



## The Health & Care Sector in the Western Region

This *WDC Insights* summarises the key findings of the report 'The Health & Care Sector in the Western Region: Regional Sectoral Profile' <sup>1</sup>, the second in a series of Regional Sectoral Profiles analysing individual economic sectors in the Western Region.

Health & Care is the third largest employment sector in the Western Region and includes those working in hospitals, nursing homes, crèches, day facilities, medical, dental and physiotherapist practices etc. Discussions of the Health & Care sector are generally about the provision of healthcare services, but here we focus on its role in job creation and regional and rural development.

### Employment in Health & Care in the Western Region

According to Census 2016, 42,027 people were employed in Health & Care in the Western Region. It plays a more significant role in the region's labour market than nationally, accounting for 12.6% of total employment in the Western Region compared with 11.1% (Table 1).

At 15.5% of all employment, Sligo has the highest share working in Health & Care in Ireland, while Leitrim (13.5%) is second highest nationally and Galway City and Galway County (both 13%) are jointly fourth. All western counties (except Clare) have a higher than average share working in Health & Care and it is the largest employment sector for six of the region's 40 towns – Letterkenny, Sligo, Ballinasloe, Bearna, Strandhill and Collooney. Census data counts people where they live, even if they commute to work elsewhere, and proximity to a large hospital is clearly a key factor.

The number of people working in Health & Care in the Western Region grew by 14.8% between 2011 and 2016, close to double the growth of total employment in the region (7.5%) meaning it was a substantial driver of the region's jobs recovery. All counties experienced far stronger growth in Health & Care jobs than in employment generally.

**Table 1: Selected employment indicators for Health & Care in the Western Region and state, 2016**

County	No. Employed 2016	% Change 2011-2016	Health & Care as % of Total Employment	% of Health & Care that is Female	% of Health & Care that is Self-employment
Clare	4,852	12.4%	9.8%	83.9%	6.1%
Donegal	7,420	12.7%	12.7%	80.8%	4.5%
Galway City	4,533	16.4%	13.0%	75.5%	7.4%
Galway County	9,739	17.4%	13.0%	82.7%	5.8%
Leitrim	1,722	10.6%	13.5%	83.0%	4.8%
Mayo	6,400	15.7%	12.4%	81.6%	5.1%
Roscommon	3,343	24.4%	12.9%	83.9%	4.2%
Sligo	4,018	7.3%	15.5%	78.8%	4.4%
Western Region	42,027	14.8%	12.6%	81.3%	5.4%
State	223,725	13.4%	11.1%	80.8%	5.7%

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

1. Download from <https://www.wdc.ie/publications/reports-and-papers/>



81.3% of people working in Health & Care in the Western Region are female, with over 1 in 5 of all working women employed in the sector. The period 2011 to 2016 saw male employment increase by 25.3% in the region, while female employment grew by 12.4%.

2,253 people (5.4%) working in the sector are self-employed (employer or own account worker) and self-employment is considerably less common in Health & Care than generally across the economy. Galway City and Clare had the highest levels of self-employment. There may be greater private sector activity in larger urban centres, while the public sector seems to be more important in Roscommon, Donegal, Sligo and Leitrim with low self-employment.

Of total Health & Care employment in the Western Region, 'Residential care & social work'<sup>2</sup> (47.6%) and 'Hospital activities' (37.2%) dominate. In Roscommon 58.3% of all Health & Care employment is in 'Residential care & social work' and it accounts for over half in Clare, Leitrim and Mayo. On the other hand, over half of Health & Care employment in Galway City is in 'Hospital activities' with Sligo and Donegal next highest. All sub-sectors (except 'Medical practice') showed quite strong growth between 2011 and 2016.

## Health & Care Enterprises in the Western Region

In 2016 there were 3,485 Health & Care enterprises registered in the Western Region; that was 6.4% of total enterprises registered in the region.<sup>3</sup> Sligo (7.8%) and Galway<sup>4</sup> (7.6%) have the highest shares of Health & Care enterprises in Ireland, again reinforcing the very substantial role played by the sector in the region's economy.

## Key Policy Issues

**Higher reliance on Health & Care employment in the Western Region** increases its vulnerability to any decline in jobs in the sector. It is an important provider of professional career opportunities in rural areas where there may be fewer options and it plays a particularly significant role in female employment. While the primary policy focus for Health & Care must be the provision of quality services, the sector's parallel role as a provider of jobs, particularly in the Western Region, should also be a factor in policy decisions.

**Health & Care is a key driver of jobs growth** but may sometimes be overlooked in debates on job creation, with greater focus placed on exporting and high-tech businesses. The role of Health & Care in future jobs growth should be fully recognised in national, regional and local strategies for economic development and growth.

**An ageing population** is one of the greatest challenges facing the Health & Care sector. Effectively meeting the needs of an ageing population offers considerable growth opportunities, such as provision of non-residential elder care services allowing people to remain in their own homes for as long as possible. The Western Region's older age profile and high level of rurality means it is at the forefront of this growing demand and there are opportunities to develop innovative solutions in the region.

**Loss of rural GP practices** due to high levels of GP retirement. Provision of adequate GP services in rural areas and the impact of the loss of medical practices on the delivery of health services need to be considered in Government policy, with increasing options for online delivery of GP services one area to be explored.

**Skill shortages** have emerged in the sector with demand for healthcare professionals (doctors, nurses etc.) expected to continue to grow. There is also growing demand for care workers and childminders. These occupations are characterised by high turnover with some employers experiencing difficulty in attracting and retaining qualified care and childcare workers. Initiatives to increase the number of people with care qualifications, as well as improving working conditions for care occupations, are important for the sector's capacity to meet future needs.

For more detailed analysis see 'The Health & Care Sector in the Western Region: Regional Sectoral Profile' <http://www.wdc.ie/publications/reports-and-papers/>

2. 'Residential care & social work' includes nursing homes, residential homes for people with disabilities, crèches, childcare facilities, day facilities for the elderly and home care providers.

3. CSO, Business Demography 2016. This includes public, private and community/voluntary Health & Care entities registered in the Western Region.

4. Business Demography data does not distinguish between Galway City and Galway County.