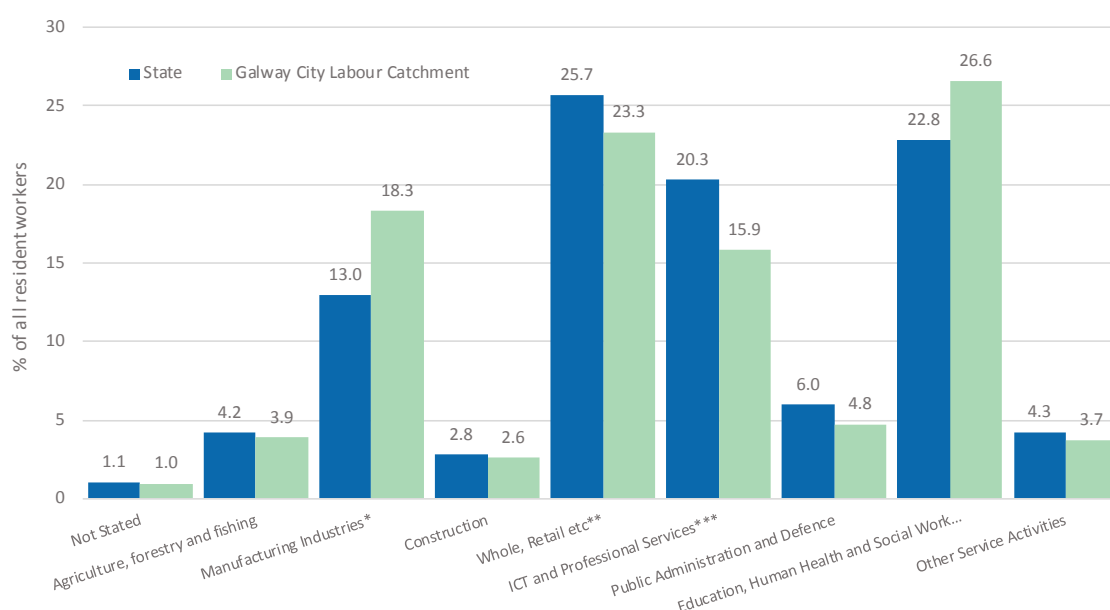


Table 3.6 details the industry of employment of the Galway City labour catchment by the location of employment – within Galway City or outside the city. As expected, employment in 'Wholesale, Retail and Commerce', 'Education, Human Health and Social', and 'ICT and Professional Services' are more dominant in those employed within Galway City whereas 'Manufacturing' and 'Agriculture, Forestry and Fishing' are higher outside the city, within the wider catchment and beyond.

3. Galway City Labour Catchment

Table 3.6: Industry Profile of those living in the Galway City Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

	Galway City Labour Catchment	Working inside Galway City	Working outside Galway City	State
Agricultural, Forestry and Fishing	3.9%	0.3%	8.3%	4.2%
Manufacturing Industries*	18.3%	16.1%	21.1%	13%
Construction	2.6%	1.7%	3.7%	2.8%
Wholesale, Retail etc**	23.3%	25.1%	21%	25.7%
ICT and Professional Services***	15.9%	17.1%	14.4%	20.3%
Public Administration and Defence	4.8%	5.4%	4%	6%
Education, Human Health and Social Work Activities	26.6%	29.7%	22.7%	22.8%
Other Services	3.7%	3.9%	3.5%	4.3%
Not Stated	1%	0.7%	1.3%	1.1%
Total	100 (70,170)	100 (38,808)	100 (31,362)	100 (1.59m)

Note: with only nine classifications available, industrial classifications in POWCAR are less detailed than normal classifications in regular Census.

*Manufacturing Industries = Manufacturing, mining and quarrying, Electricity, Gas, Water supply and Waste Management

**Wholesale, Retail etc = Wholesale, Retail Trade, Transportation and Storage, Accommodation and Food Service Activities

***ICT and Professional Services = Information and Communication, Financial, Real Estate, Professional, administration and support service activities

3.3.7 Socio-Economic Structure

The socio-economic structure of employment in the Galway City labour catchment is set out in Figure 3.7. The socio-economic group (SEG) is determined by occupation and employment status and aims to classify those on the basis of comparable skill and educational levels. This is also a useful indicator of the type of employment and skills available within labour catchments and is particularly informative when compared to the national socio-economic structure.

The socio-economic structure of the labour catchment of Galway City is broadly similar to that of the State with the largest groups being 'Non-Manual' (25.8%), 'Lower Professionals' (19.4%), 'Employers and Managers' (14.7%), 'Semi Skilled' (12.9%) and then 'Higher Professionals' (11%). Although following a similar trend there are some differences with higher relative rates in the Galway City labour catchment in the following groups: 'Semi-Skilled', 'Lower Professionals' and 'Higher Professionals'.

Table 3.7 details the socio-economic structure breakdown for those working within Galway City and those working outside Galway City. As expected, there are notable differences in rates with a higher proportion of those employed within Galway City classed as 'Higher and Lower Professionals'. The largest difference between city and non-city based workers is within the 'Non Manual' group which relates to persons working in retail, government, banking and other areas fulfilling administrative roles – such roles are linked to the high proportions of workers based in the 'Wholesale, Retail and Commerce' and 'ICT and Professional Service' industries. Excluding these groups the largest difference between city and non-city employment relates to those classed as 'Farmers' where the rate is 7.9% outside the city and only 0.3% in the city.

3. Galway City Labour Catchment

Figure 3.7: SEG Profile of those living in the Galway City Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

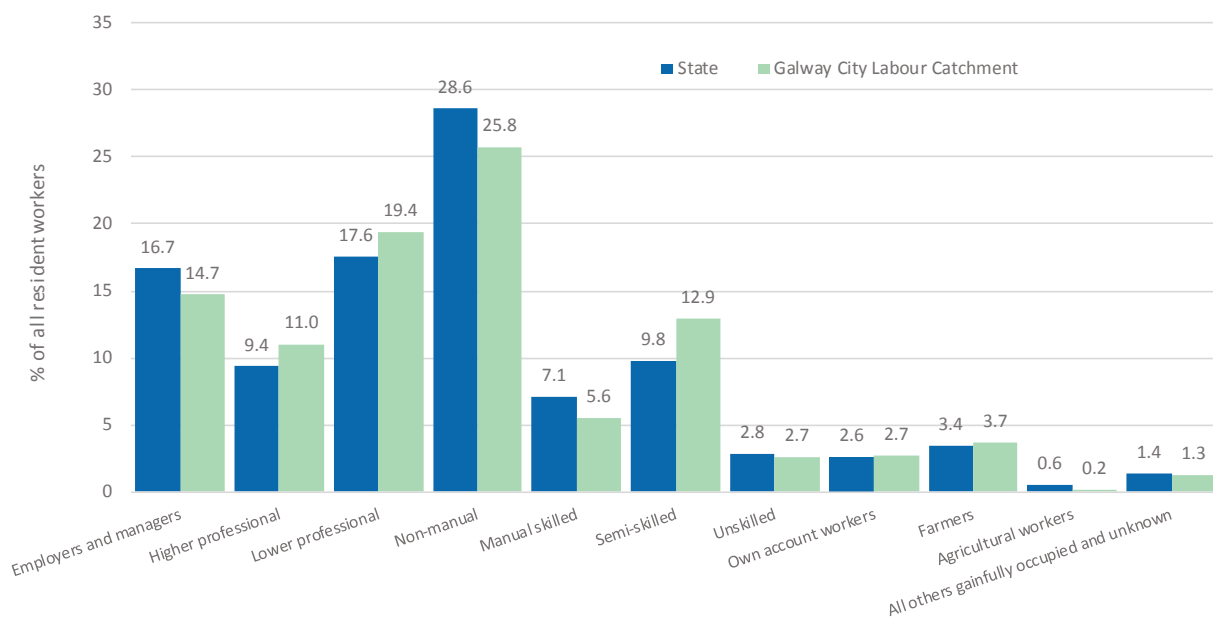


Table 3.7: SEG Profile of those living in the Galway City Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

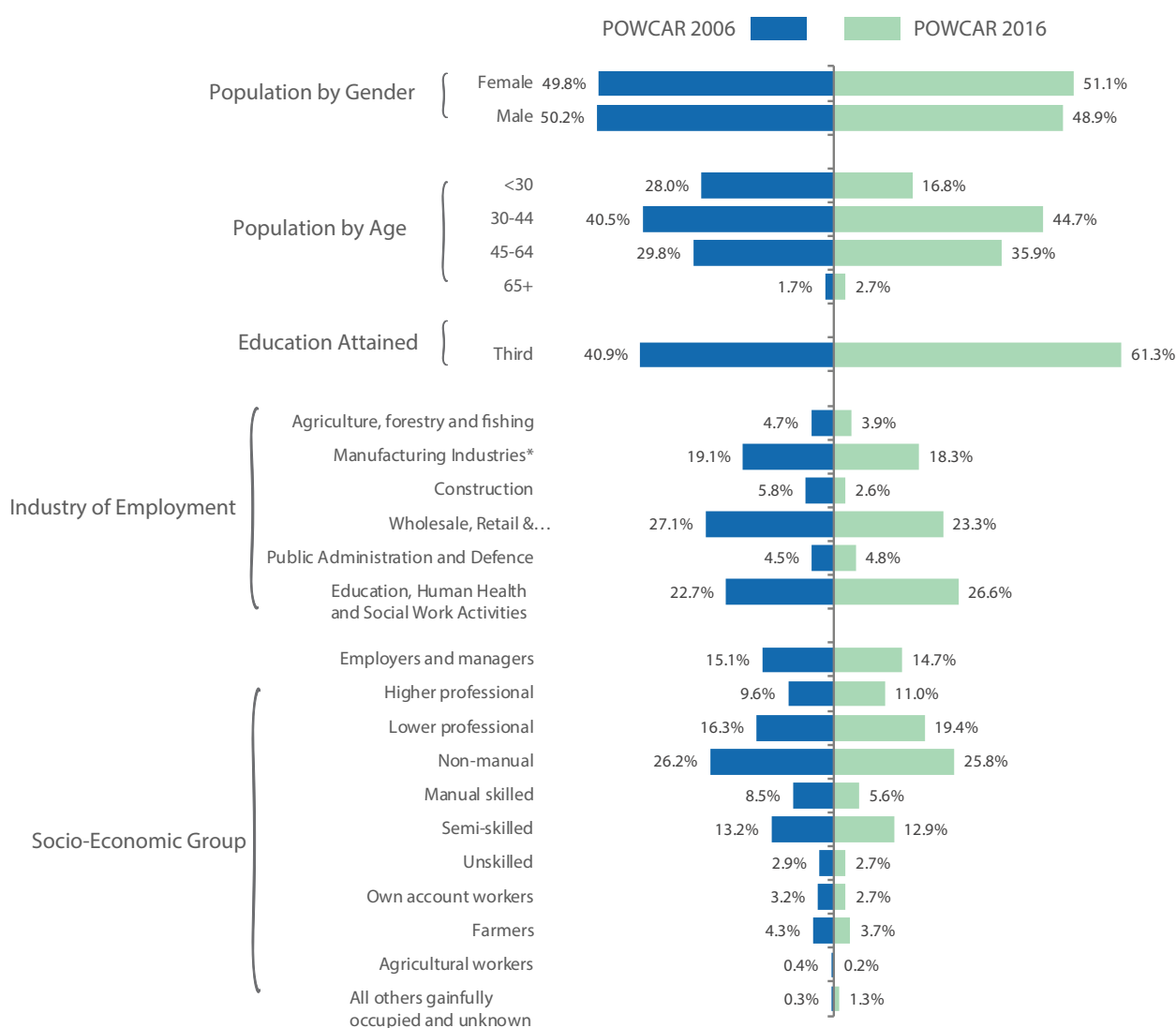
	Galway City Labour Catchment	Working inside Galway City	Working Outside Galway City	State
Employers and managers	14.7%	14.9%	14.5%	16.7%
Higher professional	11%	12.8%	8.8%	9.4%
Lower professional	19.4%	20.1%	18.6%	17.6%
Non-manual	25.8%	29.6%	21%	28.6%
Manual skilled	5.6%	4.1%	7.3%	7.1%
Semi-skilled	12.9%	12.5%	13.5%	9.8%
Unskilled	2.7%	2.7%	2.7%	2.8%
Own account workers	2.7%	1.8%	3.9%	2.6%
Farmers	3.7%	0.3%	7.9%	3.4%
Agricultural workers	0.2%	0.0%	0.4%	0.6%
Others gainfully occupied and unknown	1.3%	1.3%	1.4%	1.4%
Total	100% (70,170)	100% (38,808)	100% (31,362)	100% (1.59m)

3. Galway City Labour Catchment

3.4 Analysis of change between 2006 and 2016

The graphic below details the change that has occurred across the Galway City Labour Catchment between 2006 and 2016. This is reviewed in the context of geographical changes and then the socio-economic characteristics of those residing within the overall catchment area. Most notable changes in terms of socio-economic characteristics certainly relate to the age of resident workers and the rate of third level attainment.

- As with the analysis based on the 2006 POWCAR results, the Galway City labour market is by far the largest labour market within the Western Region. It has a resident 'at work' population of 70,170 and accounts for 27% of the total resident workforce within the Western Region. This is an increase of 8.9% (5,715) from the 2006 figure of 64,455 when it represented a marginally smaller proportion of 26.3% of the total resident workforce within the Western Region.
- A review of the geographical extent of the labour catchments from the 2006 POWCAR and 2016 POWCAR analysis reveal that both catchments are broadly similar and include most of county Galway with extensions to the north in Mayo and the south in Clare. However, a number of intercensal changes are apparent between 2006 and 2016 – most notable the widening of the labour catchments of both Tuam and Loughrea which has resulted in a contraction of the geographical spread of the Galway City labour catchment in north county Galway and south-east county Galway.



3. Galway City Labour Catchment

3.5 Galway City Labour Catchment Summary

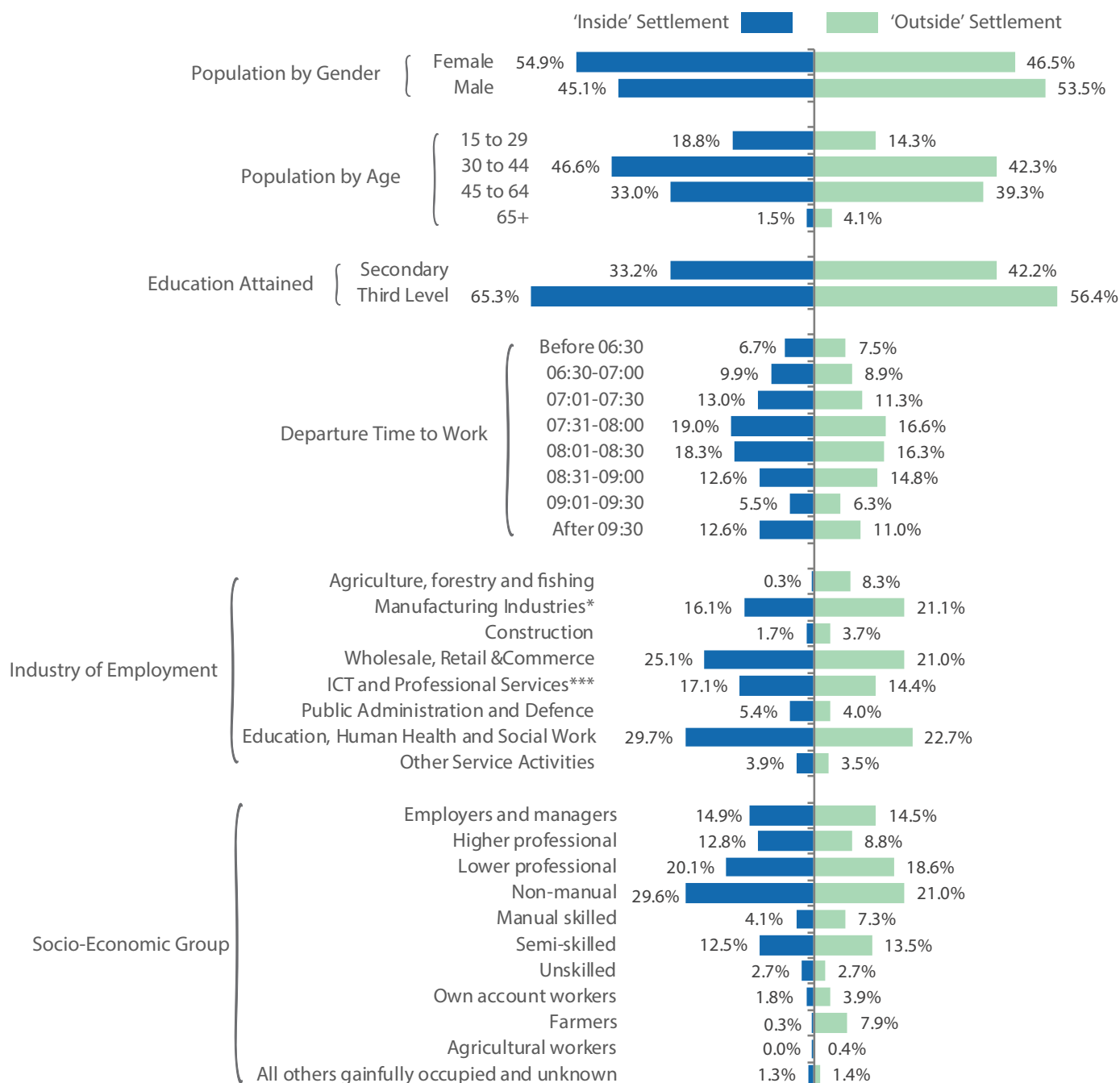
This section provides a summary of the key points of the Galway City Labour Catchment

- The Galway City labour catchment is the largest labour catchment in the Western Region (Map 2.1) with a resident 'at work' population of 70,170 which accounts for 26.9% of the total resident 'at work' population within the Western Region (260,261).
- The Galway City labour catchment can be seen to include most of county Galway and to extend beyond the county boundary, to the north (Mayo) and south (Clare) as depicted in Map 3.2. In 2016, there were 70,170 people classified as at work and living within the labour catchment. This figure is more than double the resident 'at work' population within the city at its core (34,085). The 2016 total is +8.8% higher than the 2006 total of 64,455.
- The labour catchments of other towns within county Galway such as Tuam, Ballinasloe, Loughrea and Clifden also play an important part of labour catchments within Galway county. These towns are themselves the most important places for employment for those living in their immediate hinterlands, and therefore constitute separate, but small, labour catchments.
- Of those living in the Galway City labour catchment, 55.3% (38,808) are employed within Galway City and suburbs and 44.7% (31,362) are employed outside the city and in the rest of the catchment and beyond. Key destinations outside the city are Galway Rural (22.3% or 15,620), Tuam (1.8% or 1,285) and Athenry (1.8% or 1,248) – see Table 3.1 for more details.
- There is strong evidence that workers are willing to commute long distance to employment locations within Galway City. This is not surprising given the greater number and quality of jobs within the city, compared with surrounding areas (Map 3.1)
- A demographic profile of the Galway City labour catchment shows the following:
 - The age profile of those working in Galway City is quite young and second youngest of the five cities in Ireland and also the second youngest of the seven county towns in the Western Region.
 - Female workers account for a larger proportion of the workforce than their male counterparts with rates of 51.1% and 48.9% respectively. This gender gap is further extended when looking at those employed within the city where more women than men are employed, 54.9% and 45.1% respectively.
 - Those at work and residing in the Galway City labour catchment have a higher level of education than State average – with rates of 61.3% and 56.1% respectively (3rd level). This rate is higher than all other Western Region county town catchments. Those within the catchment and employed in Galway City have a higher rate at 65.3%.
- Analysis of the profile of the industry of employment within the Galway City labour catchment shows the following:
 - The single largest employer is the 'Education, Human Health and Social Work' sector and accounts for 26.6% (18,655) which is higher than the State average (22.8%).
 - Both the 'Wholesale, Retail and Commerce' (23.3% or 16,360) and 'ICT and Professional Services' (15.9% or 11,125) are important employment sectors although both are below the State average.
 - Manufacturing Industries (18.3% or 12,855) is the fourth most important sector and much higher than the State average of 13%.

3. Galway City Labour Catchment

3.6 Socio-economic comparison of those employed 'Inside' and 'Outside' Galway City

The graphic below details the socio-economic characteristics of resident workers within the Galway City labour catchment who are employed within Galway City (Inside) and those that are employed outside Galway City – within the wider labour catchment and beyond (Outside).



Sligo Town Labour Catchment



4. Sligo Town Labour Catchment

Introduction

Sligo town had a population of 19,199 persons recorded in the 2016 Census. Sligo is the 4th largest town within the Western Region and the 24th largest in the State. Since 2006, the population residing within the town of Sligo has decreased by -1% (+203). In the five years since Census 2011, the population of the town also decreased by -1.3% (-253). Demographic comparisons between urban centres tend to be difficult due to intercensal boundary changes. For instance, in 2014 all legal town boundaries (Sligo included) were abolished under the Local Government Act 2014. Accordingly the population of these former legal towns have been newly defined using the standard census town criteria. For some towns, the impact of this has been to lose area and population, compared with previous computations.

According to POWSCAR 2016, the total number of jobs located within Sligo was 13,024 and accounts for 5.4% of all jobs located within the Western Region (242,712). Of all cities and towns in Ireland, Sligo has the 10th highest number of jobs located within the town boundary and accounts for 61.8% of all jobs located within County Sligo – by far the highest rate within the Western Region counties. Relative to the six other main settlements in this report, Sligo has the 2nd highest number of jobs within the town with only higher numbers in Galway City (44,376) and then lower numbers in Letterkenny (11,395), Ennis (10,172), Castlebar (9,045), Roscommon (3,917) and Carrick-on-Shannon (2,868). It should be noted that the above job numbers relate to those within the town boundary as defined by the CSO and do not include jobs located outside the town boundary or nearby employment concentrations (industrial parks, local factories etc).

4.1 The importance of Sligo as a place of work

Map 4.1 shows the extent of commuting flows to Sligo for employment opportunities. The colours represent the different proportions of people who live in each ED and travel to work in Sligo. The map shows every ED (within the frame) by commuting flow to Sligo. EDs with commuter numbers linked to Sligo town between one and four (trips) have been set to a value of one¹.

As would be expected, the EDs closest to Sligo town have the highest proportion working in the town, and this is indicated by the darker shades of blue in and around the town perimeter. Beyond these areas, the proportion travelling to the town gradually decreases. The map shows the declining proportion of those living in each ED and commuting to Sligo, graduating from the dark blue where in excess of 60% of people living in those EDs work in Sligo town, through to medium green where between 5 and 15% living in those EDs commute to work in Sligo town – this stretches across all of Sligo local authority and into large parts of north Leitrim, parts of south Donegal and north Roscommon. Key settlements on the extreme of the commuting catchment (>5%) are Enniscrone, Tubbercurry, Boyle, Carrick-on-Shannon, Drumkeeran, Belcoo, Manorhamilton, Bundoran and Ballyshannon. With 13,024 jobs located within Sligo it acts as a key economic driver within the north-west region of Ireland and is a very important employment hub within the wider Western Region.

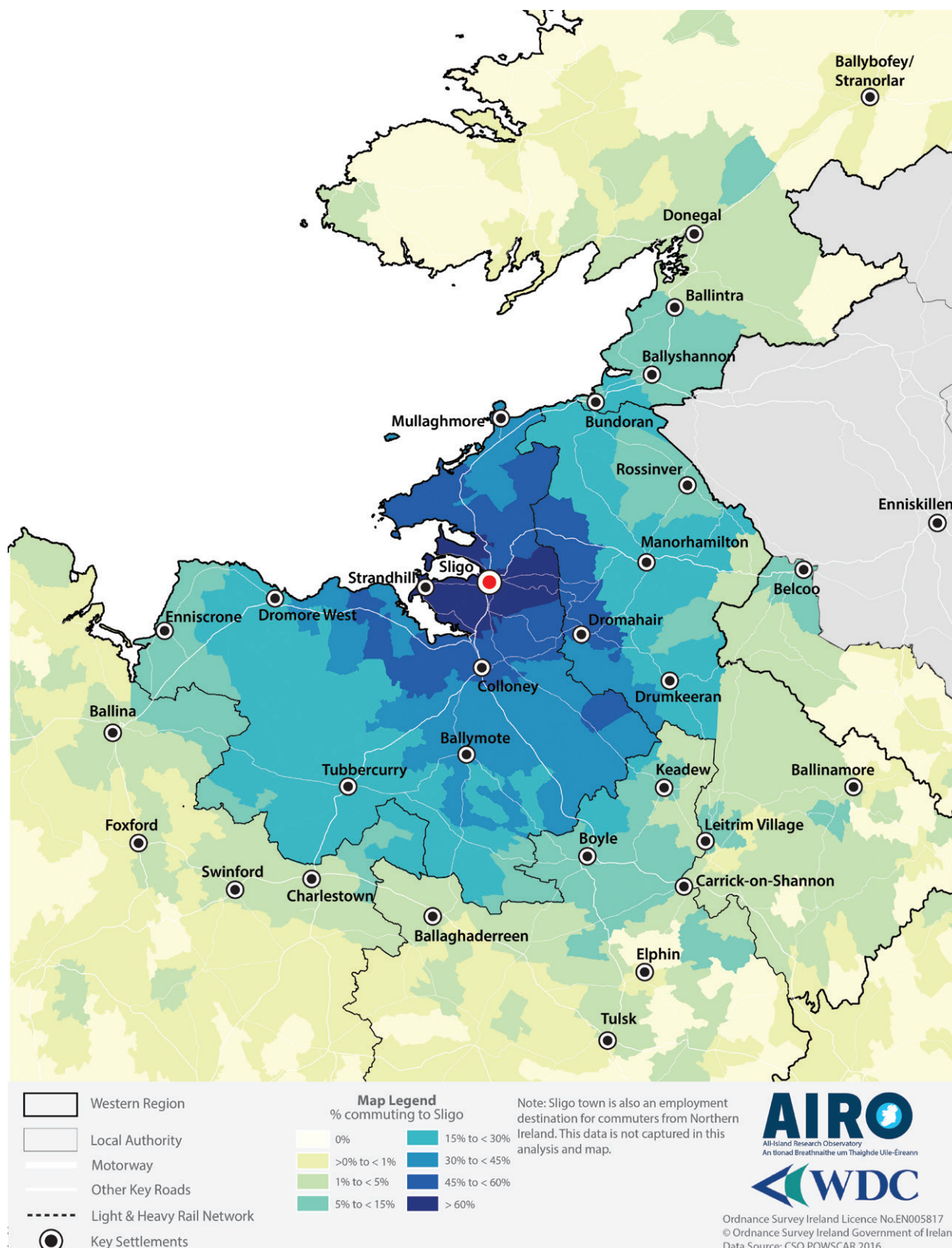
4.2 The Sligo Labour Catchment

While Map 4.1 shows every ED from where even one person commuted to Sligo, all of these EDs are not included in the Sligo labour catchment. The Sligo labour catchment, is made up only of those EDs for which Sligo town is the most popular work destination for those living there. Other EDs, whose commuters travel in greater numbers to other towns are assigned to the catchments of these other towns. Map 4.2 shows the Sligo labour catchment, depicted by the light green colour.

¹ This is due to data confidentiality protocols related to access to the POWCAR 2016 dataset.

4. Sligo Town Labour Catchment

Map 4.1: Percentage of persons commuting to Sligo Town, 2016 (Source: AIRO & CSO POWCAR)

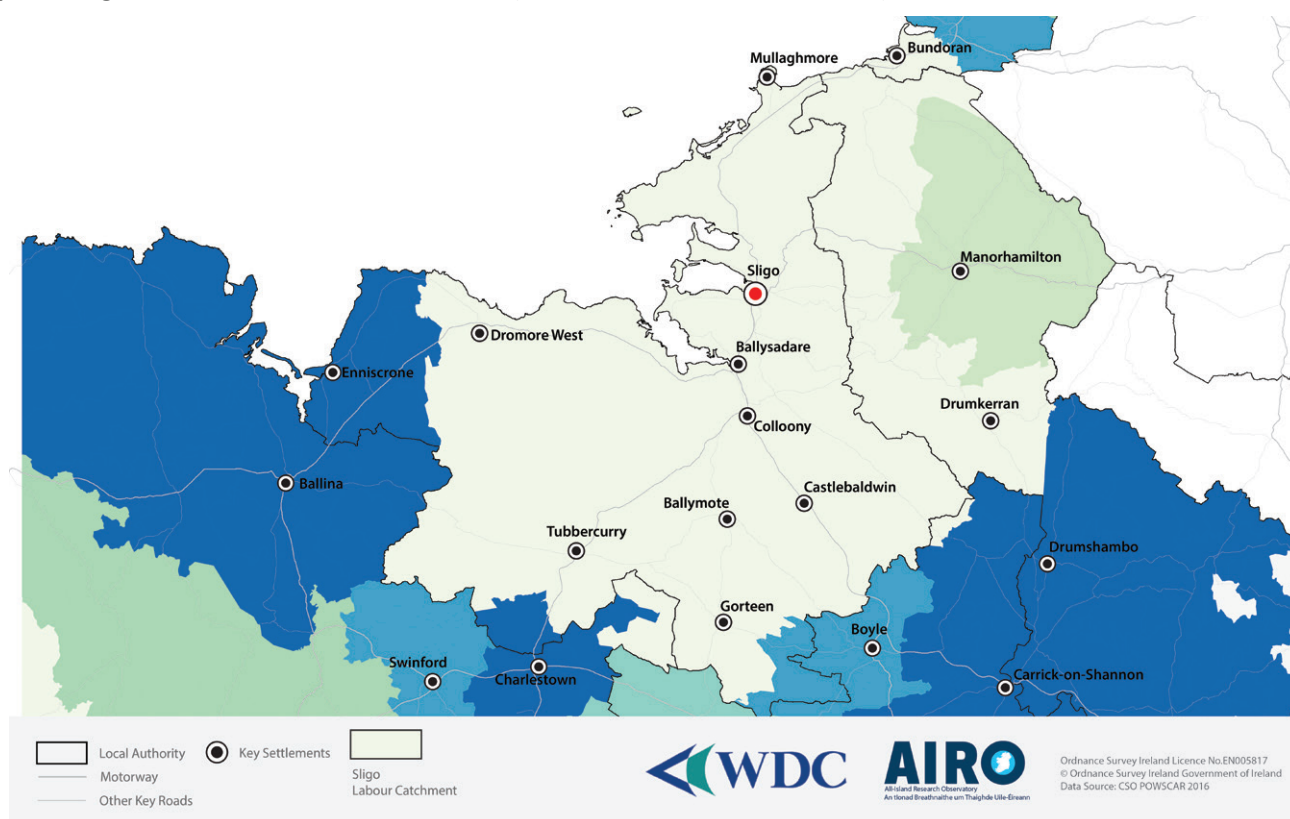


4. Sligo Town Labour Catchment

The data presented in Map 4.2 show that Sligo town's influence as a place of work extends over a large area and extends into parts of north Leitrim and the very southern portion of Donegal. The total resident and 'at work' population residing within the Sligo town labour catchment is 21,834 and it is the second largest labour catchment within the Western Region. In fact, the entire Sligo town labour catchment is far larger than the number of resident workers in the town at its core. Sligo town labour catchment has a population at work more than three times the census population of resident workers in Sligo town itself, (21,834 and 6,878 (including blank and mobile workers) respectively).

The labour catchment for Sligo town extends throughout most of county Sligo with the exception of two small areas in the west and south west that are linked to the labour catchments of Ballina and Charlestown, respectively.

Map 4.2: Sligo Town Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)



4. Sligo Town Labour Catchment

4.3 Profile of the Sligo Town Labour Catchment

Map 4.2 identified (in beige) the Sligo labour catchment. In the following section we examine the socio-economic characteristics of all those living in this labour catchment and at work, even though they may not all have been working in Sligo town in April 2016. We do this because although some may not be working in Sligo town they are living in the catchment from which Sligo town's labour supply is drawn and including them provides a more complete assessment of the potential labour supply for Sligo town. The Sligo labour catchment is therefore separated into those who live in the catchment and are employed in the following; 'Inside' the town or 'Outside' the town i.e., elsewhere in the catchment or locations such as Galway City, Ballina, Dublin etc. This profile is further supported by an analysis of changes in the catchment between 2006 and 2016, both in terms of geography and socio-economic characteristics (4.4), a comparison matrix of town and non-town workers (4.6) and an overall comparison matrix for all seven labour catchments (10.1).

4.3.1 Place of Work

The Sligo labour catchment can be seen to include most of county Sligo and parts of north-east Leitrim and south Donegal. In 2016, there were 21,834 people classified as at work, living within the Sligo labour catchment (+7.45% from 20,321 in 2006). In Figure 4.1 and Table 4.1 the main work locations for those who live in the Sligo labour catchment are set out.

Figure 4.1: Place of work of those living in the Sligo Town Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

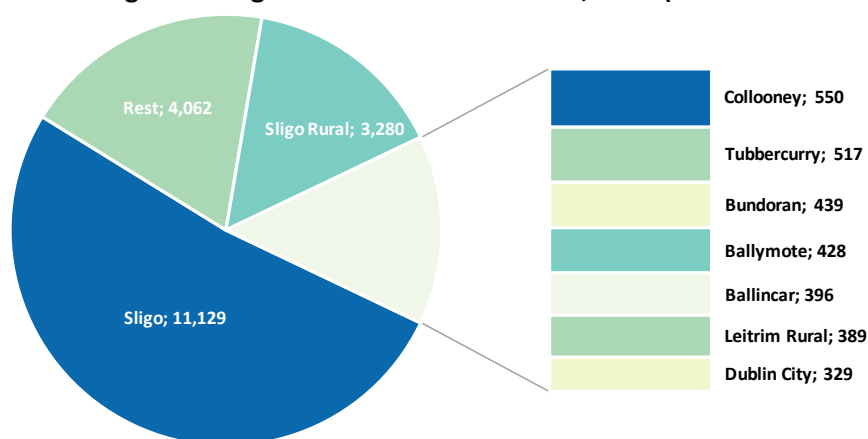


Table 4.1: Place of work of those living in the Sligo Town Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

Labour Catchment	Number	%
Sligo	11,129	51%
Other	4,062	18.6%
Sligo Rural	3,280	15%
Collooney	550	2.5%
Tubbercurry	517	2.4%
Bundoran	439	2%
Ballymote	428	2%
Ballinacra	396	1.8%
Leitrim Rural	389	1.8%
Dublin City	329	1.5%
Manorhamilton	315	1.4%
Total	21,834	100%

4. Sligo Town Labour Catchment

As expected, Sligo is the principal place of employment, accounting for 11,129 (51%) of all employment. Sligo Rural County (3,280) is the next most popular destination, being the work location for 15% of all those living in the Sligo labour catchment.

The other large employment destinations for residents within the Sligo town labour catchment are primarily towns in close proximity to Sligo (Collooney, Tubbercurry, Bundoran, Ballymote, Ballincar and Manorhamilton etc). Dublin City (329 or 1.5%) is also highlighted as key a destination for Sligo labour catchment residents. Recent changes to the motorway network, reduced travel times and more flexible working arrangements are certainly contributory factors to this. It should also be noted that the travel to work data from the CSO do not necessarily mean that commuters make daily trips and is more an identification of the main place and location of employment. There is also a considerable number of destinations located within and across other small settlements (>1,000 population) in the Western Region (Rest, 4,062 or 18.6%).

4.3.2 Travel Departure Times

In a change from the previous two POWCAR publications (2006 and 2011), the latest results from the 2016 Census only provide commuting details on the travel time departure of resident workers and not distance travelled. Results from distance travelled variables have included a large element of 'noise' with a documented low level of correlation between recorded 'distance travelled' and actual physical home to work distances. As such, the new travel indicator is based on the travel departure times of resident workers. Figure 4.2 below details the overall 'travel time departure' distribution of all Sligo town labour catchment resident workers.

The most common travel time departures are within '08:01-08:30' and '08:31-09:00' band with both accounting for 37% of all resident workers. In comparison to the State average, Sligo town labour catchment resident workers have a lower proportion leaving for work in the three early bands pre '07:30' with rates of 31.3% and 20.6%, respectively. Relative to the six other county towns, Sligo (20.6%) has the second lowest rate of early commuters (pre 7.30am) with only Letterkenny labour catchment workers with a lower rate at 19.1%. Highest rates are recorded by the Galway City (28.8%) and Ennis (26.3%) labour catchment workers.

A comparison of the 'travel-time departures' of those working in Sligo town and those working elsewhere shows that Sligo town bound workers tend to have later departure times than other workers residing within the overall labour catchment. A total of 19.7% of Sligo town bound workers residing in the labour catchment depart for work pre '07:30' and this is marginally lower than the rate for workers travelling to other destinations (21.5%).

4. Sligo Town Labour Catchment

Figure 4.2: Time of Departure of those living in the Sligo Town Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

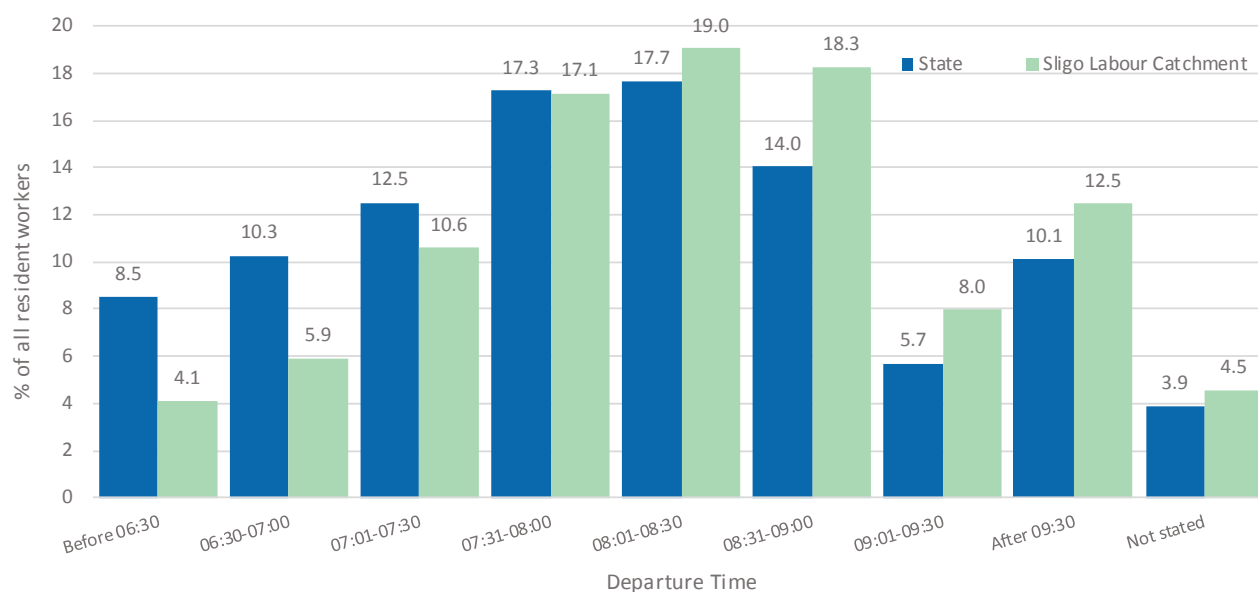


Table 4.2: Time of Departure of those living in the Sligo Town Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

	Before 06:30	06:30-07:00	07:01-07:30	07:31-08:00	08:01-08:30	08:31-09:00	09:01-09:30	After 09:30	Not stated	Total
Sligo Labour Catchment (Total)	896	1,290	2,310	3,744	4,158	3,986	1,738	2,719	993	21,834
Working inside Sligo	390	547	1,255	2,016	2,454	2,139	839	1,290	199	11,129
Working outside Sligo	506	743	1,055	1,728	1,704	1,847	899	1,429	794	10,705
State	135,187	163,290	199,035	274,425	281,003	223,164	90,521	160,901	62,111	1,589,637
Sligo Labour Catchment (Total)	4.1%	5.9%	10.6%	17.1%	19%	18%	8%	12.5%	4.5%	100%
Working inside Sligo	3.5%	4.9%	11.3%	18.1%	22.1%	19.2%	7.5%	11.6%	1.8%	100%
Working outside Sligo	4.7%	6.9%	9.9%	16.1%	15.9%	17.3%	8.4%	13.3%	7.4%	100%
State	8.5%	10.3%	12.5%	17.3%	17.7%	14%	5.7%	10.1%	3.9%	100%

4.3.3 Gender

The gender composition of residents in the Sligo town labour catchment is shown below. Within the Sligo town labour catchment, female workers account for a larger proportion of the total workforce than their male counterparts with rates of 52.4% and 47.6% respectively – this is the highest female proportion of all seven county town labour catchments within the Western Region. The national picture is slightly different

4. Sligo Town Labour Catchment

with males (50.1%) accounting for a marginally higher rate than females (49.9%). There is a variation between men and women in terms of the location of their work. More women than men work in Sligo town, 58.1% and 41.9% respectively. Outside of Sligo town destinations, male employment is higher than female employment with 53.6% of those employed outside the town being males. This reflects traditional employment patterns where agricultural employment in rural areas in part accounts for a higher male employment rate outside of the town. In contrast, employment sectors which are perceived as traditionally female are concentrated in the town, for example retail, banking, finance, public administration and tourism.

Table 4.3: Gender Profile of those living in the Sligo Town Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

	Female	Male	Total
Sligo Labour Catchment (Total)	11,437	10,397	21,834
Working inside Sligo	6,470	4,659	11,129
Working outside Sligo	4,967	5,738	10,705
State	793,196	796,441	1,589,637
Sligo Labour Catchment (Total)	52.4%	47.6%	100%
Working inside Sligo	58.1%	41.9%	100%
Working outside Sligo	46.4%	53.6%	100%
State	49.9%	50.1%	100%

An important point to note here is the fact that this analysis excludes all workers who do not have a fixed place of employment i.e., those with a blank or un-codable place of work and those with a place of work classed as 'mobile' (See Appendix). For instance, an analysis of the gender balance of all workers (including blank and mobile) reveals that 53.7% of all workers are male and 46.3% are female (State average). The rates in the Western Region are broadly similar with males accounting for 53.3% and females accounting for 46.7% of all workers. As such, the gender figures detailed and discussed in the above section should be treated with caution as the underlying worker population does not represent the complete population.

4.3.4 Age

The age profile of those at work and over 15 years who live in the Sligo town labour catchment is shown in Table 4.4. The age profile of the Sligo town labour catchment has the 3rd highest proportion of <30 years (14.5%) residing in the Western Region with only higher rates in the Letterkenny (17%) and Galway City (16.8%) labour catchments. Relative to the State average, the Sligo town labour catchment age profile has a much lower rate of young workers (less than 30 years) than the State average of 17.5%.

This may be explained by the fact that many young people migrate to other destinations for education and do not return to Sligo Town for immediate employment opportunities afterwards. With the exception of Galway City, this phenomenon is valid for all other areas, both urban and rural, within the Western Region.

4. Sligo Town Labour Catchment

The rate of young workers is marginally lower for those employed within the town than those employed outside and is evident in the data presented in Table 4.4. A total of 13.9% of all Sligo town's workers are aged 'less than 30 years' whereas the rate for non-Sligo town workers is 15.1%. This rate is different to both the Galway City and Ennis labour catchments where the urban based workers have a younger age profile. In general, there is a major difference in the age of resident workforce in urban and rural areas. For instance, the cities (CSO Settlements) of Dublin, Cork and Galway all have rates of young workers (less than 30 years) in excess of 24% whereas the average rate for Sligo County is 14.4%. At 13%, Galway County has the lowest rate of all local authorities in the State.

Table 4.4: Age Profile of those living in the Sligo Town Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

	<30 years	30 to 44 years	45 to 64 years	65+ years	Total
Sligo Labour Catchment (Total)	3,161	8,884	9,183	606	21,834
Working inside Sligo	1,545	4,713	4,703	168	11,129
Working outside Sligo	1,616	4,171	4,480	438	10,705
State	278,647	694,783	575,181	41,026	1,589,637
Sligo Labour Catchment (Total)	14.5%	40.7%	42.1%	2.8%	100%
Working inside Sligo	13.9%	42.3%	42.3%	1.5%	100%
Working outside Sligo	15.1%	39%	41.8%	4.1%	100%
State	17.5%	43.7%	36.2%	2.6%	100%

4.3.5 Education

Table 4.5.1 shows a lower than average educational profile among those living in the Sligo town labour catchment with 55.5% having completed third level education compared to 56.1% nationally. However, relative to the other six towns included in this analysis Sligo town has the second most educated workforce with only Galway City (61.3%) having a higher rate. Again, it is important to note that this is based on workers with a known work destination only and excludes those with Blank or Mobile work destination (32.4% of those coded blank or mobile in the State have third level qualifications). As a whole, overall education levels in Ireland have increased dramatically since the early 'nineties with the proportion of the population with a third level qualification increasing from 13.6% in 1991 to 42% in 2016.

There is also a large difference between the education attainment of those who are employed within Sligo town (59.2% with 3rd level) and those employed outside the town (51.7% with 3rd level). This relates to a higher calibre of employment opportunities being located within the town – this is further detailed in the follow on sections on Industry of Employment and Socio-Economic Group.

4. Sligo Town Labour Catchment

Table 5.5.2 below details the education attainment levels within each of the seven labour catchments for all workers, those employed within the city/town and those employed elsewhere. Relative to the other main settlements Sligo has the second highest level of overall education of those employed within the town. With a recorded rate of only 59.2% with 3rd level education employed in Sligo, only the settlement of Galway City (65.3%) has a higher rate of highly educated workers and is perhaps reflective of the level of high calibre jobs within the settlement in 3rd level institutes of education (Sligo IT), hospitals (Sligo General) and FDI companies such as Abbott, Abbvie, Bruss and GSK.

Table 4.5.1: Education Profile of those living in the seven Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

	Secondary Level	Third Level	Not Stated	Total
Sligo Labour Catchment (Total)	9,362	12,127	345	21,834
Working inside Sligo	4,389	6,591	149	11,129
Working outside Sligo	4,973	5,536	196	10,705
State	670,114	891,660	27,863	1,589,637
Sligo Labour Catchment (Total)	42.9%	55.5%	1.6%	100%
Working inside Sligo	39.4%	59.2%	1.3%	100%
Working outside Sligo	46.5%	51.7%	1.8%	100%
State	42.2%	56.1%	1.8%	100%

Table 4.5.2: % of Labour Catchment by Destination with 3rd Level Education, 2016 (Source: AIRO & CSO POWCAR)

	Working in Town	Working outside Town	Total
Galway	65.3%	56.4%	61.3%
Ennis	50.3%	57.2%	54.5%
Sligo	59.2%	51.7%	55.5%
Letterkenny	57.3%	46.4%	51.6%
Castlebar	50.3%	50.4%	50.4%
Roscommon	46.5%	50.3%	49%
Carrick-on-Shannon	47.8%	53.4%	51.9%
State			56.1%

4. Sligo Town Labour Catchment

4.3.6 Employment by Industrial Group

Analysis of the profile of employment by industry group provides an indication of the structure of the local economy and the type of employment it sustains as well as the skills profile of the area. It is particularly instructive to compare the profile of a region or local area to that of the State average as it can highlight differences at the local level. Employment by industrial group of all those living in the Sligo town labour catchment is shown in Figure 4.6. 'Education, Human Health and Social Work' (29.1%) and 'Wholesale, Retail Trade and Commerce' are the most important sectors (24.9%) and account for over half of all employment of those residing within the Sligo town labour catchment. 'Manufacturing Industries' (13.9%) and 'ICT, Professional Services' (10.7%) and 'Public Administration and Defence' (8.8%) are the next biggest employers for the labour catchment with all other sectors accounting for less than 6% each.

Relative to the national picture, 'Education, Human Health and Social Work' and 'Public Administration and Defence' sectors play a more important role in the overall employment base – the 'Education, Human Health and Social Work' share of employment (29.1%) is 6.3 percentage points higher than the State average (22.8%) and the 'Public Administration and Defence' sector is 2.8 percentage points higher. With the exception of 'Agriculture, Forestry and Fishing' (5.2% v 4.2%) and 'Construction' (1.9% v 2.8%), all other sectors of employment for Sligo town labour catchment residents are similar to or below the State average. The 'ICT and Professional Services' sector has the worst performance relative to the State average with the Sligo Labour Catchment recording a rate of 10.7% whereas the State average was 20.3%.

Figure 4.6: Industry Profile of those living in the Sligo Town Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

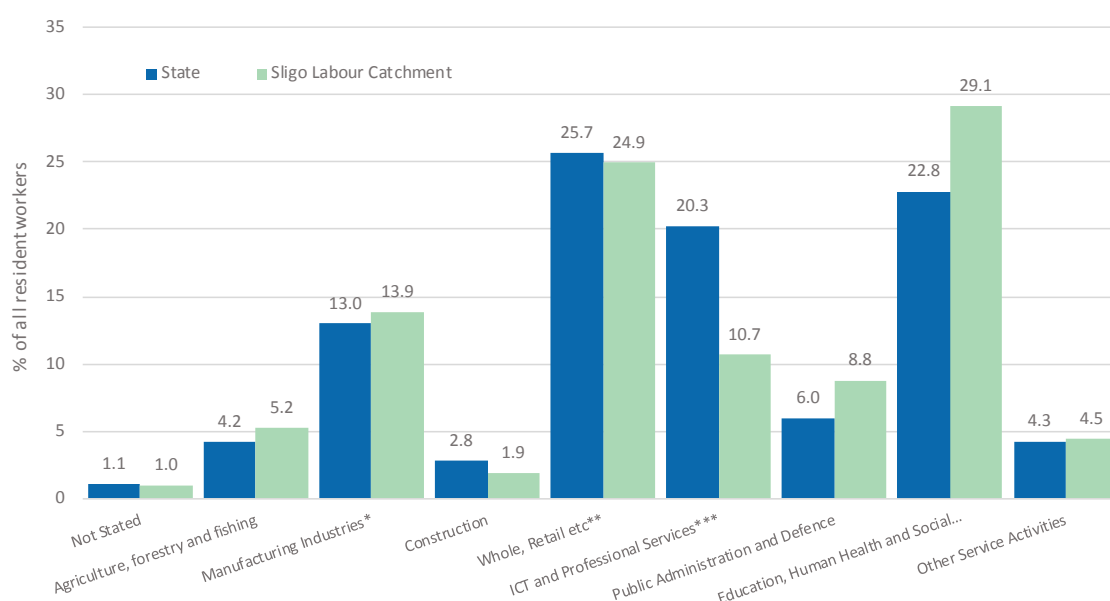


Table 4.6 details the industry of employment of the Sligo town labour catchment by the location of employment – within Sligo town and outside the town. Employment in 'Education, Human Health and Social' (33.1% v 25%), 'Manufacturing Industries' (16.1% v 11.6%) and 'Public Administration and Defence' (11.5% v 6%) are more dominant in those employed within Sligo town whereas 'Wholesale, Retail and Commerce' (21.9% v 28.1%), 'ICT and Professional Services' (10.5% v 10.9%) and 'Agriculture, Forestry and Fishing' (1% v 9.6%) are higher outside the town – within the wider catchment and beyond. Interestingly, of all the county towns within the Western Region, only Sligo town catchment has a higher proportion of non-town workers employed in the 'Wholesale, Retail and Commerce' sector than town worker counterparts.

4. Sligo Town Labour Catchment

Table 4.6: Industry Profile of those living in the Sligo Town Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

	Sligo Labour Catchment	Working inside Sligo	Working outside Sligo	State
Agricultural, Forestry and Fishing	5.2%	1%	9.6%	4.2%
Manufacturing Industries*	13.9%	16.1%	11.6%	13%
Construction	1.9%	1%	2.8%	2.8%
Wholesale, Retail etc	24.9%	21.9%	28.1%	25.7%
ICT and Professional Services***	10.7%	10.5%	10.9%	20.3%
Public Administration and Defence	8.8%	11.5%	6%	6%
Education, Human Health and Social Work Activities	29.1%	33.1%	25%	22.8%
Other Services	4.5%	4.1%	4.9%	4.3%
Not Stated	1.0%	0.8%	1.2%	1.1%
Total	100% (21,834)	100% (11,129)	100% (10,705)	100% (1.59m)

Note: with only nine classifications available, industrial classifications in POWCAR are less detailed than normal classifications in regular Census.

*Manufacturing Industries = Manufacturing, mining and quarrying, Electricity, Gas, Water supply and Waste Management

**Wholesale, Retail etc = Wholesale, Retail Trade, Transportation and Storage, Accommodation and Food Service Activities

***ICT and Professional Services = Information and Communication, Financial, Real Estate, Professional, administration and support service activities

4.3.7 Socio-Economic Group (SEG)

The socio-economic structure of employment in the Sligo town labour catchment is set out in Figure 4.7. The socio-economic group (SEG) is determined by occupation and employment status and aims to classify those on the basis of comparable skill and educational levels. This is also a useful indicator of the type of employment and skills available within labour catchments and is particularly informative when compared to the national socio-economic structure.

The socio-economic structure of the Sligo town labour catchment is broadly similar to that of the State with the largest groups being 'Non-Manual' (29.9%), 'Lower Professionals' (18.7%), 'Employers and Managers' (13.0%), 'Semi Skilled' (11.0%) and then 'Higher Professionals' (9.1%). Although following a similar trend the Sligo Town labour catchment has lower rates than the State average in the top tier SEG categories: 'Employers and Managers' (13.0% v 16.7%) and 'Higher Professionals' (9.1% v 9.4%). The Sligo Town labour catchment then has higher proportions within the socio-economic structure categories of 'Lower Professionals' (18.7% v 17.6%), 'Non-Manual' (29.9% v 28.6%), 'Semi-Skilled' (11% v 9.8%), 'Own Account Workers' (3.0% v 2.6%) and Farmers (4.9% v 3.4%).

Table 4.7 details the socio-economic structure breakdown for those working within Sligo town and those working outside the town. The largest difference between town and non-town based workers is within the 'Non Manual' and 'Higher and Lower professional' groups. Excluding these groups the largest difference between town and non-town employment relates to those classed as 'Farmers', where the rate is 0.8% in the town and 4.9% outside the town, followed by 'Manual-Skilled' (5.3% v 6.3%) and 'Own Account Workers' (1.7% v 3.0%).

4. Sligo Town Labour Catchment

Figure 4.7: SEG Profile of those living in the Sligo Town Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

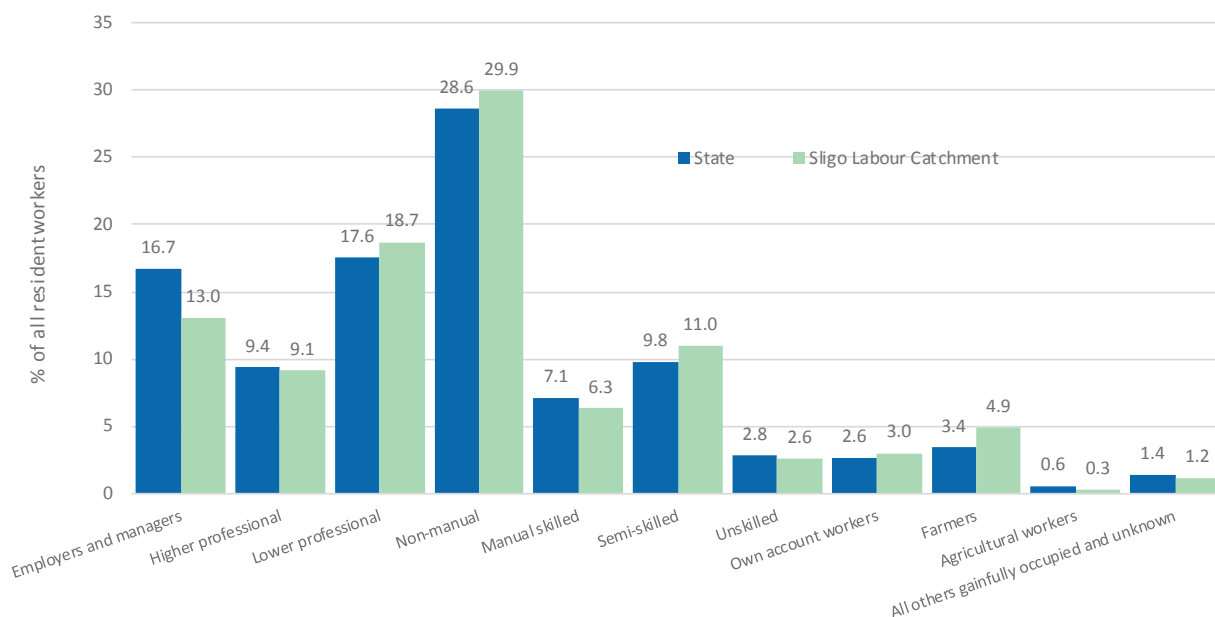


Table 4.7: SEG Profile of those living in the Sligo Town Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

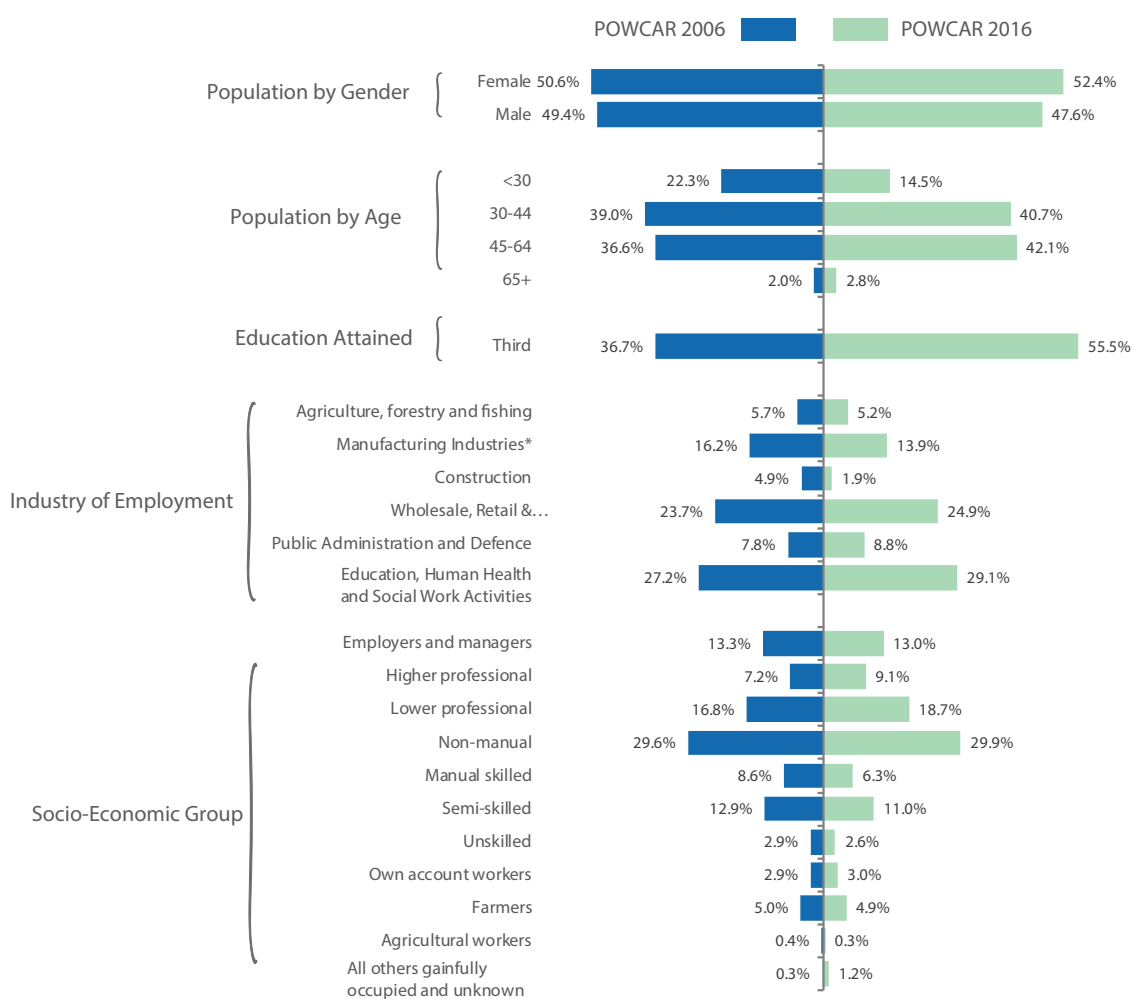
	Sligo Labour Catchment	Working inside Sligo	Working outside Sligo	State
Employers and managers	16.7%	13%	12.4%	16.7%
Higher professional	9.4%	9.1%	11.2%	9.4%
Lower professional	17.6%	18.7%	20.7%	17.6%
Non-manual	28.6%	29.9%	32.8%	28.6%
Manual skilled	7.1%	6.3%	5.3%	7.1%
Semi-skilled	9.8%	11%	11.1%	9.8%
Unskilled	2.8%	2.6%	2.7%	2.8%
Own account workers	2.6%	3%	1.7%	2.6%
Farmers	3.4%	4.9%	0.8%	3.4%
Agricultural workers	0.6%	0.3%	0.1%	0.6%
Others gainfully occupied and unknown	1.4%	1.2%	1.2%	1.4%
Total	100% (21,834)	100% (11,129)	100% (10,705)	100% (1.59m)

4. Sligo Town Labour Catchment

4.4 Analysis of change between 2006 and 2016

The graphic below details the change that has occurred across the Sligo town Labour Catchment between 2006 and 2016. This is reviewed in the context of geographical changes and then the socio-economic characteristics of those residing within the overall catchment area. Most notable changes in terms of socio-economic characteristics certainly relate to the age of resident workers and the rate of third level attainment.

- As with the analysis based on the 2006 POWCAR results, the Sligo town labour catchment is a key labour catchment in the Western Region with its ranking increasing from the third largest to the second largest over the last ten years. It has a resident 'at work' population of 21,834 and accounts for 8.4% of the total resident workforce within the Western Region. This is an increase of 7.4% (1,513) from the 2006 figure of 20,321 when it represented a marginally smaller proportion of 8.3% of the total resident workforce within the Western Region.
- A review of the geographical extent of the labour catchments from the 2006 and 2016 POWCAR analysis reveals that the Sligo labour catchment is still the dominant catchment within county Sligo. Since the 2006 based analysis, the catchment has extended and now encompasses the previous labour catchments of both Tubbercurry and Bundoran – both excluded from the 2016 analysis as they only contained two EDs (see Appendix). The growth of Sligo town in terms of jobs and population between 2006 and 2016 is a major contributory factor to the expansion of the Sligo town labour catchment and it strengthening as a key regional centre in the north-west.



4. Sligo Town Labour Catchment

4.5 Sligo Town Labour Catchment Summary

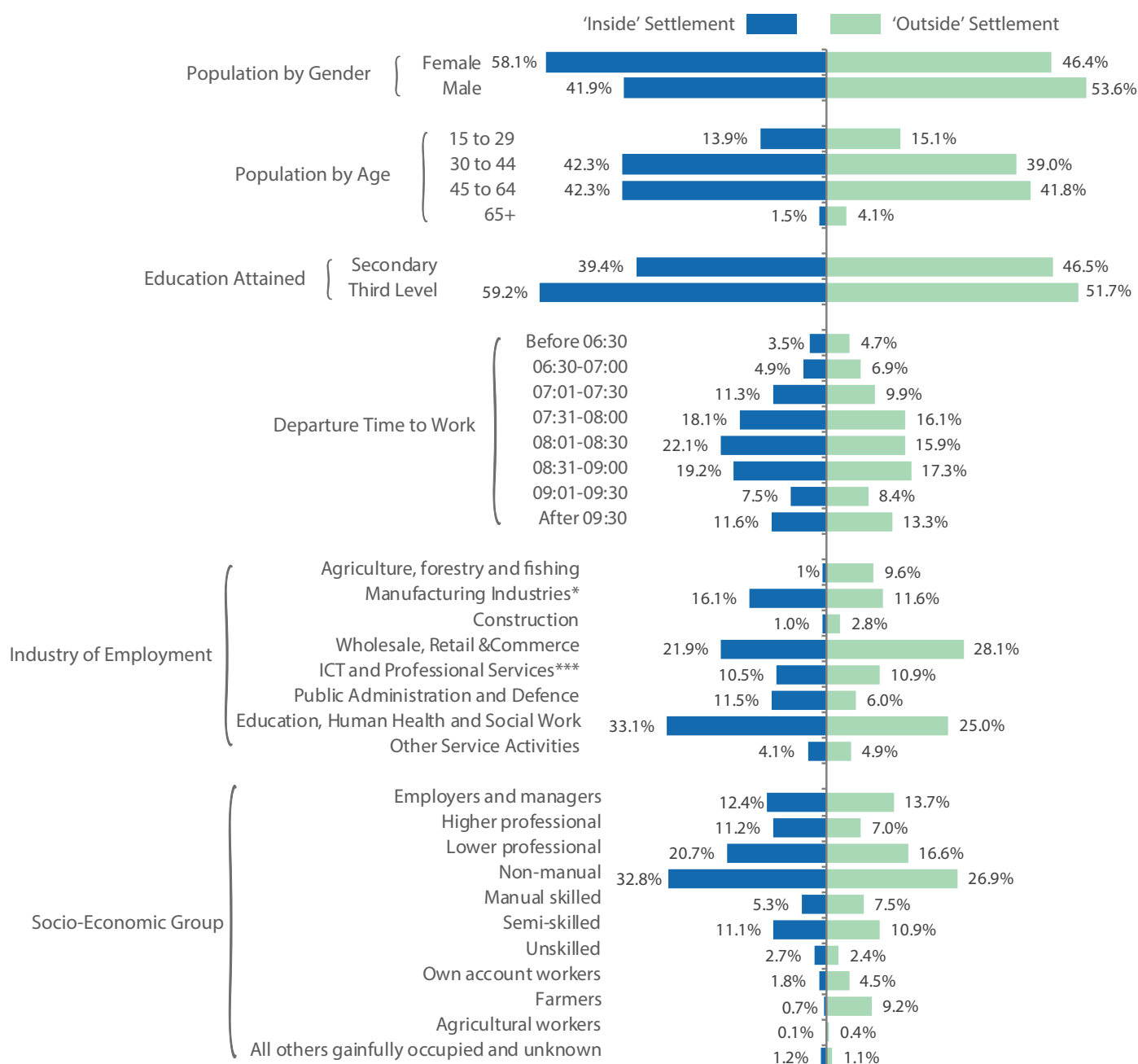
This section provides a summary of the key points of the Sligo Town Labour Catchment

- The Sligo town labour catchment is the second largest labour catchment in the Western Region (Map 2.1) with a resident 'at work' population of 21,834 which accounts for 8.4% of the total resident 'at work' population within the Western Region (260,261).
- The Sligo town labour catchment covers the vast majority of county Sligo and extends into parts of north Leitrim and the very southern portion of south Donegal (Map 4.2). In 2016, there were 21,834 people classified as at work and living within the labour catchment. This figure is more than three times the resident 'at work' population within the town at its core (6,878). The 2016 total is +7.5% higher than the 2006 total of 20,321.
- The towns of Ballina and Charlestown in Mayo and Boyle in Roscommon have labour catchments that extend into parts of west and south Sligo. These towns are themselves the most important places for employment for those living in their immediate hinterlands, and therefore constitute separate, but small, labour catchments within the county boundary of Sligo.
- Of those living in the Sligo town labour catchment, 51% (11,129) are employed within Sligo town and 49% (10,705) are employed outside the town and in the rest of the catchment and beyond. Key destinations outside the town are Sligo Rural (15% or 3,280), Collooney (2.5% or 550) and Tubbercurry (2.4% or 517) – see Table 4.1 for more details.
- A demographic profile of the Sligo town labour catchment shows the following:
 - The age profile of those living in the Sligo town labour catchment is quite young and third youngest of the catchments of the seven county towns in the Western Region.
 - Female workers account for a larger proportion of the workforce than their male counterparts with rates of 52.4% and 47.6% respectively. This gender gap is further extended when looking at those employed within the town where more women than men are employed, 58.1% and 41.9% respectively.
 - Those at work and residing in the Sligo town labour catchment have a marginally lower level of education than the State average – with rates of 55.5% and 56.1% respectively (3rd level). This is, however, the second highest rate amongst all other seven county town labour catchments in the Western Region. Those within the catchment and employed in Sligo town have a higher rate at 59.2%.
- Analysis of the profile of the industry of employment within the Sligo town labour catchment shows the following:
 - The single largest employer is the 'Education, Human Health and Social Work' sector and accounts for 29.1% (6,363) which is higher than the State average (22.8%).
 - Both the 'Wholesale, Retail and Commerce' (24.9% or 5,444) and 'ICT and Professional Services' (10.7% or 2,330) are important employment sectors although 'ICT and Professional Services' is much lower than the State average.
 - Manufacturing Industries (13.9% or 3,032) is the fourth most important sector and higher than the State average of 13%.

4. Sligo Town Labour Catchment

4.6 Socio-economic comparison of those employed 'Inside' and 'Outside' Sligo Town

The graphic below details the socio-economic characteristics of resident workers within the Sligo town labour catchment who are employed within Sligo town (Inside) and those that are employed outside Sligo town – within the wider labour catchment and beyond (Outside).



Ennis Labour Catchment



5. Ennis Labour Catchment

Introduction

The Ennis settlement had a population of 25,276 persons recorded in the 2016 Census. Ennis is the 2nd largest settlement within the Western Region and the 12th largest in the State. Since 2006, the population residing within the town of Ennis has increased by 4.2% (+1,019). In the five years since Census 2011, the population of the town has actually decreased by -0.3% (-88). Demographic comparisons between urban centres tend to be difficult due to intercensal boundary changes. For instance, in 2014 all legal town boundaries (Ennis included) were abolished under the Local Government Act 2014. Accordingly the population of these former legal towns have been newly defined using the standard census town criteria. For some towns, the impact of this has been to lose area and population, compared with previous computations.

According to POWSCAR 2016, the total number of jobs located within Ennis was 10,172 and accounts for 4.2% of all jobs located within the Western Region (242,712). Of all cities and towns in Ireland, Ennis has the 16th highest number of jobs located within the town boundary and accounts for 29.3% of all jobs located within County Clare. Relative to six other main settlements in this report, Ennis has the 4th highest number of jobs within the town with higher numbers in Galway City (44,376), Sligo (13,024) and Letterkenny (11,395) and then lower numbers in Castlebar (9,045), Roscommon (3,917) and Carrick-on-Shannon (2,868). It should be noted that the above job numbers relate to those within the town boundary as defined by the CSO and do not include jobs located outside the town boundary or nearby employment concentrations (industrial parks, local factories etc).

5.1 The importance of Ennis as a place of work

Map 5.1 shows the extent of commuting flows to Ennis for employment opportunities. The colours represent the different proportions of people who live in each ED and travel to work in Ennis. The map shows every ED (within the frame) by commuting flow to Ennis. EDs with commuters numbers linked to Ennis between one and four (trips) have been set to a value of one¹.

As would be expected, the EDs closest to Ennis have the highest proportion working in the town, and this is indicated by the darker shades of blue in and around the town perimeter. Beyond these areas, the proportion travelling to the town gradually decreases. The map shows the declining proportion of those living in each ED and commuting to Ennis, graduating from the dark blue where in excess of 60% of people living in those EDs work in Ennis, through to medium green where between 5 and 15% living in those EDs commute to work in Ennis – this stretches to Kilkee, Doonbeg, Liscannor and Lisdoonvarna along the west coast, Gort to the north and Bodyke, Sixmilebridge and Scarriff to the east. In general, the Ennis labour catchment is predominantly contained within the Clare local authority area and the influence of Limerick City as a key destination is most notable in the south-east of the county. Low levels of interaction (0.1% to 5%) are visible in locations to the north and south of the Clare border although the actual number of trips within these locations would be extremely low in most cases (less than 5).

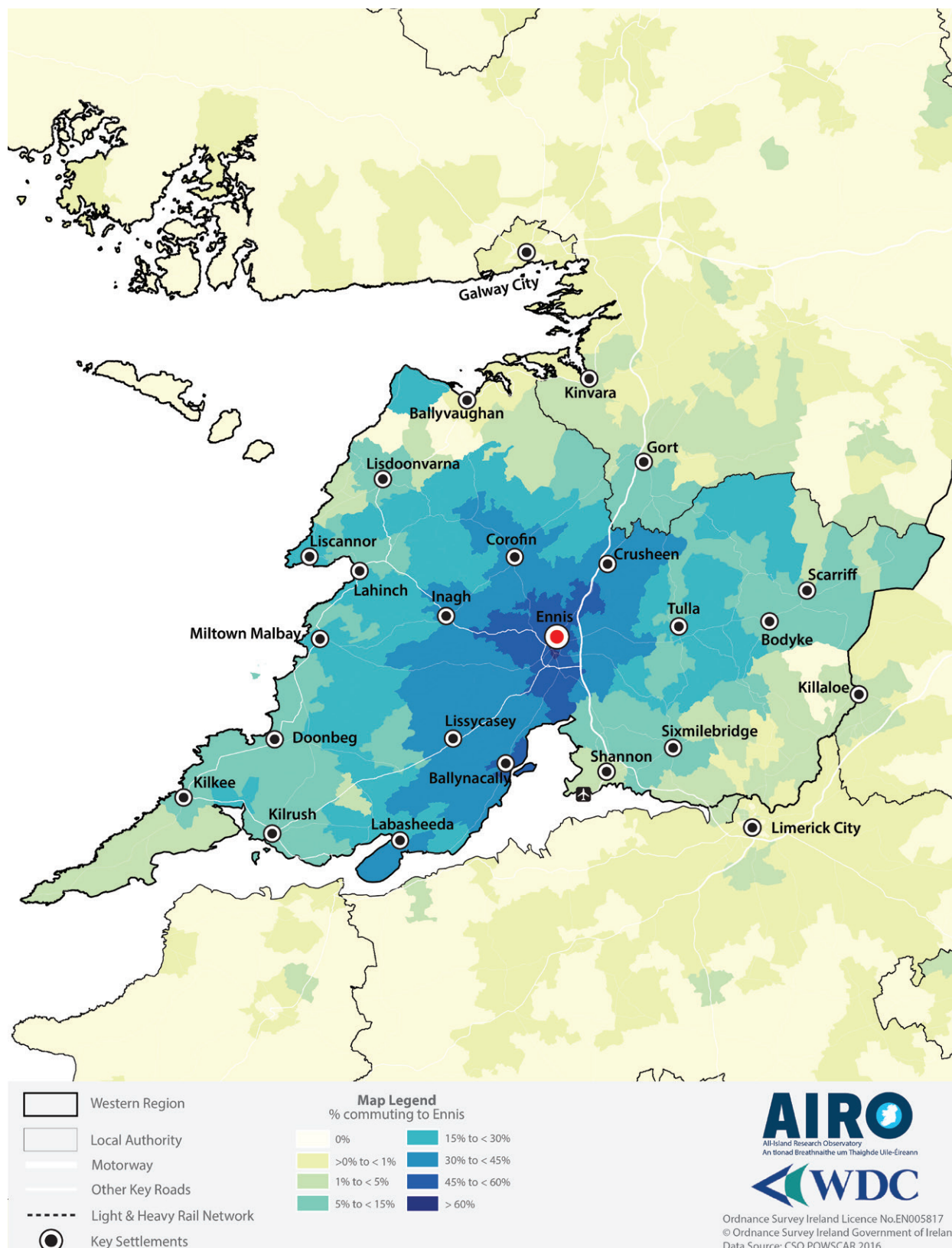
5.2 The Ennis Labour Catchment

While Map 5.1 shows every ED from where even one person commuted to Ennis, all of these EDs are not included in the Ennis labour catchment. The Ennis labour catchment, is made up only of those EDs for which Ennis is the most popular work destination for those living there. Other EDs, whose commuters travel in greater numbers to other towns are assigned to the catchments of these other towns. Map 5.2 shows the Ennis labour catchment, depicted by the green colour.

¹ This is due to data confidentiality protocols related to access to the POWCAR 2016 dataset.

5. Ennis Labour Catchment

Map 5.1: Percentage of persons commuting to Ennis, 2016 (Source: AIRO & CSO POWCAR)



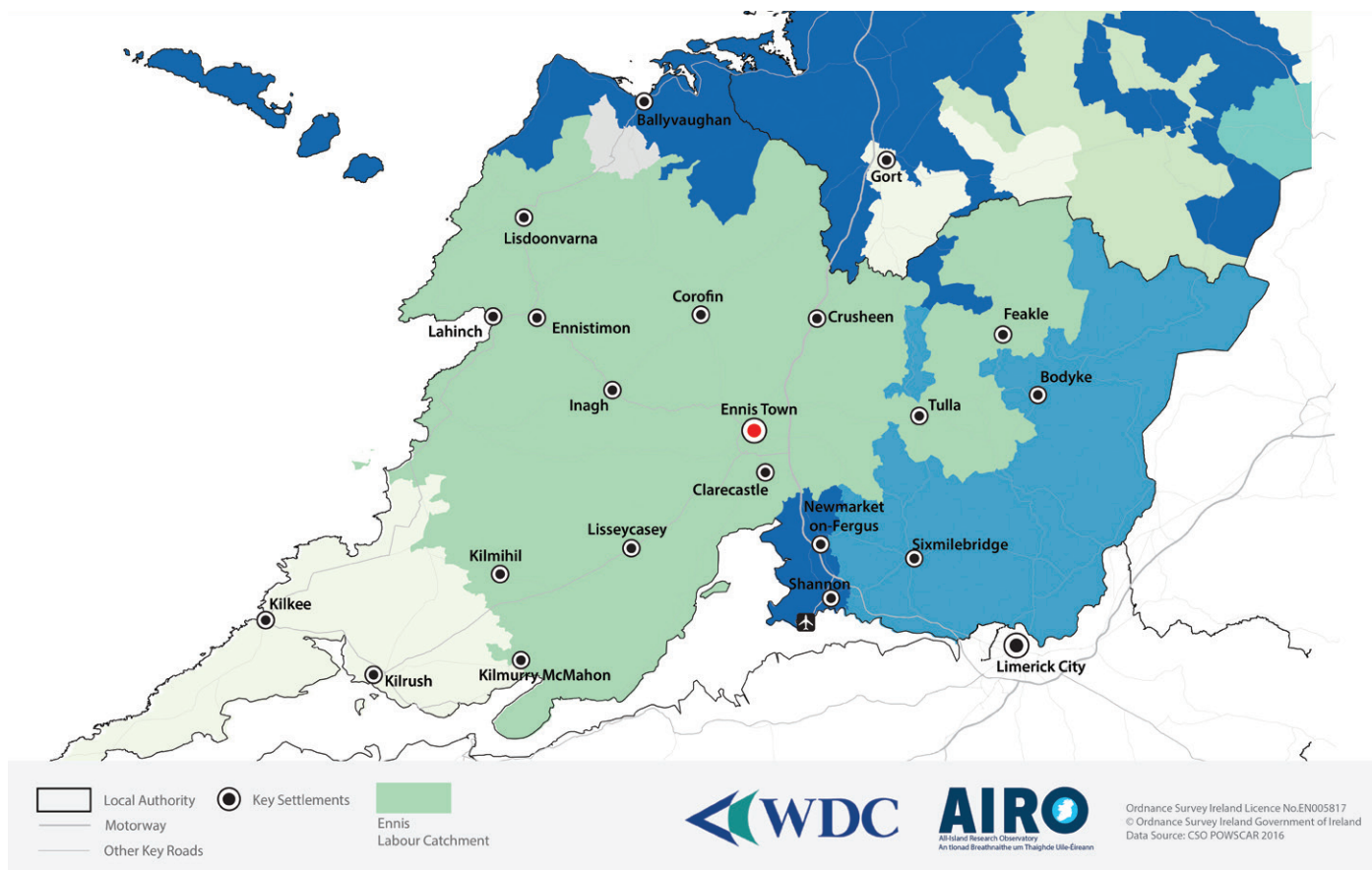
5. Ennis Labour Catchment

The data presented in Map 5.2 show that the influence of Ennis as a place of work extends over a large area but is predominately contained within county Clare. While the labour catchment extends to large parts of the county it excludes south western areas which are more influenced by the Kilrush labour catchment and the Galway City labour catchment which forms part of north-west Clare in areas close to Fanore and Ballyvaughan. Ennis is still the dominant labour catchment for parts of east Clare (Tulla and Feakle) but this area is mainly under the influence of Limerick City which acts as a major destination of south-east Clare. The strategic importance of Shannon Airport is well documented and it may seem surprising that this destination does not show a larger influence on the wider area – this is a result of the airport and associated airport jobs being actually located outside the Shannon town boundary.

The entire Ennis town labour catchment is far larger than the number of resident workers in the town at its core. Ennis town labour catchment has a population at work twice the census population of resident workers in Ennis town itself, (21,409 and 10,737 (including blank and mobile workers) respectively).

In general, Ennis is an important job location for the region but its influence is mainly within county Clare. In particular, the immediate areas surrounding Ennis, central Clare (Inagh, Corofin, Lisseycasey etc) and then the mid-western coastal areas stretching from Miltown Malbay to Doolin.

Map 5.2: Ennis Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)



5. Ennis Labour Catchment

5.3 Profile of the Ennis Labour Catchment

Map 5.2 identified (in green) the Ennis labour catchment. In the following section we examine the socio-economic characteristics of all those living in this labour catchment and at work, even though they may not all have been working in Ennis in April 2016. We do this because although some may not be working in Ennis they are living in the catchment from which the Ennis labour supply is drawn and including them provides a more complete assessment of the potential labour supply for Ennis. The Ennis labour catchment is therefore separated into those who live in the catchment and are employed in the following; 'Inside' the town or 'Outside' the town i.e., elsewhere in the catchment or locations such as Limerick City, Shannon, Dublin etc. This profile is further supported by an analysis of changes in the catchment between 2006 and 2016, both in terms of geography and socio-economic characteristics (5.4), a comparison matrix of 'Inside' and 'Outside' town workers (5.6) and an overall comparison matrix for all seven labour catchments (10.1).

5.3.1 Place of Work

The Ennis labour catchment can be seen to include most of county Clare but mainly contained within central areas and the mid-west. In 2016, there were 21,409 people classified as at work, living within the Ennis labour catchment (+0.3% from 21,333 in 2006). In Figure 5.1 and Table 5.1 the main work locations for those who live in the Ennis labour catchment are set out.

Figure 5.1: Place of work of those living in the Ennis Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

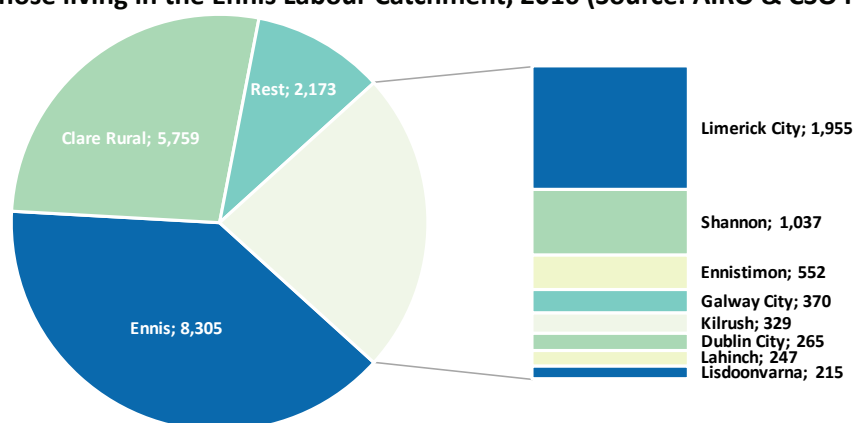


Table 5.1: Place of work of those living in the Ennis Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

Labour Catchment	Number	%
Ennis	8,305	38.8%
Clare Rural	5,759	26.9%
Rest	2,173	10.1%
Limerick City	1,955	9.1%
Shannon	1,037	4.8%
Ennistimon	552	2.6%
Galway City	370	1.7%
Kilrush	329	1.5%
Dublin City	265	1.2%
Lahinch	247	1.2%
Lisdoonvarna	215	1%
Miltown Malbay	202	0.9%
Total	21,409	100%

4. Ennis Labour Catchment

As expected, Ennis is the principal place of employment, accounting for 8,305 (38.8%) of all employment. Clare Rural County (5,759) is the next most popular destination, being the work location for 26.9% of all those living in the Ennis labour catchment. As detailed in the previous map, Limerick City is a major destination for workers residing within Clare – a total of 1,955 or 9.1% of the Ennis labour catchment are employed within the city.

The other large employment destinations for residents within the Ennis labour catchment are primarily towns in close proximity to Ennis (Shannon, Ennistymon, Kilrush, Lahinch, Lisdoonvarna and Miltown Malbay etc). Both Galway City (370 or 1.7%) and Dublin City (265 or 1.2%) are also highlighted as key destinations for Ennis labour catchment residents. Recent changes to the motorway network, reduced travel times and more flexible working arrangements are certainly contributory factors to this. It should also be noted that the travel to work data from the CSO do not necessarily mean that commuters make daily trips and is more an identification of the main place and location of employment.

5.3.2 Travel Departure Times

In a change from the previous two POWCAR publications (2006 and 2011), the latest results from the 2016 Census only provide commuting details on the travel time departure of resident workers and not distance travelled. Results from distance travelled variables have included a large element of 'noise' with a documented low level of correlation between recorded 'distance travelled' and actual physical home to work distances. As such, the new travel indicator is based on the travel departure times of resident workers. Figure 5.2 below details the overall 'travel time departure' distribution of all Ennis labour catchment resident workers.

The most common travel time departures are within '08:01-08:30' and '08:31-09:00' band with both accounting for 36.1% of all resident workers. In comparison to the State average, the Ennis labour catchment resident workers have a much lower proportion leaving for work in the three early bands pre '07:30' with rates of 31.3% and 26.3%, respectively.

A comparison of the 'travel-time departures' of those working in Ennis town and those working elsewhere shows that Ennis bound workers tend to have later departure times than other workers residing within the overall labour catchment. A total of 16.9% of Ennis bound workers residing in the labour catchment depart for work pre '07:30', almost half that of the rate for workers travelling to other destinations (32.2%). This is as a result of the mixed commuting patterns within the overall Ennis labour catchment where a total of 61% commute to destinations other than Ennis town (Limerick City, Galway City etc). By contrast, this is very different to the Galway City labour catchment where over 55% of those living within the wider catchment commuted into Galway City for work.

5. Ennis Labour Catchment

Figure 5.2: Time of Departure of those living in the Ennis Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

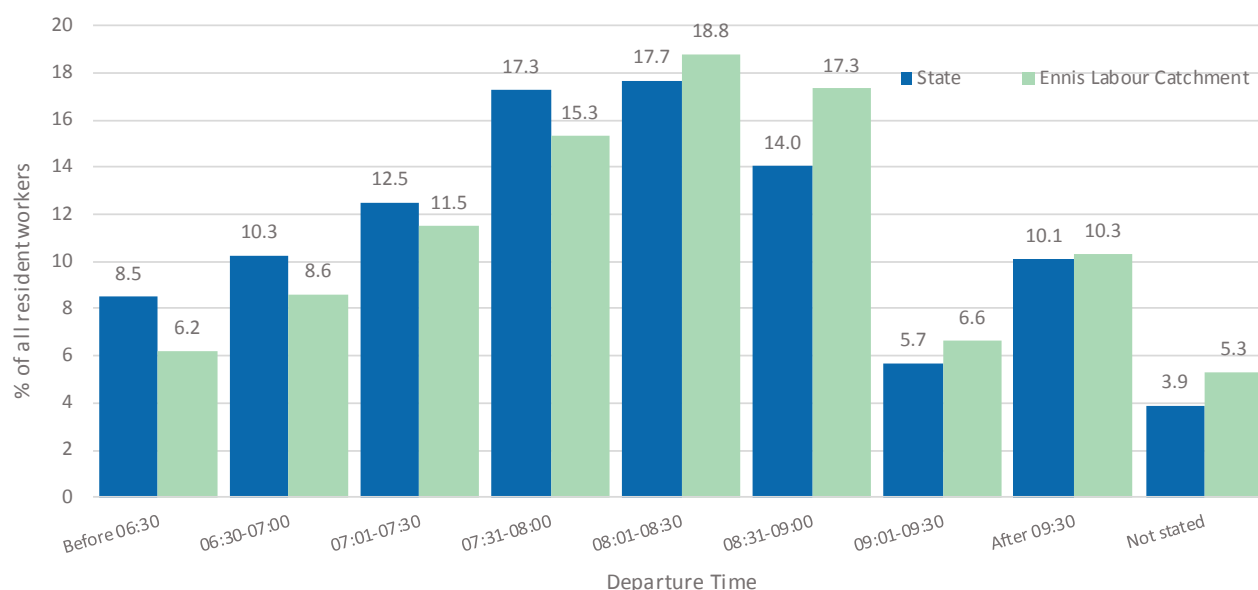


Table 5.2: Time of Departure of those living in the Ennis Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

	Before 06:30	06:30-07:00	07:01-07:30	07:31-08:00	08:01-08:30	08:31-09:00	09:01-09:30	After 09:30	Not stated	Total
Ennis Labour Catchment (Total)	1,331	1,841	2,463	3,279	4,024	3,708	1,421	2,208	1,134	21,409
Working Inside Ennis	318	396	691	1,221	1,776	1,948	737	994	224	8,305
Working Outside Ennis	1,013	1,445	1,772	2,058	2,248	1,760	684	1,214	910	13,104
State	135,187	163,290	199,035	274,425	281,003	223,164	90,521	160,901	62,111	1,589,637
Ennis Labour Catchment (Total)	6.2%	8.6%	11.5%	15.3%	18.8%	17.3%	6.6%	10.3%	5.3%	100.0
Working Inside Ennis	3.8%	4.8%	8.3%	14.7%	21.4%	23.5%	8.9%	12%	2.7%	100.0
Working Outside Ennis	7.7%	11%	13.5%	15.7%	17.2%	13.4%	5.2%	9.3%	6.9%	100.0
State	8.5%	10.3%	12.5%	17.3%	17.7%	14%	5.7%	10.1%	3.9%	100

5.3.3 Gender

The gender composition of residents in the Ennis labour catchment is shown below. Within the Ennis Labour Catchment, female workers account for a larger proportion of the total workforce than their male counterparts with rates of 51% and 49% respectively. The national picture is slightly different with males (50.1%) accounting for a marginally higher rate than females (49.9%).

5. Ennis Labour Catchment

There is a variation between men and women in terms of the location of their work. Far more women than men work in Ennis town, 60.4% and 39.6% respectively. Outside of Ennis destinations, male employment is higher than female employment with 54.9% of those employed outside the town being males. This reflects traditional employment patterns where agricultural employment in rural areas in part accounts for a higher male employment rate outside of the town. In contrast, employment sectors which are perceived as traditionally female are concentrated in the town, for example retail, banking, finance, public administration and tourism.

Table 5.3: Gender Profile of those living in the Ennis Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

	Female	Male	Total
Ennis Labour Catchment (Total)	10,923	10,486	21,409
Working inside Ennis	5,016	3,289	8,305
Working outside Ennis	5,907	7,197	13,104
State	793,196	796,441	1,589,637
Ennis Labour Catchment (Total)	51%	49%	100%
Working inside Ennis	60.4%	39.6%	100%
Working outside Ennis	45.1%	54.9%	100%
State	49.9%	50.1%	100%

An important point to note here is the fact that this analysis excludes all workers who do not have a fixed place of employment i.e., those with a blank or un-codable place of work and those with a place of work classed as 'mobile' (See Appendix). For instance, an analysis of the gender balance of all workers (including blank and mobile) reveals that 53.7% of all workers are male and 46.3% are female (State average). The rate in the Western Region are broadly similar with males accounting for 53.3% and females accounting for 46.7% of all workers. As such, the gender figures detailed and discussed in the above section should be treated with caution as the underlying worker population does not represent the complete population.

5.3.4 Age

The age profile of those at work and over 15 years who live in the Ennis labour catchment is shown in Table 5.4. Relative to other towns in this analysis, the age profile of the Ennis labour Catchment (13.3%) has the second lowest rate of workers aged less than 30 residing within the catchment.

This is perhaps somewhat surprising but may be explained by the fact that there is no third level educational institution within the town and that many young people migrate to other destinations for education and do not return to Ennis for immediate employment opportunities afterwards.

4. Ennis Labour Catchment

The rate of young workers is marginally higher for those employed within the town than those outside it and is evident in the data presented in Table 4.4 below. A total of 13.8% of all Ennis labour catchment workers employed in Ennis are aged 'less than 30 years' whereas the rate for non-Ennis workers is 13.1%. The proportion of young workers (less than 30) residing within the Ennis labour catchment, working in the town or elsewhere, is much lower than the overall State average of 17.5%. In general, there is a major difference in the age of the resident workforce in urban and rural areas. For instance, the cities (CSO Settlements) of Dublin, Cork and Galway all have rate in excess of 24% whereas the average rate for Clare County is 13.5%. At 13%, Galway County has the lowest rate of all local authorities in the State.

Table 5.4: Age Profile of those living in the Ennis Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

	<30 years	30 to 44 years	45 to 64 years	65+ years	Total
Ennis Labour Catchment (Total)	2,856	8,825	9,016	712	21,409
Working inside Ennis	1,145	3,365	3,623	172	8,305
Working outside Ennis	1,711	5,460	5,393	540	13,104
State	278,647	694,783	575,181	41,026	1,589,637
Ennis Labour Catchment (Total)	13.3%	41.2%	42.1%	3.3%	100%
Working inside Ennis	13.8%	40.5%	43.6%	2.1%	100%
Working outside Ennis	13.1%	41.7%	41.2%	4.1%	100%
State	17.5%	43.7%	36.2%	2.6%	100%

5.3.5 Education

Table 5.5 shows a lower than average educational profile among those living in the Ennis labour catchment with 54.5% having completed third level education compared to 56.1% nationally. Relative to the other six towns included in this analysis, Ennis has the third most educated workforce with only Galway City (61.3%) and Sligo (55.5%) with higher rates. Again, it is important to note that this is based on workers with a known work destination only and excludes those with Blank or Mobile work destination (32.4% of those coded blank or mobile in the State have third level qualifications). As a whole, overall education levels in Ireland have increased dramatically since the early '1990's with the proportion of the national population with a third level qualification increasing from 13.6% in 1991 to 42% in 2016.

There is also a large difference between the education attainment of those who are employed within Ennis (50.3% with 3rd level) and those employed outside the town (57.2% with 3rd level). This may relate to the high level of commuting from within the labour catchment to highly qualified employment opportunities within Limerick City, Shannon and other locations.

5. Ennis Labour Catchment

Table 5.5.2 below details the education attainment levels within each of the seven labour catchments for all workers, those employed within the city/town and those employed elsewhere. Relative to the other main settlements, Ennis has a relatively low level of overall education of those employed within the town. With a recorded rate of only 50.3% with 3rd level education employed in Ennis, the settlements of Galway City (65.3%), Sligo (59.2%) and Letterkenny (57.3%) have much higher rates of highly educated workers and is perhaps reflective the location of third level education institutes, major hospitals and IDA business parks with higher levels of foreign direct investment companies.

Table 5.5.1: Education Profile of those living in the Ennis Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

	Secondary Level	Third Level	Not Stated	Total
Ennis Labour Catchment (Total)	9,375	11,668	366	21,409
Working inside Ennis	3,959	4,177	169	8,305
Working outside Ennis	5,416	7,491	197	13,104
State	670,114	891,660	27,863	1,589,637
Ennis Labour Catchment (Total)	43.8%	54.5%	1.7%	100%
Working inside Ennis	47.7%	50.3%	2%	100%
Working outside Ennis	41.3%	57.2%	1.5%	100%
State	42.2%	56.1%	1.8%	100%

Table 5.5.2: % of Labour Catchment by Destination with 3rd Level Education, 2016 (Source: AIRO & CSO POWCAR)

	Working in Town	Working outside Town	Total
Galway	65.3%	56.4%	61.3%
Ennis	50.3%	57.2%	54.5%
Sligo	59.2%	51.7%	55.5%
Letterkenny	57.3%	46.4%	51.6%
Castlebar	50.3%	50.4%	50.4%
Roscommon	46.5%	50.3%	49%
Carrick-on-Shannon	47.8%	53.4%	51.9%
State			56.1%

4. Ennis Labour Catchment

5.3.6 Employment by Industrial Group

Analysis of the profile of employment by industry group provides an indication of the structure of the local economy and the type of employment it sustains as well as the skills profile of the area. It is particularly instructive to compare the profile of a region or local area to that of the State average as it can highlight differences at the local level. Employment by industrial group of all those living in the Ennis labour catchment is shown in Figure 5.6. The 'Wholesale, Retail Trade and Commerce' sector is the most important employer (25.8%) and along with 'Education, Human Health and Social Work' (23%) account for just under half of all employment of those residing within the Ennis Labour Catchment. 'Manufacturing Industries' (15.4%) and 'ICT and Professional Services' (13.6%) are the next biggest employers for the labour catchment with all other sectors accounting for less than 8% each.

Relative to the national picture, 'Agriculture, Forestry and Fishing' and 'Manufacturing Industries' sectors play a more important role in the overall employment base. The 'Agriculture, Forestry and Fishing' share of employment (6.5%) is 2.3 percentage points higher than the State average (4.2%) and the 'Manufacturing Industries' sector is 2.4 percentage points higher than the State average (13%). With the exception of 'Public Administration and Defence' (7.7% v 6%), all other sectors of employment for Ennis labour catchment residents are similar to or below the State average. The 'ICT and Professional Services' sector has the lowest rate relative to the State average with the Ennis Labour Catchment recording a rate of 13.6% whereas the State average was 20.3%.

Figure 5.6: Industry Profile of those living in the Ennis Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

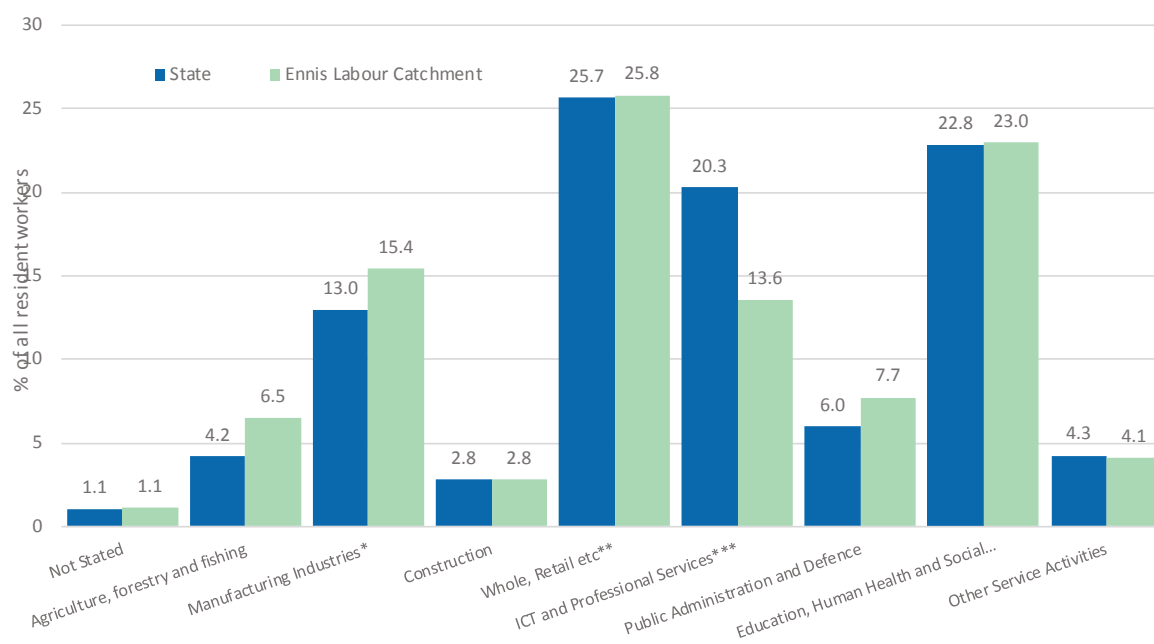


Table 5.6 details the industry of employment of the Ennis labour catchment by the location of employment – within Ennis or outside the town. Employment in 'Wholesale, Retail and Commerce', 'Education, Human Health and Social, and 'Public Administration and Defence' are more dominant among those employed within Ennis. The 'ICT and Professional Services', 'Manufacturing' and 'Agriculture, Forestry and Fishing' sectors are higher for those employed outside the town in locations such as Shannon and Limerick City for urban based employment and then within rural locations for agricultural based employment.

5. Ennis Labour Catchment

Table 5.6: Industry profile of those living in the Ennis Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

	Ennis Labour Catchment	Working inside Ennis	Working outside Ennis	State
Agricultural, Forestry and Fishing	6.5%	0.8%	10.1%	4.2%
Manufacturing Industries*	15.4%	12.1%	17.6%	13%
Construction	2.8%	2.1%	3.2%	2.8%
Wholesale, Retail etc	25.8%	28.8%	23.9%	25.7%
ICT and Professional Services***	13.6%	12.1%	14.4%	20.3%
Public Administration and Defence	7.7%	11.2%	5.5%	6%
Education, Human Health and Social Work Activities	23%	26.3%	20.8%	22.8%
Other Services	4.1%	5.6%	3.1%	4.3%
Not Stated	1.1%	0.9%	1.3%	1.1%
Total	100% (21,409)	100% (8,305)	100% (13,104)	100% (1.59m)

Note: with only nine classifications available, industrial classifications in POWCAR are less detailed than normal classifications in regular Census.

*Manufacturing Industries = Manufacturing, mining and quarrying, Electricity, Gas, Water supply and Waste Management

**Wholesale, Retail etc = Wholesale, Retail Trade, Transportation and Storage, Accommodation and Food Service Activities

***ICT and Professional Services = Information and Communication, Financial, Real Estate, Professional, administration and support service activities

5.3.7 Socio-Economic Structure

The socio-economic structure of employment in the Ennis Labour Catchment is set out in Figure 5.7. The socio-economic group (SEG) is determined by occupation and employment status and aims to classify those on the basis of comparable skill and educational levels. This is also a useful indicator of the type of employment and skills available within labour catchments and is particularly informative when compared to the national socio-economic structure.

The socio-economic structure of the labour catchment of Ennis is broadly similar to that of the State with the largest groups being 'Non-Manual' (28.1%), 'Lower Professionals' (18.3%), 'Employers and Managers' (14.2%), 'Semi Skilled' (9.6%) and then 'Higher Professionals' (8%). Although following a similar trend the Ennis labour catchment has lower rates than the State average in the top tier socio-economic structure categories: 'Employers and Managers' (14.2% v 16.7%) and 'Higher Professionals' (8% v 9.4%). The Ennis labour catchment also has a higher proportion within the socio-economic structure categories of 'Own Account Workers' (3.6% v 2.6%) and Farmers (6.2% v 3.4%).

Table 5.7 details the socio-economic structure breakdown for those working within Ennis and those working outside Ennis. As a follow on to previous indicators on the high level of external commuting (i.e., beyond the catchment such as Shannon or Limerick) to quality employment opportunities, there are somewhat notable differences in rates with a higher proportion of those employed outside Ennis town classed as 'Higher and Lower Professionals'. Although only marginal, this needs to be contextualised and take account of the high levels of agricultural socio-economic structure in the non-town workers which in fact understates the overall percentage rates of the 'Higher and Lower Professionals' in the non-town group.

The largest difference between town and non-town based workers is within the 'Non Manual' group which relates to persons working in retail, government, banking and other areas fulfilling administrative roles.

5. Ennis Labour Catchment

After these, the largest difference between town and non-town employment relates to those classed as 'Farmers' where the rate is 9.6% outside the town and only 0.8% in the town.

Figure 5.7: SEG Profile of those living in the Ennis Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

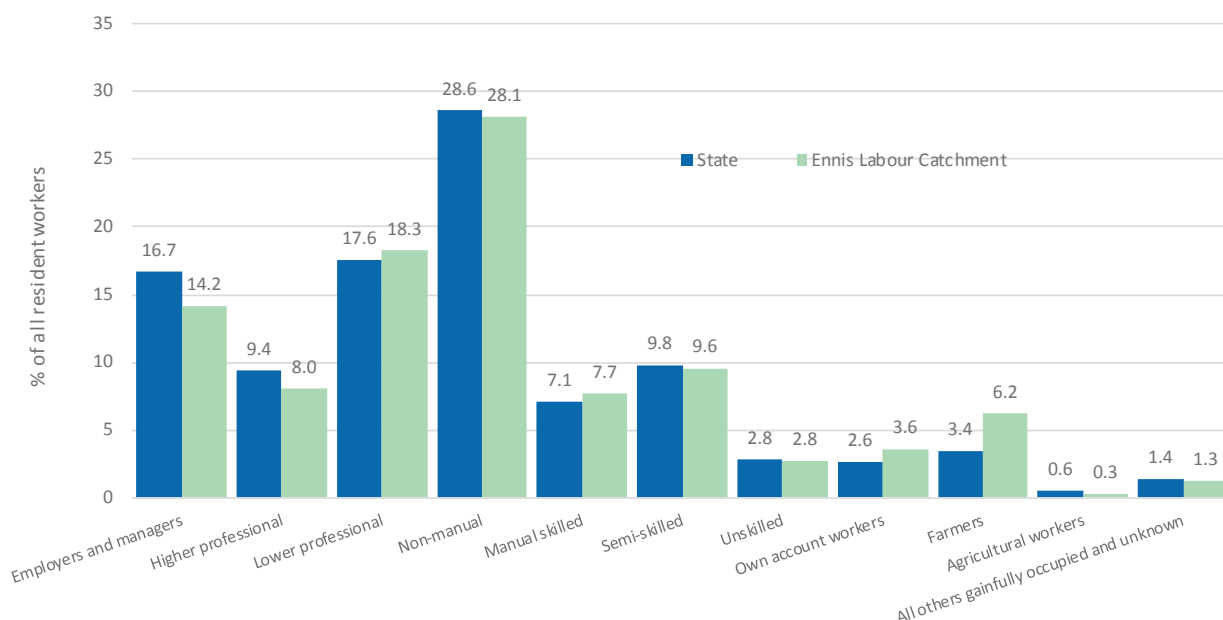


Table 5.7: SEG Profile of those living in the Ennis Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

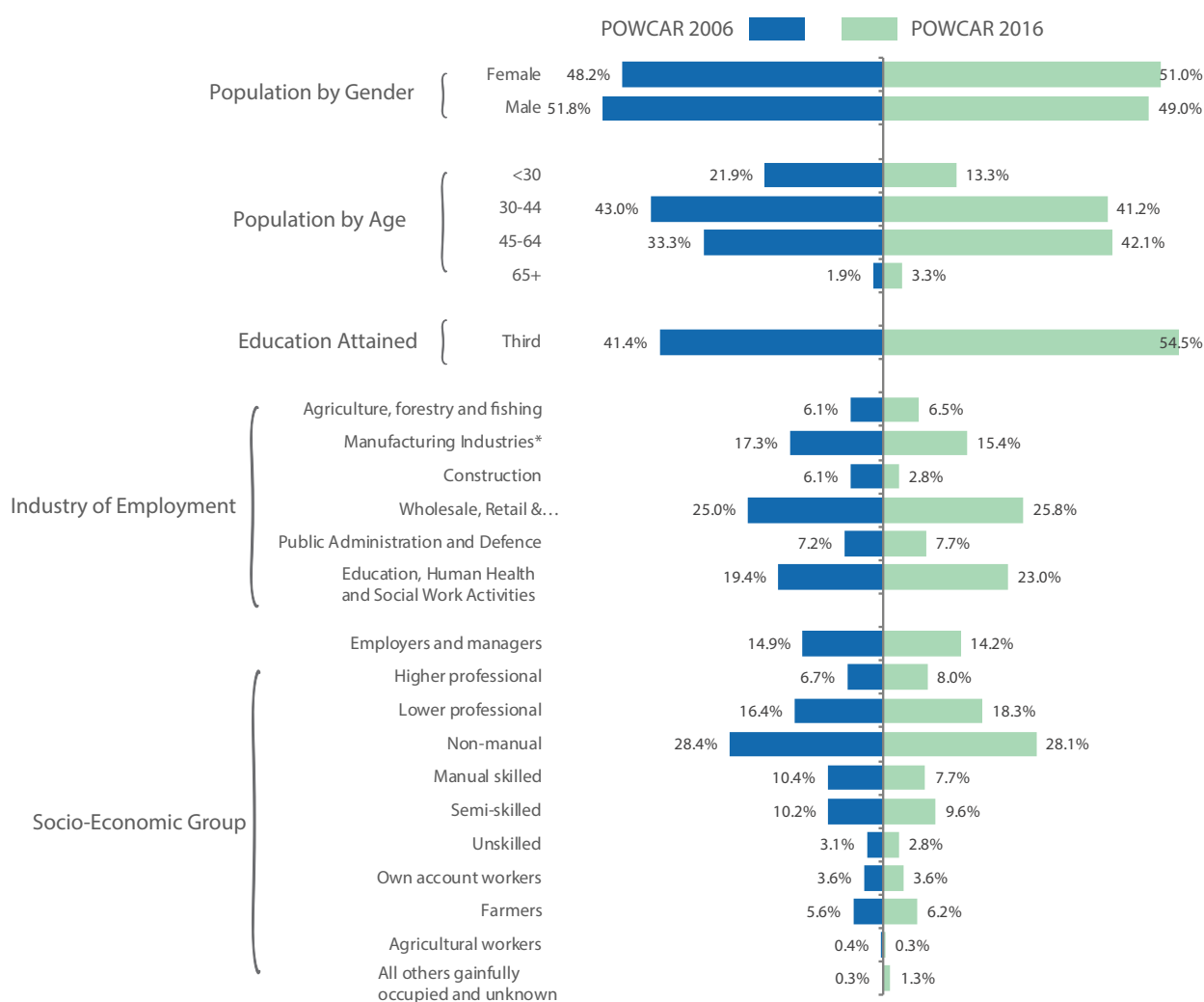
	Ennis Labour Catchment	Working inside Ennis	Working outside Ennis	State
Employers and managers	14.2%	13.5%	14.6%	16.7%
Higher professional	8%	7.1%	8.6%	9.4%
Lower professional	18.3%	17.8%	18.6%	17.6%
Non-manual	28.1%	36.5%	22.8%	28.6%
Manual skilled	7.7%	6.2%	8.6%	7.1%
Semi-skilled	9.6%	10.7%	8.9%	9.8%
Unskilled	2.8%	2.8%	2.7%	2.8%
Own account workers	3.6%	3.2%	3.9%	2.6%
Farmers	6.2%	0.8%	9.6%	3.4%
Agricultural workers	0.3%	0.1%	0.4%	0.6%
Others gainfully occupied and unknown	1.3%	1.3%	1.3%	1.4%
Total	100% (21,409)	100% (8,305)	100% (13,104)	100% (1.59m)

5. Ennis Labour Catchment

5.4 Analysis of change between 2006 and 2016

The graphic below details the change that has occurred across the Ennis Labour Catchment between 2006 and 2016. This is reviewed in the context of geographical changes and then the socio-economic characteristics of those residing within the overall catchment area. Most notable changes in terms of socio-economic characteristics certainly relate to the age of resident workers and the rate of third level attainment.

- As with the analysis based on the 2006 POWCAR results, the Ennis labour catchment is a key labour catchment in the Western Region however its ranking decreased from the second largest to the third largest over the last ten years. It has a resident 'at work' population of 21,409 and accounts for 8.2% of the total resident workforce within the Western Region. This is an increase of 0.35% (76) from the 2006 figure of 21,333 when it represented a marginally higher proportion of 8.7% of the total resident workforce within the Western Region.
- A review of the geographical extent of the labour catchments from the 2006 and 2016 POWCAR analysis reveals there has been little change to the overall size of the catchments in the last ten years. South-east Clare is still very much under the influence of Limerick City and Shannon and parts of north Clare linked to Galway City. Perhaps the strengthening position of Kilrush is most notable, partly due to Kilkee not being included in the analysis (see Appendix), which has had a diminishing effect on the dominance of the Ennis labour catchment in areas in close proximity to Doonbeg etc.



5. Ennis Labour Catchment

5.5 Ennis Labour Catchment Summary

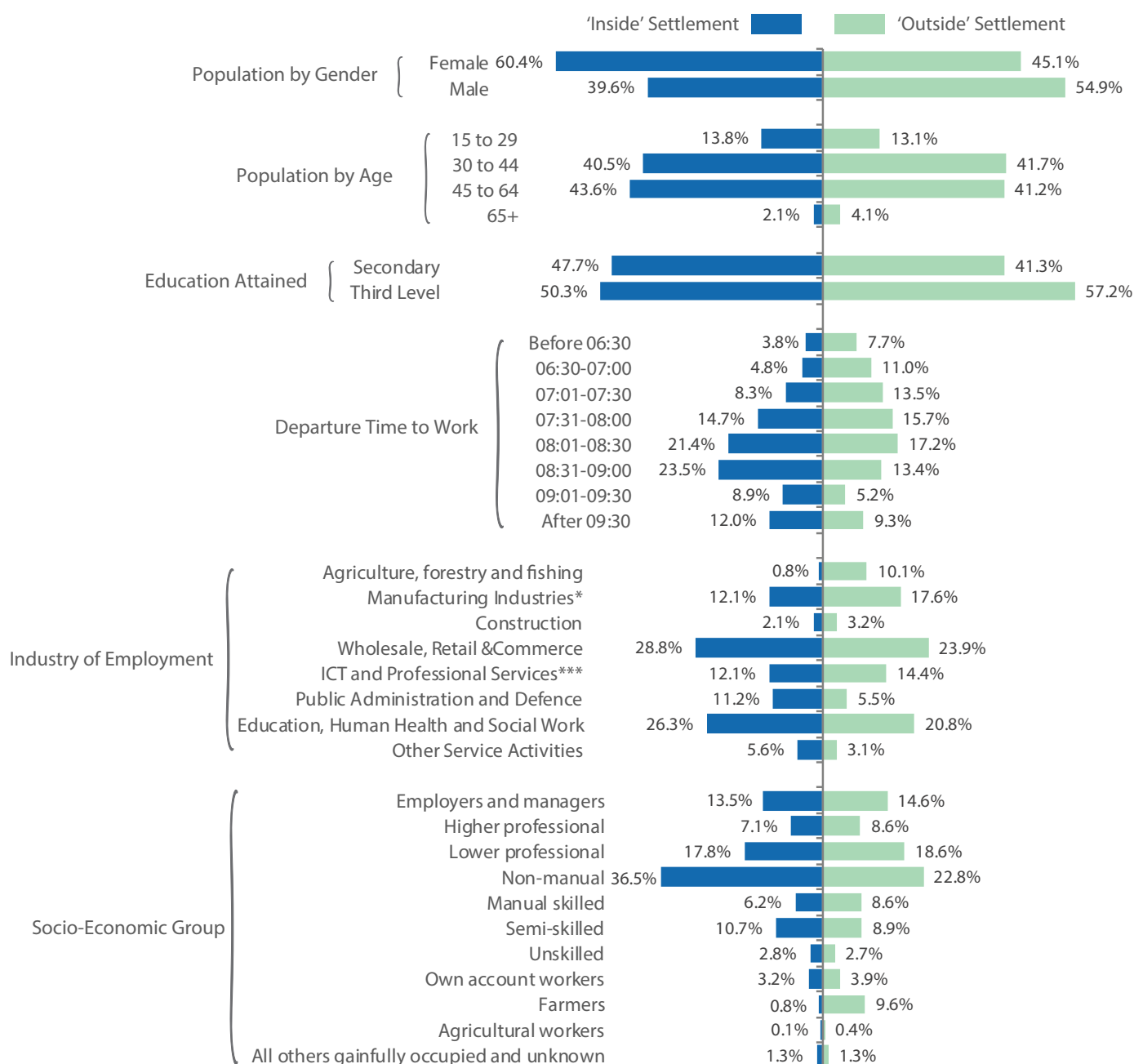
This section provides a summary of the key points of the Ennis Labour Catchment

- The Ennis labour catchment is the third largest labour catchment in the Western Region (Map 2.1) with a resident 'at work' population of 21,409 which accounts for 8.2% of the total resident 'at work' population within the Western Region (260,261).
- The Ennis labour catchment covers a large proportion of central and west Clare and is completely contained within county Clare with no extension into other local authority areas (Map 4.2). In 2016, there were 21,409 people classified as at work and living within the labour catchment. This figure is just under three times the resident 'at work' population within the town at its core (10,737). The 2016 total is +0.3% higher than the 2006 total of 21,333.
- The Ennis labour catchment is constrained by the influence of Kilrush to the west, Shannon and Limerick City to the south and Galway City to the north. These towns (and cities) are themselves the most important places for employment for those living in their immediate hinterlands, and therefore constitute separate and quite large labour catchments within the county boundary of Clare.
- Of those living in the Ennis labour catchment, 38.8% (8,305) are employed within Ennis town and 61.2% (13,104) are employed outside the town and in the rest of the catchment and beyond. Key destinations outside the town are Clare Rural (26.9% or 5,759), Limerick City (9.1% or 1,955) and Shannon (4.8% or 1,037) – see Table 5.1 for more details.
- A demographic profile of the Ennis labour catchment shows the following:
 - The age profile of those living in the Ennis labour catchment is the second oldest of the catchments of the seven county towns in the Western Region.
 - Female workers account for a larger proportion of the workforce than their male counterparts with rates of 51% and 49% respectively. This gender gap is further extended when looking at those employed within the town where more women than men are employed, 60.4% and 39.6% respectively.
 - Those at work and residing in the Ennis labour catchment have a marginally lower level of education than the State average – with rates of 54.5% and 56.1% respectively (3rd level). In contrast to other labour catchment profiles, those employed outside Ennis town have a much higher level of third level education with a rate 57.2% compared to those employed in Ennis town (50.3%).
- Analysis of the profile of the industry of employment within the Ennis labour catchment shows the following:
 - The single largest employer is the 'Wholesale, Retail and Commerce' sector and accounts for 25.8% (5,528) which is similar to the State average (25.7%).
 - Both the 'Education, Human Health and Social Work' (23% or 4,916) and 'Manufacturing Industries' (15.4% or 3,306) are important employment sectors with 'Manufacturing Industries' having a higher proportional share than the State average (13%).
 - 'ICT and Professional Services' (13.6% or 2,902) is the fourth most important sector although much lower than the State average of 20.3%.

5. Ennis Labour Catchment

5.6 Socio-economic comparison of those employed 'Inside' and 'Outside' Ennis town

The graphic below details the socio-economic characteristics of resident workers within the Ennis labour catchment who are employed within Ennis town (Inside) and those that are employed outside Ennis town – within the wider labour catchment and beyond (Outside).



Letterkenny Labour Catchment



6. Letterkenny Labour Catchment

Introduction

Letterkenny town had a population of 19,274 persons recorded in the 2016 Census. Letterkenny is the 3rd largest settlement within the Western Region and the 23rd largest in the State. Since 2006, the population residing within the town of Letterkenny has increased by 9.6% (+1,688). In the five years since Census 2011, the population of the town decreased by -1.6% (-314). Demographic comparisons between urban centres tend to be difficult due to intercensal boundary changes. For instance, in 2014 all legal town boundaries (Letterkenny included) were abolished under the Local Government Act 2014. Accordingly the population of these former legal towns have been newly defined using the standard census town criteria. For some towns, the impact of this has been to lose area and population, compared with previous computations.

According to POWSCAR 2016, the total number of jobs located within Letterkenny was 11,395 and accounts for 4.7% of all jobs located within the Western Region (242,712). Of all cities and towns in Ireland, Letterkenny has the 14th highest number of jobs located within the town boundary and accounts for 28.7% of all jobs located within County Donegal – a moderate rate and relates to the importance of other economic drivers such as Derry City. Relative to the six other main settlements in this report, Letterkenny has the 3rd highest number of jobs within the town with only higher numbers in Galway City (44,376) and Sligo (13,024) and then lower numbers in Ennis (10,172), Castlebar (9,045), Roscommon (3,917) and Carrick-on-Shannon (2,868). It should be noted that the above job numbers relate to those within the town boundary as defined by the CSO and do not include jobs located outside the town boundary or nearby employment concentrations (industrial parks, local factories etc).

6.1 The importance of Letterkenny as a place of work

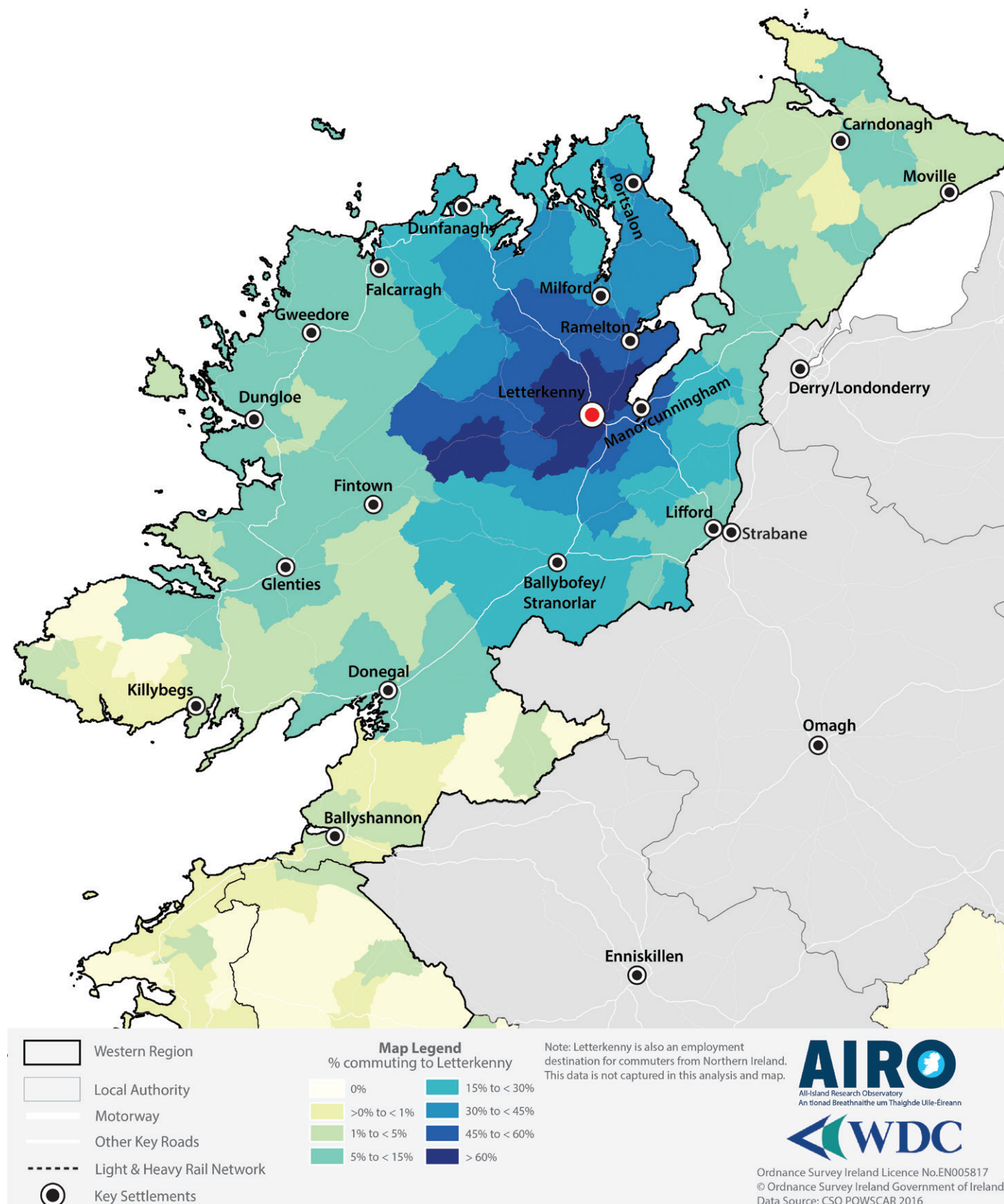
Map 6.1 shows the extent of commuting flows to Letterkenny for employment opportunities. The colours represent the different proportions of people who live in each ED and travel to work in Letterkenny. The map shows every ED (within the frame) by commuting flow to Letterkenny. EDs with commuter numbers linked to Letterkenny between one and four (trips) have been set to a value of one¹.

As would be expected, the EDs closest to Letterkenny have the highest proportion working in the town, and this is indicated by the darker shades of blue in and around the town perimeter. Beyond these areas, the proportion travelling to the town gradually decreases – this is more notable to the east of the town where the influence of employment in Derry City is higher. The map shows the declining proportion of those living in each ED and commuting to Letterkenny, graduating from the dark blue where in excess of 60% of people living in those EDs work in Letterkenny, through to light green where between 5 and 15% living in those EDs commute to work in Letterkenny. Highest rates are in the immediate hinterland and to the north of Letterkenny in areas such as Milford, Dunfanaghy and Falcarragh and to the south in areas close to Ballybofey/Stranorlar. Lower levels of interaction are visible in the west in areas such as Glenties, Dungloe and Gweedore. In general, the Letterkenny labour catchment is contained within the Donegal local authority area and the influence of Derry City and Strabane as key destinations is most notable in areas to the east and north-east (Inishowen) of the town. Low levels of interaction (0.1% to 5%) are visible in locations to the south of the Donegal border although the actual number of trips within these locations would be extremely low in most cases (less than 5).

¹ This is due to data confidentiality protocols related to access to the POWCAR 2016 dataset.

6. Letterkenny Labour Catchment

Map 4.1: Percentage of persons commuting to Letterkenny, 2016 (Source: AIRO & CSO POWCAR)



6. Letterkenny Labour Catchment

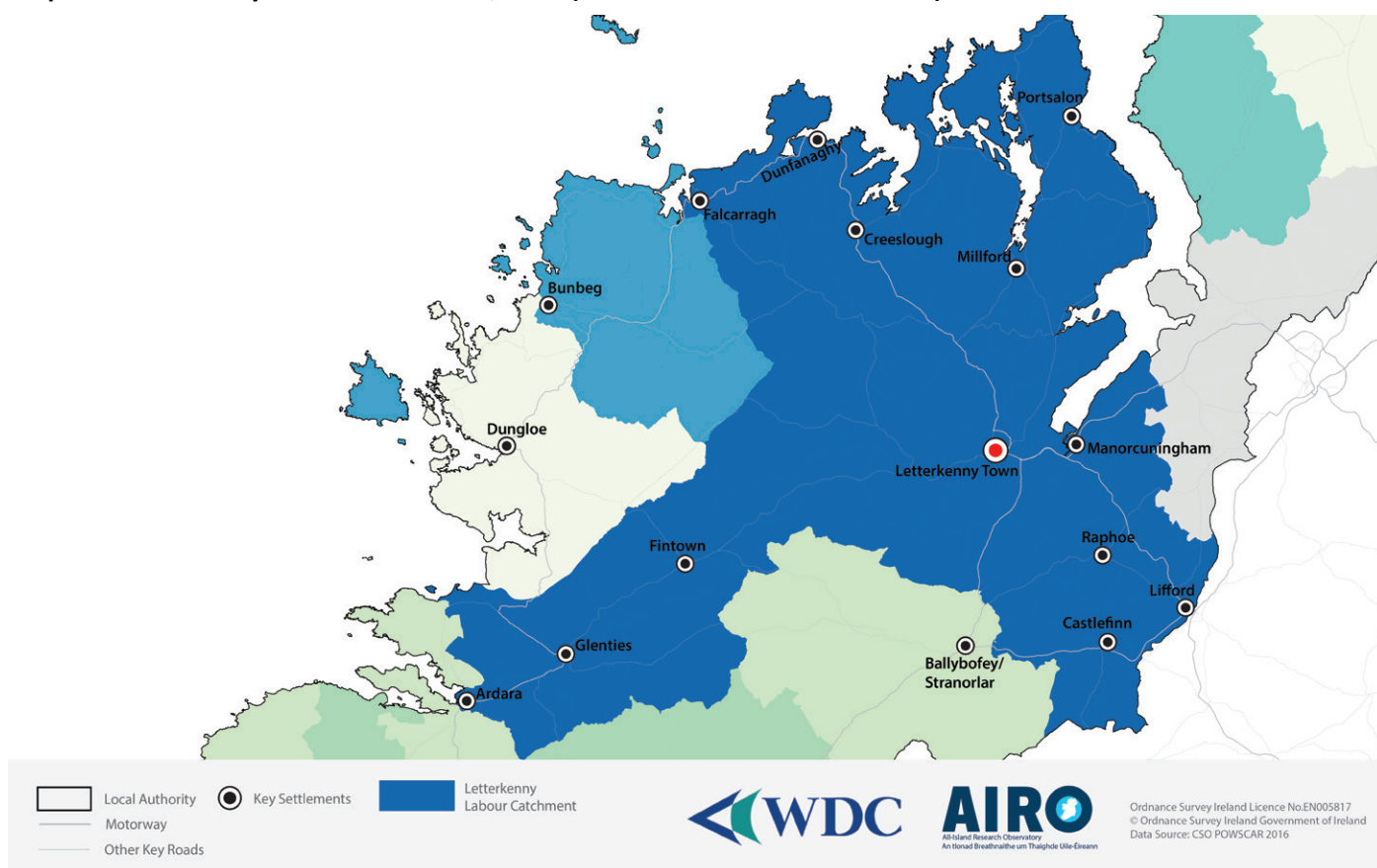
6.2 The Letterkenny Labour Catchment

While Map 6.1 showed every ED from where even one person commuted to Letterkenny, all of these EDs are not included in the Letterkenny labour catchment. The Letterkenny labour catchment, is made up only of those EDs for which Letterkenny is the most popular work destination for those living there. Other EDs, whose commuters travel in greater numbers to other towns are assigned to the catchments of these other destination towns. Map 6.2 shows the Letterkenny labour catchment, depicted by the blue colour.

The data presented in Map 6.2 show that Letterkenny's influence as a place of work extends over a large area but is completely confined within the local authority area of Donegal. Although the labour catchment is quite confined, the total resident and 'at work' population within the Letterkenny labour catchment is 19,717 (7.6% of Western Region) and is the fourth largest in terms of population size with only Ennis, Sligo and Galway City with larger labour catchments. The entire Letterkenny town labour catchment is far larger than the number of resident workers in the town at its core. Letterkenny town labour catchment has a population at work approximately 2.5 times the census population of resident workers in Letterkenny town itself, (19,717 and 7,669 (including blank and mobile workers) respectively).

Within Donegal, there are also a number of other distinct labour catchments such as Dungloe, Bunbeg and Ballybofey/Stranorlar to the west and south. Map 6.2 clearly identifies the major influence that Derry City has on the employment base with a large swathe to the north-east of Letterkenny assigned to this cross-border catchment (in grey). Interestingly, areas in close proximity to Lifford and Castlefinn are still assigned to the Letterkenny labour catchment and under less influence of employment opportunities in immediate cross-border areas such as Strabane or parts of south County Derry.

Map 6.2: Letterkenny Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)



6. Letterkenny Labour Catchment

6.3 Profile of the Letterkenny Labour Catchment

Map 6.2 identified (in dark blue) the Letterkenny labour catchment. In the following section we examine the socio-economic characteristics of all those living in this labour catchment and at work, even though they may not all have been working in Letterkenny in April 2016. We do this because although some may not be working in Letterkenny they are living in the catchment from which Letterkenny's labour supply is drawn and including them provides a more complete assessment of the potential labour supply for Letterkenny. The Letterkenny labour catchment is therefore separated into those who live in the catchment and are employed in the following; 'Inside' the town or 'Outside' the town i.e., elsewhere in the catchment or locations such as Northern Ireland, Sligo, Dublin etc. This profile is further supported by an analysis of changes in the catchment between 2006 and 2016, both in terms of geography and socio-economic characteristics (6.4), a comparison matrix of town and non-town workers (6.5) and an overall comparison matrix for all seven labour catchments (10.1).

6.3.1 Place of Work

The Letterkenny labour catchment can be seen to include large parts of county Donegal but mainly contained within central areas and the north and north-east. In 2016, there were 19,717 people classified as at work, living within the Letterkenny labour catchment (+10.3% from 17,886 in 2006). In Figure 6.1 and Table 6.1 the main work locations for those who live in the Letterkenny labour catchment are set out.

Figure 6.1: Place of work of those living in the Letterkenny Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

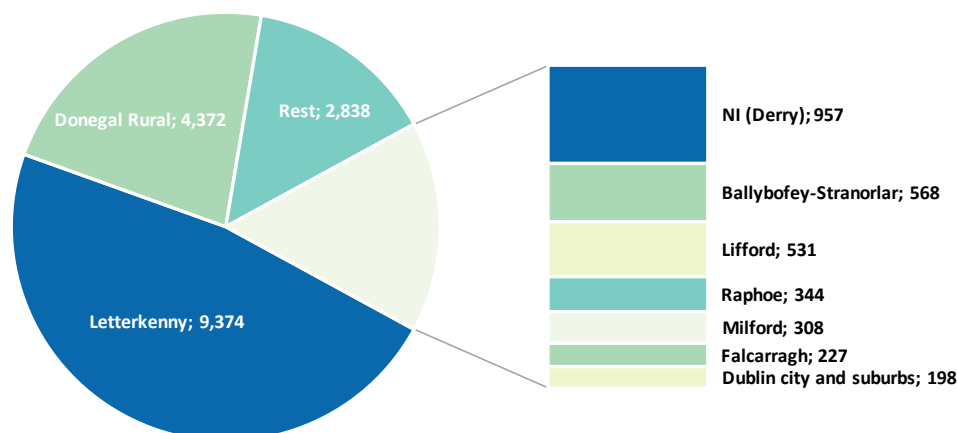


Table 6.1: Place of work of those living in the Letterkenny Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

Labour Catchment	Number	%
Letterkenny	9,374	47.5%
Donegal Rural	4,372	22.2%
Rest	2,838	14.4%
NI (Derry)	957	4.9%
Ballybofey-Stranorlar	568	2.9%
Lifford	531	2.7%
Raphoe	344	1.7%
Milford	308	1.6%
Falcarragh	227	1.2%
Dublin city and suburbs	198	1%
Total	19,717	100%

6. Letterkenny Labour Catchment

As expected, Letterkenny is the principal place of employment, accounting for 9,374 (47.5%) of all employment. Donegal Rural County (4,372) is the next most popular destination, being the work location for 22.2% of all those living in the Letterkenny labour catchment.

The other large employment destinations for residents within the Letterkenny labour catchment are primarily towns in close proximity to Letterkenny (Ballybofey/Stranorlar, Lifford, Raphoe, Milford and Falcarragh etc). Commuter flows from the Letterkenny labour catchment to Northern Ireland and Derry County account for 957 workers or 4.9% – while this is a sizeable number the proportion of flows into Derry are most dominant in areas closer to the Border and as such the Derry labour catchment comprises areas east of Manorcunningham and north into the Inishowen peninsula.

Interestingly, Dublin City (198 or 1%) is also highlighted as a destination for Letterkenny labour catchment residents. Recent changes to the motorway network, reduced travel times and more flexible working arrangements may be contributory factors to this. However, it should also be noted that the travel to work data from the CSO do not necessarily mean that commuters make daily trips and is more an identification of the main place and location of employment – it is likely that flows from Letterkenny to Dublin City fall within this category. There is also a considerable number of destinations located within and across other small settlements (>1,000 population) in the Western Region (Rest, 2,838 or 14.4%).

6.3.2 Travel Departure Times

In a change from the previous two POWCAR publications (2006 and 2011), the latest results from the 2016 Census only provide commuting details on the travel time departure of resident workers and not distance travelled. Results from distance travelled variables have included a large element of 'noise' with a documented low level of correlation between recorded 'distance travelled' and actual physical home to work distances. As such, the new travel indicator is based on the travel departure times of resident workers. Figure 6.2 below details the overall 'travel time departure' distribution of all Letterkenny labour catchment resident workers.

The most common travel time departures are within '08:01-08:30' and '08:31-09:00' band with both accounting for 40.1% of all resident workers. In comparison to the State average, Letterkenny labour catchment resident workers have a lower proportion leaving for work in the three early bands pre '07:30' with rates of 31.3% and 19.1%, respectively.

A comparison of the 'travel-time departures' of those working in Letterkenny and those working elsewhere shows that Letterkenny bound workers tend to have later departure times than other workers employed within the remainder of the labour catchment and beyond. This is as expected due to the wide spatial commuting pattern that is evident for residents of the Letterkenny labour catchment with a particular emphasis on those employed within Northern Ireland and county Derry (957 commuters). In summary, a total of only 13.9% of Letterkenny bound workers residing in the labour catchment depart for work pre '07:30' and is much lower than the rate (24%) for workers with other non-town destinations.

6. Letterkenny Labour Catchment

Figure 6.2: Time of Departure of those living in the Letterkenny labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

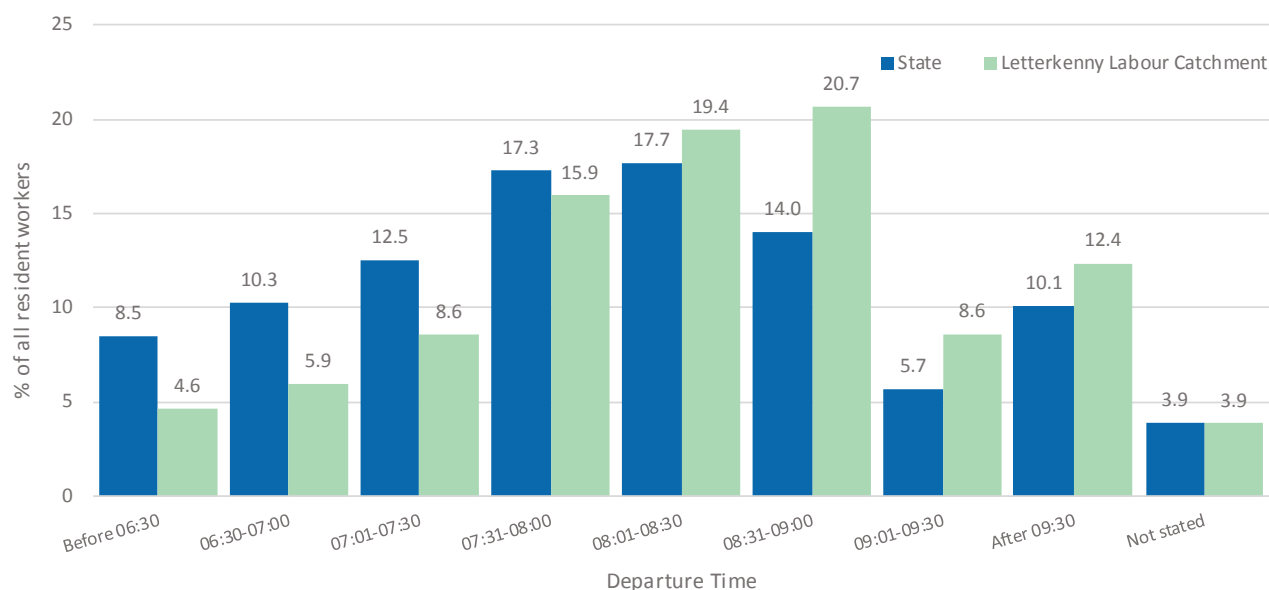


Table 6.2: Time of Departure of those living in the Letterkenny Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

	Before 06:30	06:30-07:00	07:01-07:30	07:31-08:00	08:01-08:30	08:31-09:00	09:01-09:30	After 09:30	Not stated	Total
Letterkenny Labour Catchment (Total)	910	1,172	1,692	3,144	3,829	4,074	1,695	2,439	762	19,717
Working inside Letterkenny	263	383	652	1,478	2,004	2,262	869	1,281	182	9,374
Working outside Letterkenny	647	789	1,040	1,666	1,825	1,812	826	1,158	580	10,343
State	135,187	163,290	199,035	274,425	281,003	223,164	90,521	160,901	62,111	1,589,637
Letterkenny Labour Catchment (Total)	4.6%	5.9%	8.6%	15.9%	19.4%	21%	9%	12%	4%	100%
Working inside Letterkenny	2.8%	4.1%	7%	15.8%	21.4%	24%	9%	14%	2%	100%
Working outside Letterkenny	6.3%	7.6%	10.1%	16.1%	17.6%	17.5%	8%	11.2%	5.6%	100%
State	8.5%	10.3%	12.5%	17.3%	17.7%	14%	5.7%	10.1%	3.9%	100%

6.3.3 Gender

The gender composition of residents in the Letterkenny labour catchment is shown below. Within the Letterkenny labour catchment, female workers account for a larger proportion of the total workforce than their male counterparts with rates of 51.9% and 48.1% respectively. The national picture is slightly different with males (50.1%) accounting for a marginally higher rate than females (49.9%).

6. Letterkenny Labour Catchment

There is a variation between men and women in terms of the location of their work. More women than men work in the town, 58.2% and 41.8% respectively. Outside of Letterkenny destinations, male employment is higher than female employment with 53.8% of those employed outside the town being males. This reflects traditional employment patterns where agricultural employment in rural areas in part accounts for a higher male employment rate outside of the town. In contrast, employment sectors which are perceived as traditionally female are concentrated in the town, for example retail, banking, finance, public administration and tourism.

Table 6.3: Gender Profile of those living in the Letterkenny Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

	Female	Male	Total
Letterkenny Labour Catchment (Total)	10,240	9,477	19,717
Working inside Letterkenny	5,459	3,915	9,374
Working outside Letterkenny	4,781	5,562	10,343
State	793,196	796,441	1,589,637
Letterkenny Labour Catchment (Total)	51.9%	48.1%	100%
Working inside Letterkenny	58.2%	41.8%	100%
Working outside Letterkenny	46.2%	53.8%	100%
State	49.9%	50.1%	100%

An important point to note here is the fact that this analysis excludes all workers who do not have a fixed place of employment i.e., those with a blank or un-codable place of work and those with a place of work classed as 'mobile' (See Appendix). For instance, an analysis of the gender balance of all workers (including blank and mobile) reveals that 53.7% of all workers are male and 46.3% are female. The rates in the Western Region are broadly similar with males accounting for 53.3% and females accounting for 46.7% of all workers. As such, the gender figures detailed and discussed in the above section should be treated with caution as the underlying worker population does not represent the complete population.

6.3.4 Age

The age profile of those at work and over 15 years who live in the Letterkenny labour catchment is shown in Table 6.4. The young age profile (less than 30 years) of the Letterkenny labour catchment at 17% is the youngest of all seven county town labour catchments in the Western Region, marginally higher than the rate of 16.8% for Galway City but lower than the national rate of 17.5%. This is somewhat surprising considering the overall age profile of Donegal county however the location of Letterkenny IT, Letterkenny Hospital and other large regional employers would contribute towards attracting and retaining a young workforce within the catchment.

Furthermore, the workforce within the town itself is clearly younger than those working outside of it. This

6. Letterkenny Labour Catchment

is evident in the data presented in Table 6.4 below. A total of 18.3% of all Letterkenny labour catchment workers employed in Letterkenny are aged 'less than 30 years' whereas the rate for non-Letterkenny workers is 15.7%.

In general, there is a major difference in the age of the resident workforce in urban and rural areas. For instance, the cities (CSO Settlements) of Dublin, Cork and Galway all have rates in excess of 24% whereas the average rate in Donegal County is 15.9%. At 13%, Galway County has the lowest rate of all local authorities in the State.

Table 6.4: Age Profile of those living in the Letterkenny Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

	<30 years	30 to 44 years	45 to 64 years	65+ years	Total
Letterkenny Labour Catchment (Total)	3,346	8,532	7,399	440	19,717
Working inside Letterkenny	1,719	4,195	3,377	83	9,374
Working outside Letterkenny	1,627	4,337	4,022	357	10,343
State	278,647	694,783	575,181	41,026	1,589,637
Letterkenny Labour Catchment (Total)	17.0	43.3	37.5	2.2	100.0
Working inside Letterkenny	18.3	44.8	36.0	0.9	100.0
Working outside Letterkenny	15.7	41.9	38.9	3.5	100.0
State	17.5	43.7	36.2	2.6	100

6.3.5 Education

Table 6.5.1 shows a lower than average educational profile among those living in the Letterkenny labour catchment with 51.6% having completed third level education compared to 56.1% nationally. Relative to the other six towns included in this analysis, Letterkenny has the third least educated workforce with only Castlebar (50.4%) and Roscommon (49%) with lower rates. Again, it is important to note that this is based on workers with a known work destination only and excludes those with Blank or Mobile work destination (32.4% of those coded blank or mobile in the State have third level qualifications). As a whole, overall education levels in Ireland have increased dramatically since the early 'nineties with the proportion of the population with a third level qualification increasing from 13.6% in 1991 to 42% in 2016.

There is also a large difference between the education attainment of those who are employed within Letterkenny (57.3% with 3rd level) and those employed outside the town (46.4% with 3rd level). This relates to the high level of commuting from within the labour catchment to highly qualified employment opportunities inside the town – Letterkenny IT, Letterkenny Hospital etc.

6. Letterkenny Labour Catchment

Table 6.5.2 below details the education attainment levels within each of the seven labour catchments for all workers, those employed within the city/town and those employed elsewhere. Relative to the other main settlements Letterkenny has the third highest level of overall education of those employed within the town. With a recorded rate of only 57.3% with 3rd level education employed in Letterkenny, only the towns of Sligo (59.2%) and Galway City (65.3%) have a higher rate of highly educated workers.

Table 6.5.1: Education Profile of those living in the Letterkenny Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

	Secondary Level	Third Level	Not Stated	Total
Letterkenny Labour Catchment (Total)	9,234	10,166	317	19,717
Working inside Letterkenny	3,881	5,367	126	9,374
Working outside Letterkenny	5,353	4,799	191	10,343
State	670,114	891,660	27,863	1,589,637
Letterkenny Labour Catchment (Total)	46.8%	51.6%	1.6%	100%
Working inside Letterkenny	41.4%	57.3%	1.3%	100%
Working outside Letterkenny	51.8%	46.4%	1.8%	100%
State	42.2%	56.1%	1.8%	100%

Table 6.5.2: % of Labour Catchment by Destination with 3rd Level Education, 2016 (Source: AIRO & CSO POWCAR)

	Working in Town	Working outside Town	Total
Galway	65.3%	56.4%	61.3%
Ennis	50.3%	57.2%	54.5%
Sligo	59.2%	51.7%	55.5%
Letterkenny	57.3%	46.4%	51.6%
Castlebar	50.3%	50.4%	50.4%
Roscommon	46.5%	50.3%	49%
Carrick-on-Shannon	47.8%	53.4%	51.9%
State			56.1%

6. Letterkenny Labour Catchment

6.3.6 Employment by Industrial Group

Analysis of the profile of employment by industry group provides an indication of the structure of the local economy and the type of employment it sustains as well as the skills profile of the area. It is particularly instructive to compare the profile of a region or local area to that of the State average as it can highlight differences at the local level. Employment by industrial group of all those living in the Letterkenny labour catchment is shown in Figure 6.6. The 'Education, Human Health and Social Work' sector is the most important employer (29.3%) and along with 'Wholesale, Retail Trade and Commerce' (27.0%), these sectors account for just over half of all employment of those residing within the Letterkenny labour catchment. 'ICT and Professional Services' (15.3%) and 'Manufacturing Industries' (8.1%) are the next biggest employers for the labour catchment with all other sectors accounting for less than 8% each.

Relative to the national picture, the 'Education, Human Health and Social Work', 'Wholesale, Retail Trade and Commerce', 'Public Administration and Defence' and 'Agriculture, Forestry and Fishing' sectors play a more important role in the overall employment base – in particular the 'Education, Human Health and Social Work' share of employment (29.3%) is 6.5 percentage points higher than the State average (22.8%). Of the other sectors of employment for Letterkenny labour catchment residents, 'ICT and Professional Services' (15.3% v 20.3%) and 'Manufacturing Industries' (8.1% v 13.0%) have the lowest rates compared to the State average. Interestingly, the proportional share of 'Manufacturing Industries' is lower in the Letterkenny labour catchment than the State average – with the exception of Carrick-on-Shannon, the rate is higher than the State average in all of the other five county town labour catchments.

Figure 6.6: Industry Profile of those living in the Letterkenny Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

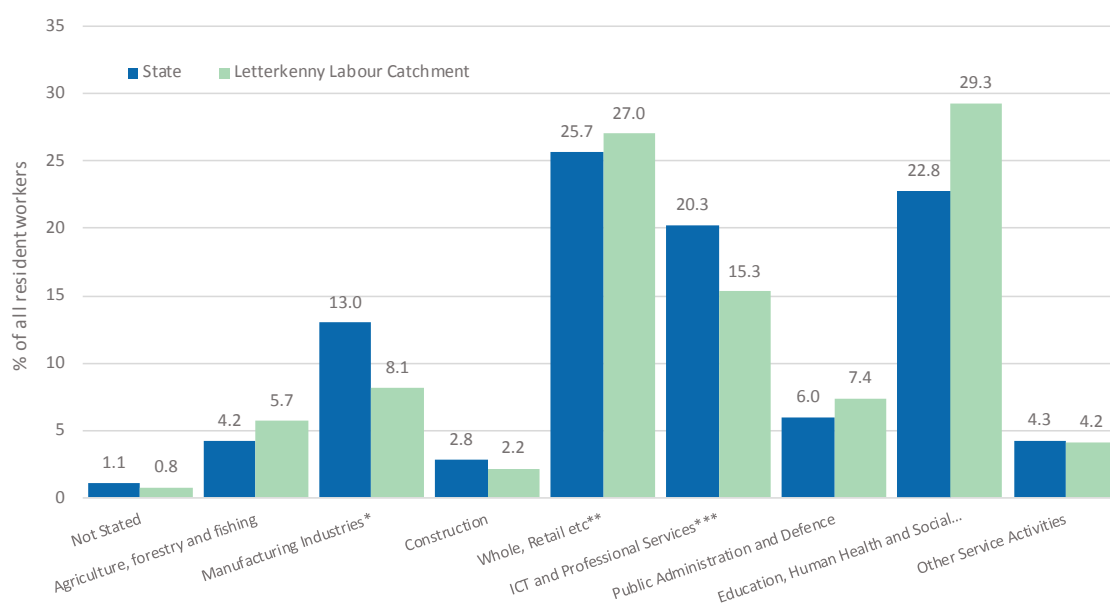


Table 6.6 details the industry of employment of the Letterkenny labour catchment by the location of employment – within Letterkenny or outside the town. Employment in 'ICT and Professional Services' and 'Education, Human Health and Social Work' are more dominant for those employed within Letterkenny whereas 'Agriculture, Forestry and Fishing', 'Manufacturing Industries', 'Construction' and 'Public Administration and Defence' are higher outside the town – within the wider catchment and beyond.

6. Letterkenny Labour Catchment

Table 6.6: Industry Profile of those living in the Letterkenny Labour Catchment, 2016 (Source: AIRO & CSO POW-

	Letterkenny Labour Catchment	Working inside Letterkenny	Working outside Letterkenny	State
Agricultural, Forestry and Fishing	5.7%	0.4%	10.6%	4.2%
Manufacturing Industries*	8.1%	5.5%	10.5%	13%
Construction	2.2%	0.8%	3.4%	2.8%
Wholesale, Retail etc	27%	27%	27.1%	25.7%
ICT and Professional Services***	15.3%	21.4%	9.8%	20.3%
Public Administration and Defence	7.4%	6.8%	7.9%	6%
Education, Human Health and Social Work Activities	29.3%	33.5%	25.6%	22.8%
Other Services	4.2%	4.1%	4.2%	4.3%
Not Stated	0.8%	0.5%	1.0%	1.1%
Total	100% (19,717)	100% (9,374)	100% (10,343)	100% (1.59m)

Note: with only nine classifications available, industrial classifications in POWCAR are less detailed than normal classifications in regular Census.

*Manufacturing Industries = Manufacturing, mining and quarrying, Electricity, Gas, Water supply and Waste Management

**Wholesale, Retail etc = Wholesale, Retail Trade, Transportation and Storage, Accommodation and Food Service Activities

***ICT and Professional Services = Information and Communication, Financial, Real Estate, Professional, administration and support service activities

6.3.7 Socio-Economic Structure

The socio-economic structure of employment in the Letterkenny labour catchment is set out in Figure 6.7. The socio-economic group (SEG) is determined by occupation and employment status and aims to classify those on the basis of comparable skill and educational levels. This is also a useful indicator of the type of employment and skills available within labour catchments and is particularly informative when compared to the national socio-economic structure.

While the socio-economic structure of the labour catchment of Letterkenny follows the overall State trends it shows some marked differences with 'Non-Manual' (31.8% v 28.6%) and 'Lower Professionals' (20.8% v 17.6%) having a greater proportion than the State average while 'Employers and Managers' (11.9% v 16.7%) and 'Higher Professionals' (7.6% v 9.4%) have lower proportions than the State average. The Letterkenny labour catchment also has a higher proportion within the socio-economic structure categories of Farmers (4.6% v 3.4%).

Table 6.7 details the socio-economic structure breakdown for those working within Letterkenny and those working outside Letterkenny. As a follow on to previous indications on the high level of internal commuting to quality employment opportunities, there are notable differences in rates with a higher proportion of those employed inside Letterkenny town classed as 'Higher and Lower Professionals'. Another clear difference between town and non-town based workers is within the 'Non Manual' group which is more common inside Letterkenny, which relates to persons working in retail, government, banking and other areas fulfilling administrative roles. Excluding these groups the largest difference between town and non-town employment relates to those classed as 'Farmers' where the rate is 9.6% outside the town and only 0.8% in the town.

6. Letterkenny Labour Catchment

Figure 6.7: SEG Profile of those living in the Letterkenny Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

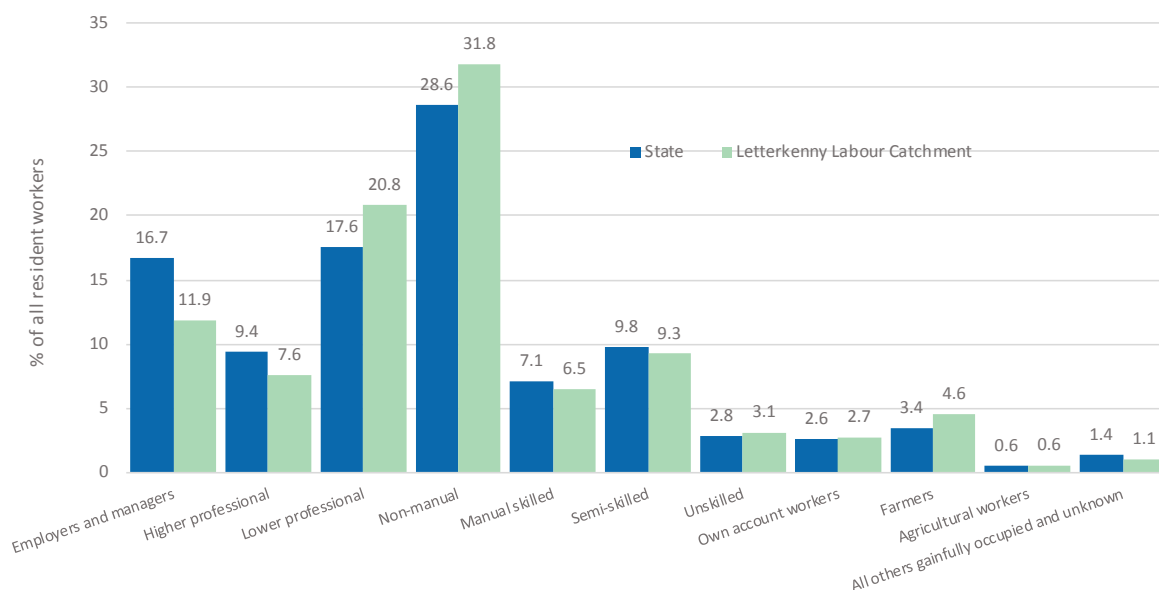


Table 6.7: SEG Profile of those living in the Letterkenny Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

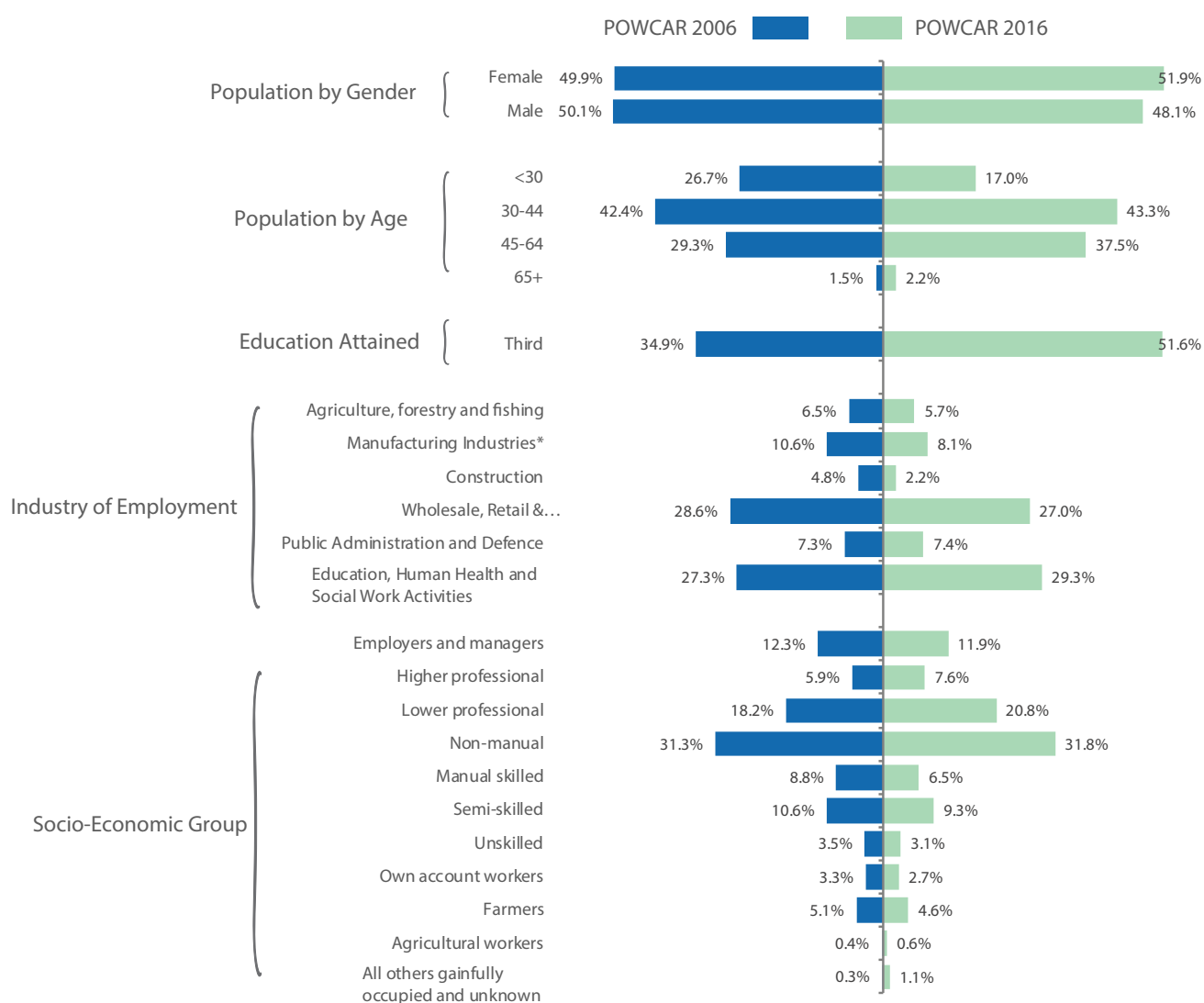
	Letterkenny Labour Catchment	Working inside Letterkenny	Working outside Letterkenny	State
Employers and managers	11.9%	11.9%	11.8%	16.7%
Higher professional	7.6%	9.2%	6.2%	9.4%
Lower professional	20.8%	24.5%	17.5%	17.6%
Non-manual	31.8%	36.5%	27.6%	28.6%
Manual skilled	6.5%	3.8%	9%	7.1%
Semi-skilled	9.3%	8.4%	10%	9.8%
Unskilled	3.1%	2.7%	3.6%	2.8%
Own account workers	2.7%	1.7%	3.6%	2.6%
Farmers	4.6%	0.3%	8.5%	3.4%
Agricultural workers	0.6%	0.0%	1%	0.6%
Others gainfully occupied and unknown	1.1%	0.9%	1.2%	1.4%
Total	100% (19,717)	100% (9,374)	100% (10,343)	100% (1.59m)

6. Letterkenny Labour Catchment

6.4 Analysis of change between 2006 and 2016

The graphic below details the change that has occurred across the Letterkenny Labour Catchment between 2006 and 2016. This is reviewed in the context of geographical changes and then the socio-economic characteristics of those residing within the overall catchment area. Most notable changes in terms of socio-economic characteristics certainly relate to the age of resident workers and the rate of third level attainment.

- As with the analysis based on the 2006 POWCAR results, the Letterkenny labour catchment is a key labour catchment in the Western Region and retains its ranking as the fourth largest labour catchment in the Western Region. It has a resident 'at work' population of 19,717 and accounts for 7.6% of the total resident workforce within the Western Region. This is an increase of 10.2% (1,831) from the 2006 figure of 17,886 when it represented a marginally lower proportion of 7.3% of the total resident workforce within the Western Region.
- A review of the geographical extent of the labour catchments from the 2006 and 2016 POWCAR analysis reveals that there has been very little change over the last ten years. The Letterkenny catchment is still dominant in central and north-west Donegal but constrained by the various smaller labour catchments such as Dungloe, Bunbeg, Ballybofey and then the Derry catchment to the east. Interestingly, there has been very little change in the extent of the Derry labour catchment between 2006 and 2016.



6. Letterkenny Labour Catchment

6.5 Letterkenny Labour Catchment Summary

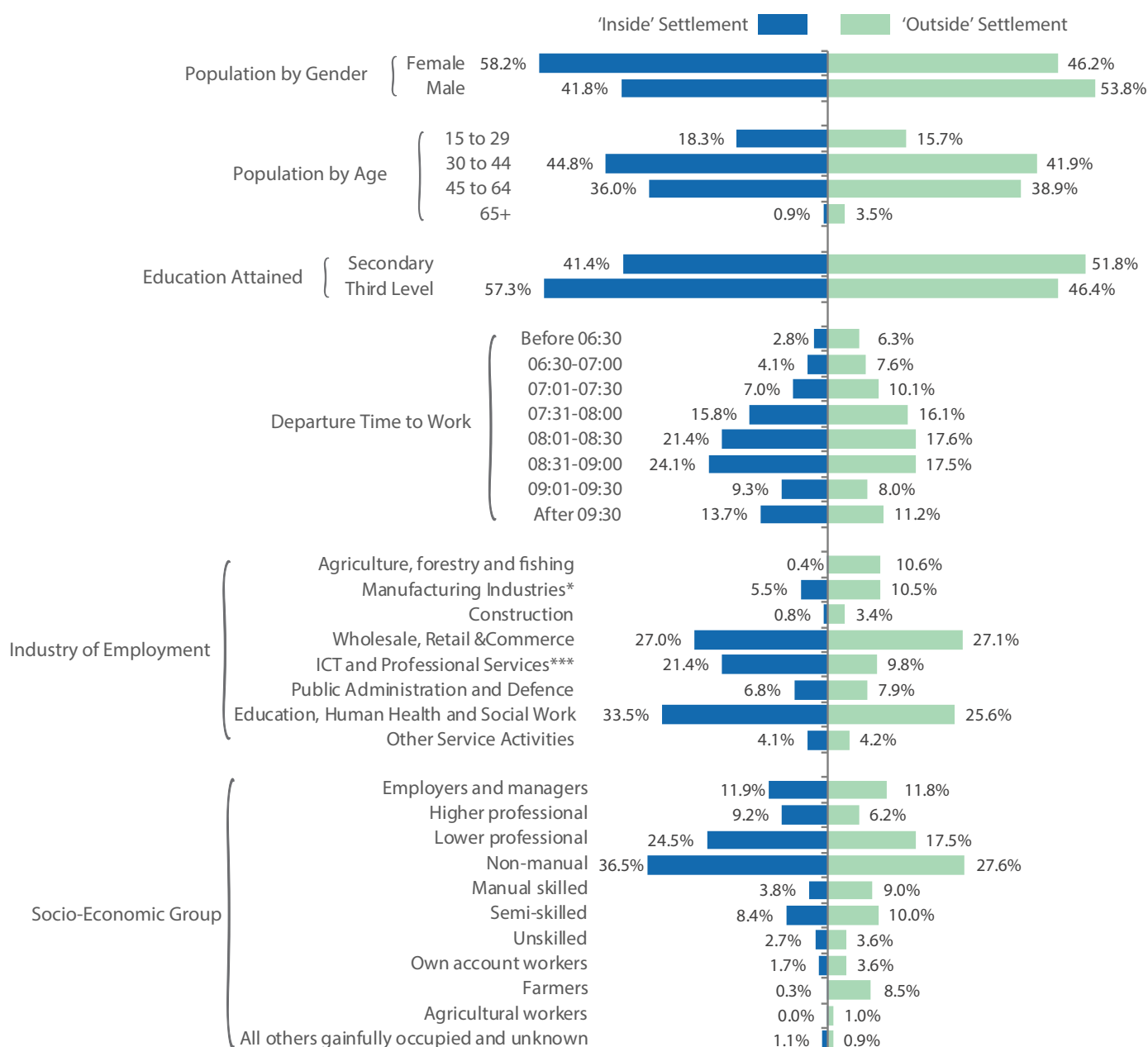
This section provides a summary of the key points of the Letterkenny Labour Catchment.

- The Letterkenny labour catchment is the fourth largest labour catchment in the Western Region (Map 2.1) with a resident 'at work' population of 19,717 which accounts for 7.6% of the total resident 'at work' population within the Western Region (260,261).
- The Letterkenny labour catchment covers a large area but is completely confined within the local authority area of Donegal (Map 6.2). In 2016, there were 19,171 people classified as at work and living within the labour catchment. This figure is approximately 2.5 times the resident 'at work' population within the town at its core (7,669). The 2016 total is +10.3 higher than the 2006 total of 17,886.
- Within Donegal there are also a number of other distinct labour catchments such as Dungloe, Bunbeg and Ballybofey/Stranorlar. Derry also has a major influence on the north-east of the county. These towns (and cities) are themselves the most important places for employment for those living in their immediate hinterlands, and therefore constitute separate and quite large labour catchments within the county boundary of Donegal.
- Of those living in the Letterkenny labour catchment, 47.5% (9,374) are employed within Letterkenny town and 52.5% (10,343) are employed outside the town and in the rest of the catchment and beyond. Key destinations outside the town are Donegal Rural (22.2% or 4,372), NI (Derry) (4.9% or 957) and Ballybofey/Stranorlar (2.9% or 568) – see Table 6.1 for more details.
- A demographic profile of the Letterkenny labour catchment shows the following:
 - The age profile of those living in the Letterkenny labour catchment is the youngest of the catchments of the seven county towns in the Western Region.
 - Female workers account for a larger proportion of the workforce than their male counterparts with rates of 51.9% and 48.1% respectively. This gender gap is further extended when looking at those employed within the town where more women than men are employed, 58.2% and 41.8% respectively.
 - Those at work and residing in the Letterkenny labour catchment have a much lower level of education than the State average – with rates of 51.6% and 56.1% respectively (3rd level). Those employed in Letterkenny town have a higher rate of 57.3%.
- Analysis of the profile of the industry of employment within the Letterkenny labour catchment shows the following:
 - The single largest employer is the 'Education, Human Health and Social Work' sector and accounts for 29.3% (5,779) which is much higher than the State average (22.8%).
 - Both the 'Wholesale, Retail and Commerce' (27% or 5,329) and 'ICT and Professional Services' (15.3% or 3,018) are important employment sectors although 'ICT and Professional Services' is much lower than the State average (20.3%)
 - 'Manufacturing Industries' (8.1% or 1,601) is the fourth most important sector although lower than the State average of 13%.

6. Letterkenny Labour Catchment

6.6 Socio-economic comparison of those employed 'Inside' and 'Outside' Letterkenny town

The graphic below details the socio-economic characteristics of resident workers within the Letterkenny labour catchment who are employed within Letterkenny town (Inside) and those that are employed outside Letterkenny town – within the wider labour catchment and beyond (Outside).



Castlebar Labour Catchment



7. Castlebar Labour Catchment

Introduction

Castlebar town had a population of 12,068 persons recorded in the 2016 Census. Castlebar is the 5th largest settlement within the Western Region and the 58th largest in the State. Since 2006, the population residing within the town of Castlebar has increased by +1.5% (+177). In the five years since Census 2011, the population of the town decreased by -2% (-250). Demographic comparisons between urban centres tend to be difficult due to intercensal boundary changes. For instance, in 2014 all legal town boundaries (Castlebar included) were abolished under the Local Government Act 2014. Accordingly the population of these former legal towns have been newly defined using the standard census town criteria. For some towns, the impact of this has been to lose area and population, compared with previous computations.

According to POWSCAR 2016, the total number of jobs located within Castlebar was 9,045 and accounts for 3.7% of all jobs located within the Western Region (242,712). Of all cities and towns in Ireland, Castlebar has the 17th highest number of jobs located within the town boundary and accounts for 23.6% of all jobs located within County Mayo – the lowest rate within the Western Region counties and reflecting the number of other important economic drivers in the county such as Ballina and Westport. Relative to the six other main settlements in this report, Castlebar has the 5th highest number of jobs within the town with only higher numbers in Galway City (44,376), Sligo (13,024), Letterkenny (11,395), Ennis (10,172) and then lower in Roscommon (3,917) and Carrick-on-Shannon (2,868). It should be noted that the above job numbers relate to those within the town boundary as defined by the CSO and do not include jobs located outside the town boundary or nearby employment concentrations (industrial parks, local factories etc).

7.1 The importance of Castlebar as a place of work

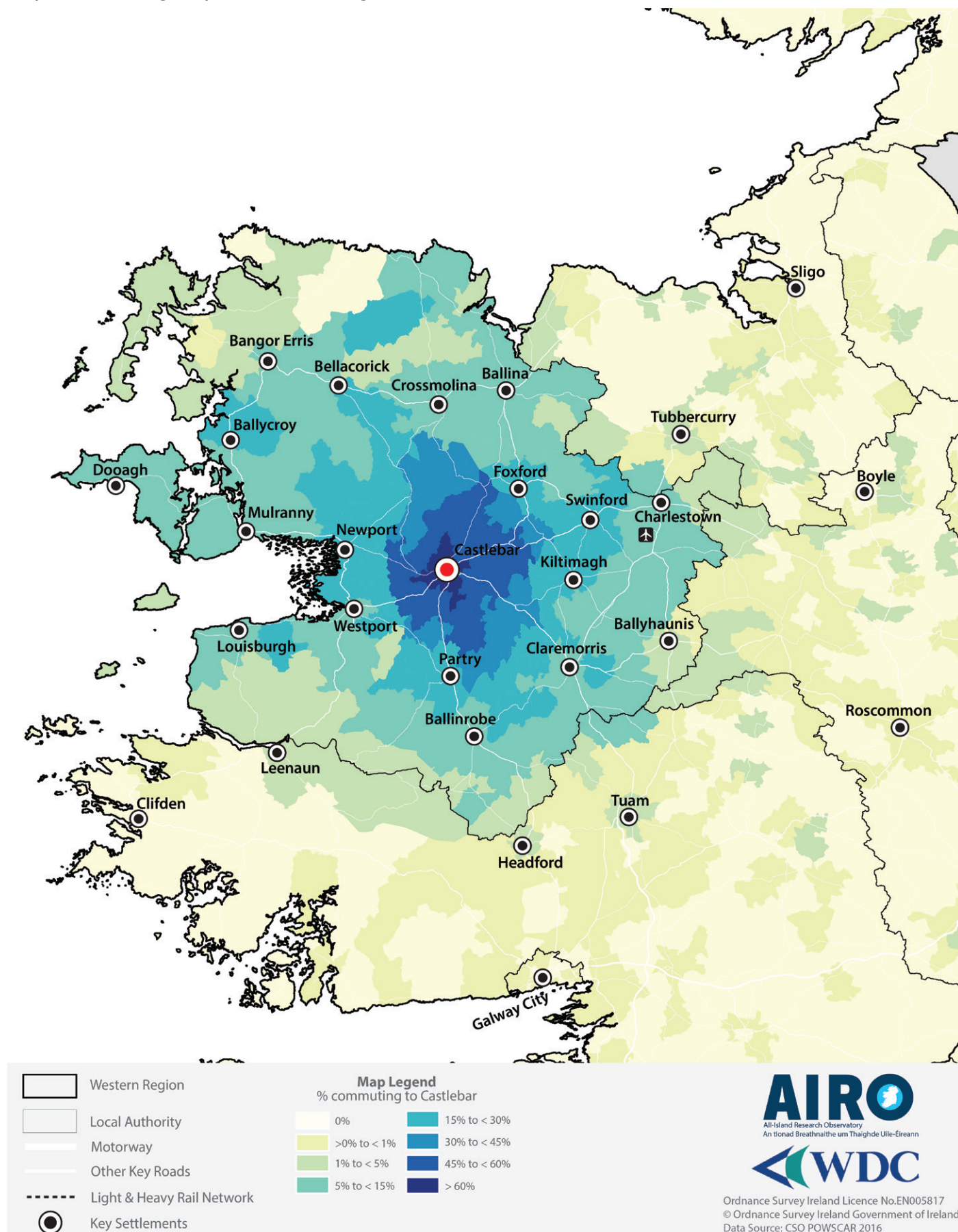
Map 7.1 shows the extent of commuting flows to Castlebar for employment opportunities. The colours represent the different proportions of people who live in each ED and travel to work in Castlebar. The map shows every ED (within the frame) by commuting flow to Castlebar. EDs with commuter numbers linked to Castlebar of between one and four (trips) have been set to a value of one¹.

As would be expected, the EDs closest to Castlebar have the highest proportion working in the town, and this is indicated by the darker shades of blue in and around the town perimeter. Beyond these areas, the proportion travelling to the town gradually decreases. The map shows the declining proportion of those living in each ED and commuting to Castlebar, graduating from the dark blue where in excess of 60% of people living in those EDs work in Castlebar, through to light green where between 5 and 15% living in those EDs commute to work in Castlebar. The commuting catchment to Castlebar is primarily restricted to within Mayo and very much dominates the central parts of the county with much lower flows from the south (influence of Galway City) and to the north (influence of both Ballina and Sligo). At the extremes, commuters travel from areas such as Achill, Bangor Erris, Swinford, Claremorris, Ballinrobe and Louisburgh. Castlebar acts as the key economic driver for the county but is supported by numerous other strong and growing regional economic centres such as Ballina (4,810 jobs) and Westport (4,142 jobs) – both higher in employment opportunities than Roscommon and Carrick-on-Shannon (both county towns). Low levels of interaction (0.1% to 5%) are visible in locations outside the Mayo border although the actual number of trips within these locations would be extremely low in most areas (less than 5).

¹ This is due to data confidentiality protocols related to access to the POWCAR 2016 dataset.

7. Castlebar Labour Catchment

Map 7.1: Percentage of persons commuting to Castlebar, 2016 (Source: AIRO & CSO POWCAR)



7. Castlebar Labour Catchment

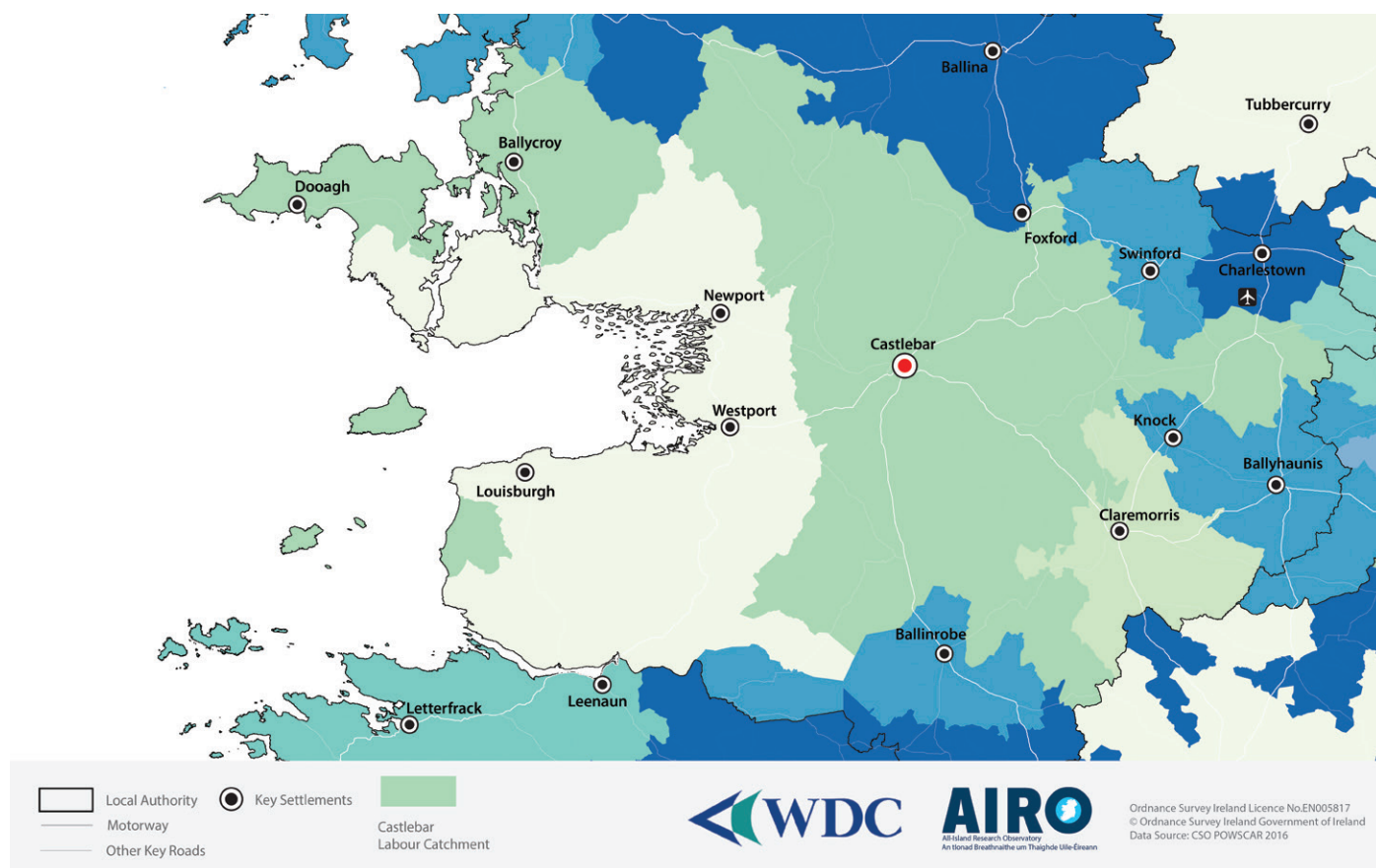
7.2 The Castlebar Labour Catchment

While Map 7.1 showed every ED from where even one person commuted to Castlebar, all of these EDs are not included in the Castlebar labour catchment. The Castlebar labour catchment, is made up only of those EDs for which Castlebar is the most popular work destination for those living there. Other EDs, whose commuters travel in greater numbers to other towns are assigned to the catchments of these other towns. Map 7.2 shows the Castlebar labour catchment, depicted by the green colour.

The data presented in Map 7.2 show that Castlebar's influence as a place of work extends over a large area but is fully contained within central Mayo and small parts of the west in areas such as north Achill and Ballycroy. Although the labour catchment is quite confined, the total resident and 'at work' population within the Castlebar labour catchment is 13,931 (5.3% of Western Region) and is the fifth largest in terms of population size with only Letterkenny, Ennis, Sligo and Galway City with larger labour catchments. Interestingly, the labour catchment of nearby Ballina is the seventh largest in the Western Region with Limerick City the sixth. The entire Castlebar town labour catchment is far larger than the number of resident workers in the town at its core. Castlebar town labour catchment has a population at work just under three times the census population of resident workers in Castlebar town itself, (13,931 and 4,710 (including bank and mobile workers) respectively).

Map 7.2 clearly shows the smaller labour catchments embedded within or adjacent to the larger Castlebar labour catchment. The towns of Swinford, Charlestown, Ballyhaunis, Claremorris and Ballinrobe have their own labour catchments and, although relatively small, play an important part within the economic function of Mayo – this is quite different to other counties within the Western Region.

Map 7.2: Castlebar Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)



7. Castlebar Labour Catchment

7.3 Profile of the Castlebar Labour Catchment

Map 7.2 identified (in green) the Castlebar labour catchment. In the following section we examine the socio-economic characteristics of all those living in this labour catchment and at work, even though they may not all have been working in Castlebar in April 2016. We do this because although some may not be working in Castlebar they are living in the catchment from which Castlebar's labour supply is drawn and including them provides a more complete assessment of the potential labour supply for Castlebar. The Castlebar labour catchment is therefore separated into those who live in the catchment and are employed in the following; 'Inside' the town or 'Outside' the town i.e., elsewhere in the catchment or locations such as Ballina, Galway City and Sligo etc. This profile is further supported by an analysis of changes in the catchment between 2006 and 2016, both in terms of geography and socio-economic characteristics (7.4), a comparison matrix of town and non-town workers (7.5) and an overall comparison matrix for all seven labour catchments (10.1).

7.3.1 Place of Work

The Castlebar labour catchment can be seen to include a large central belt of county Mayo but is also constrained by other large catchments such as Westport, Ballina and a number of smaller catchments to the east and south. In 2016, there were 13,931 people classified as at work, living within the Castlebar labour catchment (+1.3% from 13,757 in 2006). In Figure 7.1 and Table 7.1 the main work locations for those who live in the Castlebar labour catchment are set out.

Figure 7.1: Place of work of those living in the Castlebar Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

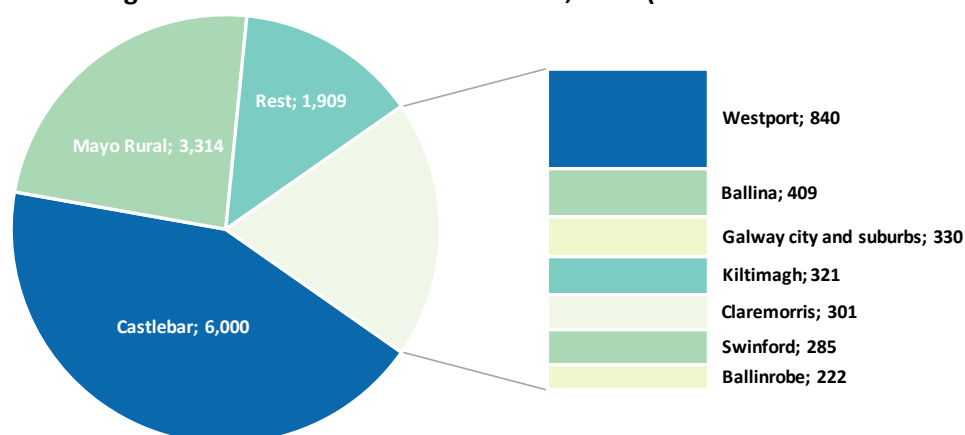


Table 7.1: Place of work of those living in the Castlebar Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

Labour Catchment	Number	%
Castlebar	6,000	43.1%
Mayo Rural	3,314	23.8%
Rest	1,909	13.7%
Westport	840	6%
Ballina	409	2.9%
Galway city and suburbs	330	2.4%
Kiltimagh	321	2.3%
Claremorris	301	2.2%
Swinford	285	2%
Ballinrobe	222	1.6%
Total	13,931	100%

7. Castlebar Labour Catchment

As expected, Castlebar is the principal place of employment, accounting for 6,000 (43.1%) of all employment. Mayo Rural County (3,314) is the next most popular destination, being the work location for 23.8% of all those living in the Castlebar labour catchment.

The other large employment destinations for residents within the Castlebar labour catchment are primarily towns in close proximity to Castlebar (Westport, Ballina, Kiltimagh, Claremorris, Swinford and Ballinrobe etc). Galway City (330 or 2.4%) is also highlighted as a key destination for Castlebar labour catchment residents. Recent improvements to the road network, reduced travel times and more flexible working arrangements are certainly contributory factors to this. It is likely that flows from this catchment are from the southern part in areas closer to Claremorris and Ballinrobe etc. It should also be noted that the travel to work data from the CSO do not necessarily mean that commuters make daily trips and is more an identification of the main place and location of employment. There is also a considerable number of destinations located within and across other small settlements (>1,000 population) in the Western Region (Rest, 1,909 or 13.7%).

7.3.2 Travel Departure Times

In a change from the previous two POWCAR publications (2006 and 2011), the latest results from the 2016 Census only provide commuting details on the travel time departure of resident workers and not distance travelled. Results from distance travelled variables have included a large element of 'noise' with a documented low level of correlation between recorded 'distance travelled' and actual physical home to work distances. As such, the new travel indicator is based on the travel departure times of resident workers. Figure 7.2 below details the overall 'travel time departure' distribution of all Castlebar labour catchment resident workers.

The most common travel time departures are within '08:01-08:30' and '08:31-09:00' band with both accounting for 37.7% of all resident workers. In comparison to the State average, Castlebar labour catchment resident workers have a lower proportion leaving for work in the three early bands pre '07:30' with rates of 31.3% and 23.5%, respectively. Relative to the other seven county town labour catchments, Castlebar has the fourth lowest rate of early departure time with only Carrick-on-Shannon (23.4%), Sligo (20.6%) and Letterkenny (19.1%) with lower rates.

A comparison of the 'travel-time departures' of those working in Castlebar and those working elsewhere, shows that Castlebar bound workers tend to have later departure times than other workers residing with the overall labour catchment. This is as expected due to the wide spatial commuting pattern that is evident for the non-town workforce with settlements such Galway City (330) and other regional towns acting as employment destinations. In summary, a total of 19.2% of Castlebar bound workers residing in the labour catchment depart for work pre '07:30' and is much lower than the rate for workers departing to other destination at 26.7%.

7. Castlebar Labour Catchment

Figure 7.2: Time of Departure of those living in the Castlebar labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

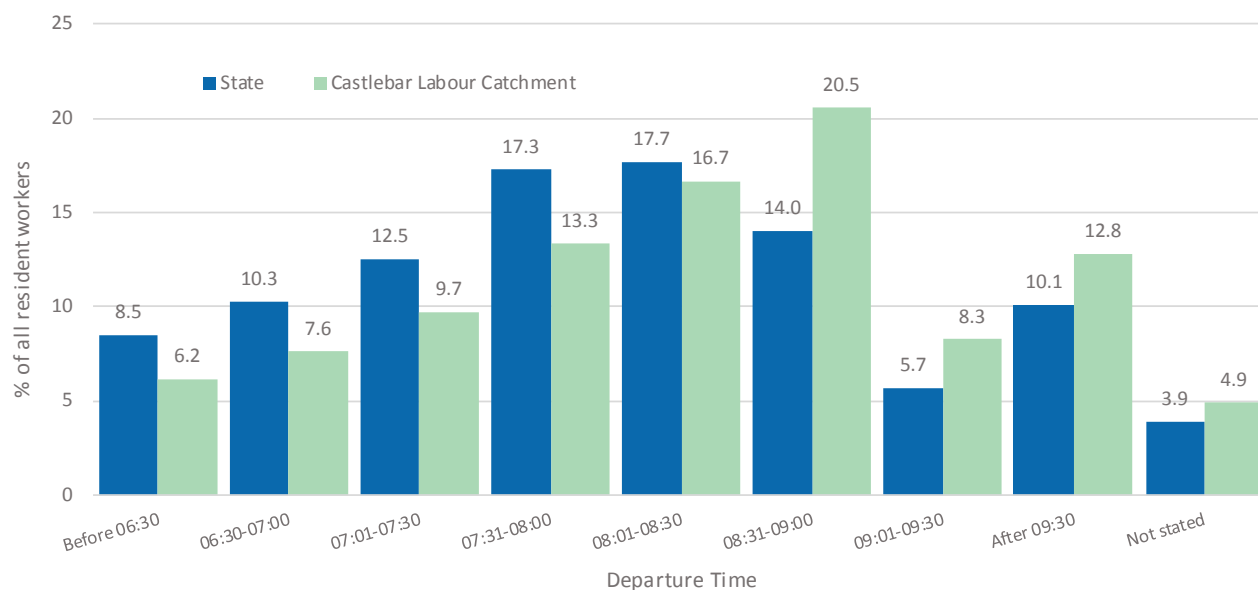


Table 7.2: Time of Departure of those living in the Castlebar Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

	Before 06:30	06:30-07:00	07:01-07:30	07:31-08:00	08:01-08:30	08:31-09:00	09:01-09:30	After 09:30	Not stated	Total
Castlebar Labour Catchment (Total)	858	1,062	1,353	1,859	2,322	2,861	1,151	1,783	682	13,931
Working inside Castlebar	260	390	504	756	1,041	1,445	578	916	110	6,000
Working outside Castlebar	598	672	849	1,103	1,281	1,416	573	867	572	7,931
State	135,187	163,290	199,035	274,425	281,003	223,164	90,521	160,901	62,111	1,589,637
Castlebar Labour Catchment (Total)	6.2	7.6	9.7	13.3	16.7	21	8	13	5	100
Working inside Castlebar	4.3	6.5	8.4	12.6	17.4	24	10	15	2	100
Working outside Castlebar	7.5	8.5	10.7	13.9	16.2	17.9	7.2	10.9	7.2	100
State	8.5	10.3	12.5	17.3	17.7	14.0	5.7	10.1	3.9	100

7.3.3 Gender

The gender composition of residents in the Castlebar labour catchment is shown below. Within the Castlebar labour catchment, female workers account for a larger proportion of the total workforce than their male counterparts with rates of 51.5% and 48.5% respectively. The national picture is slightly different with males (50.1%) accounting for a marginally higher rate than females (49.9%).

7. Castlebar Labour Catchment

There is a variation between men and women in terms of the location of their work. More women than men work in Castlebar, 59.6% and 40.5% respectively. Outside of the town destinations, male employment is higher than female employment with 59.6% of those employed outside the city being males. This reflects traditional employment patterns where agricultural employment in rural areas in part accounts for a higher male employment rate outside of the town. In contrast, employment sectors which are perceived as traditionally female are concentrated in the town, for example retail, banking, finance, public administration and tourism.

Table 7.3: Gender Profile of those living in the Castlebar Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

	Female	Male	Total
Castlebar Labour Catchment (Total)	7,179	6,752	13,931
Working inside Castlebar	3,573	2,427	6,000
Working outside Castlebar	3,606	4,325	7,931
State	793,196	796,441	1,589,637
Castlebar Labour Catchment (Total)	51.5%	48.5%	100%
Working inside Castlebar	59.6%	40.5%	100%
Working outside Castlebar	45.5%	54.5%	100%
State	49.9%	50.1%	100%

An important point to note here is the fact that this analysis excludes all workers who do not have a fixed place of employment i.e., those with a blank or un-codeable place of work and those with a place of work classed as 'mobile' (See Appendix). For instance, an analysis of the gender balance of all workers (including blank and mobile) reveals that 53.7% of all workers are male and 46.3% are female (State average). The rate in the Western Region is broadly similar with males accounting for 53.3% and females accounting for 46.7% of all workers. As such, the gender figures detailed and discussed in the above section should be treated with caution as the underlying worker population does not represent the complete population.

7.3.4 Age

The age profile of those at work and over 15 years who live in the Castlebar labour catchment is shown in Table 7.4. Relative to other towns in this analysis, the age profile of the Castlebar Labour catchment has the third lowest rate of workers aged less than 30 years (13.5%) residing within the catchment – only Ennis (13.3%) and Carrick-on-Shannon (12.8%) have lower rates.

The overall age profile of the Mayo resident workforce (14.2% aged under 30) combined with high levels of out-migration of younger people from rural areas within county Mayo to participate in third-level education and to take up employment opportunities elsewhere is certainly a contributory factor to this trend.

7. Castlebar Labour Catchment

The rate of young workers is marginally lower for those employed within the town than those employed outside and is evident in the data presented in Table 7.4. A total of 12.8% of all of Castlebar's workers are aged 'less than 30 years' whereas the rate for non-Castlebar town workers is 14%. This rate is different to both the Galway City and Ennis labour catchments where the urban based workers have a younger age profile. This is evident in the data presented in Table 7.4 below.

In general, there is a major difference in the age of resident workforce in urban and rural areas. For instance, the cities of Dublin, Cork and Galway all have rate in excess of 24% whereas the average rate in Mayo is 14.2%. Galway County has the lowest rate in the State at 13%.

Table 7.4: Age Profile of those living in the Castlebar Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

	<30 years	30 to 44 years	45 to 64 years	65+ years	Total
Castlebar Labour Catchment (Total)	1,877	5,504	6,111	439	13,931
Working inside Castlebar	769	2,370	2,764	97	6,000
Working outside Castlebar	1,108	3,134	3,347	342	7,931
State	278,647	694,783	575,181	41,026	1,589,637
Castlebar Labour Catchment (Total)	13.5%	39.5%	43.9%	3.2%	100%
Working inside Castlebar	12.8%	39.5%	46.1%	1.6%	100%
Working outside Castlebar	14%	39.5%	42.2%	4.3%	100%
State	17.5%	43.7%	36.2%	2.6%	100%

7.3.5 Education

Table 7.5.1 shows a lower than average educational profile among those living in the Castlebar labour catchment with 50.4% having completed third level education compared to 56.1% nationally. Relative to the other six towns included in this analysis Castlebar has the second least educated workforce with only Roscommon (49.0%) having a lower rate. Again, it is important to note that this is based on workers with a known work destination only and excludes those with Blank or Mobile work destination (32.4% of those coded blank or mobile in the State have third level qualifications). As a whole, overall education levels in Ireland have increased dramatically since the early 'nineties with the proportion of the population with a third level qualification increasing from 13.6% in 1991 to 42% in 2016.

Remarkably, there is little difference between the education attainment of those who are employed within Castlebar (50.3% with 3rd level) and those employed outside the town (50.4% with 3rd level).

7. Castlebar Labour Catchment

Table 7.5.2 below details the education attainment levels within each of the seven labour catchments for all workers, those employed within the city/town and those employed elsewhere. Relative to the other main settlements Castlebar has the joint third lowest level of overall education of those employed within the town. With a recorded rate of only 50.3% with 3rd level education employed in Castlebar, only the settlements of Ennis (50.35), Carrick-on-Shannon (47.8%) and Roscommon town (46.5%) have lower rates of highly educated workers and is perhaps reflective of a lower level of high calibre jobs located within the settlements.

Table 7.5.1: Education Profile of those living in the Castlebar Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

	Secondary Level	Third Level	Not Stated	Total
Castlebar Labour Catchment (Total)	6,711	7,017	203	13,931
Working inside Castlebar	2,892	3,016	92	6,000
Working outside Castlebar	3,819	4,001	111	7,931
State	670,114	891,660	27,863	1,589,637
Castlebar Labour Catchment (Total)	48.2%	50.4%	1.5%	100%
Working inside Castlebar	48.2%	50.3%	1.5%	100%
Working outside Castlebar	48.2%	50.4%	1.4%	100%
State	42.2%	56.1%	1.8%	100%

Table 7.5.2: % of Labour Catchment by Destination with 3rd Level Education, 2016 (Source: AIRO & CSO POWCAR)

	Working in Town	Working outside Town	Total
Galway	65.3%	56.4%	61.3%
Ennis	50.3%	57.2%	54.5%
Sligo	59.2%	51.7%	55.5%
Letterkenny	57.3%	46.4%	51.6%
Castlebar	50.3%	50.4%	50.4%
Roscommon	46.5%	50.3%	49%
Carrick-on-Shannon	47.8%	53.4%	51.9%
State			56.1%

7. Castlebar Labour Catchment

7.3.6 Employment by Industrial Group

Analysis of the profile of employment by industry group provides an indication of the structure of the local economy and the type of employment it sustains as well as the skills profile of the area. It is particularly instructive to compare the profile of a region or local area to that of the State average as it can highlight differences at the local level. Employment by industrial group of all those living in the Castlebar labour catchment is shown in Figure 7.6. The 'Wholesale, Retail Trade and Commerce' (26.9%) and 'Education, Human Health and Social Work' (26.9%) sectors account for over half of all employment of those residing within the Castlebar Labour Catchment. 'Manufacturing Industries' (14.6%) and 'ICT and Professional Services' (9.2%) are the next biggest employers for the labour catchment with all other sectors accounting for less than 8% each.

Relative to the national picture, 'Education, Human Health and Social Work' in particular plays a more important role in the overall employment base – the 'Education, Human Health and Social Work' share of employment (29.6%) is 4.1 percentage points higher than the State average (22.8%). 'Wholesale, Retail and Commerce' (29.9% v 25.7%), 'Manufacturing Industries' (14.6% v 13.0%), 'Public Administration and Defence' (7.5% v 6.0%) and in particular 'Agriculture and Fishing' (6.3% v 4.2%) all perform above the State average. The 'ICT and Professional Services' sector has the worst performance relative to the State average recording a rate of 9.2% whereas the State average was 20.3%.

Figure 7.6: Industry Profile of those living in the Castlebar Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

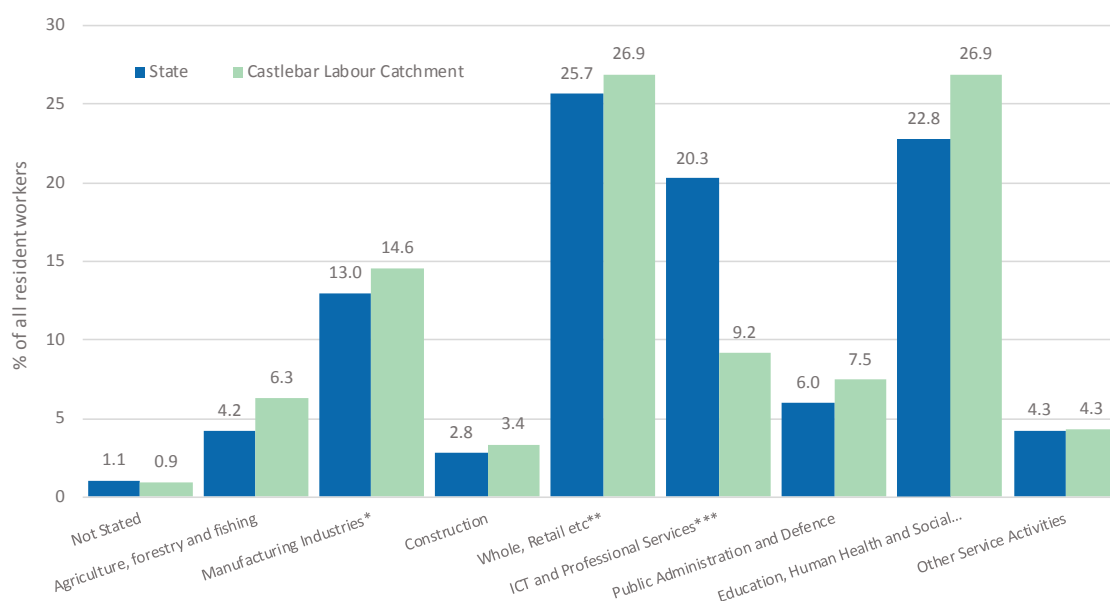


Table 7.6 details the industry of employment of the Castlebar labour catchment by the location of employment – within Castlebar or outside the town. Employment in the following sectors are higher inside the town: 'Education, Human Health and Social Work Activities' (31.4% v 23.6%), 'Wholesale, Retail and Commerce' (28.7% v 25.6%) and 'Public Administration and Defence' (12.1% v 4%). On the other hand, the proportional share of employment in 'Manufacturing Industries' (12.7% v 16%), 'ICT and Professional Services' (7.9% v 10.2%), 'Construction' (1.4% v 4.8%) and in particular 'Agricultural, Forestry and Fishing' (1% v 10.3%) are all higher outside the town – within the wider catchment and beyond.

7. Castlebar Labour Catchment

Table 7.6: Industry Profile of those living in the Castlebar Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

	Castlebar Labour Catchment	Working inside Castlebar	Working outside Castlebar	State
Agricultural, Forestry and Fishing	6.3%	1%	10.3%	4.2%
Manufacturing Industries*	14.6%	12.7%	16%	13%
Construction	3.4%	1.4%	4.8%	2.8%
Wholesale, Retail etc	26.9%	28.7%	25.6%	25.7%
ICT and Professional Services***	9.2%	7.9%	10.2%	20.3%
Public Administration and Defence	7.5%	12.1%	4%	6%
Education, Human Health and Social Work Activities	26.9%	31.4%	23.6%	22.8%
Other Services	4.3%	4.4%	4.3%	4.3%
Not Stated	0.9%	0.4%	1.3%	1.1%
Total	100% (13,931)	100% (6,000)	100% (7,931)	100% (1.59m)

Note: with only nine classifications available, industrial classifications in POWCAR are less detailed than normal classifications in regular Census.

*Manufacturing Industries = Manufacturing, mining and quarrying, Electricity, Gas, Water supply and Waste Management

**Wholesale, Retail etc = Wholesale, Retail Trade, Transportation and Storage, Accommodation and Food Service Activities

***ICT and Professional Services = Information and Communication, Financial, Real Estate, Professional, administration and support service activities

7.3.7 Socio-Economic Structure

The socio-economic structure of employment in the Castlebar labour catchment is set out in Figure 7.7. The socio-economic group (SEG) is determined by occupation and employment status and aims to classify those on the basis of comparable skill and educational levels. This is also a useful indicator of the type of employment and skills available within labour catchments and is particularly informative when compared to the national socio-economic structure.

While the socio-economic structure of the labour catchment of Castlebar follows the overall State trends there are a few marked differences with 'Semi-skilled' (12.3% v 9.8%) and 'Farmers' (5.8% v 3.4%) having a greater proportion than the State average. In contrast, 'Employers and Managers' (12.7% v 16.7%) and 'Higher Professionals' (7.2% v 9.4%) have lower proportion than the State average.

Table 7.7 details the socio-economic structure breakdown for those working within Castlebar and those working outside Castlebar. There are notable differences in rates with a higher proportion of those employed inside Castlebar classed as 'Higher and Lower Professionals'. Another clear difference between town and non-town based workers is within the 'Non Manual' group which is far more common inside Castlebar, which relates to persons working in retail, government, banking and other areas fulfilling administrative roles. Excluding these groups, the largest difference between town and non-town employment relates to those classed as 'Farmers' where the rate is 9.6% outside the town and only 0.7% in the town.

7. Castlebar Labour Catchment

Figure 7.7: SEG Profile of those living in the Castlebar Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

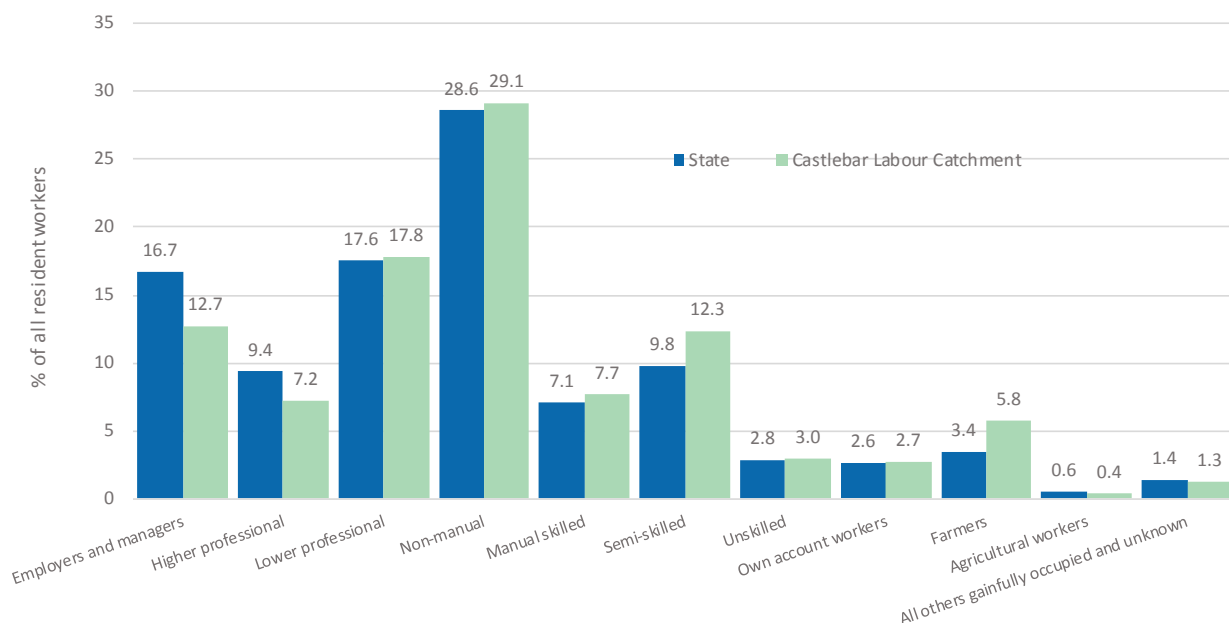


Table 7.7: SEG Profile of those living in the Castlebar Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

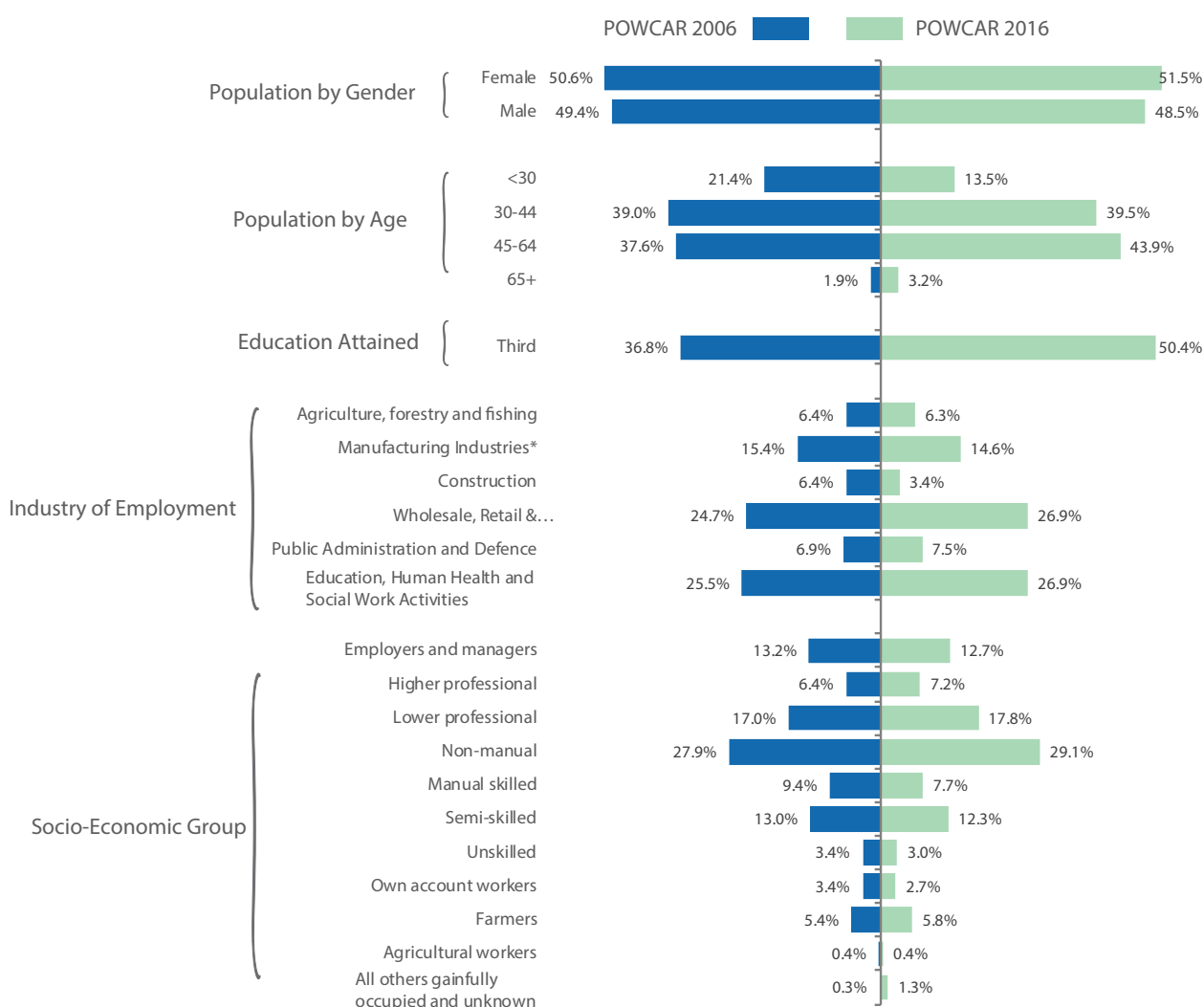
	Castlebar Labour Catchment	Working inside Castlebar	Working outside Castlebar	State
Employers and managers	12.7%	12.4%	13%	16.7%
Higher professional	7.2%	8.1%	6.5%	9.4%
Lower professional	17.8%	18.6%	17.3	17.6%
Non-manual	29.1%	35.3%	24.5%	28.6%
Manual skilled	7.7%	5.2%	9.5%	7.1%
Semi-skilled	12.3%	13.6%	11.4%	9.8%
Unskilled	3%	3.3%	2.7%	2.8%
Own account workers	2.7%	1.4%	3.7%	2.6%
Farmers	5.8%	0.7%	9.6%	3.4%
Agricultural workers	0.4%	0.1%	0.6%	0.6%
Others gainfully occupied and unknown	1.3%	1.3%	1.3%	1.4%
Total	100% (13,931)	100% (6,000)	100% (7,931)	100% (1.59m)

7. Castlebar Labour Catchment

7.4 Analysis of change between 2006 and 2016

The graphic below details the change that has occurred across the Castlebar Labour Catchment between 2006 and 2016. This is reviewed in the context of geographical changes and then the socio-economic characteristics of those residing within the overall catchment area. Most notable changes in terms of socio-economic characteristics certainly relate to the age of resident workers and the rate of third level attainment.

- As with the analysis based on the 2006 POWCAR results, the Castlebar labour catchment is a key labour catchment in the Western Region and retains its ranking as the fifth largest labour catchment in the Western Region. It has a resident 'at work' population of 13,931 and accounts for 5.4% of the total resident workforce within the Western Region. This is an increase of 1.3% (174) from the 2006 figure of 13,757 when it represented a marginally higher proportion of 5.6% of the total resident workforce within the Western Region.
- A review of the geographical extent of the labour catchments from the 2006 and 2016 POWCAR analysis reveals that there has been considerable change over the last ten years. While the overall catchment did increase in the resident 'at work' population there has been a sizeable contraction to the western part of the catchment. This is primarily related to the growth of Westport during this period – the resident 'at work' population within the Westport catchment is now 31.4% (+1,525) higher than it was in 2006.



7. Castlebar Labour Catchment

7.5 Castlebar Labour Catchment Summary

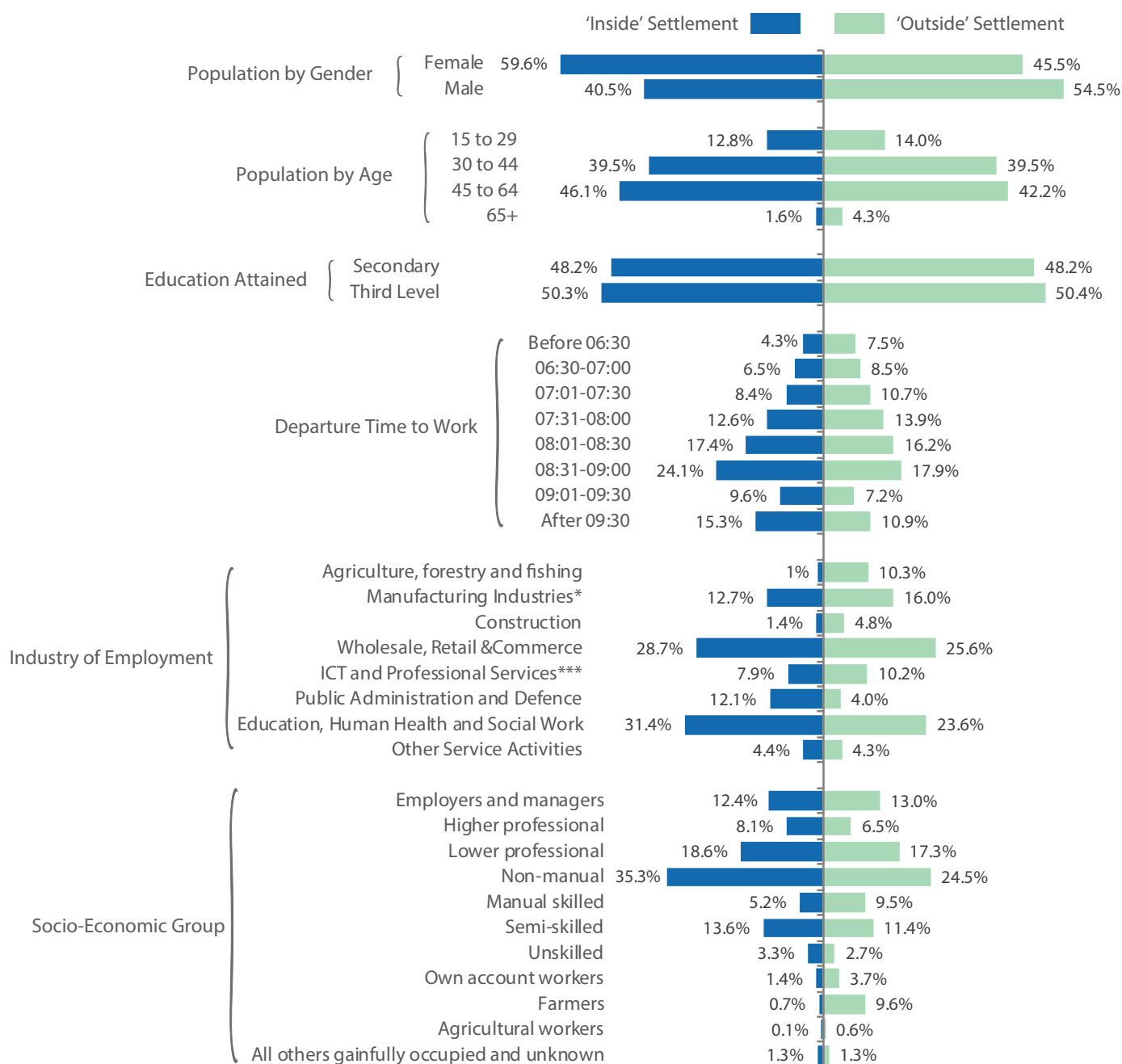
This section provides a summary of the key points of the Castlebar Labour Catchment

- The Castlebar labour catchment is the fifth largest labour catchment in the Western Region (Map 2.1) with a resident 'at work' population of 13,931 which accounts for 5.3% of the total resident 'at work' population within the Western Region (260,261).
- The Castlebar labour catchment covers a large area but is completely confined within the central area of Mayo and small areas in the west in areas such as north Achill and Ballycroy (Map 6.2). In 2016, there were 13,931 people classified as at work and living within the labour catchment. This figure is just under three times the resident 'at work' population within the town at its core (4,710). The 2016 total is +1.3% higher than the 2006 total of 13,757.
- Due to the settlement structure of Mayo, there are a number of smaller labour catchments embedded within or adjacent to the larger Castlebar labour catchment. The towns of Swinford, Charlestown, Ballyhaunis, Claremorris and Ballinrobe have their own labour catchments and play an important role within the labour catchment of Mayo. Both Westport and Ballina then have large labour catchments, the 7th and 10th largest in the Western Region.
- Of those living in the Castlebar labour catchment, 43.1% (6,000) are employed within Castlebar town and 56.9% (7,931) are employed outside the town and in the rest of the catchment and beyond. Key destinations outside the town are Mayo Rural (23.8% or 3,314), Westport (6% or 840) and Ballina (2.9% or 409) – see Table 7.1 for more details.
- A demographic profile of the Castlebar labour catchment shows the following:
 - The age profile of those living in the Castlebar labour catchment is the third oldest of the catchments of the seven county towns in the Western Region.
 - Female workers account for a larger proportion of the workforce than their male counterparts with rates of 51.5% and 48.5% respectively. This gender gap is further extended when looking at those employed within the town where more women than men are employed, 59.6% and 40.5% respectively.
 - Those at work and residing in the Castlebar labour catchment have a much lower level of education than the State average – with rates of 50.4% and 56.1% respectively (3rd level). Those employed in Castlebar have a higher rate of 57.3%.
- Analysis of the profile of the industry of employment within the Castlebar labour catchment shows the following:
 - Both the 'Wholesale, Retail and Commerce' (26.9% or 3,750) and the 'Education, Human Health and Social Work' (26.9% or 3,749) sectors are the largest employers with both proportions above the State average.
 - 'Manufacturing Industries' (14.5% or 2,032) is the third most important sector and is higher than the State average of 13%.
 - Relative to the State average, the 'ICT and Professional Services' sector has the lowest proportional share accounts for only 9.2% (1,281) compared with 20.3% across the State.

7. Castlebar Labour Catchment

7.6 Socio-economic comparison of those employed 'Inside' and 'Outside' Castlebar town

The graphic below details the socio-economic characteristics of resident workers within the Castlebar labour catchment who are employed within Castlebar town (Inside) and those that are employed outside Castlebar town – within the wider labour catchment and beyond (Outside).



Carrick-on-Shannon Labour Catchment



8. Carrick-on-Shannon Labour Catchment

Introduction

Carrick-on-Shannon had a population of 4,062 persons recorded in the 2016 Census. Carrick-on-Shannon is the 17th largest settlement within the Western Region and 102nd largest in the State. Since 2006, the population residing within the town of Carrick-on-Shannon has increased by 61% (+1,540). However, in the five years since Census 2011 the population of the town increased by a marginal 2.1% (+82). Demographic comparisons between urban centres tend to be difficult due to intercensal boundary changes. For instance, in 2014 all legal town boundaries (Carrick-on-Shannon included) were abolished under the Local Government Act 2014. Accordingly the population of these former legal towns have been newly defined using the standard census town criteria. For some towns, the impact of this has been to lose area and population, compared with previous computations.

According to POWSCAR 2016, the total number of jobs located within Carrick-on-Shannon was 2,868 and accounts for 1.2% of all jobs located within the Western Region (242,712). Of all cities and towns in Ireland, Carrick-on-Shannon has the 48th highest number of jobs located within the town boundary and accounts for 49.6% of all jobs located within County Leitrim – outlining its importance as an economic driver for the local authority area. Relative to the six other main settlements in this report, Carrick-on-Shannon has the lowest number of jobs within the town with higher numbers in Galway City (44,376), Sligo (13,034), Letterkenny (11,395), Ennis (10,172), Castlebar (9,045) and Roscommon (3,917). It should be noted that the above job numbers relate to those within the town boundary as defined by the CSO and do not include jobs located outside the town boundary or nearby employment concentrations (industrial parks, local factories etc).

8.1 The importance of Carrick-on-Shannon as a place of work

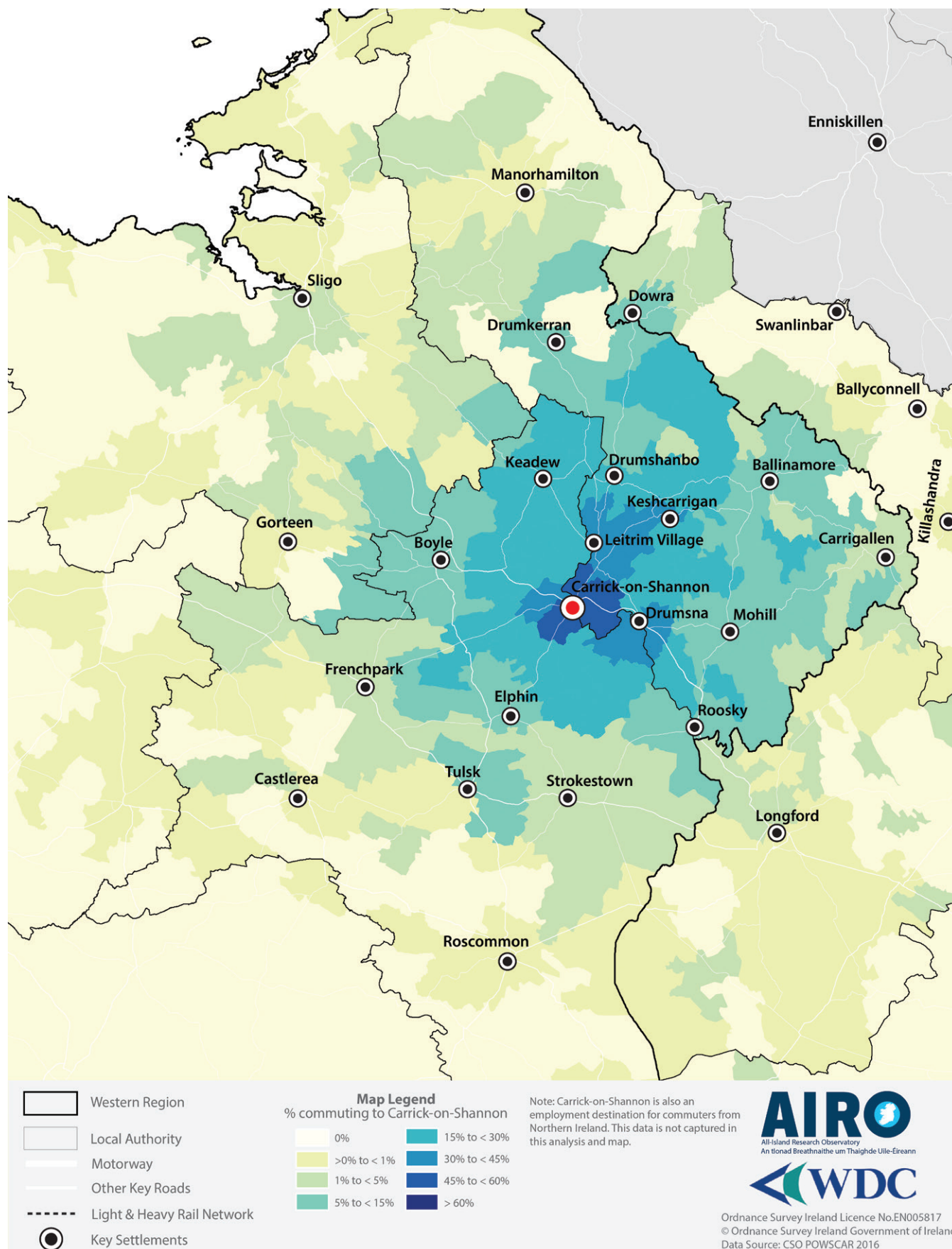
Map 8.1 shows the extent of commuting flows to Carrick-on-Shannon for employment opportunities. The colours represent the different proportions of people who live in each ED and travel to work in Carrick-on-Shannon. The map shows every ED (within the frame) by commuting flow to Carrick-on-Shannon. EDs with commuters numbers linked to Carrick-on-Shannon between one and four (trips) have been set to a value of one¹.

As would be expected, the EDs closest to Carrick-on-Shannon have the highest proportion working in the town, and this is indicated by the darker shades of blue in and around the town perimeter. Beyond these areas, the proportion travelling to the town gradually decreases. The map shows the declining proportion of those living in each ED and commuting to Carrick-on-Shannon, graduating from the dark blue where in excess of 60% of people living in those EDs work in Carrick-on-Shannon, through to light green where between 5 and 15% living in those EDs commute to work in Carrick-on-Shannon. The commuting flow to Carrick-on-Shannon is interesting as the town plays an important economic role for much of south Leitrim and then a large part of north-east Roscommon. The extremes of the commuting catchments stretch to areas such as Tulsk, Elphin, Boyle, Drumkerran, Dowra, Ballinamore and Carrigallen. There is little or no interaction from other areas in north Leitrim (influenced by Sligo town) and central/south Roscommon. Low levels of interaction (0.1% to 5%) are visible in locations further away from the immediate catchment although the actual number of trips within these locations would be extremely low in most cases (less than 5).

¹ This is due to data confidentiality protocols related to access to the POWCAR 2016 dataset.

8. Carrick-on-Shannon Labour Catchment

Map 8.1: Percentage of persons commuting to Carrick-on-Shannon, 2016 (Source: AIRO & CSO POWCAR)



8. Carrick-on-Shannon Labour Catchment

8.2 The Carrick-on-Shannon Labour Catchment

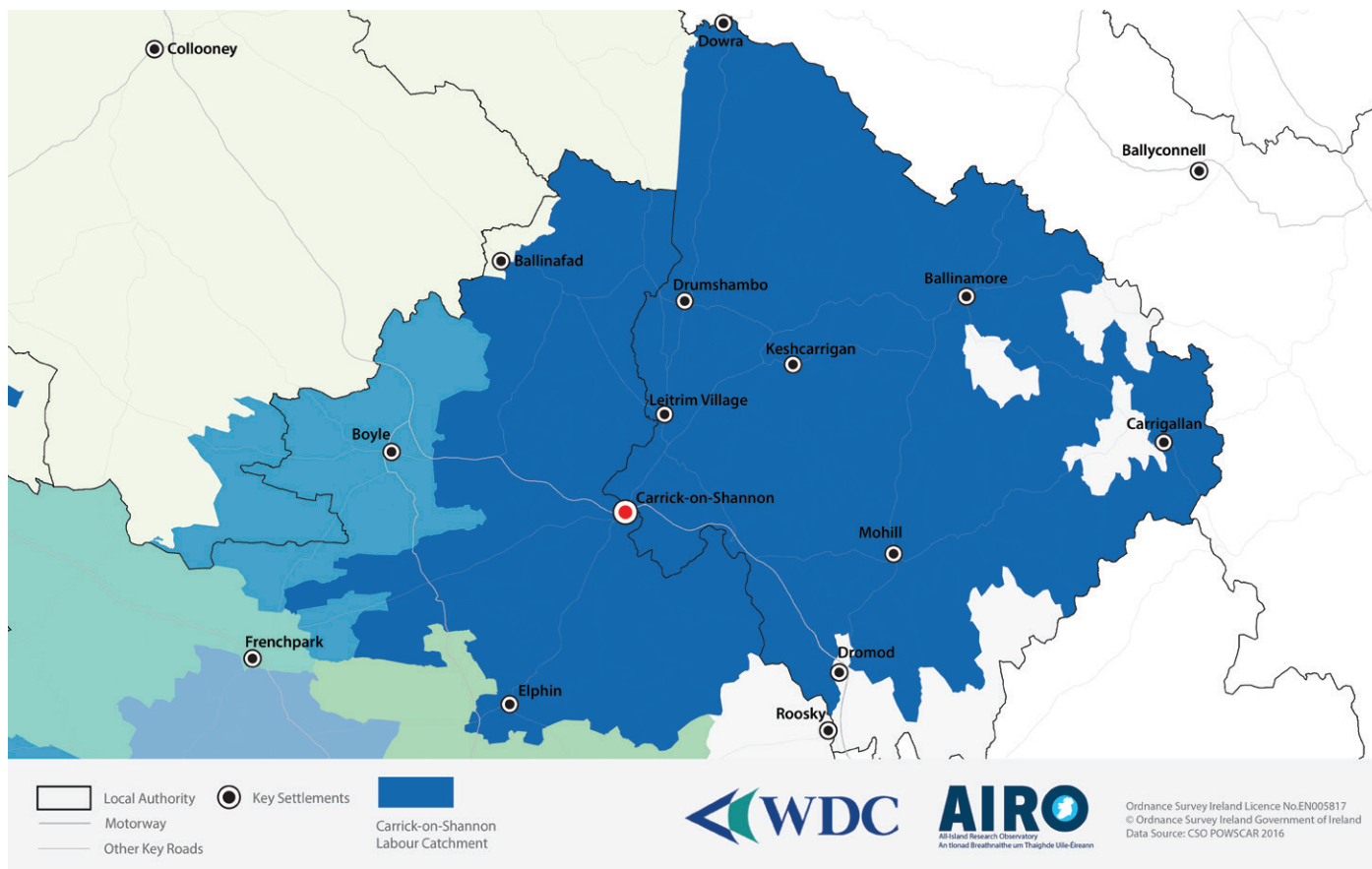
While Map 8.1 showed every ED from where even one person commuted to Carrick-on-Shannon, all of these EDs are not included in the Carrick-on-Shannon labour catchment.

The Carrick-on-Shannon labour catchment, is made up only of those EDs for which Carrick-on-Shannon is the most popular work destination for those living there. Other EDs, whose commuters travel in greater numbers to other towns are assigned to the catchments of these other towns. Map 8.2 shows the Carrick-on-Shannon labour catchment, depicted by the blue colour.

The data presented in Map 8.2 show that Carrick-on-Shannon's influence as a place of work extends over a relatively small area, and is predominantly in south Leitrim and north-east Roscommon. The strong influence of Sligo, Manorhamilton, Boyle, Roscommon town and external towns such as Longford town and Cavan town all have an impact on the overall size of the Carrick-on-Shannon labour catchment. The total resident and 'at work' population within the Carrick-on-Shannon labour catchment is 7,785 (3% of Western Region) and is the eight largest in terms of population size. The only county town with a lower labour catchment at work population is Roscommon town (7,235).

The entire Carrick-on-Shannon labour catchment is far larger than the number of resident workers in the town at its core. Carrick-on-Shannon town labour catchment has a population at work approximately 4.6 times the census population of resident workers in Carrick-on-Shannon town itself, (7,785 and 1,701 (including blank and mobile workers) respectively).

Map 8.2: Carrick-on-Shannon Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)



8. Carrick-on-Shannon Labour Catchment

8.3 Profile of the Carrick-on-Shannon Labour Catchment

Map 8.2 identified (in dark blue) the Carrick-on-Shannon labour catchment. In the following section we examine the socio-economic characteristics of all those living in this labour catchment and at work, even though they may not all have been working in Carrick-on-Shannon in April 2016. We do this because although some may not be working in Carrick-on-Shannon they are living in the catchment from which Carrick-on-Shannon's labour supply is drawn and including them provides a more complete assessment of the potential labour supply for Carrick-on-Shannon. The Carrick-on-Shannon labour catchment is therefore separated into those who live in the catchment and are employed in the following; 'Inside' the town or 'Outside' the town i.e., elsewhere in the catchment or locations such as Sligo, Longford, Dublin etc. This profile is further supported by an analysis of changes in the catchment between 2006 and 2016, both in terms of geography and socio-economic characteristics (8.4), a comparison matrix of town and non-town workers (8.5) and an overall comparison matrix for all seven labour catchments (10.1).

8.3.1 Place of Work

The Carrick-on-Shannon labour catchment can be seen to include large parts of central and southern Leitrim as well as north-west Roscommon. In 2016, there were 7,785 people classified as at work, living within the Carrick-on-Shannon labour catchment (+16.9% from 6,632 in 2006). In Figure 8.1 and Table 8.1 the main work locations for those who live in the Carrick-on-Shannon labour catchment are set out.

Figure 8.1: Place of work of those living in the Carrick-on-Shannon Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

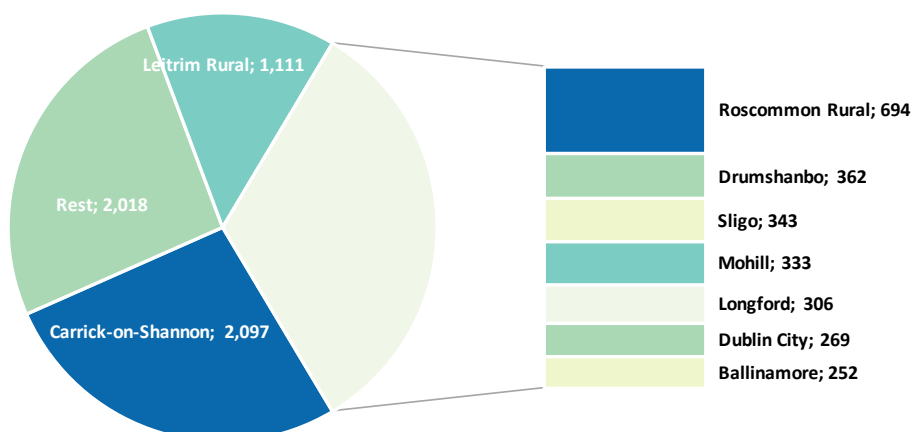


Table 8.1: Place of work of those living in the Carrick-on-Shannon Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

Labour Catchment	Number	%
Carrick-on-Shannon	2,097	26.9%
Rest	2,018	25.9%
Leitrim Rural	1,111	14.3%
Roscommon Rural	694	8.9%
Drumshanbo	362	4.6%
Sligo	343	4.4%
Mohill	333	4.3%
Longford	306	3.9%
Dublin City	269	3.5%
Ballinamore	252	3.2%
Total	7,785	100%

8. Carrick-on-Shannon Labour Catchment

As expected, Carrick-on-Shannon is the principal place of employment, accounting for 2,097 (26.9%) of all employment and has the lowest rate of core employment (in principal settlement) for all seven county towns. As with the Roscommon town labour catchment, rural based employment is very important to the overall catchment and accounts for 23.2% of all jobs – Leitrim Rural (1,111 or 14.3%) and Roscommon Rural (694 or 8.9%).

The other large employment destinations for residents within the Carrick-on-Shannon labour catchment are primarily towns in close proximity to Carrick-on-Shannon (Drumshanbo, Sligo town, Mohill, Longford town and Ballinamore etc). Interestingly, Dublin City (269 or 3.5%) is also highlighted as a destination for Carrick-on-Shannon labour catchment residents. Recent changes to the motorway network, reduced travel times and more flexible working arrangements may be contributory factors to this. However, it should also be noted that the travel to work data from the CSO do not necessarily mean that commuters make daily trips and is more an identification of the main place and location of employment - it is likely that flows from Carrick-on-Shannon to Dublin City fall within this category. There is also a considerable number of destinations located within and across other small settlements (>1,000 population) in the Western Region (Rest, 2,018 or 25.9%).

8.3.2 Travel Departure Times

In a change from the previous two POWCAR publications (2006 and 2011), the latest results from the 2016 Census only provide commuting details on the travel time departure of resident workers and not distance travelled. Results from distance travelled variables have included a large element of 'noise' with a documented low level of correlation between recorded 'distance travelled' and actual physical home to work distances. As such, the new travel indicator is based on the travel departure times of resident workers. Figure 8.2 below details the overall 'travel time departure' distribution of all Carrick-on-Shannon labour catchment resident workers.

The most common travel time departures are within '08:01-08:30' and '08:31-09:00' band with both accounting for 34.3% of all resident workers. In comparison to the State average, Carrick-on-Shannon labour catchment resident workers have a lower proportion leaving for work in the three early bands pre '07:30' with rates of 31.3% and 23.4%, respectively. This rate is the fourth lowest of the seven county town labour catchments.

A comparison of the 'travel-time departures' of those working in Carrick-on-Shannon and those working elsewhere (Table 9.2) shows that Carrick-on-Shannon bound workers tend to have much later departure times than other workers residing within the overall labour catchment. In summary, a total of 15.7% of Carrick-on-Shannon bound workers residing within the labour catchment depart for work pre '07:30' and this is much lower than the rate for workers with other work destinations (26.2%).

8. Carrick-on-Shannon Labour Catchment

Figure 8.2: Time of Departure of those living in the Carrick-on-Shannon Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

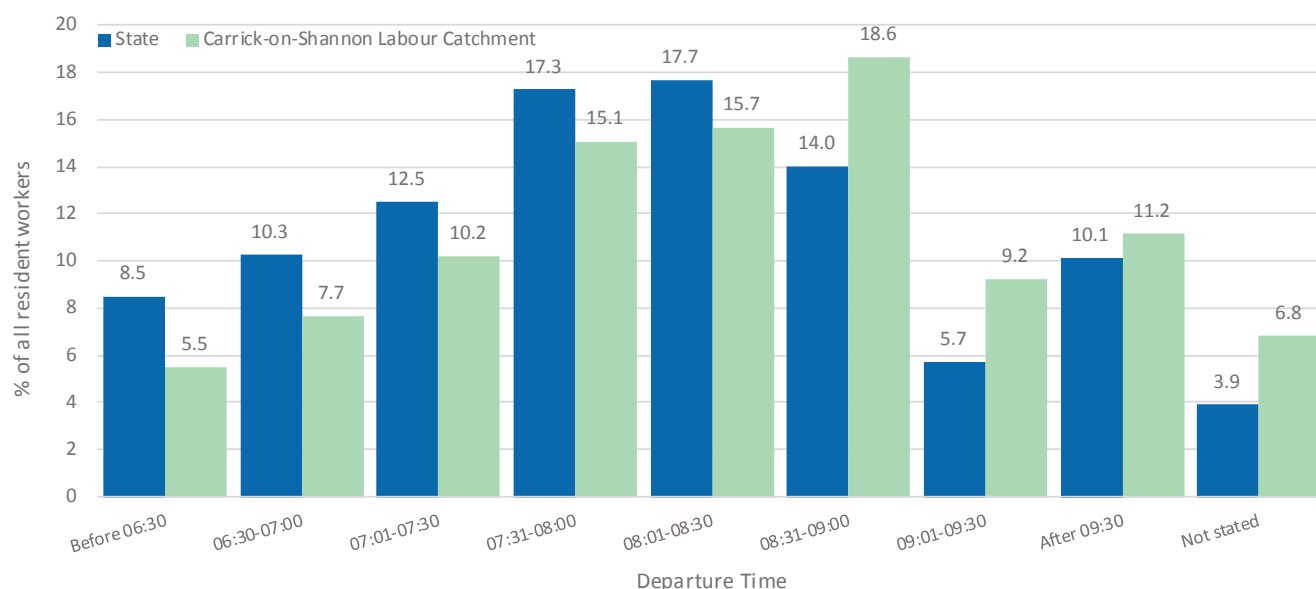


Table 8.2: Time of Departure of those living in the Carrick-on-Shannon Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

	Before 06:30	06:30-07:00	07:01-07:30	07:31-08:00	08:01-08:30	08:31-09:00	09:01-09:30	After 09:30	Not stated	Total
Carrick-on-Shannon Labour Catchment (Total)	427	597	795	1,174	1,221	1,451	719	869	532	7,785
Working inside Carrick-on-Shannon	69	107	154	300	294	495	272	355	51	2,097
Working outside Carrick-on-Shannon	358	490	641	874	927	956	447	514	481	5,688
State	135,187	163,290	199,035	274,425	281,003	223,164	90,521	160,901	62,111	1,589,637
Carrick-on-Shannon Labour Catchment (Total)	5.5%	7.7%	10.2%	15.1%	15.7%	18.6%	9.2%	11.2%	6.8%	100%
Working inside Carrick-on-Shannon	3.3%	5.1%	7.3%	14.3%	14.0%	23.6%	13.0%	16.9%	2.4%	100%
Working outside Carrick-on-Shannon	6.3%	8.6%	11.3%	15.4%	16.3%	16.8%	7.9%	9.0%	8.5%	100%
State	8.5%	10.3%	12.5%	17.3%	17.7%	14.0%	5.7%	10.1%	3.9%	100%

8.3.3 Gender

The gender composition of residents in the Carrick-on-Shannon labour catchment is shown below. Within the Carrick-on-Shannon labour catchment, female workers account for a larger proportion of the total workforce than their male counterparts with rates of 52.0% and 48.0% respectively. The national picture is different with males (50.1%) accounting for a marginally higher rate than females (49.9%).

8. Carrick-on-Shannon Labour Catchment

There is a variation between men and women in terms of the location of their work. Far more women than men work in the Carrick-on-Shannon labour catchment, 62.9% and 37.1% respectively. Outside of Carrick-on-Shannon town destinations, male employment is higher than female employment with 52.0% of those employed outside the town being males. This reflects traditional employment patterns where agricultural employment in rural areas in part accounts for a higher male employment rate outside of the town. In contrast, employment sectors which are perceived as traditionally female are concentrated in the town, for example retail, banking, finance, public administration and tourism.

Table 8.3: Gender Profile of those living in the Carrick-on-Shannon Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

	Female	Male	Total
Carrick-on-Shannon Labour Catchment (Total)	4047	3,738	7,785
Working Inside Carrick-on-Shannon	1319	778	2,097
Working Outside Carrick-on-Shannon	2728	2,960	5,688
State	793,196	796,441	1,589,637
Carrick-on-Shannon Labour Catchment (Total)	52%	48%	100%
Working Inside Carrick-on-Shannon	62.9%	37.1%	100%
Working Outside Carrick-on-Shannon	48%	52%	100%
State	49.9%	50.1%	100%

An important point to note here is the fact that this analysis excludes all workers who do not have a fixed place of employment i.e., those with a blank or un-codeable place of work and those with a place of work classed as 'mobile' (See Appendix). For instance, an analysis of the gender balance of all workers (including blank and mobile) reveals that 53.7% of all workers are male and 46.3% are female (State average). The rate in the Western Region are broadly similar with males accounting for 53.3% and females accounting for 46.7% of all workers. As such, the gender figures detailed and discussed in the above section should be treated with caution as the underlying worker population does not represent the complete population.

8.3.4 Age

The age profile of those at work and over 15 years who live in the Carrick-on-Shannon labour catchment is shown in Table 8.4. Relative to other towns in this analysis, the age profile of the Carrick-on-Shannon Labour Catchment (12.8%) has the lowest rate of workers aged less than 30 residing within the catchment with Ennis having the closest rate at 13.3%. In contrast, Galway City and Letterkenny labour catchments have rates of 16.8% and 17% respectively.

The overall age profile of the Leitrim resident workforce (13.1% aged under 30) combined with high levels of out-migration of younger people from rural areas within Leitrim and north-west Roscommon to participate in third-level education and to take up employment opportunities elsewhere is certainly a contributory factor to this trend.

8. Carrick-on-Shannon Labour Catchment

The rate of young workers is marginally higher for those employed within the town than those employed outside and is evident in the data presented in Table 8.4. A total of 14.5% of all of Carrick-on-Shannon's workers are aged 'less than 30 years' whereas the rate for those employed outside Carrick-on-Shannon town is 12.2%. This rate is similar to both the Galway City and Ennis labour catchments where the urban based workers have a younger age profile.

In general, there is a major difference in the age of the resident workforce in urban and rural areas. For instance, the cities (CSO Settlements) of Dublin, Cork and Galway all have rates in excess of 24% whereas the average rate in Leitrim County is 13.1%. At 13%, Galway County has the lowest rate of all local authorities in the State.

Table 8.4: Age Profile of those living in the Carrick-on-Shannon Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

	<30 years	30 to 44 years	45 to 64 years	65+ years	Total
Carrick-on-Shannon Labour Catchment (Total)	998	3,267	3,227	293	7,785
Working inside Carrick-on-Shannon	305	913	851	28	2,097
Working outside Carrick-on-Shannon	693	2,354	2,376	265	5,688
State	278,647	694,783	575,181	41,026	1,589,637
Carrick-on-Shannon Labour Catchment (Total)	12.8%	42%	41.5%	3.8%	100%
Working inside Carrick-on-Shannon	14.5%	43.5%	40.6%	1.3%	100%
Working outside Carrick-on-Shannon	12.2%	41.4%	41.8%	4.7%	100%
State	17.5%	43.7%	36.2%	2.6%	100%

8.3.5 Education

Table 8.5.1 shows a lower than average educational profile among those living in the Carrick-on-Shannon labour catchment with 51.9% having completed third level education compared to 56.1% nationally. Relative to the other six towns included in this analysis Carrick-on-Shannon has the fourth most educated workforce. Again, it is important to note that this is based on workers with a known work destination only and excludes those with Blank or Mobile work destination (32.4% of those coded blank or mobile in the State have third level qualifications). As a whole, overall education levels in Ireland have increased dramatically since the early 'nineties with the proportion of the population with a third level qualification increasing from 13.6% in 1991 to 42% in 2016.

There is also a modest difference between the education attainment of those who are employed within Carrick-on-Shannon (47.8% with 3rd level) and those employed outside the town (53.4% with 3rd level) - this is similar to the trend in other county towns such as Ennis, Sligo and Roscommon where the education levels are higher for those employed outside the urban centre.

8. Carrick-on-Shannon Labour Catchment

Table 8.5.2 below details the education attainment levels within each of the seven labour catchments for all workers, those employed within the city/town and those employed elsewhere. Relative to the other main settlements Carrick-on-Shannon has the second lowest level of overall education of those employed within the town. With a recorded rate of only 47.8% with 3rd level education employed in Carrick-on-Shannon the overall education rate of those employed in the town is drastically different from Galway City where the rate is far higher with a rate of 65.3%. This is a clear indication of the lower level of employment opportunities that are available within Carrick-on-Shannon.

Table 8.5.1: Education Profile of those living in the Carrick-on-Shannon Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

	Secondary Level	Third Level	Not Stated	Total
Carrick-on-Shannon Labour Catchment (Total)	3,596	4,039	150	7,785
Working inside Carrick-on-Shannon	1,051	1,003	43	2,097
Working outside Carrick-on-Shannon	2,545	3,036	107	5,688
State	670,114	891,660	27,863	1,589,637
Carrick-on-Shannon Labour Catchment (Total)	46.2%	51.9%	1.9%	100%
Working inside Carrick-on-Shannon	50.1%	47.8%	2.1%	100%
Working outside Carrick-on-Shannon	44.7%	53.4%	1.9%	100%
State	42.2%	56.1%	1.8%	100%

Table 8.5.2: % of Labour Catchment by Destination with 3rd Level Education, 2016 (Source: AIRO & CSO POWCAR)

	Working in Town	Working outside Town	Total
Galway	65.3%	56.4%	61.3%
Ennis	50.3%	57.2%	54.5%
Sligo	59.2%	51.7%	55.5%
Letterkenny	57.3%	46.4%	51.6%
Castlebar	50.3%	50.4%	50.4%
Roscommon	46.5%	50.3%	49%
Carrick-on-Shannon	47.8%	53.4%	51.9%
State			56.1%

8. Carrick-on-Shannon Labour Catchment

8.3.6 Employment by Industrial Group

Analysis of the profile of employment by industry group provides an indication of the structure of the local economy and the type of employment it sustains as well as the skills profile of the area. It is particularly instructive to compare the profile of a region or local area to that of the State average as it can highlight differences at the local level. Employment by industrial group of all those living in the Carrick-on-Shannon labour catchment is shown in Figure 9.6. The 'Wholesale, Retail Trade and Commerce' sector is the most important employer (26.0%) and along with 'Education, Human Health and Social Work' (24.6%) account for just over half of all employment of those residing within the Carrick-on-Shannon labour catchment. 'Manufacturing Industries' (12.5%) and 'ICT and Professional Services' (12.2%) are the next biggest employers for the labour catchment with all other sectors accounting for less than 10% each.

Relative to the national picture, 'Agriculture, Forestry and Fishing' and 'Public Administration and Defence' sectors in particular play a more important role in the overall employment base - the 'Agriculture, Forestry and Fishing' share of employment (7.3%) is 3.1 percentage points higher than the State average (4.2%) and the 'Public Administration and Defence' sector is 3.5 percentage points higher. The 'ICT and Professional Services' sector has the lowest performance relative to the State average with the Carrick-on-Shannon labour catchment recording a rate of 12.2% whereas the State average was 20.3%. The remaining sectors of employment for the Carrick-on-Shannon labour catchment residents are similar to or just above the State average.

Figure 8.6: Industry Profile of those living in the Carrick-on-Shannon Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

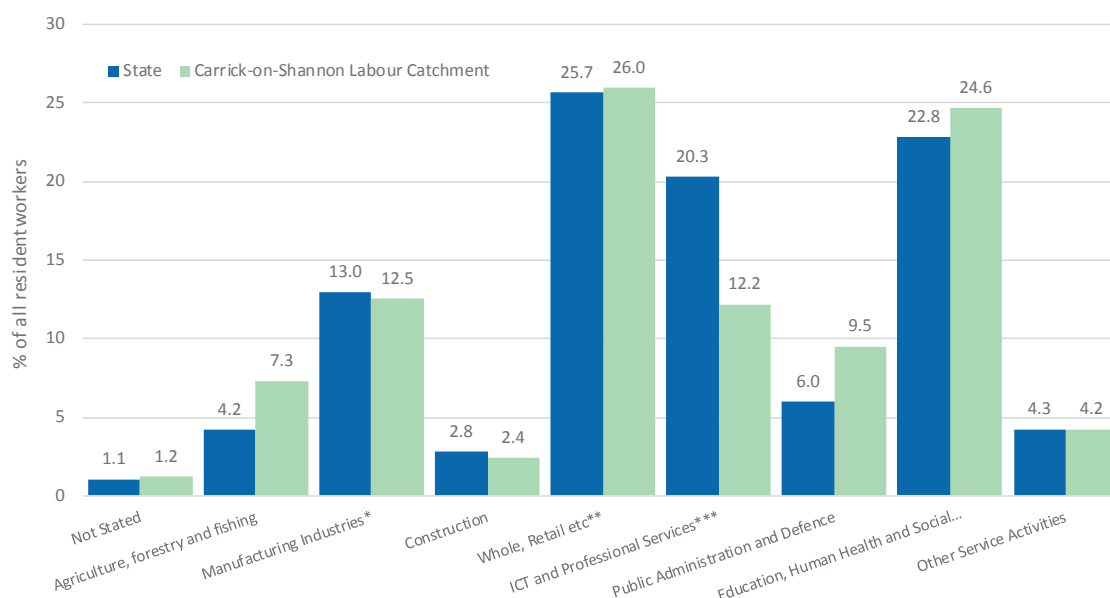


Table 8.6 details the industry of employment of the Carrick-on-Shannon labour catchment by the location of their employment - either within Carrick-on-Shannon or anywhere beyond the town. As expected, employment in 'Wholesale, Retail and Commerce', 'ICT and Professional Services' and 'Public Administration and Defence' are more dominant in those employed within Carrick-on-Shannon whereas 'Agriculture, Forestry and Fishing', 'Manufacturing', 'Construction' and 'Education, Human Health and Social Work' are higher outside the town, within the wider catchment and beyond.

8. Carrick-on-Shannon Labour Catchment

Table 8.6: Industry Profile of those living in the Carrick-on-Shannon Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

	Carrick-on-Shannon Labour Catchment	Working inside Carrick-on-Shannon	Working outside Carrick-on-Shannon	State
Agricultural, Forestry and Fishing	7.3%	0.8%	9.7%	4.2%
Manufacturing Industries*	12.5%	11%	13.1%	13%
Construction	2.4%	0.7%	3%	2.8%
Wholesale, Retail etc	26%	34.5%	22.8%	25.7%
ICT and Professional Services***	12.2%	14.2%	11.5%	20.3%
Public Administration and Defence	9.5%	14.9%	7.6%	6%
Education, Human Health and Social Work Activities	24.6%	17.4%	27.3%	22.8%
Other Services	4.2%	5.6%	3.7%	4.3%
Not Stated	1.2%	1%	1.3%	1.1%
Total	100% (7,785)	100% (2,097)	100% (5,688)	100% (1.59m)

Note: with only nine classifications available, industrial classifications in POWCAR are less detailed than normal classifications in regular Census.

*Manufacturing Industries = Manufacturing, mining and quarrying, Electricity, Gas, Water supply and Waste Management

**Wholesale, Retail etc = Wholesale, Retail Trade, Transportation and Storage, Accommodation and Food Service Activities

***ICT and Professional Services = Information and Communication, Financial, Real Estate, Professional, administration and support service activities

8.3.7 Socio-Economic Structure

The socio-economic structure of employment in the Carrick-on-Shannon labour catchment is set out in Figure 8.7. The socioeconomic group (SEG) is determined by occupation and employment status and aims to classify those on the basis of comparable skill and educational levels. This is also a useful indicator of the type of employment and skills available within labour catchments and is particularly informative when compared to the national socio-economic structure.

The socio-economic structure of the labour catchment of Carrick-on-Shannon is broadly similar to that of the State with the largest groups being 'Non-Manual' (29.7%), 'Lower Professionals' (18.6%), 'Employers and Managers' (13.9%), 'Semi Skilled' (9.9%), 'Farmers and Agricultural Workers' (7.3%) and then 'Higher Professionals' (6.2%). Although following a similar trend there are some marked differences with lower relative rates in the Carrick-on-Shannon labour catchment for 'Employers and Managers' and 'Higher Professionals' and a much higher relative rate for 'Farmers and Agricultural Workers', compared to the State average.

Table 8.7 details the socio-economic structure breakdown for those working within Carrick-on-Shannon and those working outside town. There are notable differences in rates with a higher proportion of those employed within Carrick-on-Shannon classed as 'Employers and Managers', 'Non-Manual' and 'Semi-Skilled'. The largest difference amongst these is within the 'Non Manual' group which relates to persons working in retail, government, banking and other areas fulfilling administrative roles - many of these roles in the 'Wholesale, Retail and Commerce' and 'ICT and Professional Service' industries which are large employers within settlements. In contrast to this, 'Higher Skilled' and in particular 'Manual Skilled' occupations have higher rates outside the town. Excluding these groups the largest difference between town and non-town employment relates to those classed as 'Farmers' where the rate is 9.7% outside the town and only 0.7% in the town.

8. Carrick-on-Shannon Labour Catchment

Figure 8.7: SEG Profile of those living in the Carrick-on-Shannon Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

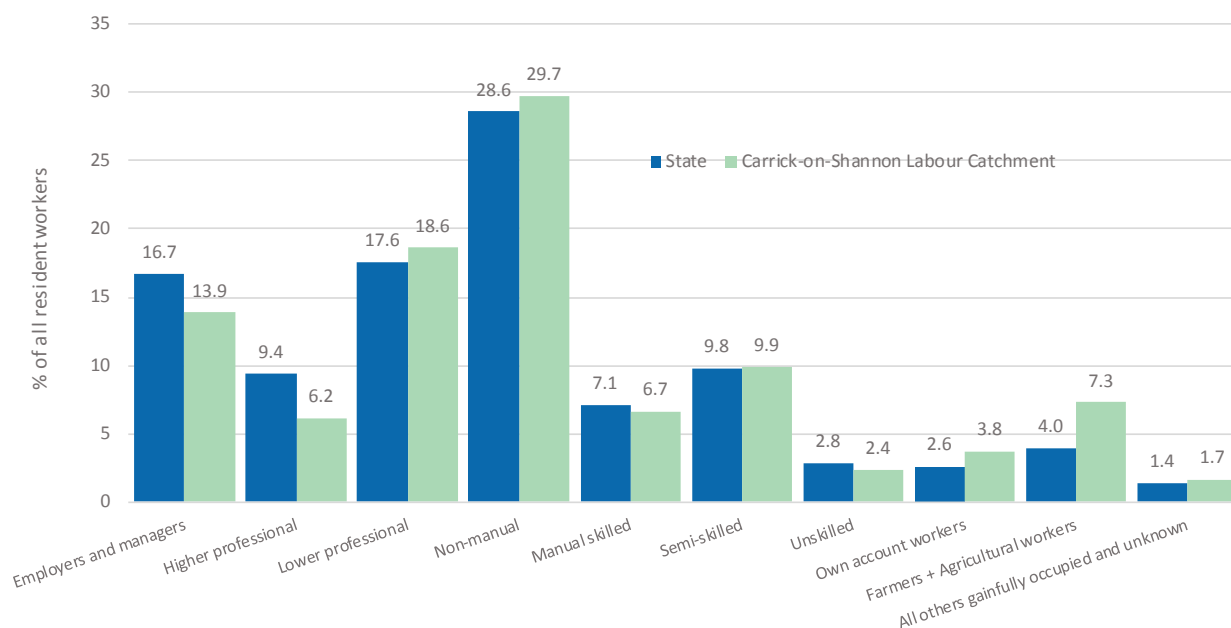


Table 8.7: SEG Profile of those living in the Carrick-on-Shannon Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

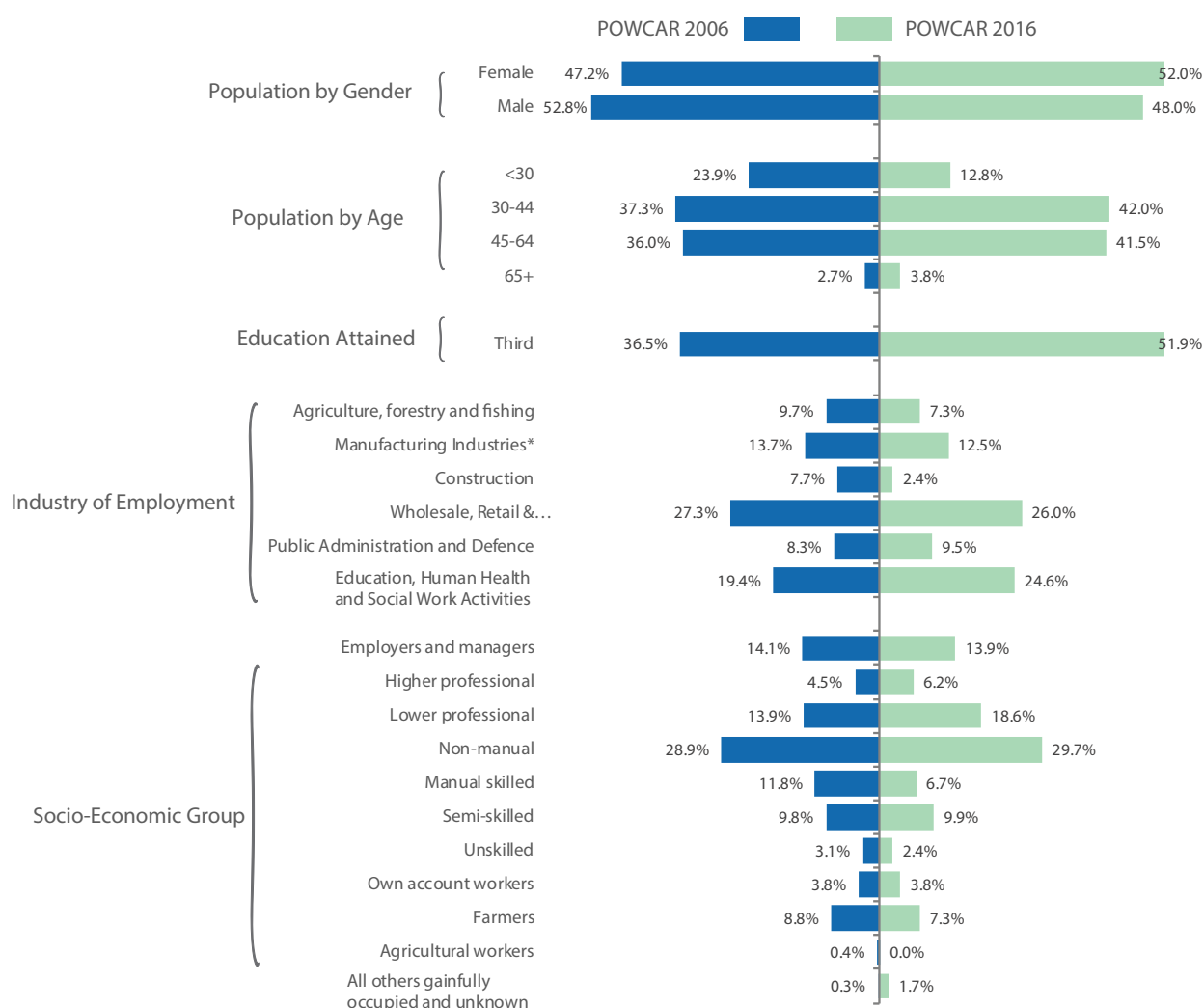
	Carrick-on-Shannon Labour Catchment	Working inside Carrick-on-Shannon	Working Outside Carrick-on-Shannon	State
Employers and managers	13.9%	15.3%	13.4%	16.7%
Higher professional	6.2%	5.2%	6.5%	9.4%
Lower professional	18.6%	14.5%	20.1%	17.6%
Non-manual	29.7%	40.6%	25.7%	28.6%
Manual skilled	6.7%	3.6%	7.8%	7.1%
Semi-skilled	9.9%	13.2%	8.6%	9.8%
Unskilled	2.4%	3%	2.1%	2.8%
Own account workers	3.8%	2.2%	4.3%	2.6%
Farmers	7.3%	0.7%	9.7%	3.4%
Agricultural workers	1.7%	1.7%	1.7%	0.6%
Others gainfully occupied and unknown	1.4%	1.0%	1.5%	1.4%
Total	100% (7,785)	100% (2,097)	100% (5,688)	100% (1.59m)

8. Carrick-on-Shannon Labour Catchment

8.4 Analysis of change between 2006 and 2016

The graphic below details the change that has occurred across the Carrick-on-Shannon Labour Catchment between 2006 and 2016. This is reviewed in the context of geographical changes and then the socio-economic characteristics of those residing within the overall catchment area. Most notable changes in terms of socio-economic characteristics certainly relate to the age of resident workers and the rate of third level attainment.

- As with the analysis based on the 2006 POWCAR results, the Carrick-on-Shannon labour catchment is a key labour catchment in the Western Region and increased its ranking from the ninth to the eight largest labour catchment in the Western Region. It has a resident 'at work' population of 7,785 and accounts for 3% of the total resident workforce within the Western Region. This is an increase of 17.4% (1,153) from the 2006 figure of 6,632 when it represented a marginally higher proportion of 5.6% of the total resident work force within the Western Region.
- A review of the geographical extent of the labour catchments from the 2006 and 2016 POWCAR analysis reveals that there has been some change over the last ten years. This is primarily in the north-west of Carrick-on-Shannon where the catchment extends further towards Boyle and Ballinacfad than it did in 2006. The catchment has also extended further south towards Roosky and Elphin and this is reflected in the large increase (17.4%) in resident 'at work' population within the catchment.



8. Carrick-on-Shannon Labour Catchment

8.5 Carrick-on-Shannon Labour Catchment Summary

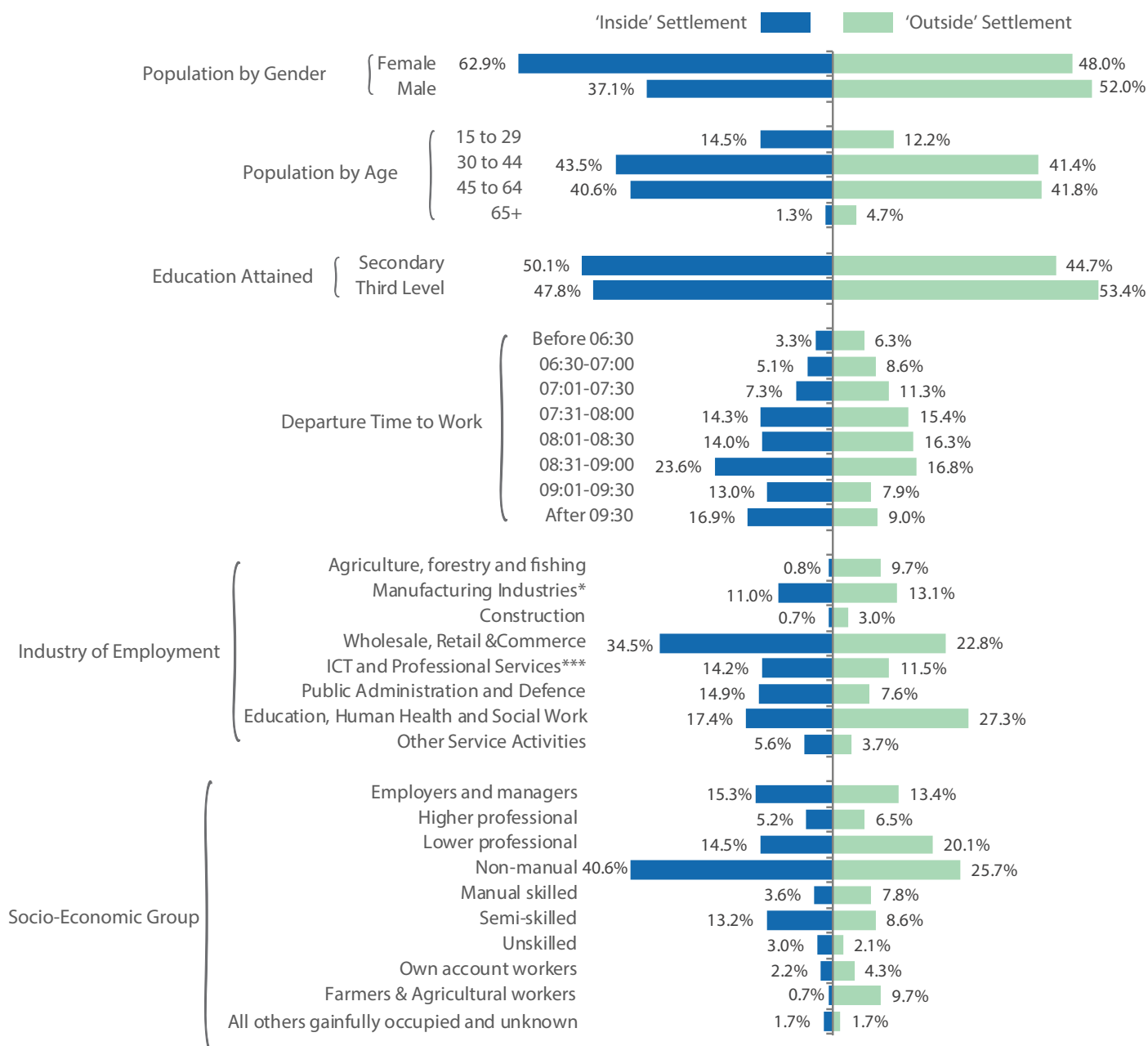
This section provides a summary of the key points of the Carrick-on-Shannon Labour Catchment

- The Carrick-on-Shannon labour catchment is the eight largest labour catchment in the Western Region (Map 2.1) with a resident 'at work' population of 7,785 which accounts for 3% of the total resident 'at work' population within the Western Region (260,261).
- The Carrick-on-Shannon labour catchment covers a relatively small area and is predominantly within south Leitrim and north-east Roscommon (Map 8.2). In 2016, there were 7,785 people classified as at work and living within the labour catchment. This figure is approximately 4.6 times the resident 'at work' population within the town at its core (1,701). The 2016 total is +16.9 higher than the 2006 total of 6,632.
- The strong influence of Sligo, Manorbhamilton, Boyle, Roscommon town and external towns such as Longford and Cavan all have an impact on the size of the Carrick-on-Shannon labour catchment. These towns (and cities) are themselves the most important places for employment for those living in their immediate hinterlands, and therefore constitute separate and quite large labour catchments within the county boundary of Leitrim.
- Of those living in the Carrick-on-Shannon labour catchment, 26.9% (2,097) are employed within Carrick-on-Shannon and 73.1% (5,688) are employed outside the town and in the rest of the catchment and beyond. Key destinations outside the town are Leitrim Rural (14.3% or 1,111), Roscommon Rural (8.9% or 694) and Drumshanbo (4.6% or 363) – see Table 8.1 for more details.
- A demographic profile of the Carrick-on-Shannon labour catchment shows the following:
 - The age profile of those living in the Carrick-on-Shannon labour catchment is the oldest of the catchments of the seven county towns in the Western Region.
 - Female workers account for a larger proportion of the workforce than their male counterparts with rates of 52% and 48% respectively. This gender gap is further extended when looking at those employed within the town where more women than men are employed, 62.9% and 37.1% respectively.
 - Those at work and residing in the Carrick-on-Shannon labour catchment have a much lower level of education than the State average – with rates of 51.9% and 56.1% respectively (3rd level). As with the Ennis labour catchment profile, those employed outside Carrick-on-Shannon town have a higher rate of third level attainment (53.5%) compared with those working in the town (47.8%).
- Analysis of the profile of the industry of employment within the Carrick-on-Shannon labour catchment shows the following:
 - The single largest employer is the 'Wholesale, Retail and Commerce' sector and accounts for 26% (2,021) which is marginally higher than the State average (25.7%).
 - The 'Education, Health Care and Social Work' sector is the second most important employer with a rate of 24% (1,919) and again is marginally higher than the State average (22.8%).
 - Both the 'Manufacturing Industries' (12.5% or 975) and the 'ICT and Professional Services' (12.2% or 949) sectors are also important sectors. As with other labour catchments, the 'ICT and Professional Services' proportional share is much lower than the State average (20.3%).

8. Carrick-on-Shannon Labour Catchment

8.6 Socio-economic comparison of those employed 'Inside' and 'Outside' Carrick-on-Shannon town

The graphic below details the socio-economic characteristics of resident workers within the Carrick-on-Shannon town labour catchment who are employed within Carrick-on-Shannon (Inside) and those that are employed outside Carrick-on-Shannon – within the wider labour catchment and beyond (Outside).



Roscommon Town Labour Catchment



9. Roscommon Town Labour Catchment

Introduction

Roscommon town had a population of 5,876 persons recorded in the 2016 Census. Roscommon is the 12th largest settlement within the Western Region and the 77th largest in the State. Since 2006, the population residing within the town of Roscommon has increased by +17.1% (+859). In the five years since Census 2011, the population of the town increased by +3.2% (+183). Demographic comparisons between urban centres tend to be difficult due to intercensal boundary changes. For instance, in 2014 all legal town boundaries (Roscommon included) were abolished under the Local Government Act 2014. Accordingly the population of these former legal towns have been newly defined using the standard census town criteria. For some towns, the impact of this has been to lose area and population, compared with previous computations.

According to POWCAR 2016, the total number of jobs located within Roscommon town was 3,917 and accounts for 1.6% of all jobs located within the Western Region (242,712). Of all cities and towns in Ireland, Roscommon has the 36th highest number of jobs located within the town boundary and accounts for 26.4% of all jobs located within County Roscommon – a moderate rate and possibly reflects the importance of other settlements such as Athlone as economic drivers for the local authority area. Relative to the six other main settlements in this report, Roscommon has the second lowest number of jobs within the town with higher numbers in Galway City (44,376), Letterkenny (11,395), Ennis (10,172), Castlebar (9,045) and then lower in Carrick-on-Shannon (2,868). It should be noted that the above job numbers relate to those within the town boundary as defined by the CSO and do not include jobs located outside the town boundary or nearby employment concentrations (industrial parks, local factories etc).

9.1 The importance of Roscommon as a place of work

Map 9.1 shows the extent of commuting flows to Roscommon for employment opportunities. The colours represent the different proportions of people who live in each ED and travel to work in Roscommon. The map shows every ED (within the frame) by commuting flow to Roscommon. EDs with commuters numbers linked to Roscommon town of between one and four (trips) have been set to a value of one¹.

As would be expected, the EDs closest to Roscommon have the highest proportion working in the town, and this is indicated by the darker shades of blue in and around the town perimeter. Beyond these areas, the proportion travelling to the town gradually decreases. The map shows the declining proportion of those living in each ED and commuting to Roscommon, graduating from the dark blue where in excess of 60% of people living in those EDs work in Roscommon, through to light green where between 5 and 15% living in those EDs commute to work in Roscommon. The main commuting flows into Roscommon town mainly originate within the central parts of the county with some external commuters from neighbouring county Galway – such as Mountbellew and Glenamaddy and then Ballaghderreen and Rooskey in Roscommon. There are very low levels of interaction from the south of Roscommon and north Roscommon which are under the influence from Athlone and Carrick-on-Shannon, respectively. Low levels of interaction (0.1% to 5%) are visible in locations outside the Roscommon border although the actual number of trips within these locations would be extremely low in most cases (less than 5).

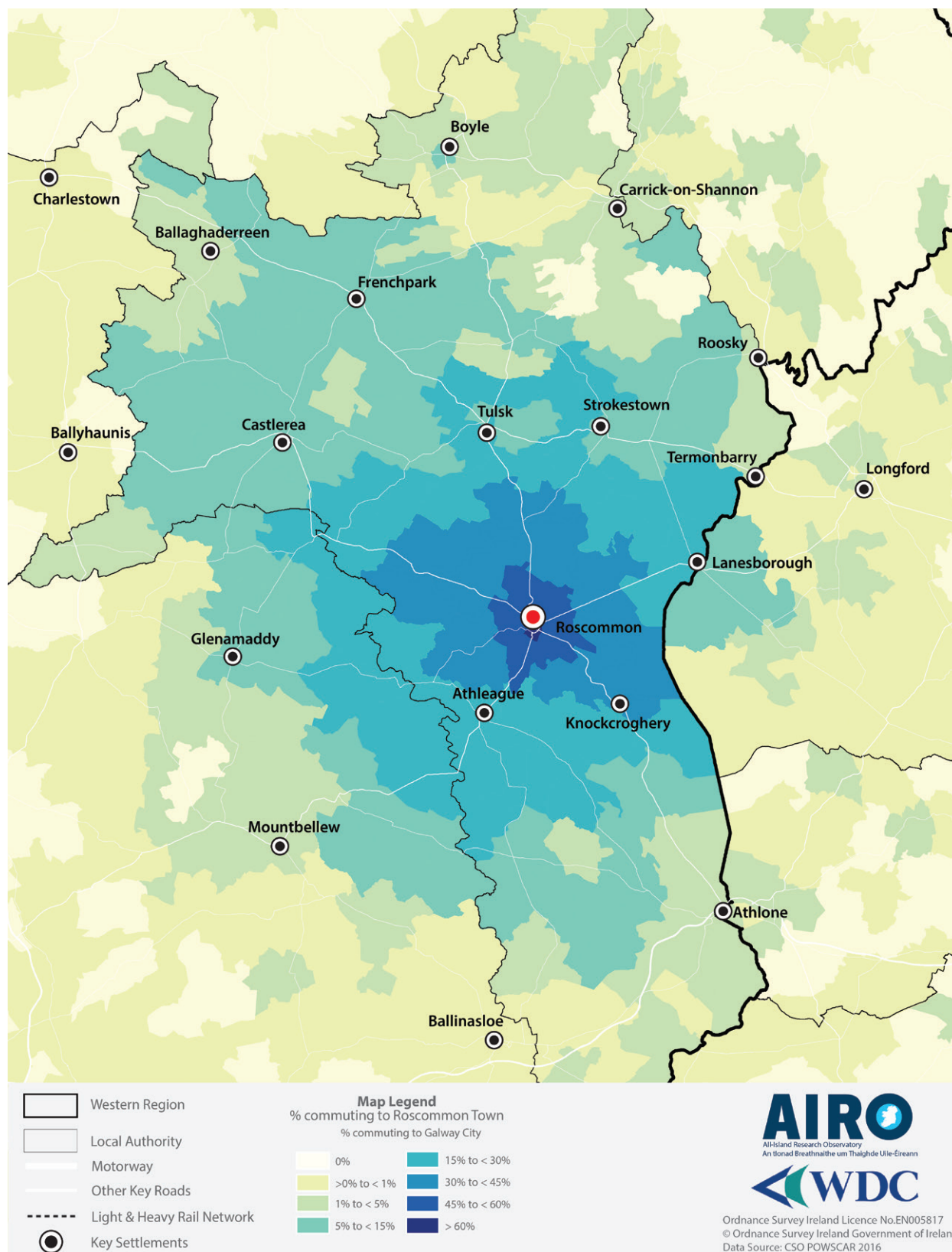
9.2 The Roscommon Labour Catchment

While Map 9.1 showed every ED from where even one person commuted to Roscommon, all of these EDs are not included in the Roscommon labour catchment. The Roscommon town labour catchment, is made

¹ This is due to data confidentiality protocols related to access to the POWCAR 2016 dataset.

9. Roscommon Town Labour Catchment

Map 9.1: Percentage of persons commuting to Roscommon Town, 2016 (Source: AIRO & CSO POWCAR)



9. Roscommon Town Labour Catchment

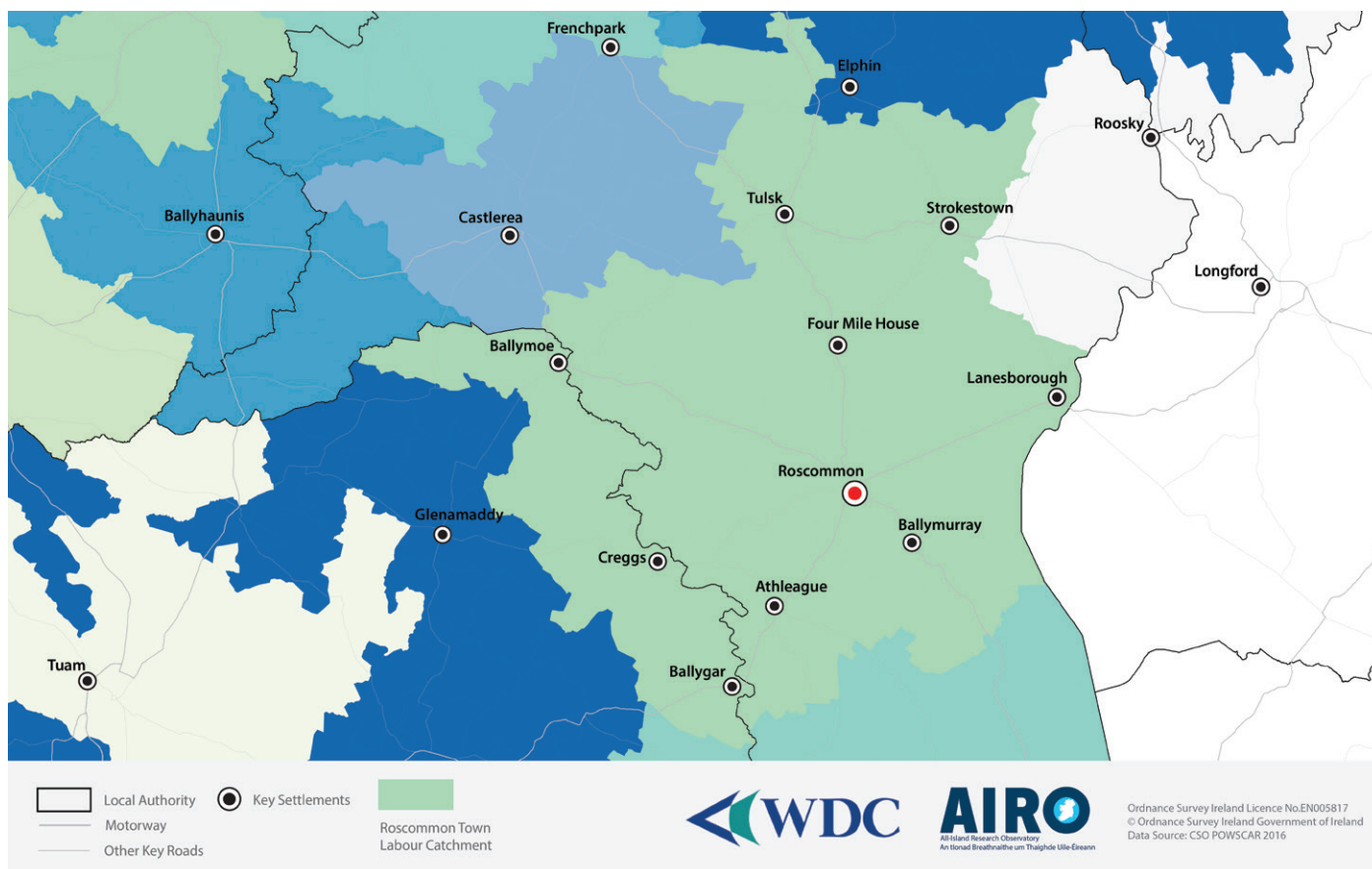
up only of those EDs for which Roscommon is the most popular work destination for those living there. Other EDs, whose commuters travel in greater numbers to other towns are assigned to the catchments of these other towns. Map 9.2 shows the Roscommon town labour catchment, depicted by the green colour.

The data presented in Map 9.2 show that Roscommon's influence as a place of work extends over a relatively small area with some additional assignment to eastern EDs in county Galway. The strong influence of Athlone, Carrick-on-Shannon, Castlerea and Longford town (external to the Western Region) all have an impact on the overall size of Roscommon town labour catchment. Due its relative size, the total resident and 'at work' population within the Roscommon labour catchment is 7,235 (2.8% of Western Region) and is the ninth largest in terms of population size. Interestingly, the labour catchment of two non-county towns are larger than that of Roscommon town – Ballina (9,034) and Limerick City* (9,647).

Regardless of this, the entire Roscommon town labour catchment is far larger than the number of resident workers in the town at its core. Roscommon town labour catchment has a population at work approximately 3.3 times the census population of resident workers in Roscommon Town (7,235 and 2,210 (including blank and mobile workers) respectively).

*Note: This is the portion of the Limerick City labour catchment that is within the Western Region only.

Map 9.2: Roscommon Town Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)



8. Roscommon Town Labour Catchment

9.3 Profile of the Roscommon Town Labour Catchment

Map 9.2 identified (in dark blue) the Roscommon town labour catchment. In the following section we examine the socio-economic characteristics of all those living in this labour catchment and at work, even though they may not all have been working in Roscommon town in April 2016. We do this because although some may not be working in Roscommon town they are living in the catchment from which Roscommon town's labour supply is drawn and including them provides a more complete assessment of the potential labour supply for Roscommon town. The Roscommon labour catchment is therefore separated into those who live in the catchment and are employed in the following; 'Inside' the town or 'Outside' the town i.e., elsewhere in the catchment or locations such as Athlone, Galway City, Dublin etc. This profile is further supported by an analysis of changes in the catchment between 2006 and 2016, both in terms of geography and socio-economic characteristics (9.4), a comparison matrix of town and non-town workers (9.5) and an overall comparison matrix for all seven labour catchments (10.1).

9.3.1 Place of Work

The Roscommon labour catchment can be seen to include most of county Roscommon but mainly contained within central areas and southern and northern parts of the county under the influence from Athlone, Carrick-on-Shannon, Castlerea and Boyle. In 2016, there were 7,234 people classified as at work, living within the Roscommon labour catchment (-1% from 7,306 in 2006). In Figure 9.1 and Table 9.1 the main work locations for those who live in the Roscommon town labour catchment are set out.

Figure 9.1: Place of work of those living in the Roscommon Town Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

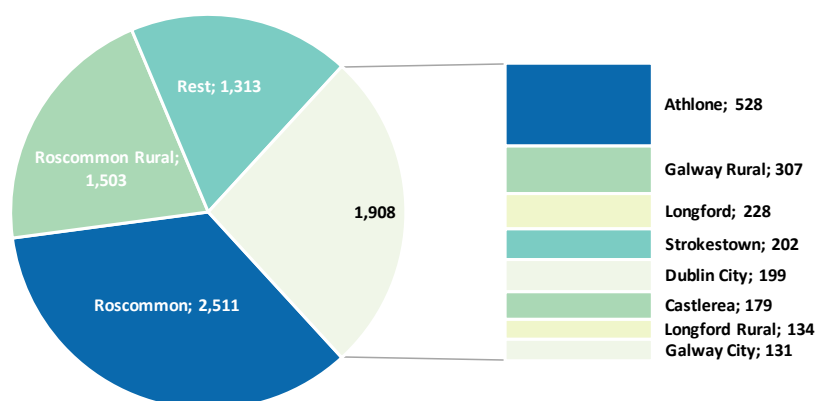


Table 9.1: Place of work of those living in the Roscommon Town Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

Labour Catchment	Number	%
Roscommon	2,511	34.7%
Roscommon Rural	1,503	20.8%
Other	1,313	18.1%
Athlone	528	7.3%
Galway Rural	307	4.2%
Longford	228	3.2%
Strokestown	202	2.8%
Dublin City	199	2.8%
Castlerea	179	2.5%
Longford Rural	134	1.9%
Galway City	131	1.8%
Total	7,235	100%

9. Roscommon Town Labour Catchment

As expected, Roscommon is the principal place of employment, accounting for 2,511 (34.7%) of all employment. Employment in rural areas, accounting for 26.9%, is more dominant in the Roscommon town labour catchment than any of the other main county town catchments with extensive flows to job destinations in Roscommon Rural County (1,503 or 20.8%), Galway Rural County (307 or 4.2%) and Longford Rural County (134 or 1.9%).

The other large employment destinations for residents within the Roscommon town labour catchment are primarily towns in close proximity to Roscommon (Athlone, Longford Town, Strokestown and Castlerea). Both Galway City (131 or 1.8%) and Dublin City (199 or 2.8%) are also highlighted as key destinations for Roscommon labour catchment residents. Recent changes to the motorway network, reduced travel times and more flexible working arrangements are certainly contributory factors to this. It should also be noted that the travel to work data from the CSO do not necessarily mean that commuters make daily trips and is more an identification of the main place and location of employment.

9.3.2 Travel Departure Times

In a change from the previous two POWCAR publications (2006 and 2011), the latest results from the 2016 Census only provide commuting details on the travel time departure of resident workers and not distance travelled. Results from distance travelled variables have included a large element of 'noise' with a documented low level of correlation between recorded 'distance travelled' and actual physical home to work distances. As such, the new travel indicator is based on the travel departure times of resident workers. Figure 9.2 below details the overall 'travel time departure' distribution of all Roscommon town labour catchment resident workers.

The most common travel time departures are within '08:01-08:30' and '08:31-09:00' band with both accounting for 35.8% of all resident workers. In comparison to the State average, Roscommon town labour catchment resident workers have a lower proportion leaving for work in the three early bands pre '07:30' with rates of 31.3% and 23.9%, respectively. Relative to the other six county town labour catchments, Roscommon town has the fourth lowest rate of workers departing for work pre 7.30am with only Castlebar (23.5%), Sligo (20.6%) and Letterkenny (19.1%) with lower rates.

A comparison of the 'travel-time departures' of those working in Roscommon town and those working elsewhere shows that Roscommon town bound workers tend to have later departure times than other worker residing with the overall labour catchment. This is as expected due to the wide spatial commuting pattern that is evident for non-Roscommon town based workers – with employment destinations in Athlone, Dublin City and Galway City. A total of 15.5% of Roscommon town bound workers residing in the labour catchment depart for work pre '07:30' and is much lower than the rate for workers travelling to other destinations with a rate of 28.4%.

9. Roscommon Town Labour Catchment

Figure 9.2: Time of Departure of those living in the Roscommon Town Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

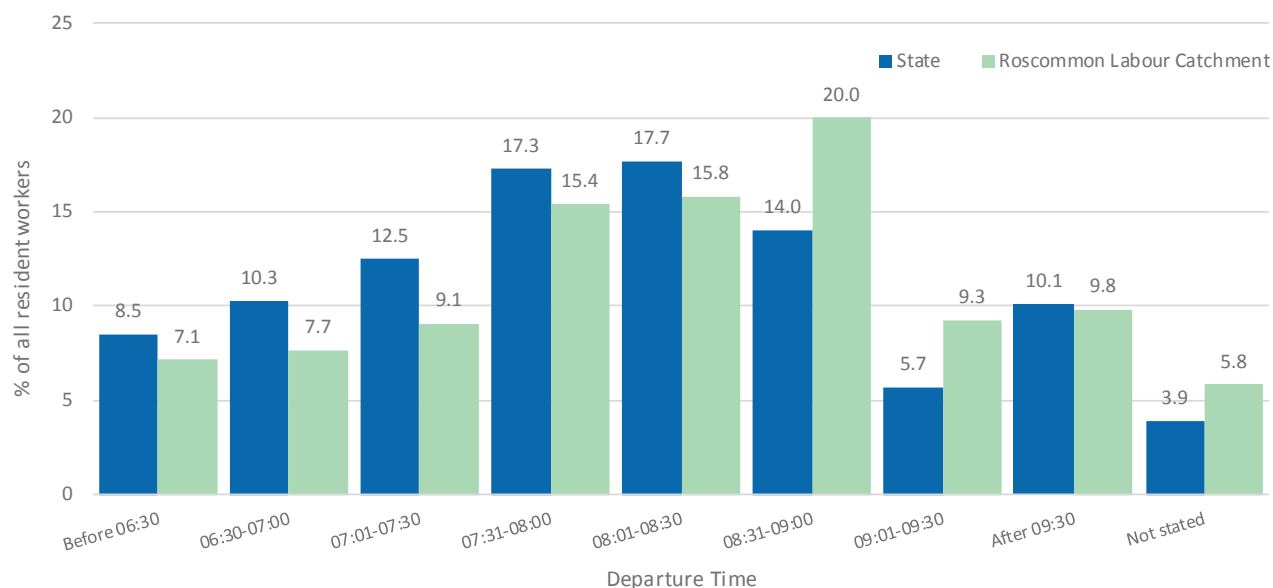


Table 9.2: Time of Departure of those living in the Roscommon Town Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

	Before 06:30	06:30-07:00	07:01-07:30	07:31-08:00	08:01-08:30	08:31-09:00	09:01-09:30	After 09:30	Not stated	Total
Roscommon Town Labour Catchment (Total)	517	554	657	1,114	1,144	1,446	670	711	422	7,235
Working inside Roscommon Town	88	137	162	344	392	679	331	325	53	2,511
Working outside Roscommon Town	429	417	495	770	752	767	339	386	369	4,724
State	135,187	163,290	199,035	274,425	281,003	223,164	90,521	160,901	62,111	1,589,637
Roscommon Town Labour Catchment (Total)	7.1%	7.7%	9.1%	15.4%	15.8%	20%	9.3%	9.8%	5.8%	100%
Working inside Roscommon Town	3.5%	5.5%	6.5%	13.7%	15.6%	27%	13.2%	12.9%	2.1%	100%
Working outside Roscommon Town	9.1%	8.8%	10.5%	16.3%	15.9%	16.2%	7.2%	8.2%	7.8%	100%
State	8.5%	10.3%	12.5%	17.3%	17.7%	14%	5.7%	10.1%	3.9%	100%

9.3.3 Gender

The gender composition of residents in the Roscommon town labour catchment is shown below. Within the Roscommon town labour catchment, male workers account for a larger proportion of the total workforce than their male counterparts with rates of 50.2% and 49.8% respectively. This is similar to national picture, with males (50.1%) also accounting for a marginally higher rate than females (49.9%).

9. Roscommon Town Labour Catchment

There is wide variation between men and women in terms of the location of their work. Far more women than men work in Roscommon town, 61.1% and 38.9% respectively. With the exception of Carrick-on-Shannon, this is the highest rate of female employment in any of the seven county towns. Outside of Roscommon town destinations, male employment is higher than female employment with 56.2% of those employed outside the town being males. This reflects traditional employment patterns where agricultural employment in rural areas in part accounts for a higher male employment rate outside of the town. In contrast, employment sectors which are perceived as traditionally female are concentrated in the town, for example retail, banking, finance, public administration and tourism.

Table 9.3: Gender Profile of those living in the Roscommon Town Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

	Female	Male	Total
Roscommon Town Labour Catchment (Total)	3,603	3,632	7,235
Working inside Roscommon Town	1,534	977	2,511
Working outside Roscommon Town	2,069	2,655	4,724
State	793,196	796,441	1,589,637
Roscommon Town Labour Catchment (Total)	49.8%	50.2%	100%
Working inside Roscommon Town	61.1%	38.9%	100%
Working outside Roscommon Town	43.8%	56.2%	100%
State	49.9%	50.1%	100%

An important point to note here is the fact that this analysis excludes all workers who do not have a fixed place of employment i.e., those with a blank or un-codeable place of work and those with a place of work classed as 'mobile' (See Appendix). For instance, an analysis of the gender balance of all workers (including blank and mobile) reveals that 53.7% of all workers are male and 46.3% are female (State average). The rate in the Western Region are broadly similar with males accounting for 53.3% and females accounting for 46.7% of all workers. As such, the gender figures detailed and discussed in the above section should be treated with caution as the underlying worker population does not represent the complete population.

9.3.4 Age

The age profile of those at work and over 15 years who live in the Roscommon town labour catchment is shown in Table 9.4. Relative to other towns in this analysis, the age profile of the Roscommon town labour catchment (13.7%) has the fourth lowest rate of workers aged less than 30 residing within the catchment with lower rates in Castlebar (13.5%), Ennis (13.3%) and Carrick-on-Shannon (12.8%).

The overall age profile of the Roscommon town labour catchment resident workforce (13.6% aged under 30) combined with high levels of out-migration of younger people from rural areas within Roscommon to participate in third-level education and to take up employment opportunities elsewhere is certainly a contributory factor to this trend.

9. Roscommon Town Labour Catchment

The rate of young workers is marginally lower for those employed within the town than those employed outside and is evident in the data presented in Table 9.4. A total of 12.3% of all of Roscommon town's workers are aged 'less than 30 years' whereas the rate for non-Roscommon town workers is 14.4%. This rate is different to both the Galway City and Ennis labour catchments where the urban based workers have a younger age profile. This is evident in the data presented in Table 9.4 below.

In general, there is a major difference in the age of resident workforce in urban and rural areas. For instance, the cities (CSO Settlements) of Dublin, Cork and Galway all have rate in excess of 24% whereas the average rate in Roscommon is 13.6%. At 13%, Galway County has the lowest rate of all local authorities in the State.

Table 9.4: Age Profile of those living in the Roscommon Town Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

	<30 years	30 to 44 years	45 to 64 years	65+ years	Total
Roscommon Town Labour Catchment (Total)	988	2,945	3,022	280	7,235
Working inside Roscommon Town	310	1,021	1,120	60	2,511
Working outside Roscommon Town	678	1,924	1,902	220	4,724
State	278,647	694,783	575,181	41,026	1,589,637
Roscommon Town Labour Catchment (Total)	13.7%	40.7%	41.8%	3.9%	100%
Working inside Roscommon Town	12.3%	40.7%	44.6%	2.4%	100%
Working outside Roscommon Town	14.4%	40.7%	40.3%	4.7%	100%
State	17.5%	43.7%	36.2%	2.6%	100%

9.3.5 Education

Table 9.5.1 shows a lower than average educational profile among those living in the Roscommon town labour catchment with 49% having completed third level education compared to 56.1% nationally. Relative to the other six towns included in this analysis, Roscommon town labour catchment has the least educated workforce. Again, it is important to note that this is based on workers with a known work destination only and excludes those with Blank or Mobile work destination (32.4% of those coded blank or mobile in the State have third level qualifications). As a whole, overall education levels in Ireland have increased dramatically since the early 'nineties with the proportion of the population with a third level qualification increasing from 13.6% in 1991 to 42% in 2016.

There is also a modest difference between the education attainment of those who are employed within Roscommon Town (46.5% with 3rd level) and those employed outside the town (50.3% with 3rd level). The relates to some commuting from within the labour catchment to employment opportunities requiring higher education levels outside the town – Athlone, Galway City etc.

9. Roscommon Town Labour Catchment

Table 9.5.2 below details the education attainment levels within each of the seven labour catchments for all workers, those employed within the city/town and those employed elsewhere. Relative to the other main settlements Roscommon town has the lowest level of overall education of those employed within the town. With a recorded rate of only 46.5% with 3rd level education employed in Roscommon the overall education rate of those employed in the town is drastically different from Galway City where the rate is almost 20 percentage points higher with a rate of 65.3%. This is a clear indication of the lower level of employment opportunities that are available within Roscommon town.

Table 9.5.1: Education Profile of those living in the Roscommon Town Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

	Secondary Level	Third Level	Not Stated	Total
Roscommon Town Labour Catchment (Total)	3,573	3,545	117	7,235
Working inside Roscommon Town	1,300	1,167	44	2,511
Working outside Roscommon Town	2,273	2,378	73	4,724
State	670,114	891,660	27,863	1,589,637
Roscommon Town Labour Catchment (Total)	49.4%	49%	1.6%	100%
Working inside Roscommon Town	51.8%	46.5%	1.8%	100%
Working outside Roscommon Town	48.1%	50.3%	1.5%	100%
State	42.2%	56.1%	1.8%	100%

Table 9.5.2: % of Labour Catchment by Destination with 3rd Level Education, 2016 (Source: AIRO & CSO POWCAR)

	Working in Town	Working outside Town	Total
Galway	65.3%	56.4%	61.3%
Ennis	50.3%	57.2%	54.5%
Sligo	59.2%	51.7%	55.5%
Letterkenny	57.3%	46.4%	51.6%
Castlebar	50.3%	50.4%	50.4%
Roscommon	46.5%	50.3%	49%
Carrick-on-Shannon	47.8%	53.4%	51.9%
State			56.1%

8. Roscommon Town Labour Catchment

9.3.6 Employment by Industrial Group

Analysis of the profile of employment by industry group provides an indication of the structure of the local economy and the type of employment it sustains as well as the skills profile of the area. It is particularly instructive to compare the profile of a region or local area to that of the State average as it can highlight differences at the local level. Employment by industrial group of all those living in the Roscommon town labour catchment is shown in Figure 9.6. The 'Education, Human Health and Social Work' sector is the most important employer (26.4%) and along with 'Wholesale, Retail Trade and Commerce' (23.5%) account for half of all employment of those residing within the Roscommon labour catchment. 'Manufacturing Industries' (13.7%), 'Public Administration and Defence' (10.5%) and 'ICT and Professional Services' (9.5%) are the next biggest employers for the labour catchment with all other sectors accounting for less than 10% each.

Relative to the national picture, 'Education, Human Health and Social Work', 'Public Administration and Defence' and then 'Agriculture, Forestry and Fishing' sectors play a more important role in the overall employment base – the 'Agriculture, Forestry and Fishing' rate (8.8%) is almost three times higher than the State average at 4.2%, 'Public Administration and Defence' share of employment (10.5%) is 4.5 percentage points higher than the State average (6%) and 'Education, Human Health and Social Work' sector is 3.6 percentage points higher than the State average (22.8%). The 'ICT and Professional Services' sector has the lowest performance relative to the State average with the Roscommon labour catchment recording a rate of 9.5% whereas the State average was 20.3%.

Figure 9.6: Industry Profile of those living in the Roscommon Town Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

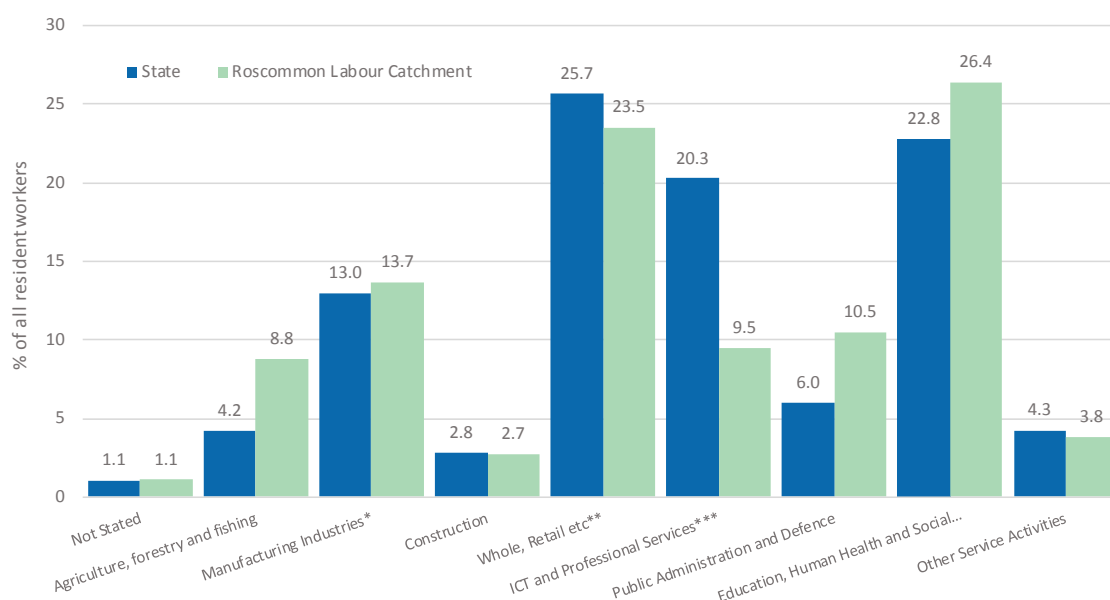


Table 9.6 details the industry of employment of the Roscommon town labour catchment by the location of employment – within Roscommon or outside the town. Employment in 'Education, Human Health and Social Work Activities', 'Wholesale, Retail & Commerce', 'Public Administration and Defence' and 'ICT and Professional Services' are more dominant in those employed within Roscommon town, whereas 'Agricultural, Forestry and Fishing', 'Manufacturing Industries' and 'Construction' are higher outside the town – within the wider catchment and beyond.

9. Roscommon Town Labour Catchment

Table 9.6: Industry Profile of those living in the Roscommon Town Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

	Roscommon Town Labour Catchment	Working inside Roscommon Town	Working outside Roscommon Town	State
Agricultural, Forestry and Fishing	8.8%	1.2%	12.8%	4.2%
Manufacturing Industries*	13.7%	5.9%	17.8%	13%
Construction	2.7%	2%	3.1%	2.8%
Wholesale, Retail & Commerce**	23.5%	29.7%	20.2%	25.7%
ICT and Professional Services***	9.5%	10%	9.3%	20.3%
Public Administration and Defence	10.5%	14.8%	8.2%	6%
Education, Human Health and Social Work Activities	26.4%	30.4%	24.3%	22.8%
Other Services	3.8%	5.3%	3.0%	4.3%
Not Stated	1.1%	0.8%	1.3%	1.1%
Total	100% (7,235)	100% (2,511)	100% (4,724)	100% (1.59m)

Note: with only nine classifications available, industrial classifications in POWCAR are less detailed than normal classifications in regular Census.

*Manufacturing Industries = Manufacturing, mining and quarrying, Electricity, Gas, Water supply and Waste Management

**Wholesale, Retail etc = Wholesale, Retail Trade, Transportation and Storage, Accommodation and Food Service Activities

***ICT and Professional Services = Information and Communication, Financial, Real Estate, Professional, administration and support service activities

9.3.7 Socio-Economic Structure

The socio-economic structure of employment in the Roscommon town labour catchment is set out in Figure 9.7. The socio-economic group (SEG) is determined by occupation and employment status and aims to classify those on the basis of comparable skill and educational levels. This is also a useful indicator of the type of employment and skills available within labour catchments and is particularly informative when compared to the national socio-economic structure.

While the socio-economic structure of the labour catchment of Roscommon follows the overall State trends it shows some marked differences, with 'Farmers' (8.1% v 3.4%) having a considerably greater proportion than the State average while both 'Employers and Managers' (13.2%) and 'Higher Professionals' (5.9%) have lower proportions than the State average.

Table 9.7 details the socio-economic structure breakdown for those working within Roscommon and those working outside Roscommon. There are notable differences in rates with a higher proportion of those employed inside Roscommon town classed as 'Non-manual' which relates to persons working in retail, government, banking and other areas fulfilling administrative roles. The remaining largest differences between town and non-town employment relates to those classed as 'Manual-skilled' (5.4% v 9.9%) and 'Farmers' where the rate is only 0.7% in the town and 12% outside the town.

9. Roscommon Town Labour Catchment

Figure 9.7: SEG Profile of those living in the Roscommon Town Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

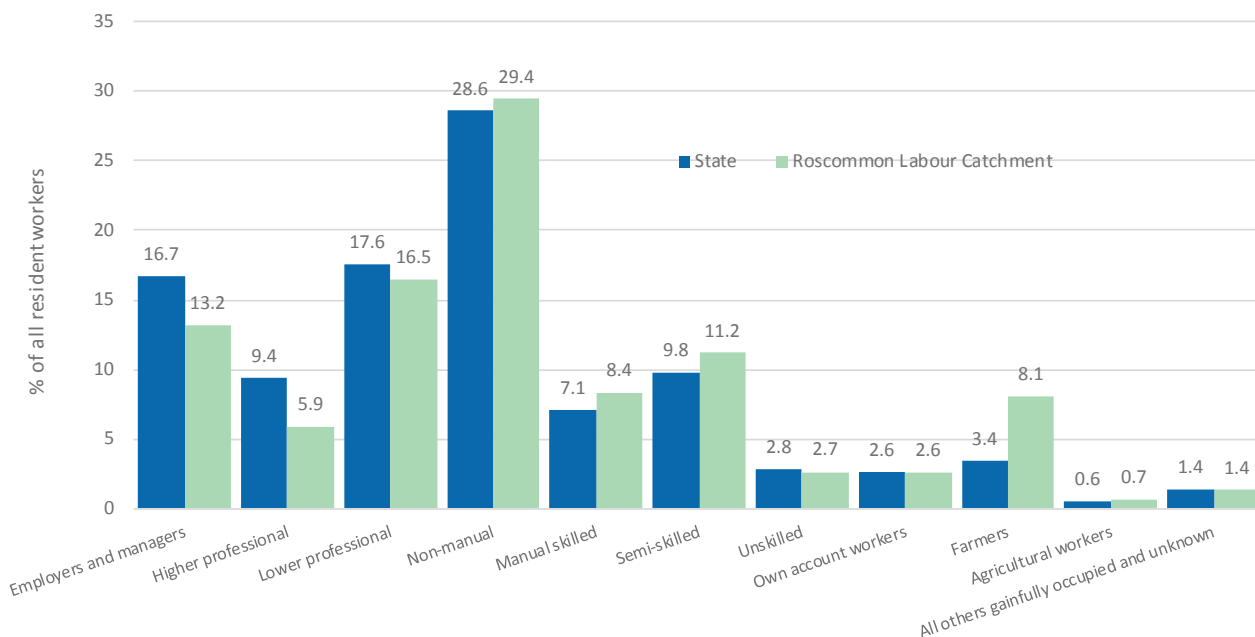


Table 9.7: SEG Profile of those living in the Roscommon Town Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

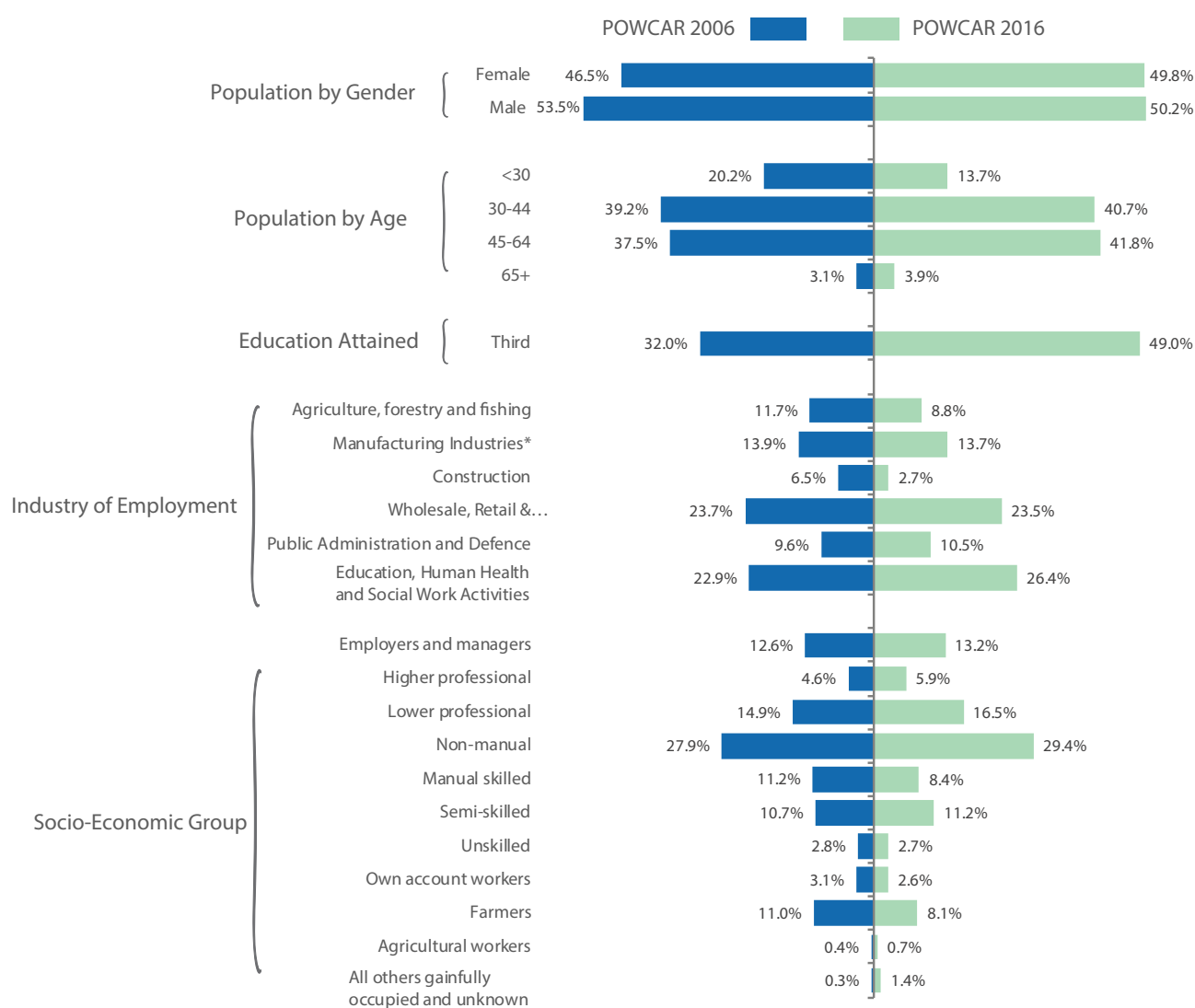
	Roscommon Town Labour Catchment	Working inside Roscommon Town	Working outside Roscommon Town	State
Employers and managers	13.2%	13.9%	12.8%	16.7%
Higher professional	5.9%	6.1%	5.8%	9.4%
Lower professional	16.5%	16.4%	16.6%	17.6%
Non-manual	29.4%	39.3%	24.2%	28.6%
Manual skilled	8.4%	5.4%	9.9%	7.1%
Semi-skilled	11.2%	11.2%	11.2%	9.8%
Unskilled	2.7%	3.5%	2.2%	2.8%
Own account workers	2.6%	2.2%	2.9%	2.6%
Farmers	8.1%	0.7%	12%	3.4%
Agricultural workers	0.7%	0.3%	0.9%	0.6%
Others gainfully occupied and unknown	1.4%	1.0%	1.5%	1.4%
Total	100%	100%	100%	100%

9. Roscommon Town Labour Catchment

9.4 Analysis of change between 2006 and 2016

The graphic below details the change that has occurred across the Roscommon town Labour Catchment between 2006 and 2016. This is reviewed in the context of geographical changes and then the socio-economic characteristics of those residing within the overall catchment area. Most notable changes in terms of socio-economic characteristics certainly relate to the age of resident workers and the rate of third level attainment.

- As with the analysis based on the 2006 POWCAR results, the Roscommon town labour catchment is a key labour catchment in the Western Region however it decreased its ranking from the eight to the ninth largest labour catchment in the Western Region. It has a resident 'at work' population of 7,235 and accounts for 2.8% of the total resident workforce within the Western Region. This is a decrease of -0.97% (-71) from the 2006 figure of 7,306 when it represented a marginally higher proportion of 2.99% of the total resident work force within the Western Region.
- A review of the geographical extent of the labour catchments from the 2006 and 2016 POWCAR analysis reveals that there has been very little change in the last ten years. The most notable difference is a slight contraction of the catchment in east Galway with areas in close proximity to Glenamaddy now more linked to Galway City than Roscommon town.



9. Roscommon Town Labour Catchment

9.5 Roscommon Town Labour Catchment Summary

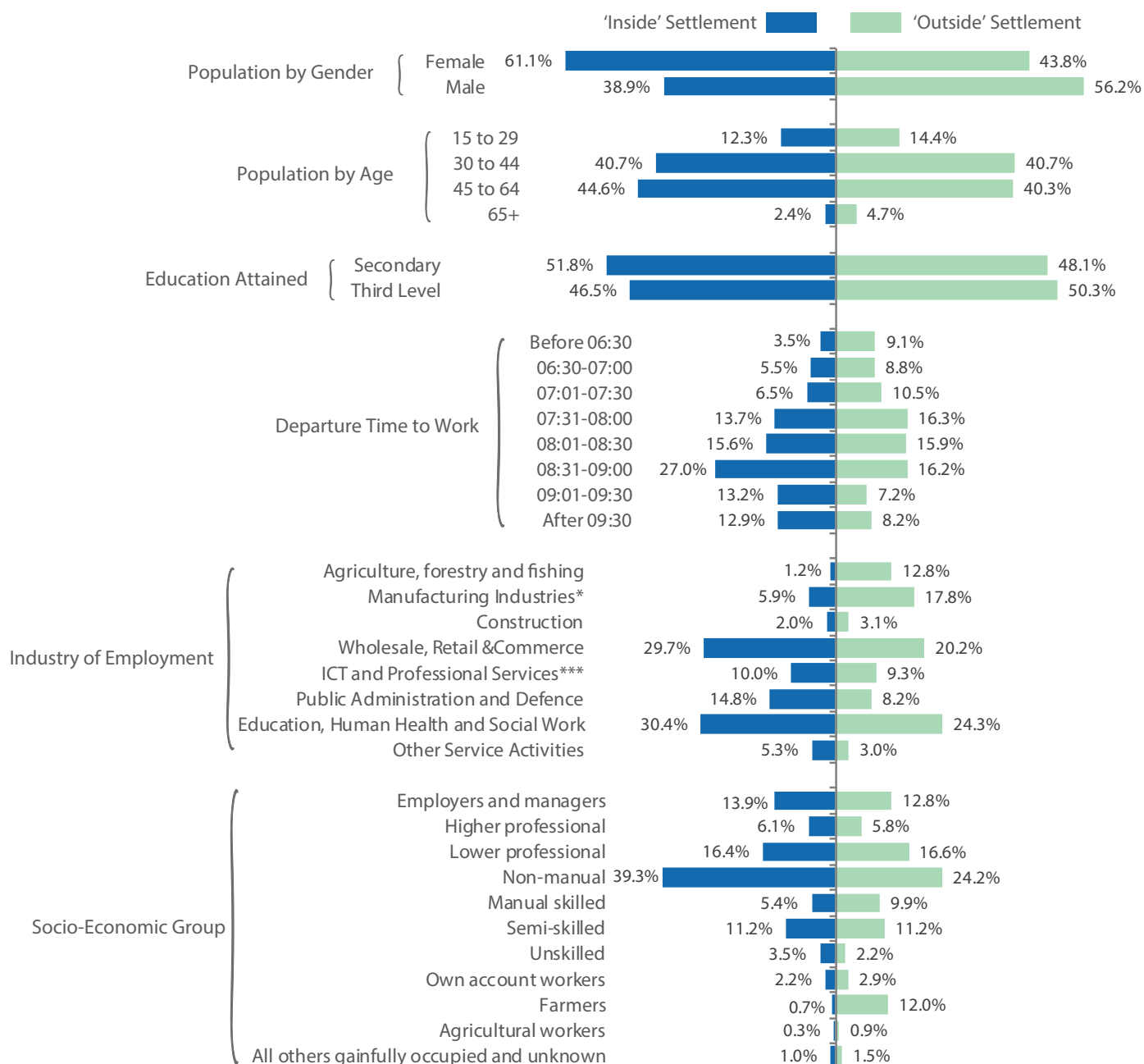
This section provides a summary of the key points of the Roscommon town Labour Catchment

- The Roscommon town labour catchment is the ninth largest labour catchment in the Western Region (Map 2.1) with a resident 'at work' population of 7,235 which accounts for 2.8% of the total resident 'at work' population within the Western Region (260,261).
- The Roscommon town labour catchment covers a relatively small area within central Roscommon with some additional EDs assigned in eastern parts of county Galway (Map 9.2). In 2016, there were 7,235 people classified as at work and living within the labour catchment. This figure is approximately 3.3 times the resident 'at work' population within the town at its core (2,210). The 2016 total is -1% lower than the 2006 total of 7,306. As such, this is the only labour catchment of the seven county towns in the Western Region that declined in 'at work' population between 2006 and 2016.
- The strong influence of Athlone, Carrick-on-Shannon, Castlerea and Longford town all have an impact on the overall size of the Roscommon town labour catchment. These towns are themselves the most important places for employment for those living in their immediate hinterlands, and therefore constitute separate and quite large labour catchments within the county boundary of Roscommon.
- Of those living in the Roscommon town labour catchment, 34.7% (2,511) are employed within Roscommon and 65.3% (4,724) are employed outside the town and in the rest of the catchment and beyond. Key destinations outside the town are Roscommon Rural (20.8% or 1,503), Athlone (7.3% or 528) and Galway Rural (4.2% or 307) – see Table 9.1 for more details.
- A demographic profile of the Roscommon town labour catchment shows the following:
 - The age profile of those living in the Roscommon town labour catchment is the third oldest of the catchments of the seven county towns in the Western Region.
 - Female workers account for a larger proportion of the workforce than their male counterparts with rates of 50.2% and 49.8% respectively. This gender gap is further extended when looking at those employed within the town where more women than men are employed, 61.1% and 38.9% respectively.
 - Those at work and residing in the Roscommon town labour catchment have a much lower level of education than the State average – with rates of 49% and 56.1% respectively (3rd level). In fact, the Roscommon town labour catchment has the lowest rate of 3rd level attainment of all seven county town labour catchments in the Western Region.
- Analysis of the profile of the industry of employment within the Roscommon town labour catchment shows the following:
 - The single largest employer is the 'Education, Health Care and Social Work' sector and accounts for 26.4% (1,901) which is higher than the State average (22.8%).
 - The 'Wholesale, Retail and Commerce' sector is the second most important employer with a rate of 23.5% (1,703) and is lower than the State average of 25.7%.
 - Both 'Manufacturing Industries' (13.7% or 988) and 'Public Administration and Defence' (10.5% or 758) are also key employers. Interestingly, 'Public Administration and Defence' is much higher than the State average of 6%.

9. Roscommon Town Labour Catchment

9.6 Socio-economic comparison of those employed 'Inside' and 'Outside' Roscommon town

The graphic below details the socio-economic characteristics of resident workers within the Roscommon town labour catchment who are employed within Roscommon town (Inside) and those that are employed outside Roscommon town – within the wider labour catchment and beyond (Outside).



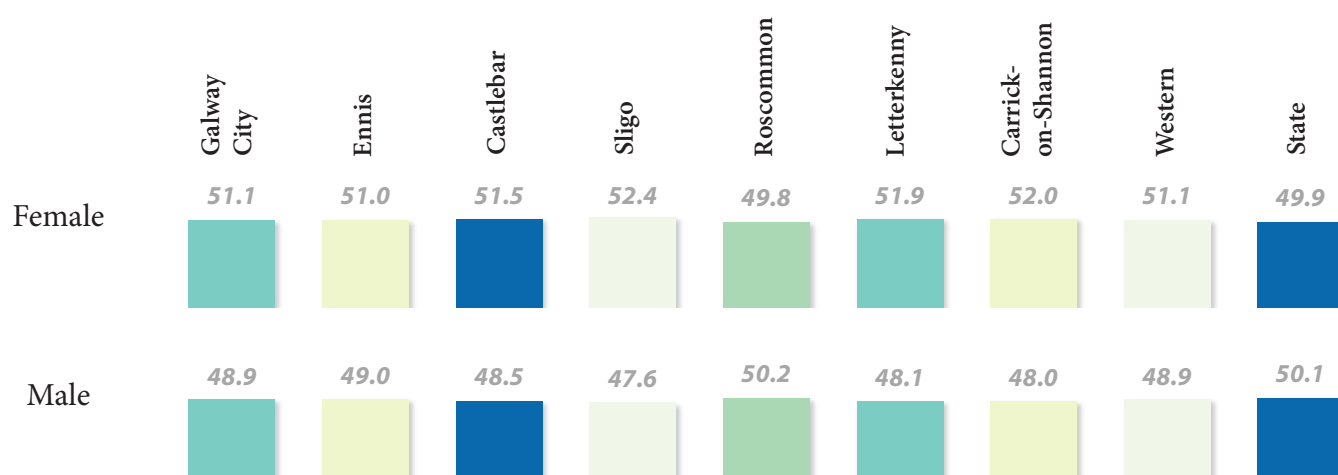
10. Labour Catchment Comparisons

10.1.1 Time of Departure to Work (%)

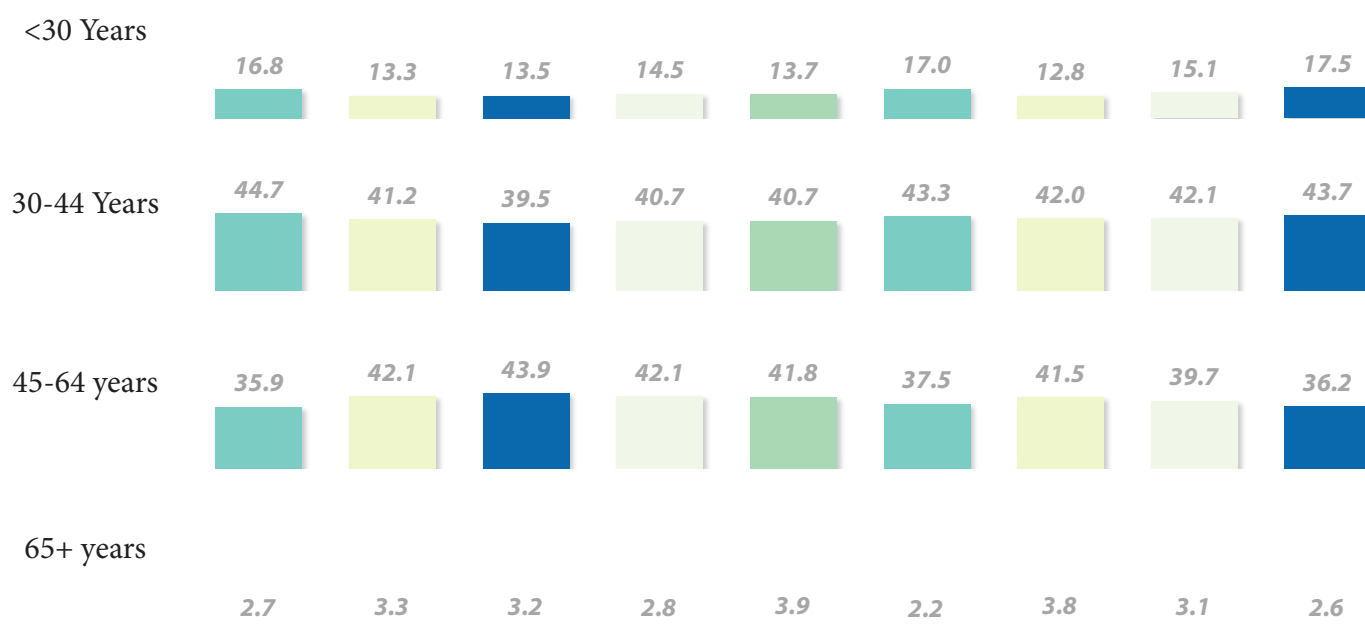


10. Labour Catchment Comparisons

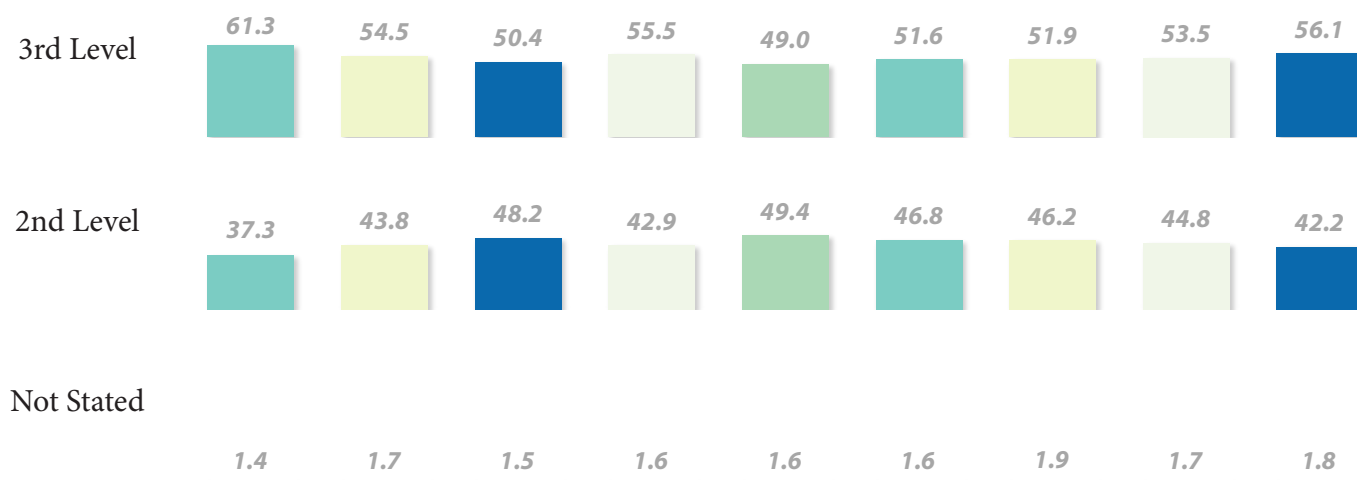
10.1.2 Gender (%)



10.1.3 Age (%)



10.1.4 Education (%)

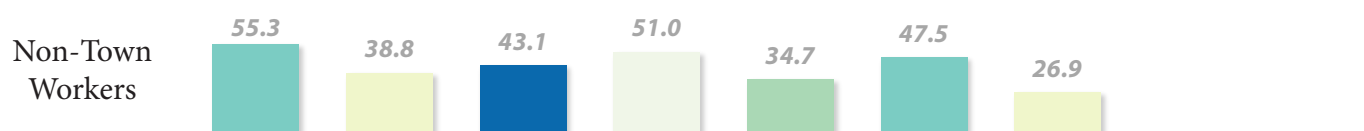


10. Labour Catchment Comparisons

10.1.5 Industry of Employment (%)



10.1.6 Non-Town Workers (%)



10. Labour Catchment Comparisons

10.1.7 Socio-Economic Group (SEG) (%)



11. Overall Conclusions and Implications

Introduction

This report is based on the POWCAR dataset compiled from the results from Census 2016 and is a follow up on a previous report developed using POWCAR results from Census 2006. The report outlines the labour catchments of all towns in the Western Region with a population greater than 1,000. In total, the report maps 42 labour catchments and provides a detail socio-demographic profile of the seven county towns within the Western Region. The report also outlines the main element of change that have occurred between 2006 and 2016. These data are very useful for researchers and policy-makers whose interest is data analysis at the regional or local level. The analysis allows for a greater understanding of travel to work patterns in the Western Region and the various labour catchments to which they give rise. The main conclusions and implications from this analysis are set out below.

1. According to POWSCAR 2016, there were a total of 260,2613 people living within the Western Region and at work. This figure has increased by 6% (+14,712) from the total of 245,549 outlined within POWSCAR 2006. Interestingly, the 2006 figure was almost identical to that identified within POWSCAR 2011 when there was a total of 245,505 people living within the Western Region and at work. It should be noted that in 2011 the average unemployment rate in the Western Region (census based) was 20.1% whereas the rate in 2006 was less than half that rate at only 9% – as such the total numbers at work in 2011 were much lower. The unemployment rate in the Western Region as of April 2016 was 13.9% although it should be noted that this figure would have decreased further in the last two years.
2. As with the results from the 2006 POWSCAR analysis, the Galway City labour force catchment is by far the largest with 70,170 people living within the catchment and at work (55.3% actually employed within Galway City). This catchment accounts for 27% of the total population at work and residing within the Western Region and is larger than the labour catchments of Sligo, Ennis and Letterkenny combined. In a slight change from the 2006 results, Sligo now has the second largest catchment in the Western Region with a population at work of 21,834 which is marginally higher than Ennis (21,409).
3. A town's labour catchment is that area from which a town draws most of its' workforce. All the town labour catchments reviewed in this report have significantly more people at work than the census population at work and residing in that town. The difference can be by up to 4 times as much, for example the Carrick-on-Shannon labour catchment has a population at work 4.6 times the census population at work and residing in Carrick-on-Shannon town. This highlights the importance of a town's labour catchment as a measure of labour supply. The labour catchments of Sligo town, Castlebar and Roscommon town also have an at work population greater than three times the population at work and residing within the relevant towns.
4. Therefore in terms of population at work, all of these towns have access to a much greater labour supply than the town population. This information, along with the labour market profiles of those living there, will help inform development agencies, employers and local authorities on employment and enterprise in the region.
5. The labour forces residing within the larger labour catchments are quite contained. In most labour catchments, the majority of the labour force, approximately 75% plus, work in just seven to ten different locations. Of all seven labour catchment, Galway City is the strongest destination and attracts 55.3% of all labour catchment workers. The Carrick-on-Shannon labour catchment records the lowest rate with only 27% of it's wider labour catchment at work population employed in the town.

11. Overall Conclusions and Implications

6. In general, there has been little change between the size, relating to both percentage of overall population and geographic extent, and overall ranking order of the labour catchments between 2006 and 2016. In fact, in 2016 the seven county town labour catchments account for an increase of only +0.5% from the overall proportional share of the total population at work and residing within the Western Region in 2006.

7. The most interesting aspect to the change in socio-economic characteristics of labour catchments in the Western Region between 2006 and 2016 is the major increase in level of third level attainment of workers within rates increasing from 39.9% in 2006 to 53.5% in 2016. The 2016 rate in the Western Region is lower than the State average of 56.1%. Within the seven county town catchments, Galway City has by far the highest rate at 61.3%. The Roscommon town catchment recorded the lowest rate at 49%.

8. Areas close to or having third level institutions tend to have a much higher proportion of people with a third level degree or higher living there. In the Galway, Sligo and Ennis labour catchments 54% or more of those employed had a third level degree or higher. However, the presence of a higher education institution does not necessarily lead to a high proportion with a third level qualification as is the case for Castlebar which only has a rate of 50.4%.

9. At the State level, 53.5% of the population at work have attained a third level degree or higher. This proportion is notably lower in many of the labour catchments in the Western Region and may be in part due to a poor supply of employment opportunities requiring such skills, particularly in the knowledge economy. This indicates a brain drain from some parts of the Western Region, to larger centres such as Galway or outside the Region. Relative to all local authority areas (31) in Ireland, Galway City has the 2nd highest rate of third level attainment of resident workers whereas Roscommon, Donegal and Mayo have the 10th, 9th and 7th lowest rates.

10. Another key change between 2006 and 2016 relates to the changing underlying age profile of those residing within the Western Region and the State with a major decrease evident in the rate of young workers (less than 30 years). Between 2006 and 2016 the rate of young workers (less than 30 years) decreased from 24.6% to 15.1%, respectively. This declining trend is also evident at the State level with rates decreasing from 27.4% in 2006 to 17.5% in 2016.

11. Generally the labour catchments of larger towns and cities have younger workforces. Within the county town catchments, both Letterkenny (17%) and the Galway City (16.8%) catchment have by far the highest rates with a young workforce (<30 years). The Carrick-on-Shannon catchment recorded the lowest rate at 12.8%.

12. The age profile of each labour catchment is also likely to be influenced by the occupational profile of the catchment. It is interesting that the age profile of the Sligo (14.5%) and Castlebar (13.5%) labour catchments are relatively old despite the presence of Institutes of Technology in these towns which would attract a younger population. There are a number of possible explanations as outlined in the previous iteration of this report.

- The economic base of these labour catchments may not support the attraction or retention of younger workers.
- Younger workers are retained but choose to live in other areas, for example additional data show that many living in the Westport labour catchment, travel to work in Castlebar.

11. Overall Conclusions and Implications

13. An examination of employment by industrial group in each of the seven labour catchments shows some similarities and differences compared with the State picture. At the State level, the most important sectors in terms of the share employed are as follows; 'Wholesale, Retail & Trade etc*' (25.7%), 'ICT and Professional Services etc*' (20.3%) and then 'Education, Human Health and Social Work Activities' (22.8%). Within the Western Region, both the Wholesale, Retail Trade etc*' (25.8%) and 'Education, Human Health and Social Work Activities' (25.4%) are both the largest employers, however, the third most important sector is 'Manufacturing Industries*' (15.9%).

14. The industry of employment trend in the Western Region is broadly reflected across the seven county labour catchments with the top three employers similar to the regional average. The only exception to this is the 'ICT and Professional Services etc*' sector in the Letterkenny labour catchment which is the third largest employer.

15. Of particular interest is the much lower rates in the 'ICT and Professional Services' sector – this is notable as the largest growth in industry in Ireland between 2011 and 2016 has been in employment related to IT with an additional +21,262 jobs now available (CSO Census 2016). It is also interesting to note that employment in 'Residential Care' has increased +19,775 between 2011 and 2016 in Ireland and may be a factor in the 'Education, Human Health and Social' sector now becoming the largest employer within the region and the largest employer in the Galway City, Sligo town, Castlebar and Roscommon town labour catchments. This is also in part due to the presence of third level institutions and hospitals in each of these towns, but may also reflect the relative weakness of the commerce and manufacturing sectors in terms of employment. It also highlights the relative importance of public sector employment.

16. As expected, the 'Agriculture, Forestry and Fishing' sector in the Western Region plays a more important role than at the State level and accounts for 5.7% of all employment in the Western Region (4.2% at the State level). With the exception of the Galway City labour catchment, this sector is much higher than the State average with highest rates in the Roscommon town (8.8%) and Carrick-on-Shannon (7.3%) labour catchments. There has been a marginal reduction in the rates employed in 'Agriculture, Forestry and Fishing' in the Western Region between 2006 (6.7%) and 2016 (5.7%).

17. As of April 2016, the 'Construction' sector accounted for only 2.7% of those employed and residing within the Western Region. This rate is marginally lower than the State average of 2.8%. Across all seven county town labour catchments the 'Construction' sector is the second smallest employer with rates all below 3.4% and as low as 1.9% in the Sligo town labour catchment. This is a major change from 2006 when employment in this sector accounted for 5.9% of all those employed and residing in the region. However, it should be noted that the very 'mobile' nature of employment in this sector means that such workers are strongly represented within the 'no fixed place of work' category. Therefore such workers are under-represented in this report. Regardless, there has been a major decline in 'construction' related employment across the region since 2006. Increased activity in this sector in the last two years since the enumeration of Census 2016 will no doubt result in increased levels of employment in this sector.

*Manufacturing Industries = Manufacturing, mining and quarrying, Electricity, Gas, Water supply and Waste Management

**Wholesale, Retail & Trade etc = Wholesale, Retail Trade, Transportation and Storage, Accommodation and Food Service Activities

***ICT and Professional Services = Information and Communication, Financial, Real Estate, Professional, administration and support service activities

11. Overall Conclusions and Implications

18. The analysis has identified that the only real labour catchment that has a link to Northern Ireland is in the north-east of Donegal. This labour catchment is the 13th largest in the Western Region and accounts for 5,056 resident workers or 1.95% of the resident workforce in the Western Region. Since 2006, this catchment has increased in size by approximately 10% (476). This is an importance piece of evidence considering the on-going discussions on BREXIT and the potential of a 'hard-border' being realised. The likely commuting patterns of this labour catchment will certainly be impacted by the outcomes of this discussion.

19. The particular characteristics of employment in the labour catchments in the Western Region can provide a useful input to education and training policy, aimed at equipping the labour force to participate effectively in the knowledge economy. Important requirements will be the re-skilling of those who had been engaged in construction and unskilled occupations as well as ensuring that the overall labour force in the Western Region is at least as educated and skilled as elsewhere in Ireland.

20. The analysis of the seven labour catchments in the Western Region has highlighted the importance of rural areas (centres with less than 1,000 persons) as employment locations. Depending on the location of the county town and the proximity of nearby urban areas, a large proportion of the labour catchment residents are in fact employed in rural areas. In general, this rate is in excess of 22% with the exception being in the Sligo town labour catchment where only approximately 17% are employed in rural areas. Interestingly, the Ennis labour catchment has the highest level of rural employment with 26.9% employed in the Clare rural area. Much of this can be explained by the low number of urban settlements (>1,000 population) within Clare.

21. The analysis of places of work highlights important observations in the context of the recently published Project Ireland 2040, National Planning Framework (NPF). In particular, the role of regional centres such as Sligo and Letterkenny are identified and their geographic extent identified¹ in this report supports the view that these centres 'fulfil regional roles to a greater extent than elsewhere'. (Project Ireland 2040 p 13).

22. Project Ireland 2040 notes that the forthcoming Regional Spatial and Economic Strategies will need to identify and support these centres and their regional roles. Furthermore the support and promotion of both Sligo and Letterkenny as key drivers in the North West will help mitigate the negative consequences of Brexit along the border.

23. These data provide us with a much greater understanding of travel to work patterns in the Western Region and the various labour catchments to which they give rise. The data has also highlighted some interesting changes to the geographic extent of labour catchments and their socio-economic characteristics since 2006. This provides policy-makers with robust empirical data with which to inform their decisions. These findings will be very useful to all tiers of the planning system in Ireland; the on-going development of National Planning Framework within the Department for Housing, Planning and Local Government, the Regional Assemblies and the publication of the Regional Spatial and Economic Strategies (RSES) and finally will be of use for many local authority initiatives such as County and City Development Plans, local transport strategies and the development and monitoring of the Local Economic and Community Plans across the seven local authority areas in the Western Region.

24. The analysis undertaken here also demonstrates the value in releasing the POWCAR data and the importance of undertaking the Census in Ireland as the key dataset in understanding the social and economic dynamics that shape our Island today and into the future.

1 Only that part of the Athlone labour catchment which is contained within the Western Region is measured in this report.

Methodology

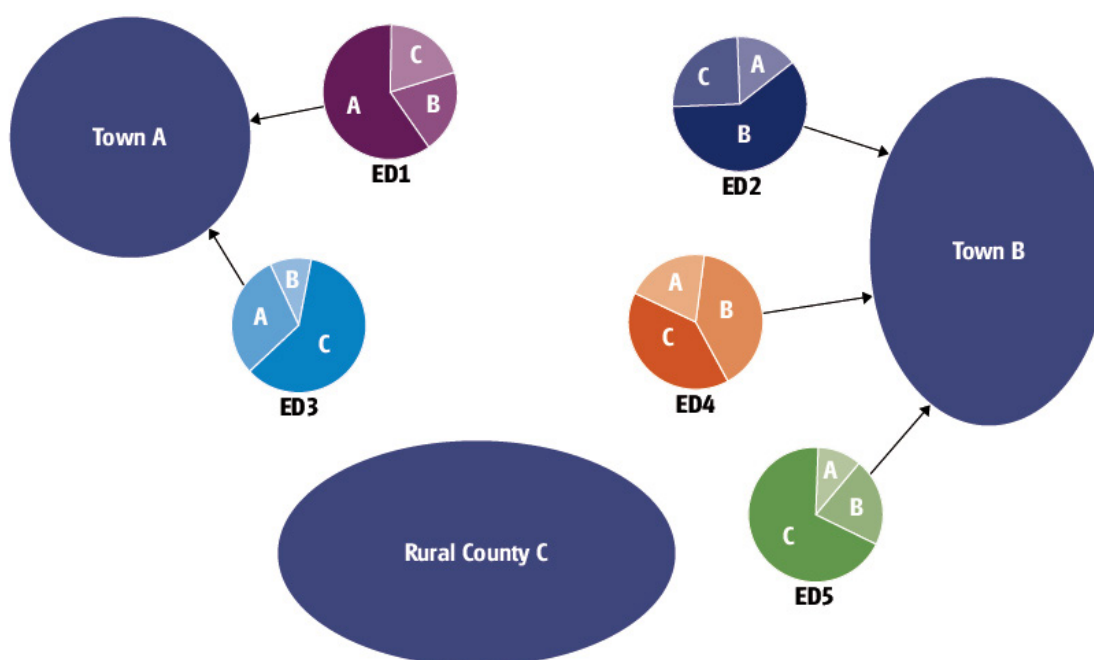
The analysis in this report aims to identify labour catchments which are based on travel to work patterns. Each of the 42 labour catchments identified are not based on town or county administrative boundaries, but on people's travel to work patterns. The method used to define the labour catchments is as follows.

Town labour catchments are created by assigning EDs ($n=3,409^1$) to a particular town's catchment based on the town in which the highest number of its residents work. All EDs are assigned to the catchment of a town in Ireland with a resident population greater than 1,000 ($n=277$). In total, there were 284 possible town destinations that any ED could be assigned to, categorised as follows:

- Towns with a population greater than 1,000 (277);
- Northern Ireland county destinations (6); and
- Residual 'rural' catchment (non town locations i.e., not in a settlement >1,000 population) (1)

The analysis followed the same methodology for assigning EDs to towns that was used in the previous research carried out in 2009 based on Census 2006. Each electoral division (ED) is examined and the place of work of all those who live in that ED is identified (either town, Northern Ireland or rural destination). Each ED is then allocated to a specific town's catchment on the basis of the town to which the highest numbers of its residents travel to work. In other words, if we look at all those in a particular ED who work and identify in which town the highest number of those people work, then that ED will be included in the labour catchment of that town. Figure A1.1 illustrates how EDs are allocated to a particular town's catchment.

Figure A1.1: Method of allocation of Electoral Divisions (EDs) to a town's labour catchment (Source: WDC, 2009)



¹ In 2006 the CSO published POWCAR results for 4,441 EDs - the complete list of EDs in Ireland. Subsequent publications in 2011 and 2016 were produced for 3,406 EDs as per the aggregated ED results from Census 2011 and 2016. As such, a direct comparison between ED flows in 2006 and 2016 is not possible in all cases.

For example, ED1 is allocated to the catchment of town A on the basis that most of its residents travel there to work, rather than to Town B or Rural County C5. ED2 is allocated to Town B on the same basis. In ED3, the majority of its residents travel to Rural County C, but as Rural County C is not a town, ED3 is not allocated to it but is allocated to Town A as Town A is the next most popular destination and is also a town with a resident population greater than 1,000. In ED4, Town B and Rural County C are equally popular destinations but the ED is allocated to Town B as this is a town (>1,000 population), whereas Rural County C is not. ED5 is similar to ED3, it is allocated to the second most popular destination because the first, Rural County C is not a town. In a number of cases, EDs had a similar number of trips to two towns (>1,000 population) and in this case the ED was assigned to the town with the closest proximity.

In the Western Region, all 950 EDs (subset of 3,409 Census 2016 EDs) were analysed to determine the number of their commuters travelling to work in each town with a population greater than 1,000 persons. Each ED was assigned to the labour catchment of one of these towns: namely, the one to which the highest number of its residents were travelling to work. The 950 EDs within the Western Region were finally allocated to 42 town catchments. Following some post-processing of the initial results (such as re-assigning EDs where there was a joint score between two settlements - the one with closest proximity was chosen) there was a total of 56 initial catchments. Of these, 17 were based on ED groups of less than 3 and as such a further re-assignment was required. This process followed the same methodology as the work carried out in 2009 with EDs assigned to the next dominant location. This process then resulted in the production of the final 42 catchments across the region – this includes one ED that had a 100% rural interaction and then a number of EDs linked to towns and locations outside the Western Region: Limerick City, Athlone, Derry County, Ballinasloe, Longford, Portumna, Cavan and Tullamore.

These are identified in Map 2.1 and Table 2.1 (Section 2). The labour catchments of seven towns, the largest town in each of the seven counties which comprise the Western Region, are examined in detail in this report. This attached map details the distribution of the catchments of the 42 labour markets. Most notable changes in this from the 2006 based analysis is the loss of Kilkee (972 population and excluded from the analysis) and then the exclusion of catchments for Tubbercurry and Bundoran as their computed catchments for 2016 had less than 3 EDs assigned to them.

Scope

The labour catchments defined in this report are based on information on the place of work and place of residence for each individual in the census. Workers with 'no fixed place of work' have therefore not been included. As a result the POWCAR dataset does not include the entire population at work. This has some implications for the research in terms of comparisons at a regional level and the representation of some occupational groups within the data.

Table A1.1 shows the response rate for different place of work categories by county in the Western Region. The first two categories (in italics) are those that are excluded from the POWCAR dataset. Construction and transport workers are strongly represented within the 'no fixed place of work' category. Therefore such workers are under-represented in this report. In addition, there are a high number of those categorised as farmers where the location of work was left blank, rather than providing a specific location or stating 'work from home'. As a result the occupational group of farmers is also under-represented.

Appendix: Methodology, Scope and National Comparisons

Table A1.1: Employment Destination Response Rate, POWCAR 2016

2016	No Fixed Place of Work (Mobile Worker)	Place of Work - Blank or Uncodeable	Works Mainly from Home	Place of Work Coded	Total POWCAR	Total Included in Analysis
Clare	5,006	4,260	3,847	35,161	48,274	39,008
Donegal	6,676	5,781	3,670	40,691	56,818	44,361
Galway County	7,019	7,538	5,859	53,480	73,896	59,339
Galway City	3,801	2,339	1,114	26,237	33,491	27,351
Leitrim	1,570	1,367	1,012	8,594	12,543	9,606
Mayo	5,069	5,216	3,708	36,130	50,123	39,838
Roscommon	2,598	2,678	2,114	18,098	25,488	20,212
Sligo	2,571	2,381	1,717	18,829	25,498	20,546
Western Region	34,310	31,560	23,041	237,220	326,131	260,261
State	206,463	174,628	111,744	1,477,893	1,970,728	1,589,637
Clare	10.4	8.8	8.0	72.8	100.0	80.8
Donegal	11.7	10.2	6.5	71.6	100.0	78.1
Galway County	9.5	10.2	7.9	72.4	100.0	80.3
Galway City	11.3	7.0	3.3	78.3	100.0	81.7
Leitrim	12.5	10.9	8.1	68.5	100.0	76.6
Mayo	10.1	10.4	7.4	72.1	100.0	79.5
Roscommon	10.2	10.5	8.3	71.0	100.0	79.3
Sligo	10.1	9.3	6.7	73.8	100.0	80.6
Western Region	10.5	9.7	7.1	72.7	100.0	79.8
State	10.5	8.9	5.7	75.0	100.0	80.7

National Comparisons

The national figures cited throughout the report are those based on the POWCAR dataset as described above. They are not necessarily the same as those reported in the full Census of Population 2016 as at work, because as shown in Table A1.1, the two categories of 'no fixed place of work' and 'place of work address blank or uncodeable', are excluded. The remaining data represent 79.8% of the total relevant census population.

Notes

Notes

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ISBN: 978-0-9576640-3-6

