

# Travel to Work and Labour Catchments in the Western Region



## Letterkenny Labour Catchment



May 2018



## 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

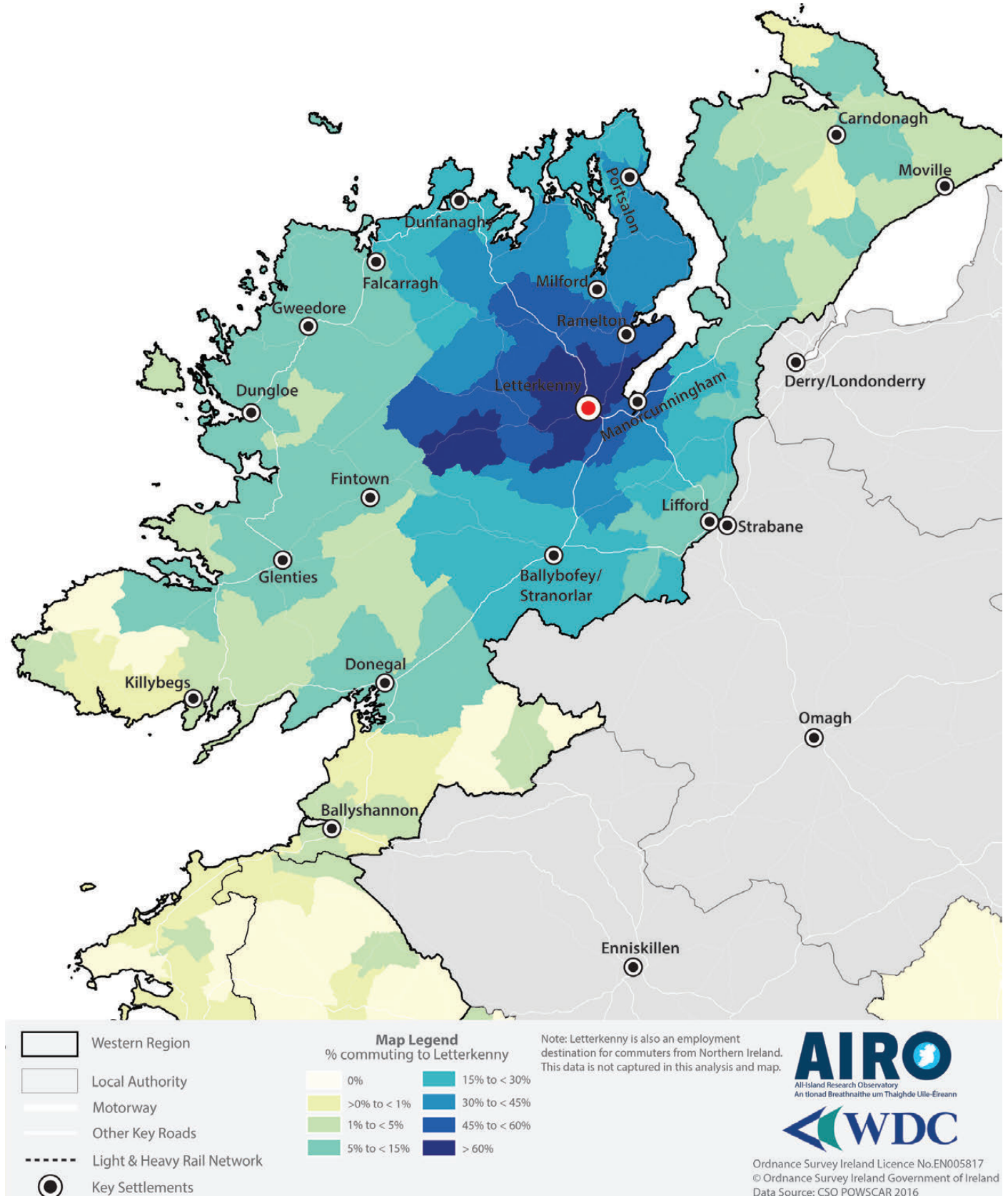
Map 6.1 shows the extent of commuting flows to Letterkenny for employment opportunities. The colours represent the different proportions of people who live in each ED and travel to work in Letterkenny. The map shows every ED (within the frame) by commuting flow to Letterkenny. EDs with commuter numbers linked to Letterkenny between one and four (trips) have been set to a value of one<sup>1</sup>.

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).

<sup>1</sup> This is due to data confidentiality protocols related to access to the POWCAR 2016 dataset.

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



## 6. Letterkenny Labour Catchment

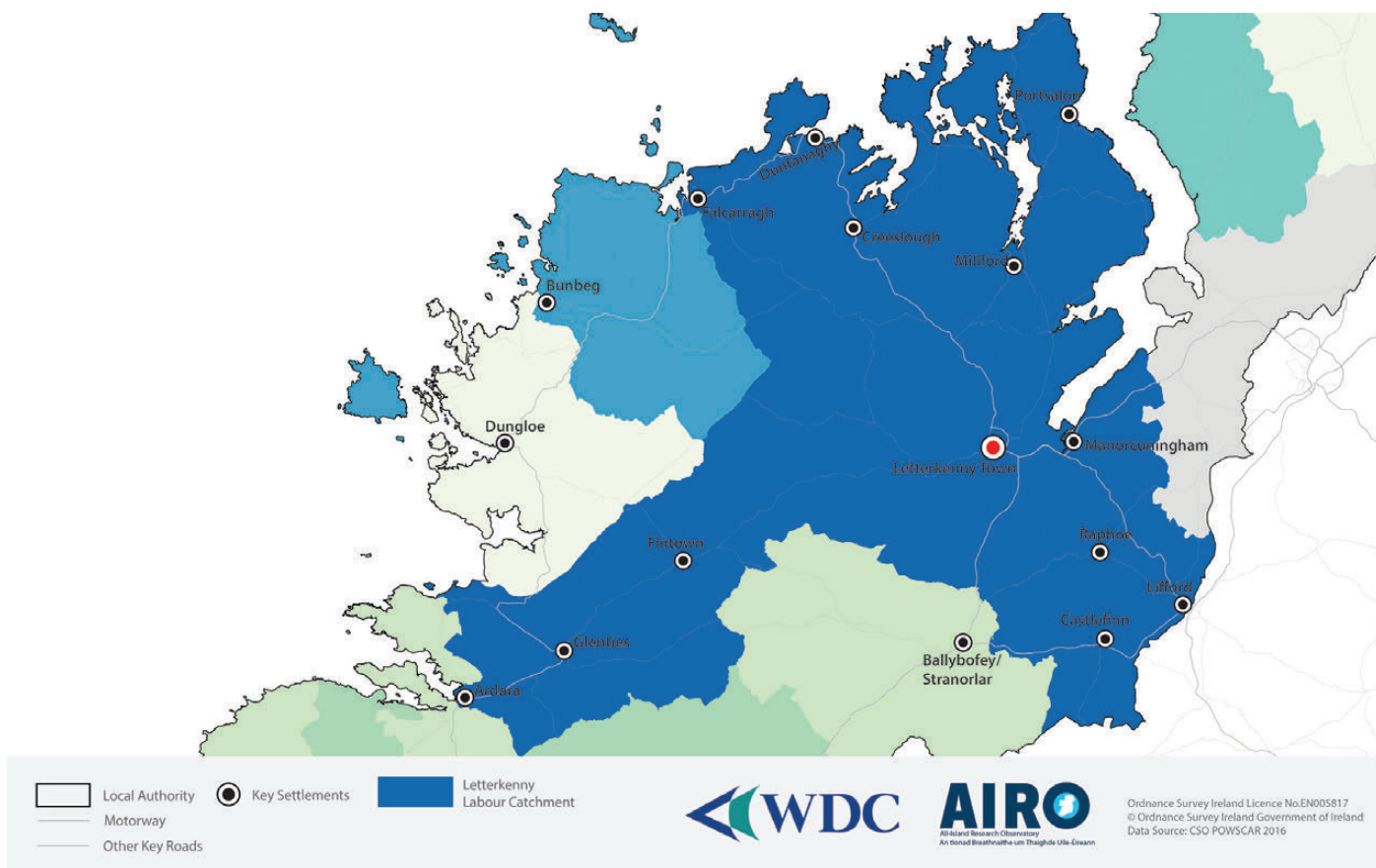
### 6.2 The Letterkenny Labour Catchment

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)

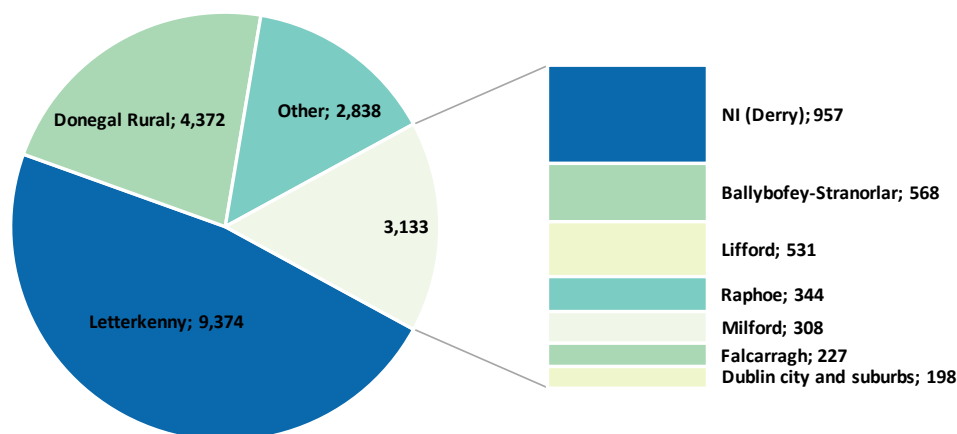


Table 6.1: Place of work of those living in the Letterkenny Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

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%
<b>Total</b>	<b>19,717</b>	<b>100%</b>

## 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 Falcaragh 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

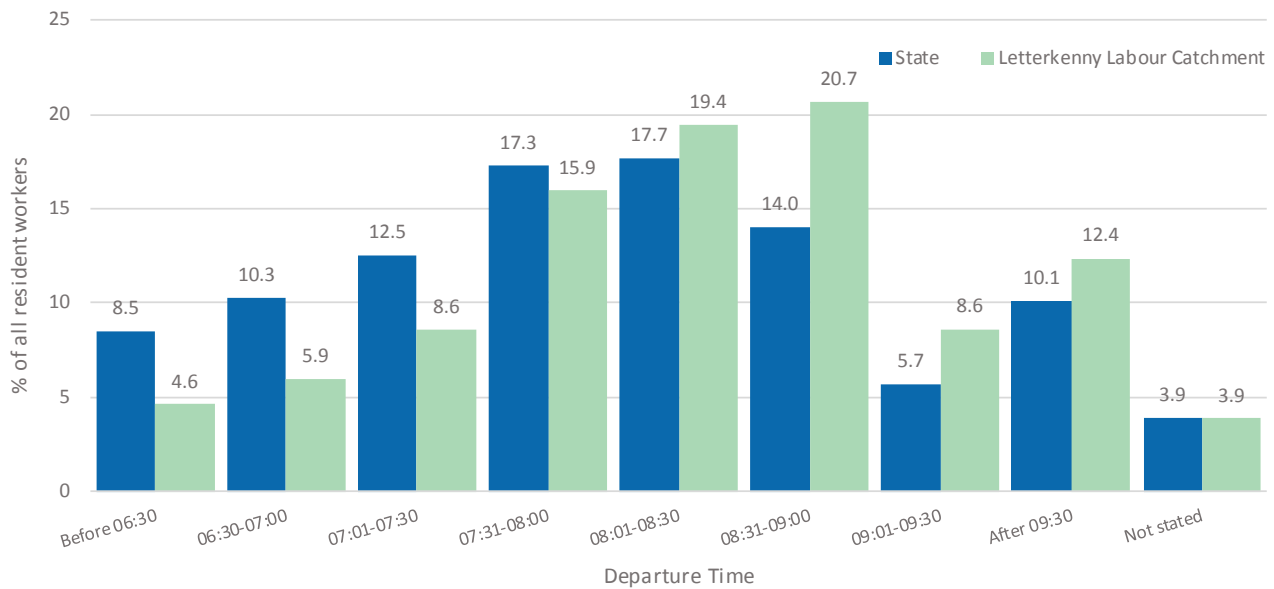
In a change from the previous two POWCAR publications (2006 and 2011), the latest results from the 2016 Census only provide commuting details on the travel time departure of resident workers and not distance travelled. Results from distance travelled variables have included a large element of ‘noise’ 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.

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**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
<b>Letterkenny Labour Catchment (Total)</b>	910	1,172	1,692	3,144	3,829	4,074	1,695	2,439	762	<b>19,717</b>
<b>Working inside Letterkenny</b>	263	383	652	1,478	2,004	2,262	869	1,281	182	<b>9,374</b>
<b>Working outside Letterkenny</b>	647	789	1,040	1,666	1,825	1,812	826	1,158	580	<b>10,343</b>
<b>State</b>	<b>135,187</b>	<b>163,290</b>	<b>199,035</b>	<b>274,425</b>	<b>281,003</b>	<b>223,164</b>	<b>90,521</b>	<b>160,901</b>	<b>62,111</b>	<b>1,589,637</b>
<b>Letterkenny Labour Catchment (Total)</b>	4.6%	5.9%	8.6%	15.9%	19.4%	21%	9%	12%	4%	<b>100%</b>
<b>Working inside Letterkenny</b>	2.8%	4.1%	7%	15.8%	21.4%	24%	9%	14%	2%	<b>100%</b>
<b>Working outside Letterkenny</b>	6.3%	7.6%	10.1%	16.1%	17.6%	17.5%	8%	11.2%	5.6%	<b>100%</b>
<b>State</b>	<b>8.5%</b>	<b>10.3%</b>	<b>12.5%</b>	<b>17.3%</b>	<b>17.7%</b>	<b>14%</b>	<b>5.7%</b>	<b>10.1%</b>	<b>3.9%</b>	<b>100%</b>

### 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%).

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

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. 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



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

### 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.

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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
<b>Letterkenny Labour Catchment (Total)</b>	9,234	10,166	317	19,717
<b>Working inside Letterkenny</b>	3,881	5,367	126	9,374
<b>Working outside Letterkenny</b>	5,353	4,799	191	10,343
<b>State</b>	<b>670,114</b>	<b>891,660</b>	<b>27,863</b>	<b>1,589,637</b>
<b>Letterkenny Labour Catchment (Total)</b>	46.8%	51.6%	1.6%	100%
<b>Working inside Letterkenny</b>	41.4%	57.3%	1.3%	100%
<b>Working outside Letterkenny</b>	51.8%	46.4%	1.8%	100%
<b>State</b>	<b>42.2%</b>	<b>56.1%</b>	<b>1.8%</b>	<b>100%</b>

**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
<b>Galway</b>	65.3%	56.4%	61.3%
<b>Ennis</b>	50.3%	57.2%	54.5%
<b>Sligo</b>	59.2%	51.7%	55.5%
<b>Letterkenny</b>	57.3%	46.4%	51.6%
<b>Castlebar</b>	50.3%	50.4%	50.4%
<b>Roscommon</b>	46.5%	50.3%	49%
<b>Carrick-on-Shannon</b>	47.8%	53.4%	51.9%
<b>State</b>			<b>56.1%</b>

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### 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)**

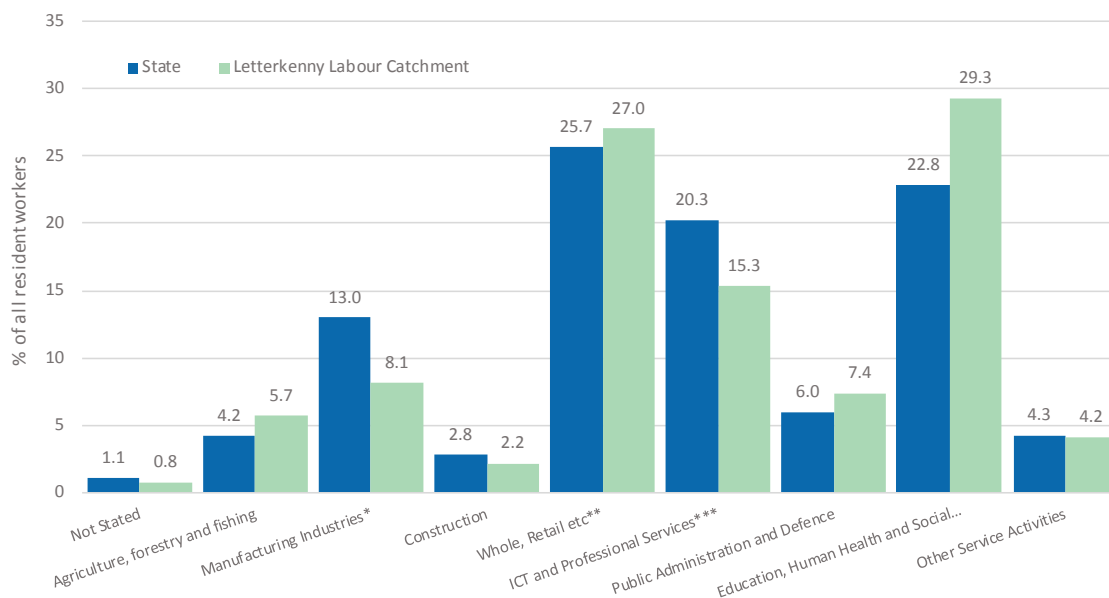


Table 6.6 details the industry of employment of the Letterkenny labour catchment by the location of employment – within Letterkenny or outside the town. Employment in ‘ICT and Professional Services’ and ‘Education, Human Health and Social Work’ are more dominant for those employed within Letterkenny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

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

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.

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

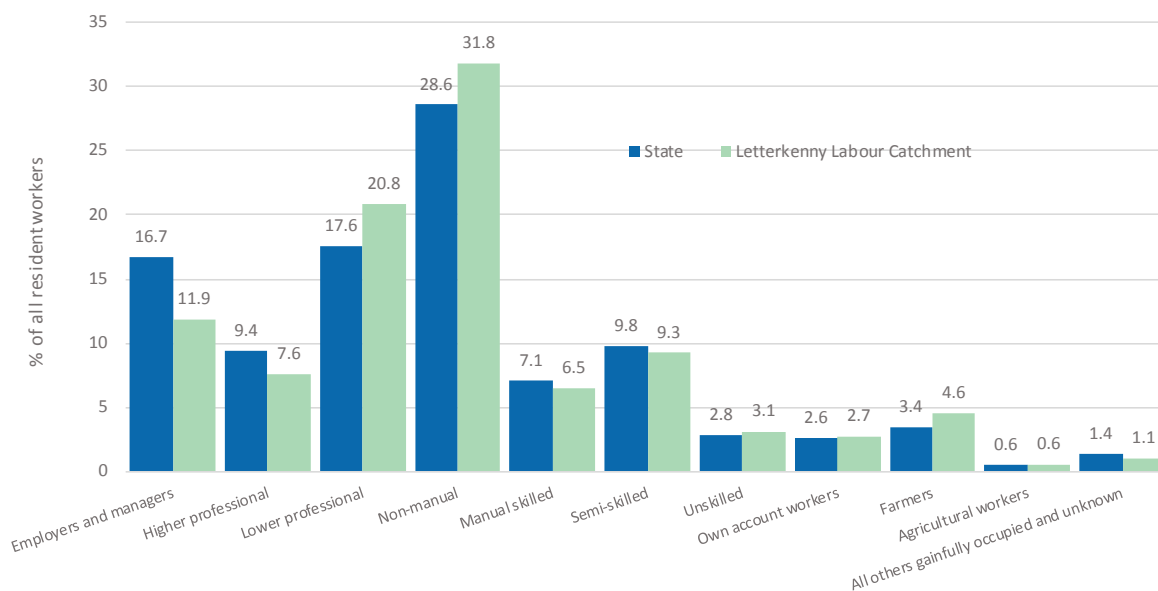


Table 6.7: SEG Profile of those living in the Letterkenny Labour Catchment, 2016 (Source: AIRO & CSO POWCAR)

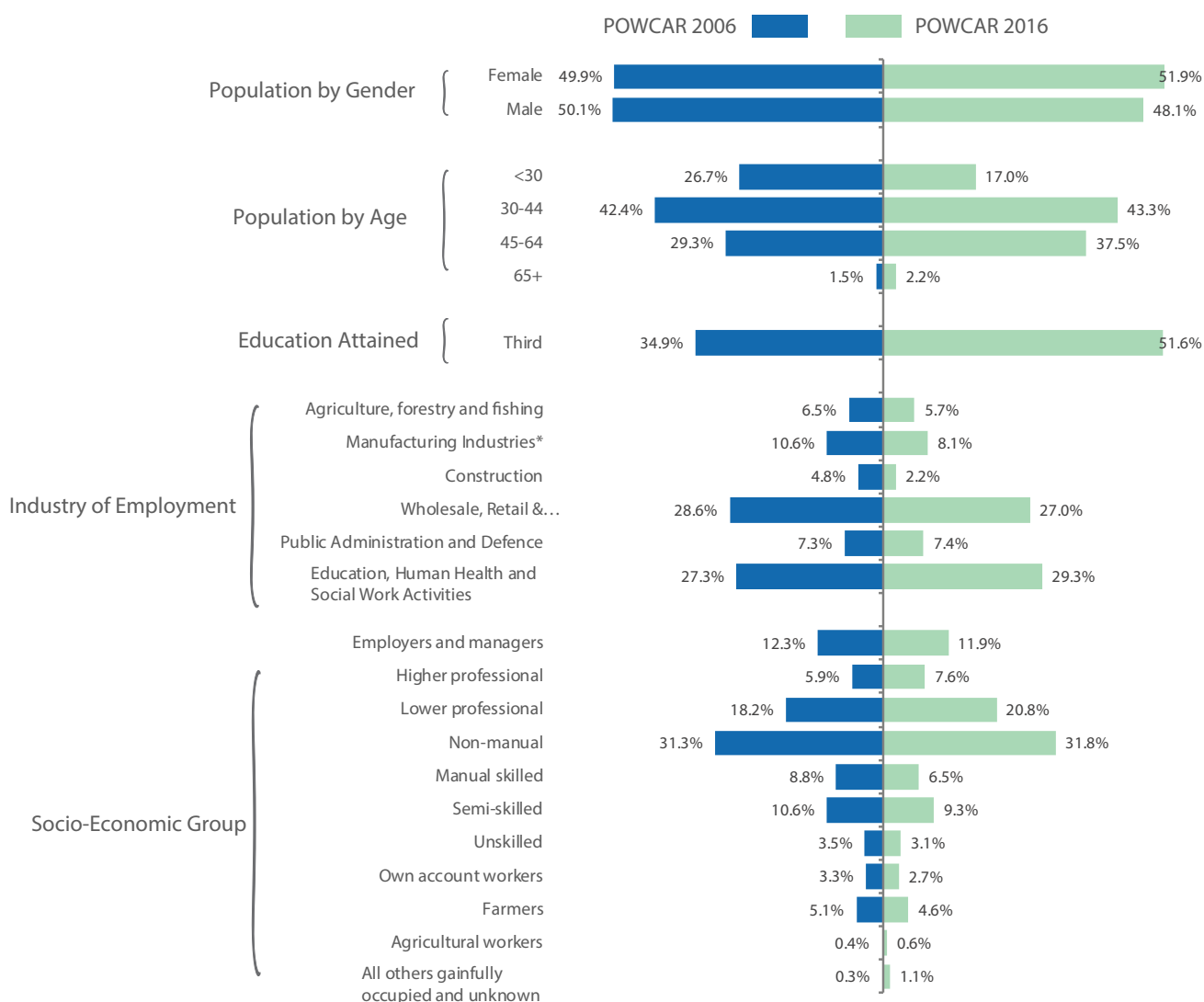
	Letterkenny Labour Catchment	Working inside Letterkenny	Working outside Letterkenny	State
<b>Employers and managers</b>	11.9%	11.9%	11.8%	16.7%
<b>Higher professional</b>	7.6%	9.2%	6.2%	9.4%
<b>Lower professional</b>	20.8%	24.5%	17.5%	17.6%
<b>Non-manual</b>	31.8%	36.5%	27.6%	28.6%
<b>Manual skilled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

## 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

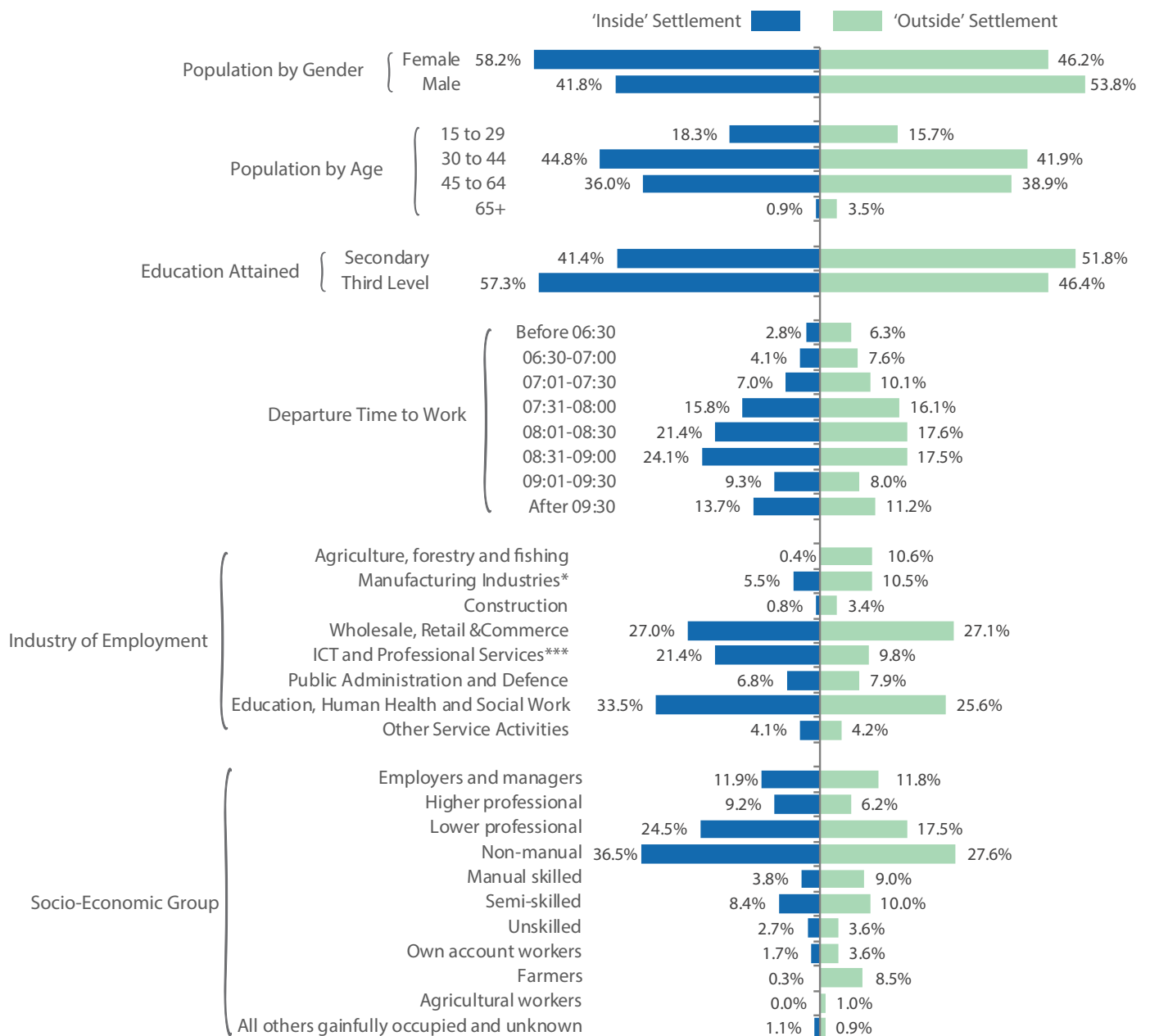
This section provides a summary of the key points of the Letterkenny Labour Catchment

- 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).





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