

Travel to Work and Labour Catchments in the Western Region



Galway City Labour Catchment



May 2018



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

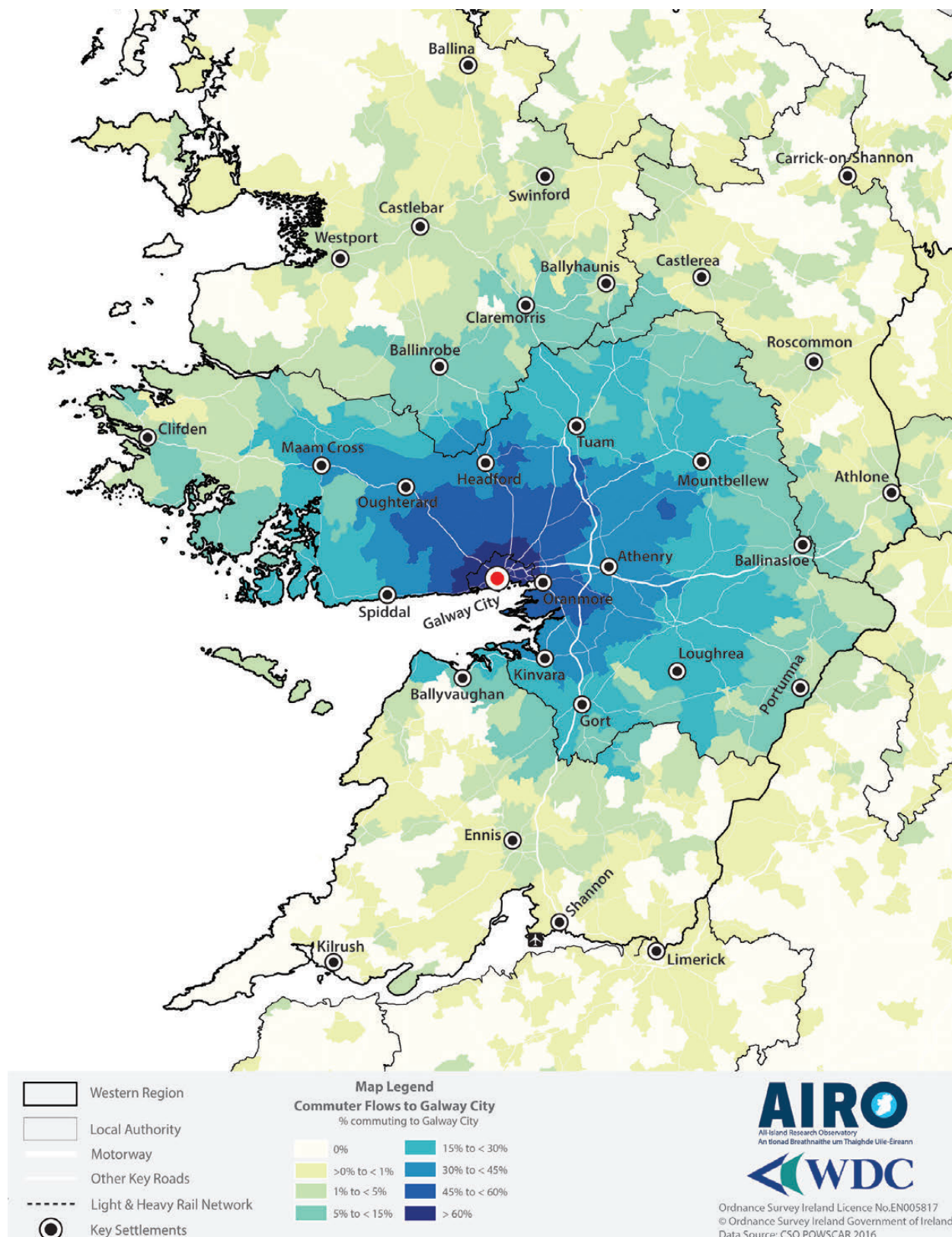
While Map 3.1 shows every ED from where even one person commuted to Galway City, all of these EDs are not included in the Galway City labour catchment. The Galway City labour catchment, is made up only of those EDs for which Galway City is the most popular work destination for those living there. Other 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.

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

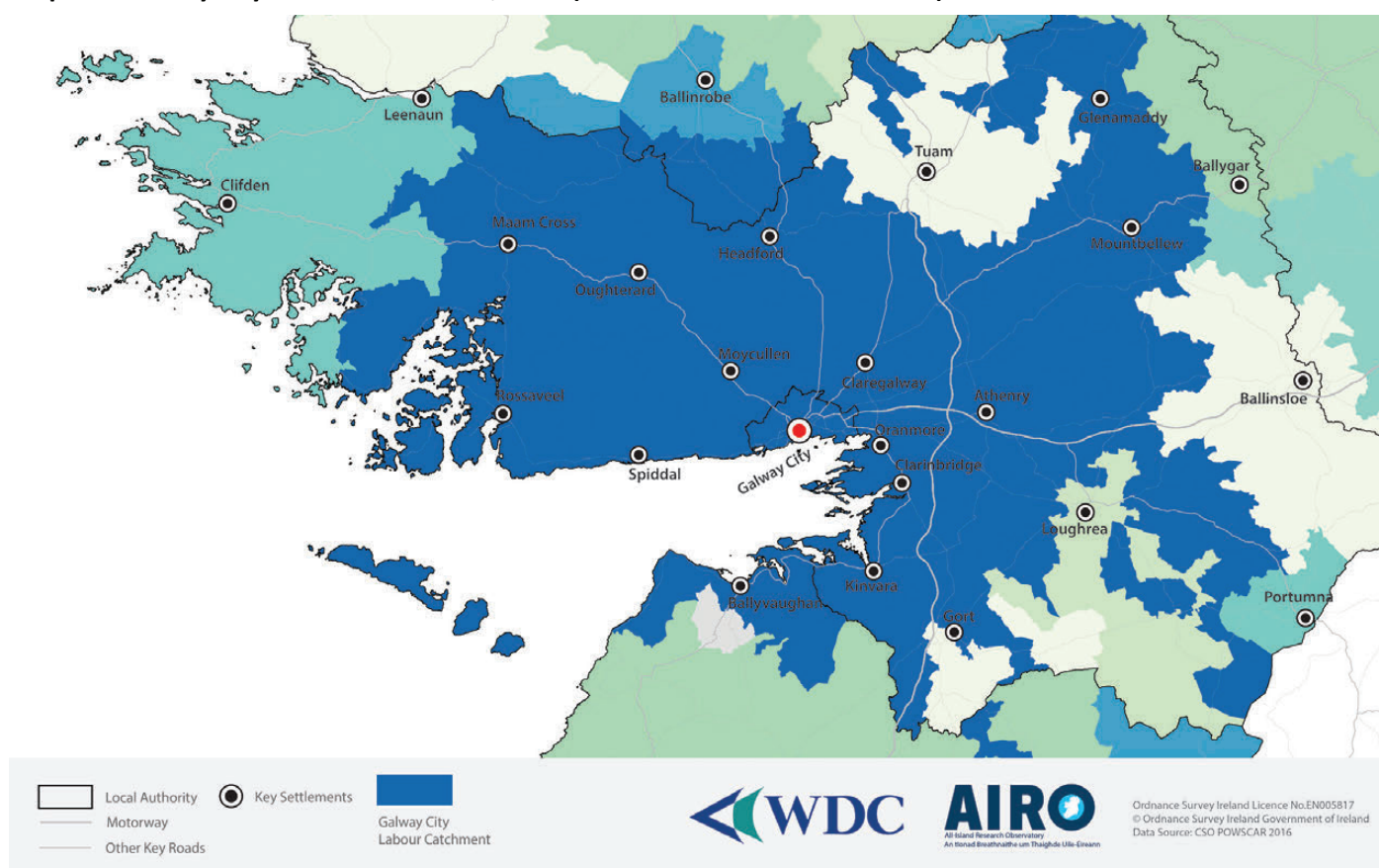


3. Galway City Labour Catchment

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)

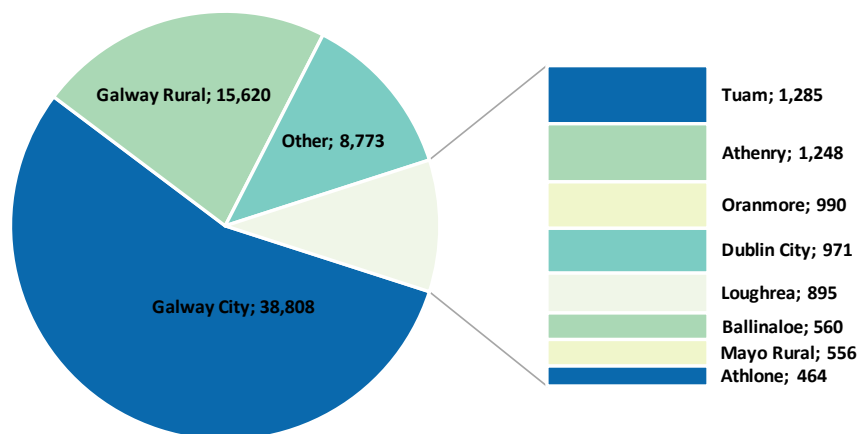


Table 3.1: Place of work of those living in the Galway City Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

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%
Ballinaloe	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).

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

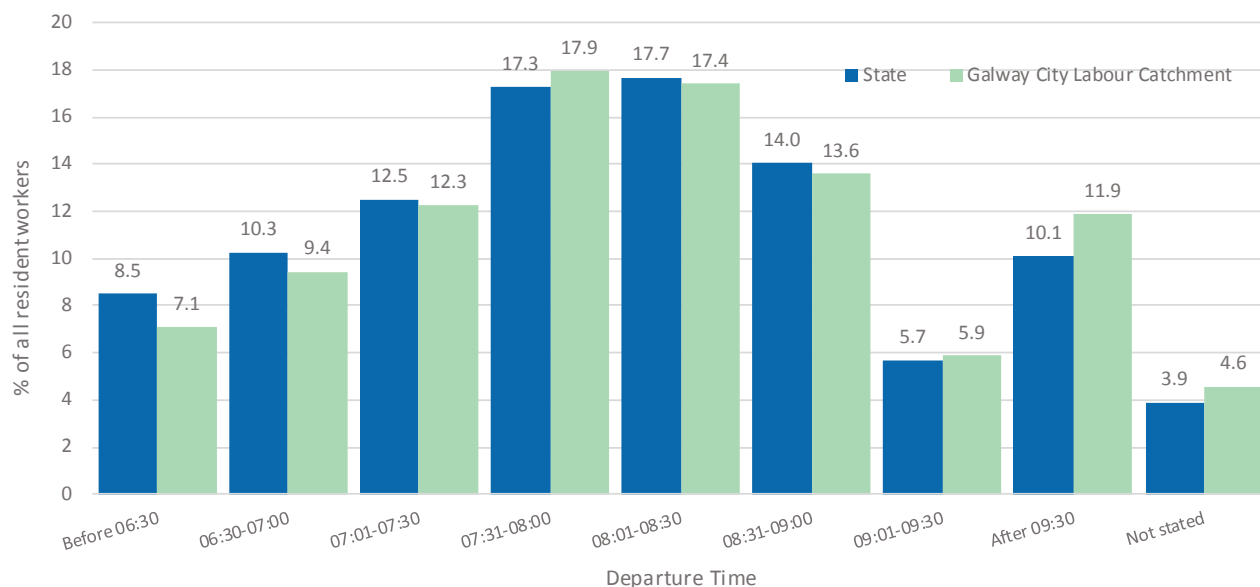


Table 3.2: Time of Departure of those living in the Galway City Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

	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%).

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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 I). 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.

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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.

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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%).

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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)

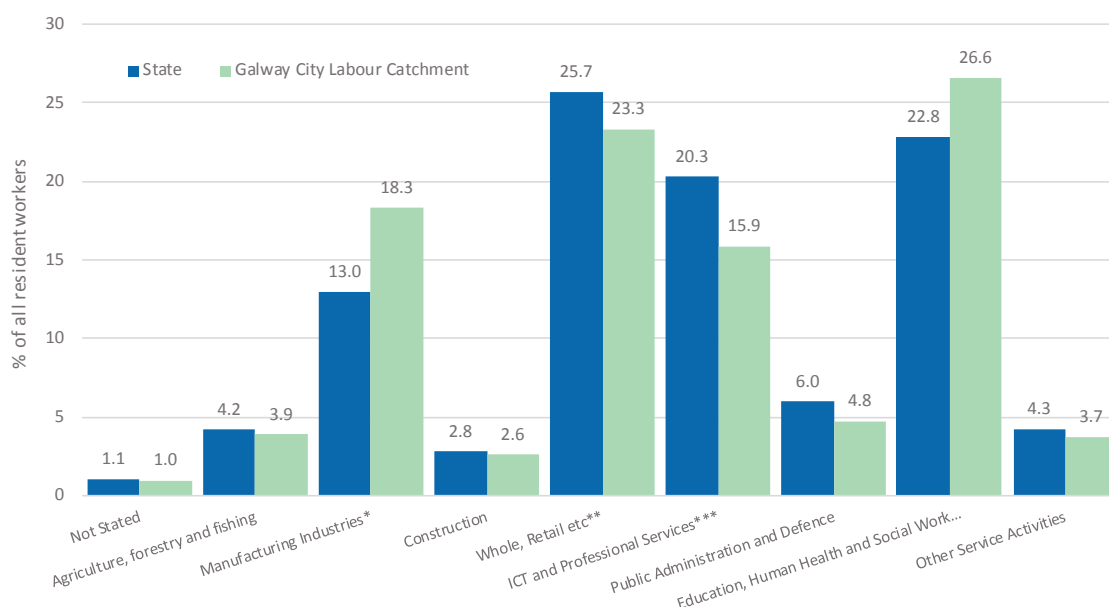


Table 3.6 details the industry of employment of the Galway City labour catchment by the location of employment – within Galway City or outside the city. As expected, employment in 'Wholesale, Retail and Commerce', 'Education, Human Health and Social', and 'ICT and Professional Services' are more dominant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

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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.

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

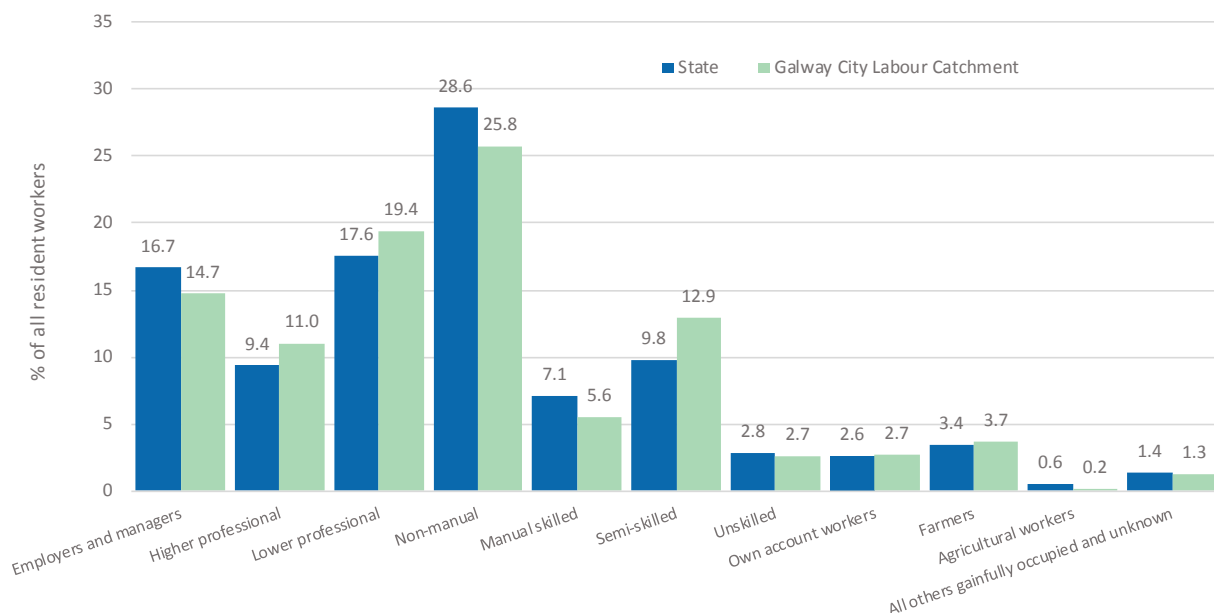


Table 3.7: SEG Profile of those living in the Galway City Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

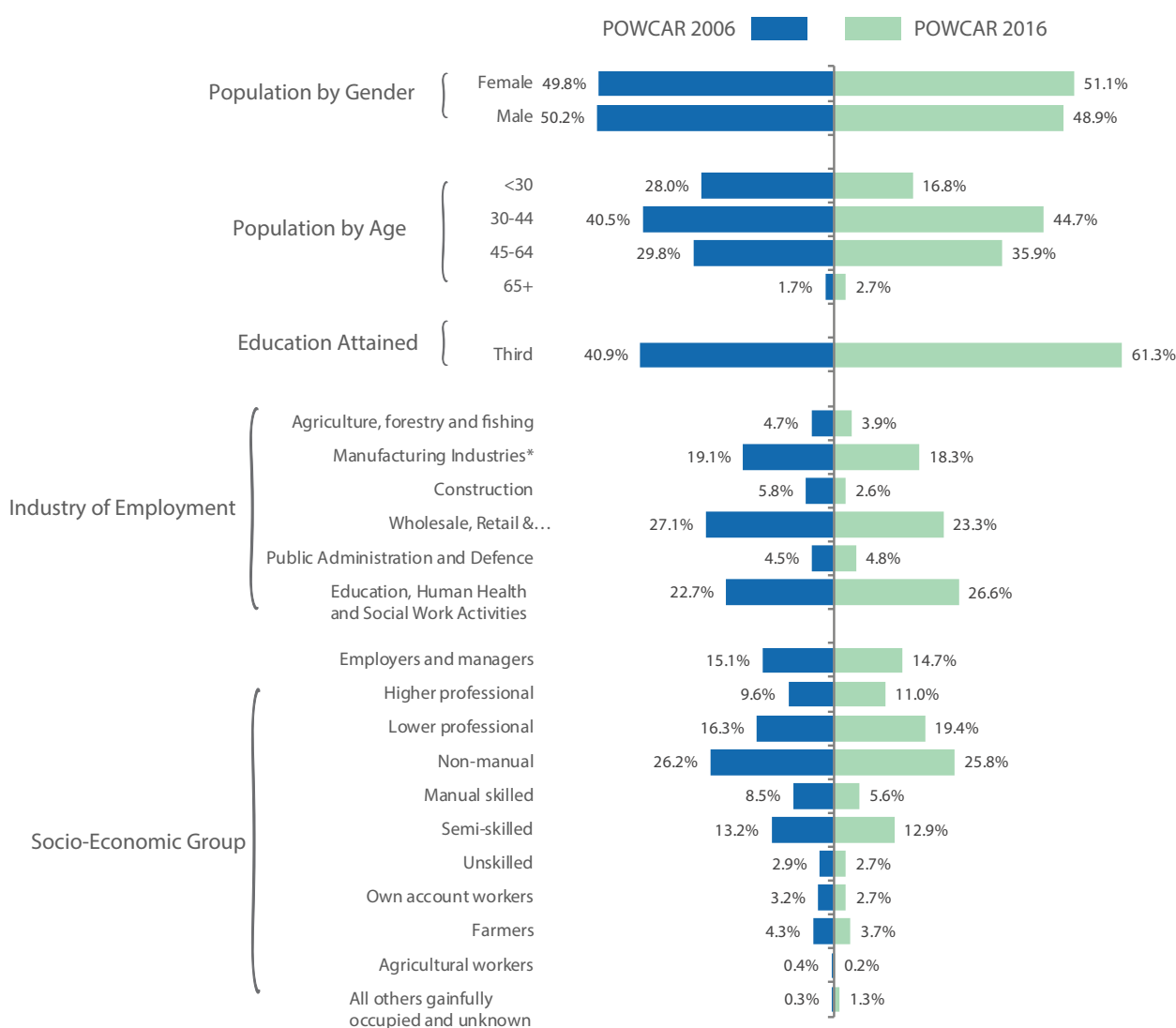
	Galway City Labour Catchment	Working inside Galway City	Working Outside Galway City	State
Employers and managers	14.7%	14.9%	14.5%	16.7%
Higher professional	11%	12.8%	8.8%	9.4%
Lower professional	19.4%	20.1%	18.6%	17.6%
Non-manual	25.8%	29.6%	21%	28.6%
Manual skilled	5.6%	4.1%	7.3%	7.1%
Semi-skilled	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)

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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.



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3.5 Galway City Labour Catchment Summary

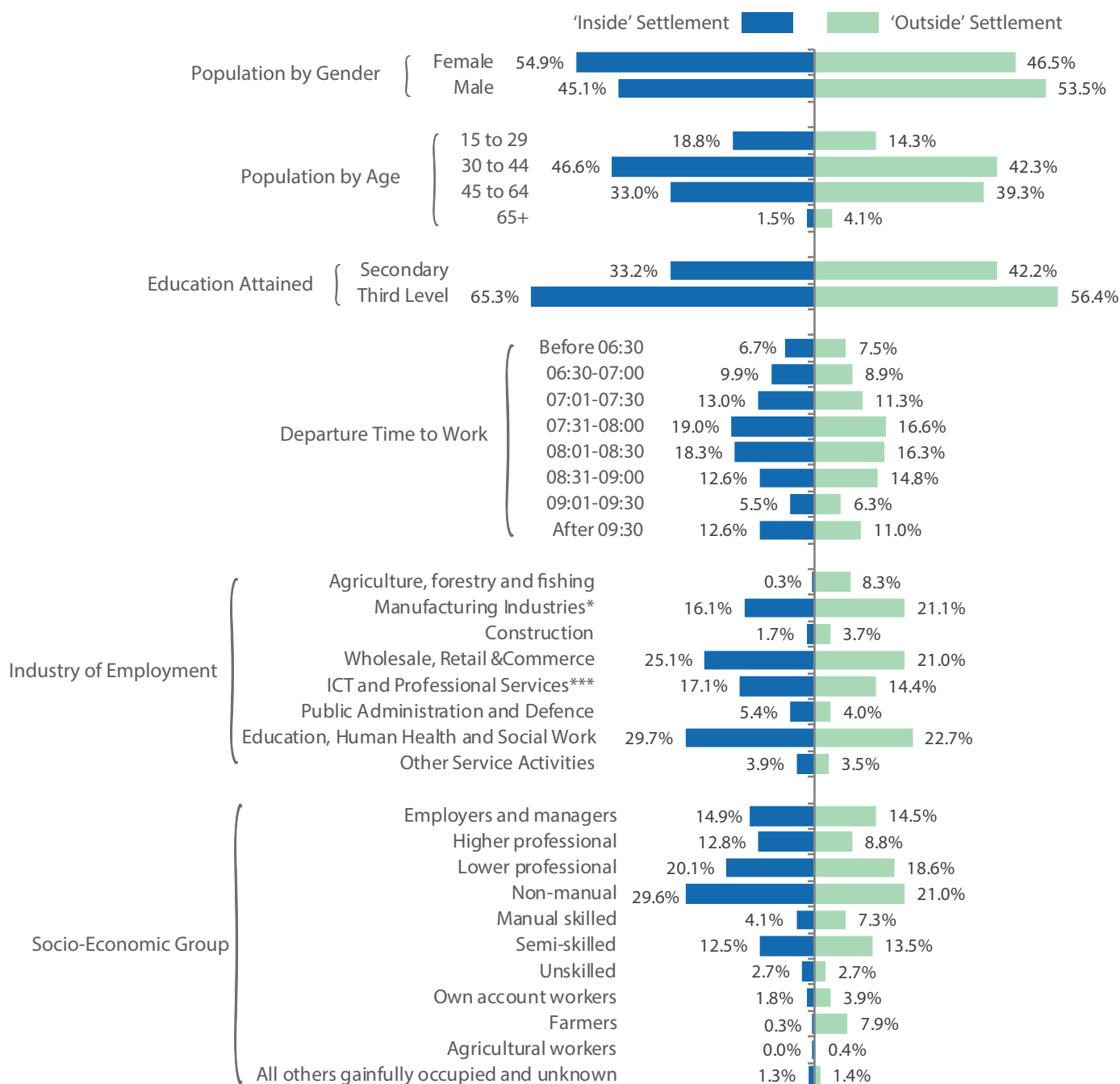
This section provides a summary of the key points of the Galway City Labour Catchment

- 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).



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