



WESTERN
DEVELOPMENT
COMMISSION



People
& Place

Travel to Work and Labour Catchments in the Western Region



Galway City Labour Catchment

2024

3. Galway City Labour Catchment

1. A graphical illustration of travel to work patterns and commuting flows (Section 3.5) and the overall labour catchment of the city (Section 3.6);
2. A detailed discussion of the labour market characteristics of all the people at work who are living in the labour catchment – place of work, industry of employment, socio-economic group, education attainment, age, gender, means of travel and time of departure (Section 3.7); and
3. Summary graphics that detail the labour catchment changes that have taken place since 2016 (both geographical and socio-economic) and socio-economic comparisons with the State and the other six key towns/city in the Western Region (Carrick-on-Shannon, Castlebar, Ennis, Letterkenny, Roscommon town and Sligo town) (Section 3.8-3.12).

3.3 The importance of Galway City as a place of work

The official CSO settlement of Galway City had a population of 85,910 persons recorded in the 2022 Census. Galway City is the largest urban centre within the Western Region (Ennis is the second largest) and the fourth largest in the State. Since 2006, the population residing within the city of Galway has increased by +18.1% (+13,181)².

Population

In the most recent intercensal period 2016 to 2022, the population of Galway City has increased by +7.5% (+5,976) compared with +5.6% and +9.1% in the five year periods from 2006-2011 and 2011-2016 respectively. This rate of growth is slightly lower than that of the State (+8.1%) but higher than the Western Region (+7%) between 2016 and 2022. A number of other towns across County Galway have seen higher population growth than the city average since 2016 with the highest rates in Oughterard (+40%), Craughwell (+34%), Moycullen (+33%), Headford (+27%), Oranmore (17%), Loughrea (+14%) and Tuam (+10%).

Labour Force

Since Census 2016 there has been an increase in the numbers living in Galway City that are in the labour force (those at work and unemployed) and those classed as being at work. Between 2016 and 2022, the labour force in Galway City has increased by +8.9% (from 40,777 to 44,406). The number of residents at work has increased by +13.4% (from 35,545 to 40,322). Conversely, the number classed as unemployed has decreased by -21.9% (from 5,232 to 4,084). The +13.4% increase in those at work in Galway City is lower than the State (+15.6%), the Western Region (+14.6%) and Galway City and County (+14%).

Daytime Working Population

According to POWSCCAR 2022, the total number of jobs located within the Galway City boundary was 51,211 and accounted for 18.8% of all jobs located within the Western Region (272,860)³. Of all cities and towns in Ireland, Galway City has the third highest number of jobs located within the city boundary (after Dublin City and Cork City). This accounted for 52.9% of all jobs located within Galway City and County (96,828). Relative to the six other main towns/city in this report, Galway City has the highest number of jobs with the other settlements ranking as follows: Sligo town (13,562), Letterkenny (13,109), Ennis (10,638), Castlebar (9,911), Roscommon town (4,315) and Carrick-on-Shannon (3,145). The ratio of local jobs (51,211) to resident workers (39,486) in the city is 1.30 indicating that the city is an employment destination for workers in the wider region.

² Demographic comparisons between urban centres tend to be difficult due to intercensal boundary changes. In preparation for Census 2022 the CSO developed a new settlement (town) geography for Ireland called Built Up Area (BUAs) - these geographies are slightly different from the town boundaries used in the enumeration of Census 2016. As such, the new boundaries in 2022 can include additional residential areas and employment locations (local jobs) that were not part of the boundary area in 2016.

³ This is called 'the daytime working population', (the number of jobs in an area) and represents the number of people working and residing in an area plus the number of workers commuting into the area of work, in this case the city of Galway.

3. Galway City Labour Catchment

Between 2016 and 2022, there was an increase of +15.4% (+6,835) jobs located in Galway City. This was the largest increase of the seven main towns/city within this report with the rate of jobs growth in other settlements as follows: Letterkenny (+15%), Roscommon town (+10.2%), Carrick-on-Shannon (+9.7%), Castlebar (+9.6%), Ennis (+4.5%) and Sligo town (+4.1%)⁴. Over the same period, the number of jobs in Galway City and County increased by +12.1% (+10,468) and the Western Region as a whole by +12.4% (+30,148) from 242,712 to 272,860. The higher rate of jobs growth in Galway City (+15.4%) was over double the rate of population growth over the 2016-2022 period (+7.5%), indicating the importance of Galway City as a job destination to the wider catchment area. Galway City accounted for 65.3% of the job growth in the City and County.

3.4 The impact of Working from Home on labour catchments

Since COVID-19, remote and hybrid working practices are much more extensive and this has reshaped the landscape of labour markets. With a substantial increase in individuals now working wholly or partly from home, the traditional concept of labour catchments centred around towns has undergone a notable transformation compared to previous analyses. In Census 2022, the CSO captured more data on working from home.

Remote work practice, wholly or partly, has been supported by government, through legislation⁵. This paradigm shift allows individuals to work from home locations while mitigating traditional constraints associated with commuting to employment locations typically in urban centres. This has resulted in large numbers of the workforce working from home and not commuting as was the traditional practice. Remote and hybrid work practices may also enable more longer distance commuting, where people commute further distances to their place of work but on a more infrequent basis.

The impact of the widespread adoption of working from home is clearly identified in the results from Census POWSCCAR 2022 and 2016. The number of people who recorded that they worked mainly from home in Ireland increased by +133%, from 111,744 workers in 2016 (5.7%) to 260,821 in 2022 (11.4%)⁶. Working **mainly** from home is considered 3+ days out of a typical 5 day week. Within the Western Region, the number who worked mainly from home in 2022 was recorded at 40,461, an increase of +75.6% (+17,420) since Census 2016. As such, the proportion of Western Region resident workers who work mainly from home has increased from 7.1% in 2016 to 10.7% in 2022. This does not capture those working from home in hybrid patterns, for example 1-2 days per week.

In Galway City and County a total of 15,192 (12.3%) resident workers were recorded as mainly working from home in Census 2022. This represents a +117.9% (+8,219) increase from the number in 2016 (6,973 or 6.5% of resident workers). This was the highest percentage increase of any Western Region local authority.

Resulting from the increased incidence in working from home, the employment base in Galway City is now characterised by a more dispersed and decentralised workforce. This, in turn, will have implications for urban planning, infrastructure development and policymaking aimed at supporting economic growth and workforce mobility.

4 | 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.

5 | The Work Life Balance and Miscellaneous Provision Act 2023 provides for all employees the right to request remote working arrangements.

6 | In April 2022, government COVID work from home guidelines had been lifted but many still continued the practice.

3. Galway City Labour Catchment

3.5 Employment based commuting patterns to Galway City

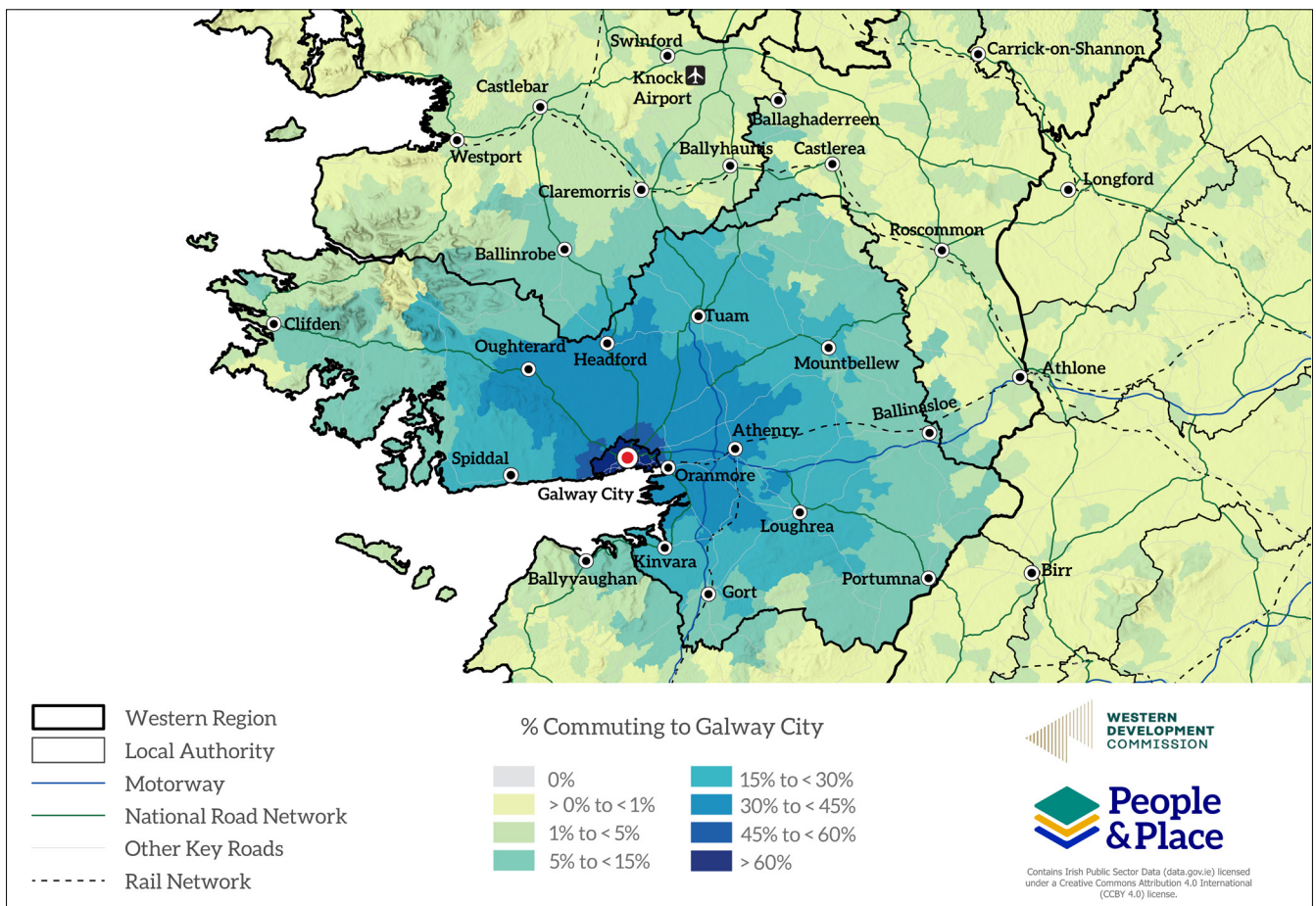
Map 3.2 shows the extent of commuting flows to Galway City for work opportunities. The colours represent the proportions of people at work who live in each ED and travel to work in Galway City.

Definition - Commuting Flows

Commuting flows are expressed as the percentage of resident workers in an Electoral Division (ED) that commute to a particular destination (i.e. Galway City, Ennis etc.) for employment.

A high commuting rate (i.e., > 60%) means that the town is a work destination for > 60% of residents in that ED.

Map 3.2: Commuting Flows into Galway City, 2022



Source: CSO POWSCCAR

As 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 perimeter (30% to >60%). Beyond these areas, the proportion travelling to the city gradually declines and is illustrated on the map; graduating from the darker green areas (Spiddal, Tuam, Mountbellew, Loughrea and Kinvara) where between 15% and 30% of resident workers in those EDs work in Galway City, through to medium green (Clifden, Ballinrobe, Claremorris, Ballinasloe, Portumna and Gort) where between 5% and 15% of resident workers in those EDs commute to work in Galway City. The remainder of County Galway and some areas in south Mayo, west Roscommon County and north Clare all have commuting rates to Galway City below 5%.

3. Galway City Labour Catchment

3.6 Identifying the Galway City labour catchment

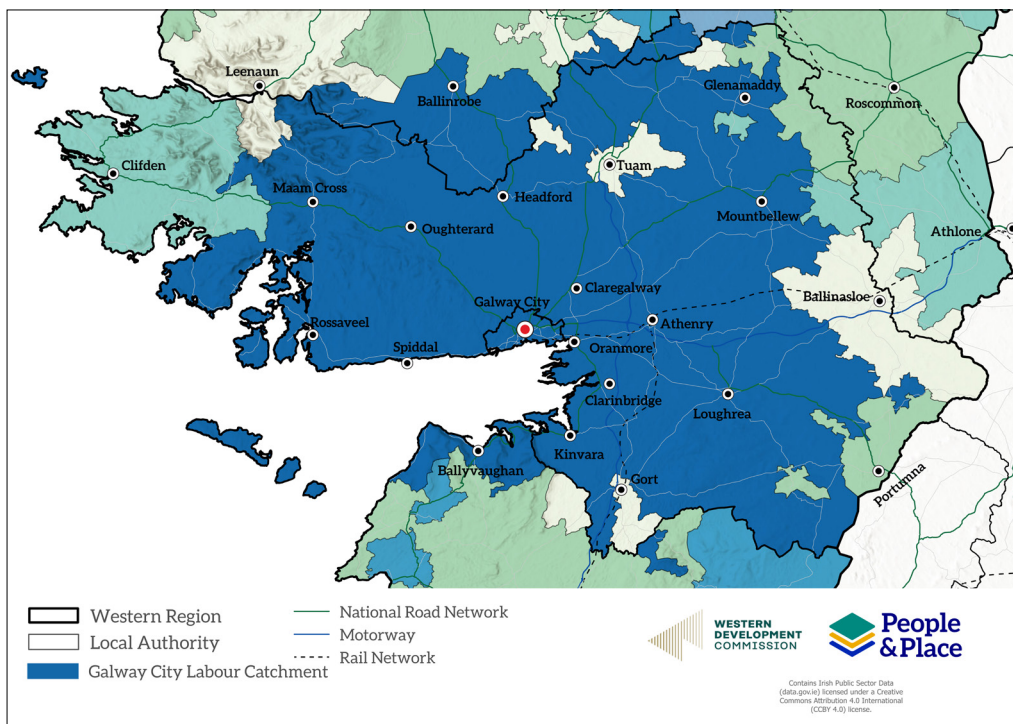
While Map 3.2 shows EDs from where even one person commuted to Galway City, all of these EDs are not included in the Galway City labour catchment. The Galway City labour catchment is based on only those EDs for which Galway City is the most popular work destination for resident workers. Other EDs, whose commuters travel in greater numbers to other towns, are assigned to the labour catchments of those towns.

Definition - Labour Catchments

The town labour catchment is the area from which a town draws most of its labour supply. Each catchment is based on the inclusion of Electoral Divisions (EDs) that are assigned to the town. An ED is assigned to the town's labour catchment if it is the most popular work destination for the resident workers in the ED⁷.

Map 3.3 shows the Galway City labour catchment as depicted by the dark blue colour. While the labour catchment extends to large parts of the county, it excludes areas in the west of Galway County which form part of the Clifden labour catchment and parts of east Galway County which are part of the individual labour catchments of Roscommon town, Athlone, Ballinasloe and Portumna. In addition, the influence of Tuam as an employment destination is evident by the location of its labour catchment in central County Galway. However, the extent of the Tuam labour catchment in 2022 is considerably smaller than that in the 2016 analysis. In a further departure from the 2016 analysis, the previous labour catchments of Ballinrobe and Loughrea are now part of the wider Galway City labour catchment. High levels of jobs growth in Galway City between 2016 and 2022 (+15.4% or +6,835), increased levels of remote working across Galway County and major improvements in the motorway network (e.g. M18 to/from Tuam) have all contributed to the changed structure of the Galway City labour catchment.

Map 3.3: Galway City labour catchment, 2022



⁷ For a more detailed explanation of the methodology, see Appendix.

3. Galway City Labour Catchment

In summary, Galway City is the key employment destination within the Western Region and its influence extends beyond the county borders well into parts of Mayo, Roscommon and Clare.

In 2022, there were 88,253 people classified as at work and living within the Galway City labour catchment (29.9% of all Western Region resident workers). As expected, Galway City has the largest labour catchment within the Western Region, followed by Sligo town (24,382), Letterkenny (23,503) and Ennis (22,342). The Galway City labour catchment has a population at work 2.2 times larger than the city of Galway (88,253 to 39,486 respectively). The geographical size of the Galway City labour catchment has expanded and now includes towns such as Loughrea and Ballinrobe and additional EDs from areas in close proximity to Tuam and Ballinasloe (see Section 3.9). Resulting from this expansion, the total resident workers residing in the labour catchment has increased by +25.8% since 2016 (from 70,170) and by +36.9% since 2006 (from 64,455).

3.7 Profile of the Galway City labour catchment

Map 3.3 above 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 2022. This is important as including those who live in the labour catchment and work elsewhere provides a more complete assessment of the potential labour supply for Galway City.

The Galway City labour catchment is therefore composed of those who live in and are employed within the city (**Working in Galway City**) and those who live in the labour catchment but work outside the city e.g. other towns such as Tuam, rural areas and locations outside the Western Region such as Limerick City etc. (**Working elsewhere in Ireland**)⁸.

This profile is further supported by an analysis of changes in the labour catchment between 2016 and 2022 (Section 3.8 and Section 3.9), both in terms of geography and socio-economic characteristics, a comparison profile of the Galway City labour catchment relative to the State (Section 3.10), a comparison profile of those 'Working in Galway City' and 'Working elsewhere in Ireland' (Section 3.11) and a comparison profile of the Galway City labour catchment and the six other main towns/city within the Western Region (Section 3.12).

3.7.1 Place of Work

The Galway City labour catchment can be seen to include all of Galway City and most of the County. It excludes parts of west and east County Galway. In Figures 3.1 and 3.2 the main work locations for those who live in the Galway City labour catchment are set out. Those who work mainly from home in the Galway City labour catchment (n=13,891)⁹ are coded with their home location as their place of work i.e., a resident worker from Galway City who works mainly from home is coded with their place of work as Galway City.

⁸ | Note: 'Working elsewhere in Ireland' refers to working anywhere beyond the town boundary, which could include suburbs outside the city boundary to more distant locations such as Dublin City.

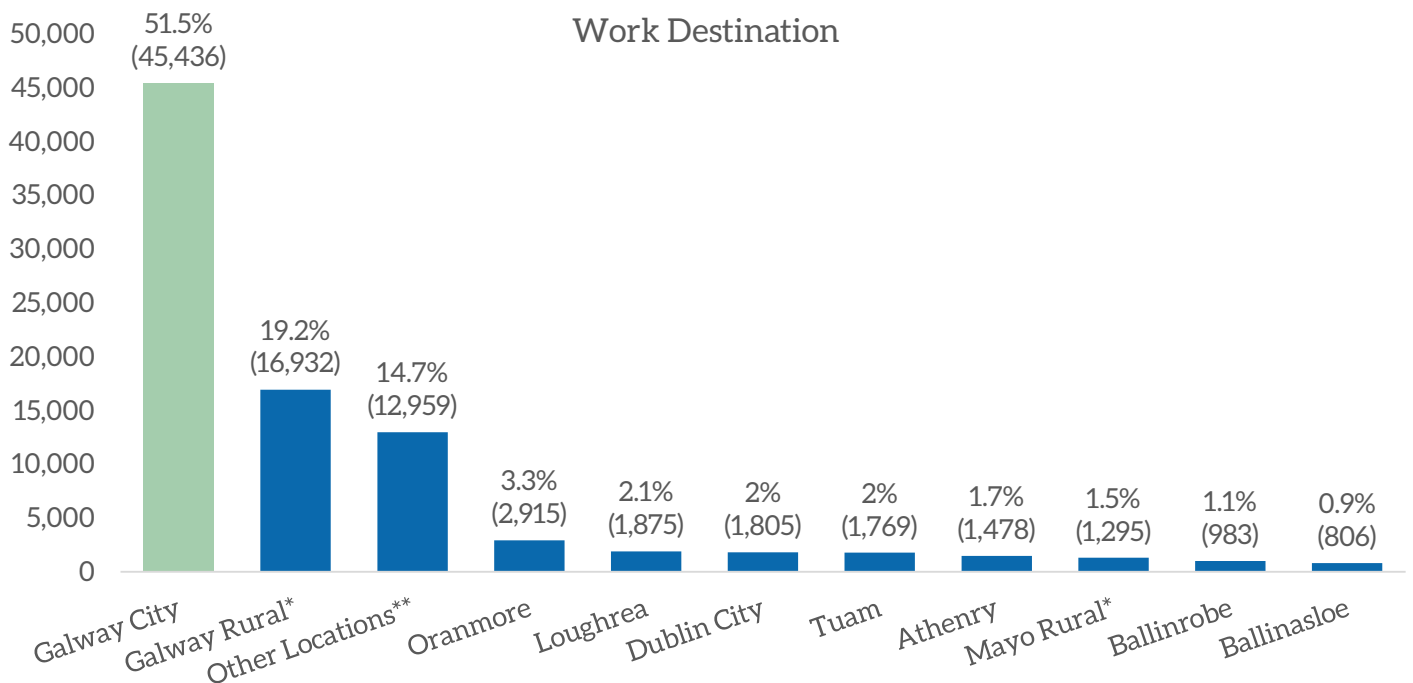
⁹ | Of the 13,891 coded as working from home in the Galway City labour catchment, 4,848 are coded as both living in and working in the Galway City settlement.

3. Galway City Labour Catchment

As expected, Galway City is the principal place of employment for those living in the labour catchment, accounting for 45,436 (51.5%) of all employment - although this share has decreased since 2016 (55.3%). While there are more people commuting to Galway City for work since 2016 (+17.1% or +6,628), the overall proportional share has declined due to a changing overall catchment profile with much higher number of resident workers classed as working 'mainly from home' and the incorporation of both Loughrea and Ballinrobe now within the overall catchment (both still key destinations for workers in close proximity to these two towns).

Of the seven labour catchments reviewed here, the Galway City labour catchment has the highest proportion of resident workers commuting to the town/city. Employment in rural parts of Galway City and County (destination outside any defined CSO settlement) is the next most popular destination and accounted for just under a fifth of all resident workers (19.2% or 16,932).

Figure 3.1: Key Destinations of resident workers in the Galway City labour catchment, 2022



*Galway/Mayo Rural' - destination outside any defined CSO settlement
 **'Other Locations' - Less than 806 commuters

The other large employment destinations for residents within the Galway City labour catchment are important towns in close proximity to Galway City; Oranmore, Loughrea, Tuam, Athenry, Ballinrobe and Ballinasloe.

Dublin City (1,805 or 2%) is highlighted as a key destination for Galway City labour catchment residents. Recent changes to the motorway network, reduced travel times and more flexible working from home arrangements are contributory factors to this.

It is clear from examining the change between 2016 and 2022 in the proportional share of employment in key destinations, that the centres of Oranmore and Loughrea have grown by +1.9% and +0.8% respectively while Galway City and 'Galway Rural' have decreased by -3.8% and -3.1% respectively (see Figure 3.2 below).

3. Galway City Labour Catchment

In summary, the Galway City labour catchment comprises just over half (51.5% or 45,436) of resident workers who are employed in Galway City with the remaining workers (48.5%) employed in locations outside of the city.

As such, the Galway City labour catchment is a heavily contested economic space with resident workers availing of job opportunities both in the city and other nearby locations (Oranmore, Loughrea, Athenry) and more distant locations (Dublin City). High levels of remote working within and across the Galway City labour catchment is also a new phenomenon and certainly something that is facilitated by a highly educated and skilled workforce resident within the catchment who are employed in roles amenable to remote working.

Figure 3.2: Key Destinations in 2022 and change since 2016

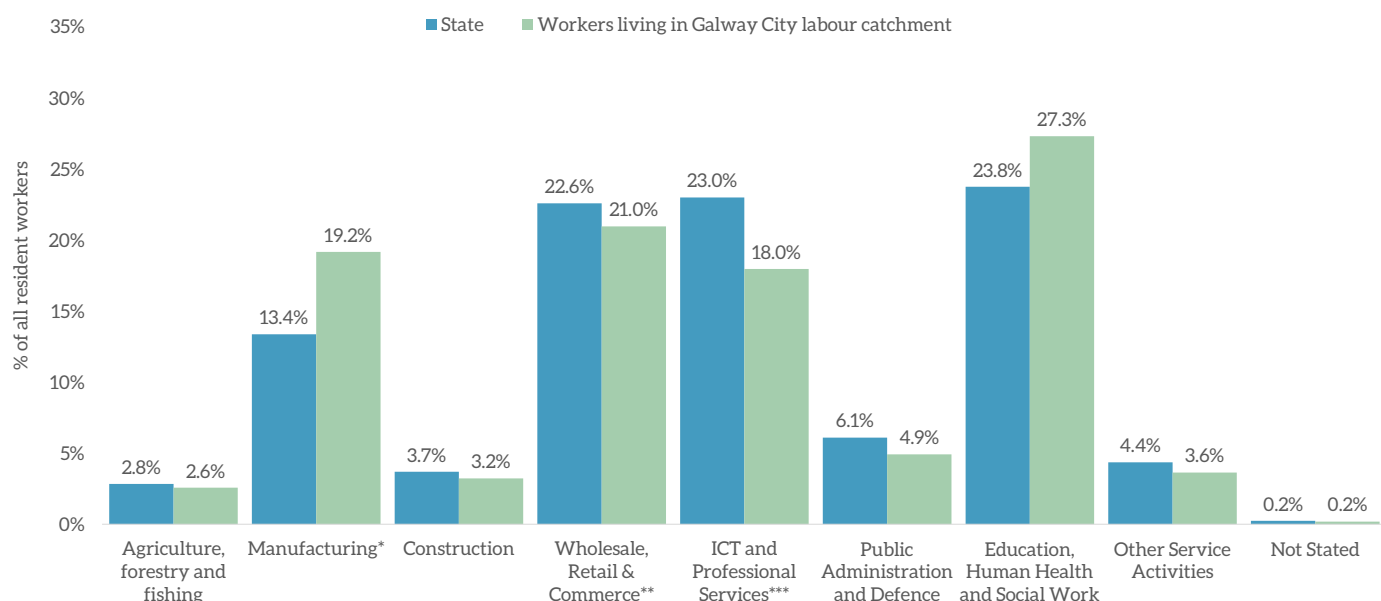
Work Destination	Resident Workers	Change 2016-2022	% Change 2016-2022	Proportional Share 2022	Proportional Share Change 2016-2022
Galway City	45,436	6,628	17.1%	51.5%	-3.8%
Galway Rural*	16,932	1,312	8.4%	19.2%	-3.1%
Other Locations**	12,959	4,186	N/A	14.7%	N/A
Oranmore	2,915	1,925	194.4%	3.3%	1.9%
Loughrea	1,875	980	109.5%	2.1%	0.8%
Dublin City	1,805	834	85.9%	2.0%	0.7%
Tuam	1,769	484	37.7%	2.0%	0.2%
Athenry	1,478	230	18.4%	1.7%	-0.1%
Mayo Rural*	1,295	739	132.9%	1.5%	0.7%
Ballinrobe	983	824	518.2%	1.1%	0.9%
Ballinasloe	806	246	43.9%	0.9%	0.1%
Total	88,253	18,083	25.8%		

3.7.2 Employment by Industrial Group

An analysis of the profile of employment by industrial group provides an indication of the structure of the local economy and the type of employment that it sustains, as well as the skills profile of the labour catchment. 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 as well as strengths and weaknesses of the local economic base.

Employment by industrial group for all those living in the Galway City labour catchment is shown in Figure 3.3 below. The 'Education, Human Health and Social Work' sector is the most important employer and accounted for over a quarter of all resident workers (27.3%). The 'Wholesale, Retail Trade, Transportation and Storage, Accommodation and Food Service Activities' sector accounted for just over a fifth of resident workers (21%) in the Galway City labour catchment. The 'Manufacturing, mining and quarrying, Electricity, Gas, Water supply and Waste Management' sector (19.2%) and 'Information and Communication, Financial, Real Estate, Professional, administration and support service activities' sector (18%) are the next biggest sectors in the labour catchment with all other sectors accounting for 5% or less.

Figure 3.3: Industrial Profile of the Galway City labour catchment and the State, 2022



Relative to the national picture, the ‘Education, Human Health and Social Work’ and ‘Manufacturing’ sectors play a more important role in the overall employment base. The ‘Education, Human Health and Social Work’ sector’s share of employment (27.3%) is 3.5 percentage points higher than the State average (23.8%) and the ‘Manufacturing’ sector (19.2%) is 5.8 percentage points higher than the State average (13.4%). The ‘ICT and Professional Services’ sector recorded a rate of 18% whereas the State average was 23%¹⁰.

Across the seven labour force catchments, Galway City recorded the highest proportion employed in the ‘Manufacturing’ sector, the highest in the ‘ICT and Professional Services’ sector and the fourth lowest proportion in the ‘Education, Human Health and Social Work’ sector.

As seen in Figure 3.4 below, the industrial groups which saw the largest proportional increases between 2016 and 2022 were the ‘ICT and Professional Services’ sector (+2.1 percentage points), the ‘Manufacturing’ sector (+0.9 percentage points) and the ‘Education, Human Health and Social Work’ sector (+0.7 percentage points). In contrast, the largest proportionate declines have been in the ‘Agriculture, forestry and fishing’ sector (-1.3 percentage points) and the ‘Wholesale, Retail & Commerce’ sector (-2.3 percentage points). These declines also occurred nationally with Agriculture, Retail and Wholesale sectors all witnessing the largest declines in employment share.

¹⁰ | Note: with only nine classifications available, industrial classifications in POWSCCAR are less detailed than normal classifications in other Census outputs.
 *Manufacturing’ = 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.

Figure 3.4: Industrial Profile of the Galway City labour catchment in 2016 and 2022

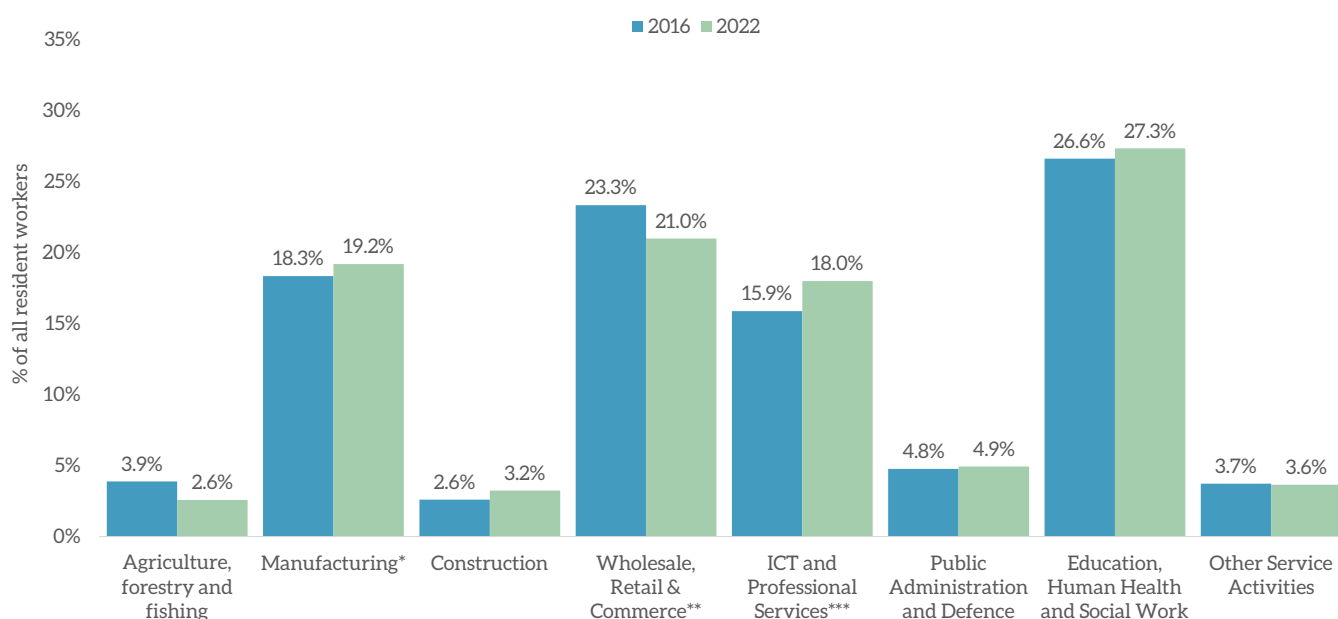


Figure 3.5 below details the industry of employment of the Galway City labour catchment by the location of employment – working within Galway City or working elsewhere. Employment in the ‘Education, Human Health and Social Work’ (29.6%) and ‘Manufacturing’ (21.8%) sectors are more dominant among those employed within Galway City. The ‘Wholesale, Retail & Commerce’ (21.8%) and ‘Agriculture, forestry and fishing’ (5.1%) sectors have a higher share of employment outside the city than within.

Figure 3.5: Industrial Profile of the Galway City labour catchment, 2022

Industry	Workers living in the Galway City labour catchment							
	Total		Working in Galway City		Working elsewhere in Ireland			
Agriculture, forestry and fishing	2,272	2.6%	131	0.3%	2,141	5.1%		
Manufacturing*	16,922	19.2%	10,166	21.8%	6,756	16.2%		
Construction	2,849	3.2%	875	1.9%	1,974	4.7%		
Wholesale, Retail & Commerce**	18,509	21.0%	9,408	20.2%	9,101	21.8%		
ICT and Professional Services***	15,866	18.0%	8,297	17.8%	7,569	18.1%		
Public Administration and Defence	4,349	4.9%	2,293	4.9%	2,056	4.9%		
Education, Human Health & Social Work	24,105	27.3%	13,782	29.6%	10,323	24.7%		
Other Service Activities	3,216	3.6%	1,515	3.3%	1,701	4.1%		
Not Stated	165	0.2%	65	0.1%	100	0.2%		
Total	88,253	100%	46,532	100%	41,721	100%		

3. Galway City Labour Catchment

3.7.3 Socio-Economic Group

The socio-economic structure of employment in the Galway City labour catchment is set out in Figure 3.6. The socio-economic group (SEG) is determined by occupation and employment status and aims to classify those on the basis of comparable skill and education levels. Occupational categories are not available in POWSCCAR. Socio-economic group is 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 structure¹¹.

The socio-economic structure of the labour catchment of Galway City is broadly similar to that of the State with the largest group by far being 'Non-manual'¹² (48.2%), although this category is marginally lower than the State average at 49.5%. As with the State, the next largest category in the Galway City labour catchment is 'Employers and Managers' at 13.3%. Relative to the other six key labour catchments, the Galway City labour catchment recorded the largest proportion of resident workers classed as 'Employers and Managers' (Ennis labour catchment is the second highest at 13%). Following these, the three categories of 'Semi-skilled', 'Manual-skilled' and 'Lower professional' all account for approximately 6-12% of the resident workforce. 'Farmers and Agricultural Workers' account for 2.6% of all resident workers in the labour catchment.

Figure 3.6: Socio-Economic Group (SEG) Profile of the Galway City labour catchment and the State, 2022

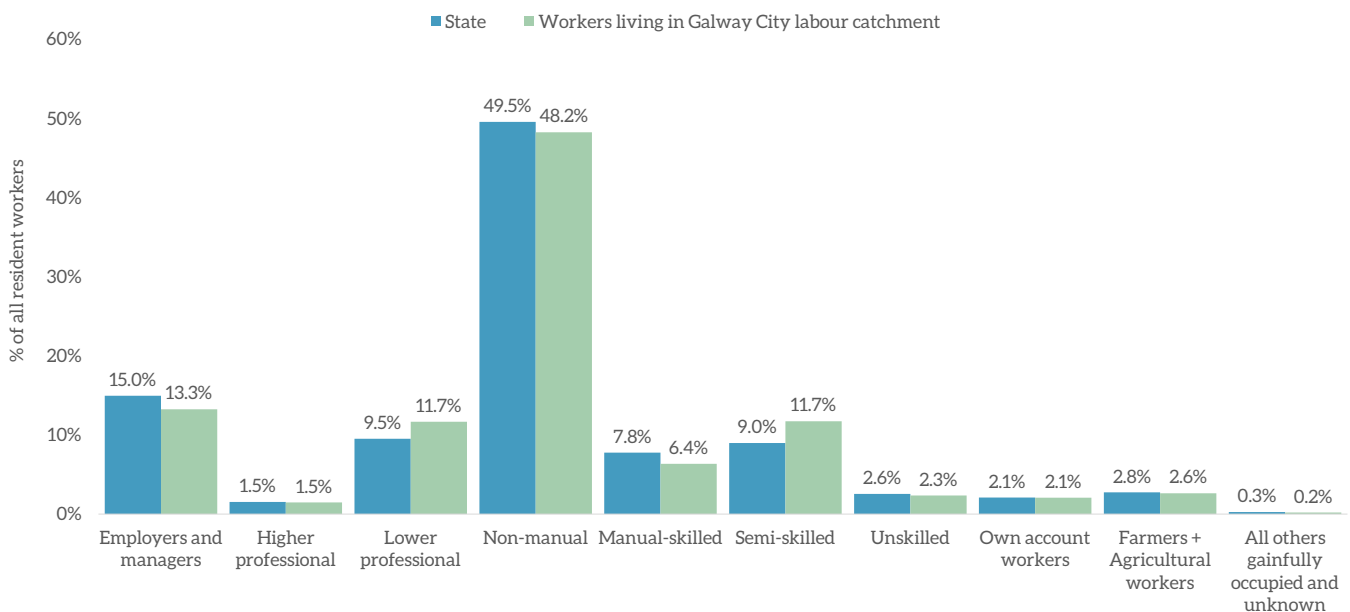


Figure 3.7 below details the socio-economic structure breakdown for those working within Galway City and those working outside Galway City. There are somewhat notable differences in rates with a higher proportion of those employed inside Galway City classed as 'Lower professional', 'Non-manual' and 'Semi-skilled' - all related to a higher level of employment in 'Manufacturing' industries in industrial estates such as Ballybrit, Ballybane and Liosban. Those working outside Galway City, in mostly rural areas, also have a higher proportion of workers as part of the 'Farmers and Agricultural workers' grouping (5.2% working outside the city vs 0.4% working in the city).

11| A break in the time series from the CSO has occurred for socio-economic group between Census 2022 and previous census results. Although the categories remain the same, it is important to note the break in time series when comparing historical tables to Census 2022 results. The biggest change that occurred across the State was the shift between the 'Higher Professional' and 'Lower professional' groups to 'Non-manual'. For instance, in 2011 and 2016 the proportion of the workforce with SEG classed as 'Non-manual' was approximately 25% and in the 2022 this proportion was 43.2%. In contrast, 'Higher Professional' groupings declined from approximately 8% in 2011 and 2016 to 1.5% in 2022 (based on full Census results including both Mobile and Uncodable workers).

12| The 'Non-manual' sector is a diverse group which relates to persons working in retail, government, banking and other areas fulfilling administrative roles.

3. Galway City Labour Catchment

The largest difference between the 'Working in Galway City' and 'Working elsewhere in Ireland' group is within the 'Non-manual' group (49.6% in Galway City vs 45.9% in job locations outside Galway City) which relates to persons working in retail, government, banking and other areas fulfilling administrative roles.

Figure 3.7: Socio-Economic Group (SEG) Profile of the Galway City labour catchment, 2022

Socio-Economic Group (SEG)	Workers living in the Galway City labour catchment							
	Total		Working in Galway City			Working elsewhere in Ireland		
Employers and managers	11,695	13.3%	5,671	12.2%	6,024	14.4%		
Higher professional	1,300	1.5%	604	1.3%	696	1.7%		
Lower professional	10,306	11.7%	6,573	14.1%	3,733	8.9%		
Non-manual	42,579	48.2%	23,089	49.6%	19,490	46.7%		
Manual-skilled	5,618	6.4%	2,143	4.6%	3,475	8.3%		
Semi-skilled	10,347	11.7%	6,728	14.5%	3,619	8.7%		
Unskilled	2,073	2.3%	970	2.1%	1,103	2.6%		
Own account workers	1,840	2.1%	484	1.0%	1,356	3.3%		
Farmers + Agricultural workers	2,320	2.6%	167	0.4%	2,153	5.2%		
All others gainfully occupied and unknown	175	0.2%	103	0.2%	72	0.2%		
Total	88,253	100%	46,532	100%	41,721	100%		

3.7.4 Education

As a whole, overall education levels in Ireland for those at work have increased dramatically since 2006 with the proportion of the national population at work having completed education with a third level qualification (excludes those with a mobile or blank destination) increasing from 43% in 2006 to 56.1% in 2016 to 63.1% in 2022.

Figure 3.8 details the average education profile among those resident workers in the Galway City labour catchment with 67.6% having completed third level education - this is higher than the rate of 63.1% for workers nationally. The rate for the Western Region was recorded at 61%. Relative to all seven labour catchments, Galway City has the most educated workforce with Sligo town (63.2%) ranking second and Ennis (62.5%) ranking third highest¹³.

¹³ | At the local authority level, Galway City recorded the second highest rate in the State at 72%. The rate for County Galway resident workers was recorded at 64%. 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 (only 32% of those coded blank or mobile in the State have third level qualifications).

3. Galway City Labour Catchment

Figure 3.8 below details the education attainment levels for all workers in the labour catchment. There is a difference between the education attainment of those who are employed within Galway City (71.1% with third level) and those employed elsewhere (63.6% with third level). This relates to the high level of commuting from within the labour catchment to the highly qualified employment opportunities within Galway City.

Figure 3.8: Education Attainment Profile of the Galway City labour catchment, 2022

Education Attainment	Workers living in the Galway City labour catchment								
	Total			Working in Galway City			Working elsewhere in Ireland		
Secondary	28,071	31.8%		13,177	28.3%		14,894	35.7%	
Third	59,639	67.6%		33,086	71.1%		26,553	63.6%	
Not Stated	543	0.6%		269	0.6%		274	0.7%	
Total	88,253	100%		46,532	100%		41,721	100%	

Relative to the other main labour catchments, workers in the Galway City labour catchment have the highest level of third level attainment of labour catchment workers employed within the city (71.1%). This reflects the type of employment opportunities in the city i.e., third level education institutes, major hospitals and IDA business parks with higher levels of foreign direct investment companies who tend to employ more third level graduates.

3.7.5 Age

In general, there is a major difference in the age of the resident workforce in urban and rural areas across the State. For instance, the urban local authorities of Galway City (25%), Dublin City (24.4%) and Cork City (21.6%) all have a resident workforce where more than a fifth are aged less than 30 years. In contrast, more rural and peripheral local authorities have a much older resident workforce. This is indeed the case for Western Region local authorities with the average rate for the region at 17.3%, aged under 30 years. Five of the ten local authorities with the lowest rates of young resident workers are Western Region local authorities - Galway County recorded the lowest rate across the State at 13.2% with other local authorities as follows: Roscommon County (13.7%), Leitrim (13.9%), Mayo (13.9%), Clare (15%), Sligo County (15.3%) and Donegal (16%).













The age profile of those aged 15 years and over at work who live in the Galway City labour catchment is shown in Figure 3.9. The proportion of young workers (<30 years) residing within the Galway City labour catchment (17.2%) is lower than the overall State average of 17.6%. Relative to other towns in this analysis, the age profile of the Galway City labour catchment is younger than the other larger labour catchments. Within the Galway City labour catchment, 17.2% of resident workers are aged <30 years compared to rates of 15.5% in Sligo and 14.1% in Ennis labour catchments.

The slightly younger age profile in Galway City may be explained by a number of factors such as Galway City having two third level institutes within the city (Atlantic Technological University Galway City and University of Galway) and that many young people migrate to Galway for education and choose to stay in Galway City due to the variety of employment opportunities available.

3. Galway City Labour Catchment

The age profile is marginally higher for those employed within Galway City than those employed elsewhere and is shown in Figure 3.9 below. A total of 19.9% (up from 18.8% in 2016) of all Galway City labour catchment workers employed in Galway City are aged 'less than 30 years' whereas the rate for workers elsewhere is 14.2% (down from 14.3% in 2016).







Figure 3.9: Age Profile of the Galway City labour catchment, 2022

Age	Workers living in the Galway City labour catchment								
	Total			Working in Galway City			Working elsewhere in Ireland		
<30	15,198	17.2%		9,281	19.9%		5,917	14.2%	
30-45	34,503	39.1%		18,706	40.2%		15,797	37.9%	
45-64	35,972	40.8%		17,647	37.9%		18,325	43.9%	
65+	2,580	2.9%		898	1.9%		1,682	4.0%	
Total	88,253	100%		46,532	100%		41,721	100%	

3.7.6 Gender

The gender composition of residents in the Galway City labour catchment is shown below. Within the Galway City labour catchment, female workers account for a larger proportion of the total workforce than their male counterparts with rates of 50.9% and 49.1% respectively. The rates in the Western Region are broadly similar with males accounting for 49% and females accounting for 51% of all workers. The national picture is slightly different with males (50.3%) accounting for a marginally higher rate than females (49.7%).

Figure 3.10: Gender Profile of the Galway City labour catchment, 2022

Gender	Workers living in the Galway City labour catchment								
	Total			Working in Galway City			Working elsewhere in Ireland		
Female	44,882	50.9%		24,676	53.0%		20,206	48.4%	
Male	43,371	49.1%		21,856	47.0%		21,515	51.6%	
Total	88,253	100%		46,532	100%		41,721	100%	

There is a variation between males and females in terms of the location of their work. A larger proportion of those residing in the Galway City labour catchment and employed in Galway City are female and account for 53% of all resident workers (Figure 3.10).

3. Galway City Labour Catchment

In contrast to this, those residing in the Galway City labour catchment and employed elsewhere are more likely to be males - accounting for 51.6% of all resident workers. This, in part, reflects traditional employment patterns where agricultural employment in rural areas accounted for a higher male employment rate outside of the city. In addition, employment sectors which are traditionally female sectors are concentrated in the city, for example retail, banking, finance, public administration and tourism.

An important point to note here is the fact that this analysis excludes all workers who reported not having a fixed place of employment i.e., those with a blank or uncodable place of work and those with a place of work classed as 'mobile' (81,661 Blank and Mobile workers in the Western Region or 21.7% of all resident workers).

3.7.7 Means of Travel

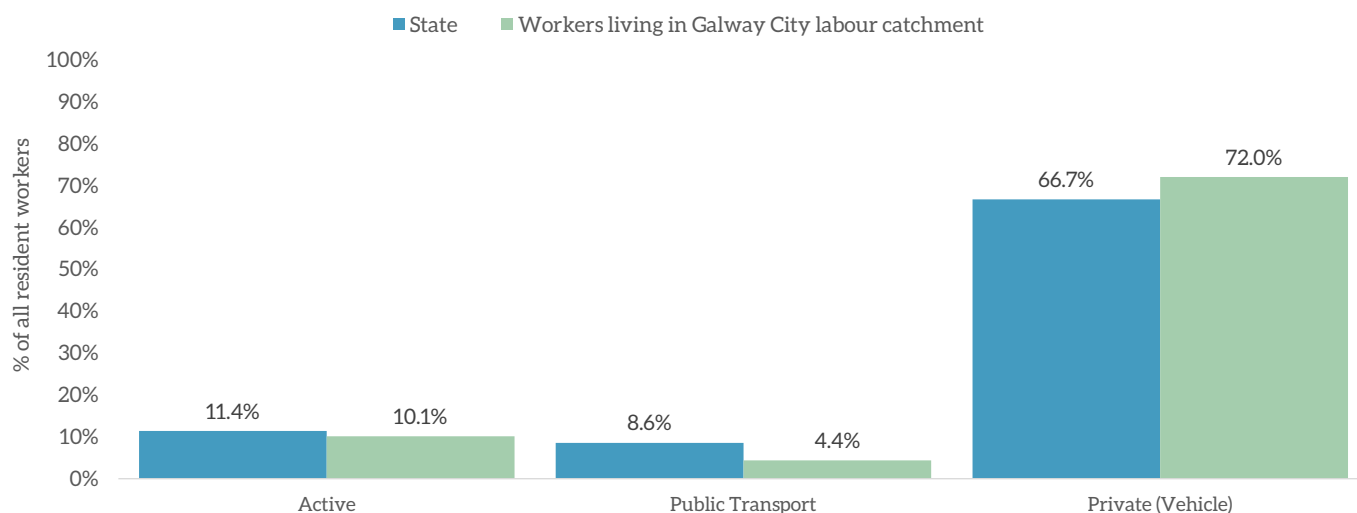
Nationally in 2022, commuting to work by car in Ireland was still the most popular means of travel, with 59% driving and a further 4% travelling as a passenger in a car. The proportion commuting by car did however fall slightly from 66% in 2016 to 63% in 2022. The second most popular way of getting to work was on foot, with 8.8% of commuters walking in 2022, down from 9.3% in 2016 and 11.5% in 2006. Commuting by bike remained at the same level as in 2016 (3%). The proportion of workers travelling by train, DART or LUAS remained at the same level as in 2011 (3%). Commuting by bus was at a similar level as in 2016 (6%), down from 6.4% in 2006.

As with the State trend, commuting to work by car (driver and car passenger) is by far the most dominant means of travel across the Western Region (71%). In fact, six of the eight Western Region local authorities are within the top ten highest rates across the State - Galway County (74.8%), Roscommon (74.3%), Clare (73.8%), Leitrim (73.2%), Mayo (72.6%) and Donegal (71.5%). This is unsurprising given the relative lack of public transport choices. The rate in Sligo is marginally lower at 69.8% with Galway City recording the third lowest rate in the State at 52.7%.

By grouping the modes of transport to work into three categories of 'Active' (walking and cycling), 'Public' (bus, train, DART/LUAS) and 'Private' (Car driver and passenger etc.) it is possible to develop a simple overview of the main modes of transport within and across the seven labour catchments (excluding Mobile and Uncodable workers).

Within the Galway City labour catchment, a total of 10.1% (8,957) used 'Active' modes, 4.4% (3,866) used 'Public' modes and 72% (63,541) used 'Private' modes of transport to employment destinations. This is the lowest rate amongst the seven labour catchments, see Figures 3.11 and 3.12 below.

Figure 3.11: Means of Travel for Resident Workers, 2022



As expected, there is a big variation in the modes used by resident workers who are employed in Galway City and those employed elsewhere. Those employed in Galway City have a much higher propensity to use ‘Active’ modes (13.8%) as opposed to those employed elsewhere (6.1%).

Figure 3.12: Means of Travel for Resident Workers - Working in the city vs elsewhere, 2022

Means of Travel	Workers living in the Galway City labour catchment								
	Total			Working in Galway City			Working elsewhere in Ireland		
Active	8,957	10.1%		6,418	13.8%		2,539	6.1%	
Public Transport	3,866	4.4%		3,054	6.6%		812	1.9%	
Private (Vehicle)	63,541	72.0%		32,276	69.4%		31,265	74.9%	
Total	76,364	86.5%		41,748	89.7%		34,616	83.0%	

Note: The percent columns above do not sum to 100% as the data only relates to Active, Public and Private modes of transport and excludes figures on those Working from Home or Not Stated.

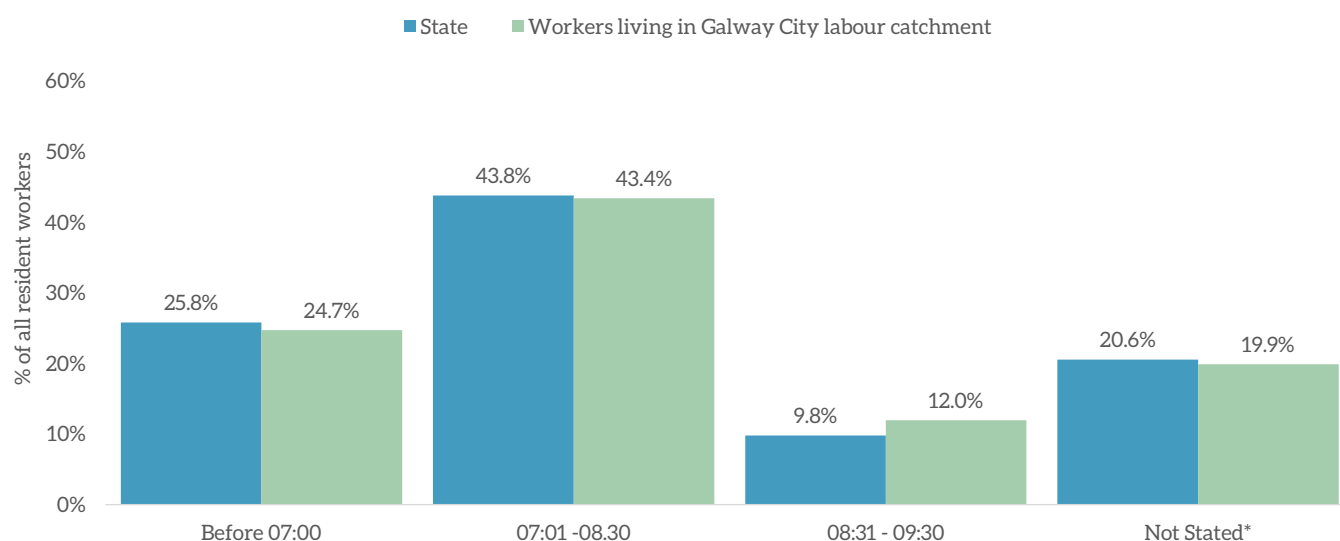
3.7.8 Travel Departure Times

In a change from the previous POWSCCAR publications since the 2016 Census, only the commuting details on the travel time departure of resident workers are provided and not distance travelled¹⁴. Figure 3.13 below details the overall ‘travel time departure’ distribution of all Galway City labour catchment resident workers.

The most common travel time departures are within the ‘07:01-8:30’ band and accounted for 43.4% of all resident workers in the labour catchment. The next most popular departure time is ‘Before 07:00’ - both recorded at approximately one in four of all workers for all Galway City labour catchment workers (24.7%) and workers in the State (25.8%).

¹⁴ | 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 travel indicator is based on the travel departure times of resident workers.

Figure 3.13: Departure Times for Resident Workers, 2022¹⁵



A comparison of the ‘travel-time departures’ of those working in Galway City and those working elsewhere shows some differences across the departure times. There is a higher share commuting to Galway City between ‘08:31-09:30’ than those commuting elsewhere. A total of 26.3% of Galway City bound workers residing in the labour catchment depart for work ‘Before 07:00’, slightly higher than the rate for workers travelling to other destinations (23%). This difference is expected and as a result of the wide geographic extent of the Galway City labour catchment from north Galway to north Clare and east towards Ballinasloe.

Figure 3.14: Departure Times for Resident Workers - Working in the city vs elsewhere, 2022

Departure Time	Workers living in the Galway City labour catchment								
	Total			Working in Galway City			Working elsewhere in Ireland		
Before 07:00	21,819	24.7%	<div style="width: 24.7%;"></div>	12,225	26.3%	<div style="width: 26.3%;"></div>	9,594	23.0%	<div style="width: 23.0%;"></div>
07:01-08:30	38,314	43.4%	<div style="width: 43.4%;"></div>	19,343	41.6%	<div style="width: 41.6%;"></div>	18,971	45.5%	<div style="width: 45.5%;"></div>
08:31-09:30	10,558	12.0%	<div style="width: 12.0%;"></div>	6,456	13.9%	<div style="width: 13.9%;"></div>	4,102	9.8%	<div style="width: 9.8%;"></div>
Not Stated*	17,562	19.9%	<div style="width: 19.9%;"></div>	8,508	18.3%	<div style="width: 18.3%;"></div>	9,054	21.7%	<div style="width: 21.7%;"></div>
Total	88,253	100%		46,532	100%		41,721	100%	

When viewing this table, caution should be advised as there is a high number included in the Not Stated category which includes those travelling after 9:30 (see Figure 3.14 above).

¹⁵ | In POWSCAR 2022, those travelling after 09:30 are included within the Not Stated category. This differs from previous reports in this series and in the full Census dataset where they are categorised separately.

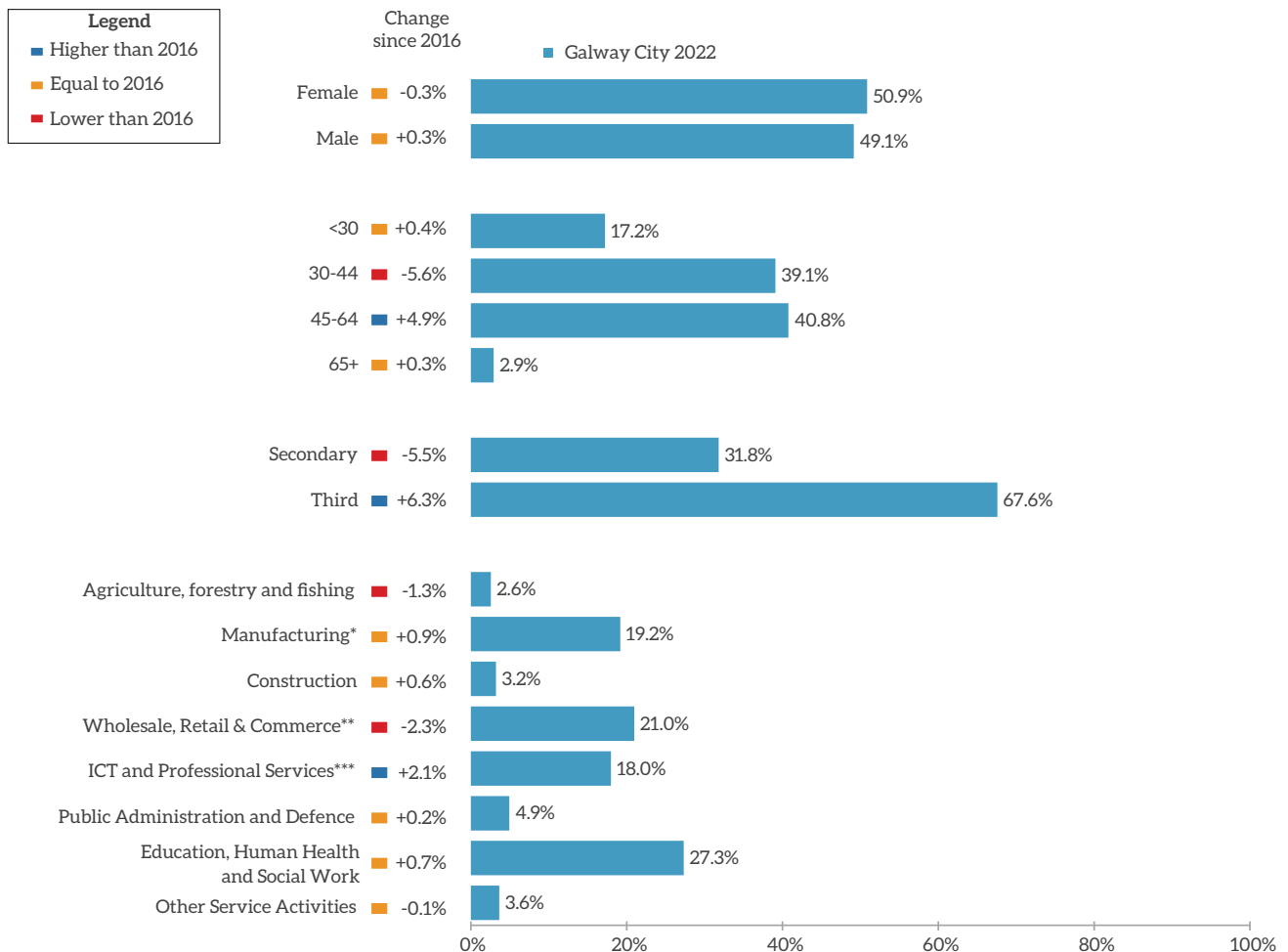
3. Galway City Labour Catchment

3.8 Analysis of change between 2016 and 2022

The graphic below details the change that has occurred across the Galway City labour catchment between 2016 and 2022. This is reviewed in the context of geographical changes and the socio-economic characteristics of those residing within the overall labour catchment. As already noted, the Galway City labour catchment is still the dominant labour catchment for large parts of central and mid-east Galway County. The geographical size of the Galway City labour catchment has expanded and now includes towns such Loughrea and Ballinrobe and additional EDs from areas in close proximity to Tuam and Ballinasloe, see maps in Section 3.9. Resulting from this expansion, the total resident workers residing in the labour catchment has increased to 88,253 from 70,170 in 2016 (+25.8% or +18,083) and from 64,455 in 2006 (+36.9% or +23,798).

Most notable changes in terms of socio-economic characteristics relate to the age of resident workers (increase in age 45-64), a more educated workforce (increase in third level attainment) a higher share engaged in the 'Manufacturing', the 'Education, Human Health and Social Work' and, in particular, 'ICT and Professional Services' related industries. As with the changing State profile, the Galway City labour catchment has also seen a decline in employment in 'Agriculture, forestry and fishing' and 'Wholesale, Retail & Commerce'.

Figure 3.15: 2022 Profile indication of change in key indicators since 2016 (comparison of % rates)



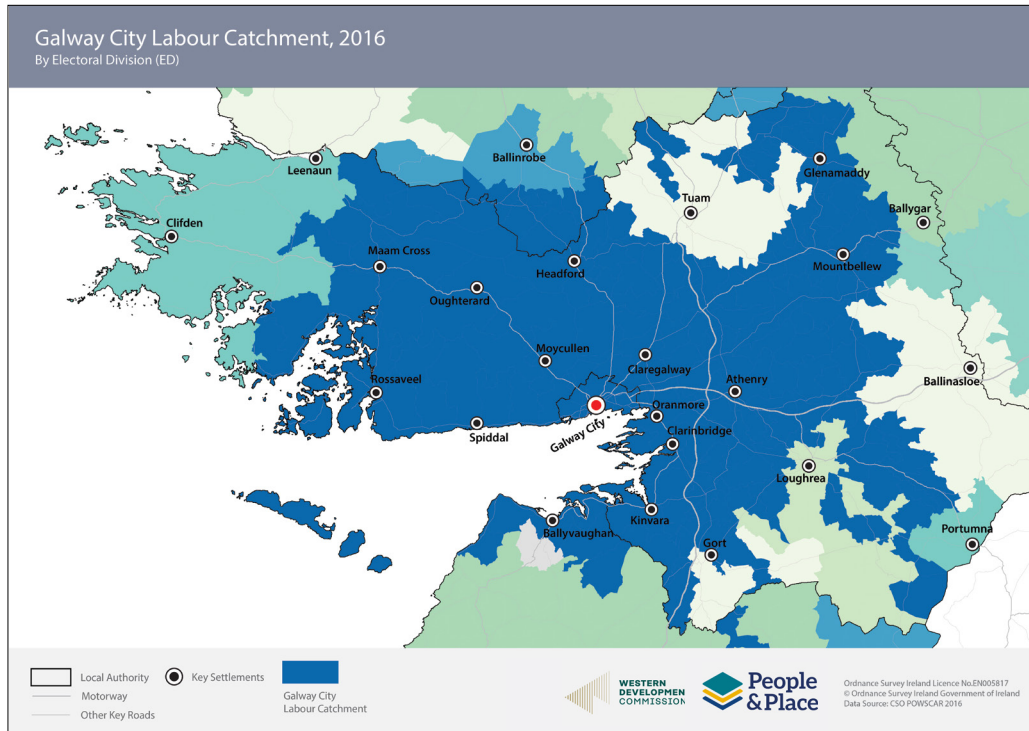
Note: with only nine classifications available, industrial classifications in POWSCCAR are less detailed than normal classifications in other Census outputs.
 *Manufacturing = Manufacturing, mining and quarrying, Electricity, Gas, Water supply and Waste Management
 **Wholesale, Retail etc. = Wholesale, 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.
 *For some percentage change figures there may be very minor rounding issues (0.1%) due to the fact that the graphic displays data at one decimal point only.

3. Galway City Labour Catchment

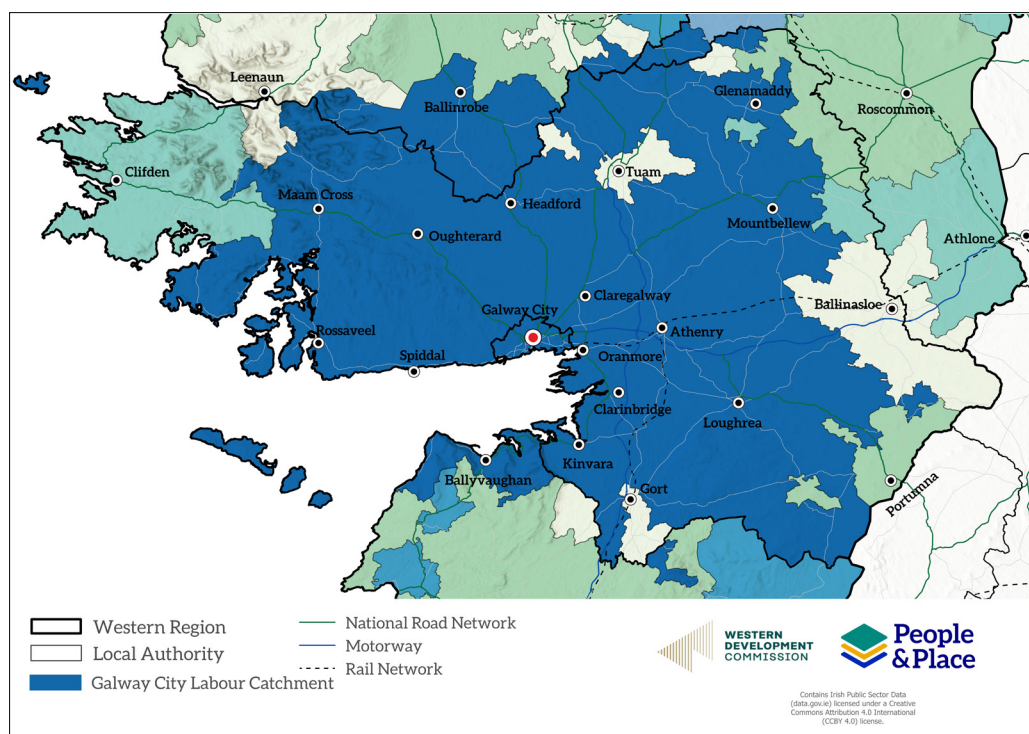
3.9 Analysis of labour catchment change between 2016 and 2022

The maps below detail the geographical changes that have taken place within the Galway City labour catchment and neighbouring labour catchments between 2016 and 2022. The extent of the Tuam labour catchment in 2022 is considerably smaller than that in the 2016 analysis. The labour catchments of Ballinrobe and Loughrea are now part of the wider Galway City labour catchment.

Map 3.4: Galway City labour catchment, 2016



Map 3.5: Galway City labour catchment, 2022

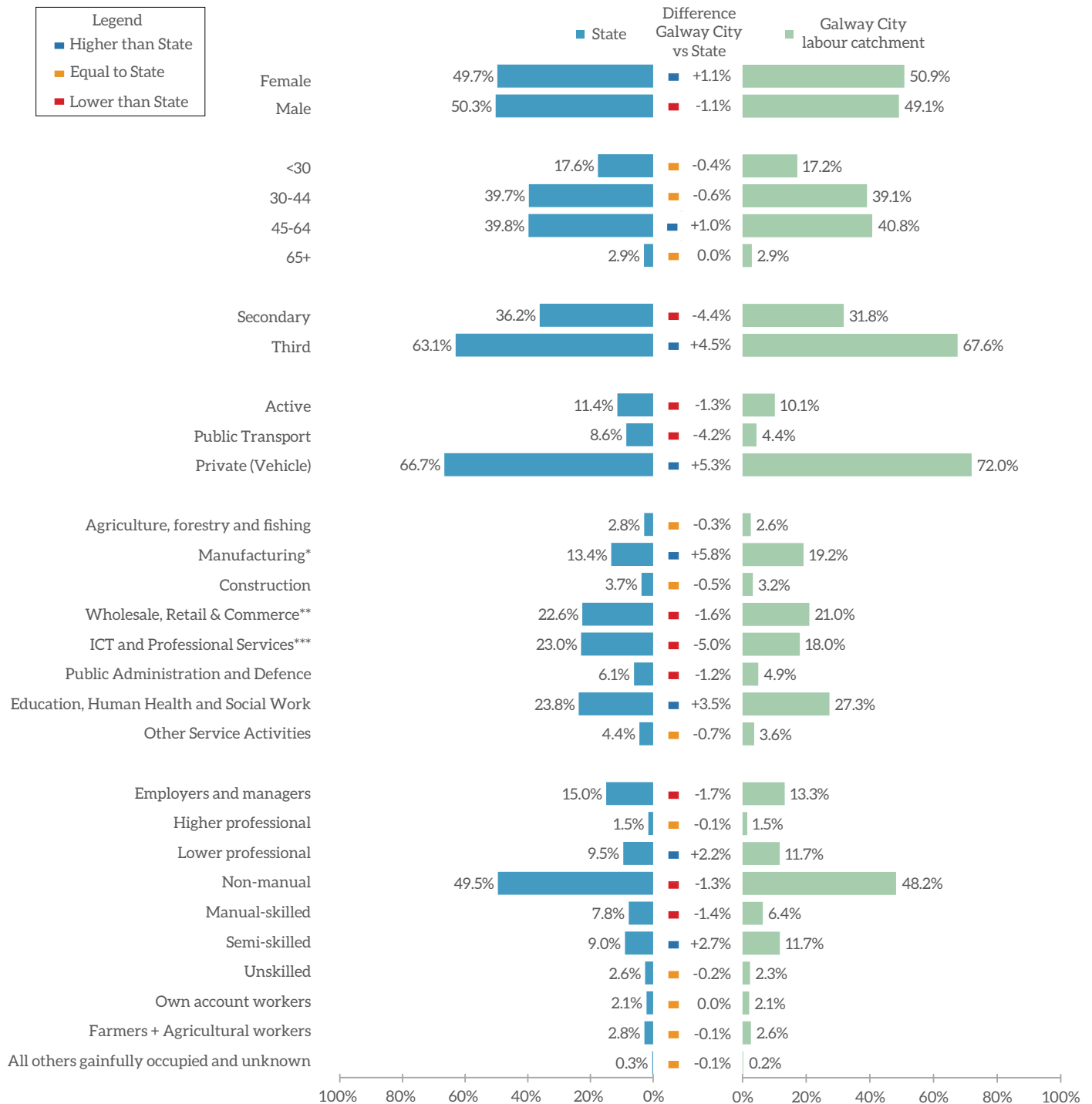


3. Galway City Labour Catchment

3.10 Galway City labour catchment comparison with the State, 2022

The graphic below details the socio-economic characteristics of resident workers within the Galway City labour catchment and provides a comparison with resident workers in the State (excludes those with a mobile or blank destination).

Figure 3.16: Comparison between State and Galway City labour catchment data for selected indicators



Note: with only nine classifications available, industrial classifications in POWSCCAR are less detailed than normal classifications in other Census outputs.

*Manufacturing = 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.

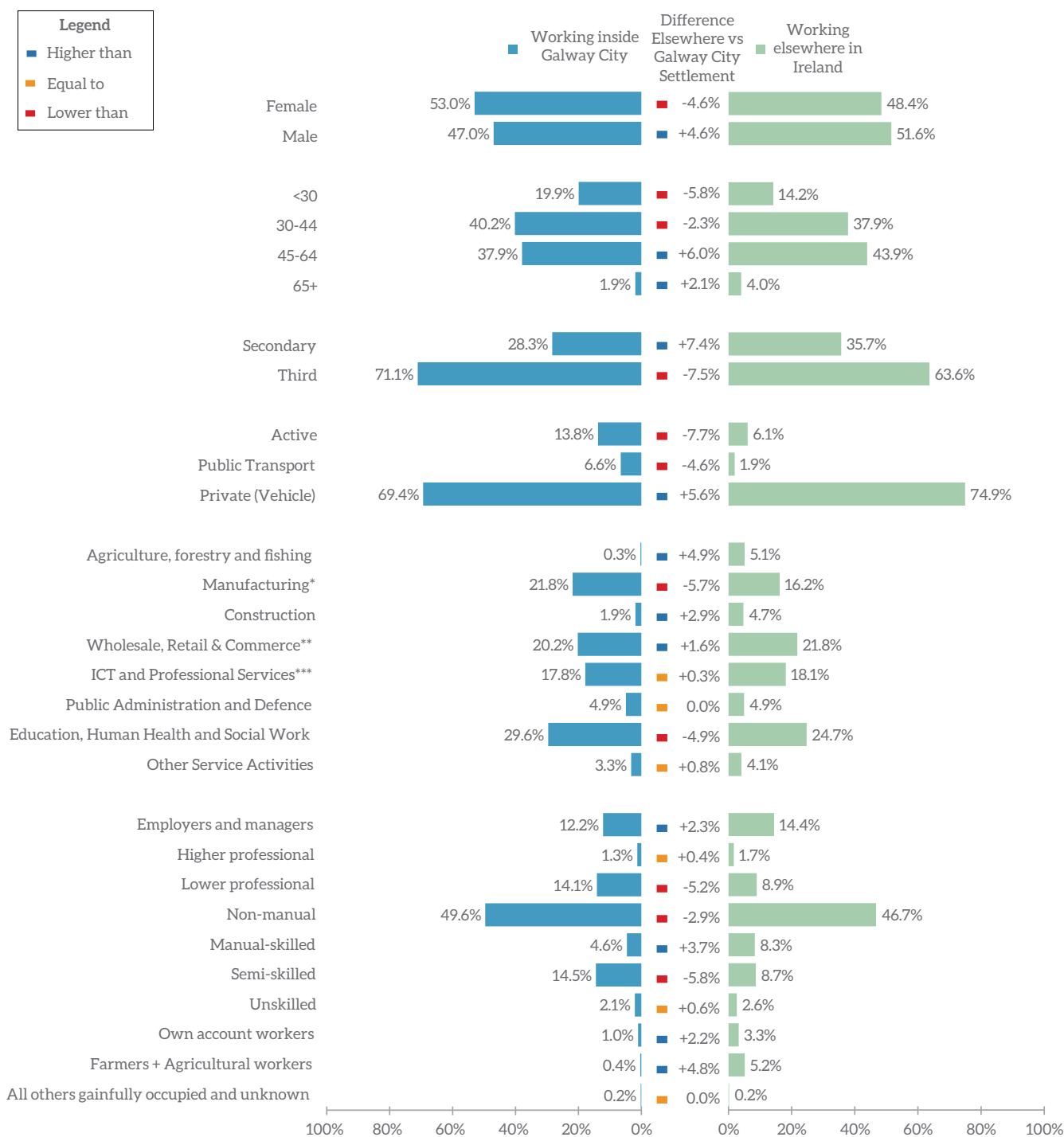
*For some percentage change figures there may be very minor rounding issues (0.1%) due to the fact that the graphic displays data at one decimal point only.

3. Galway City Labour Catchment

3.11 Galway City labour catchment - Employed within Galway City and elsewhere in Ireland comparison

The graphic below details the socio-economic characteristics of resident workers within the Galway City labour catchment who are employed in Galway City and those that are resident within the Galway City labour catchment but employed outside Galway City and elsewhere in Ireland.

Figure 3.17: Comparison between those working within Galway City and elsewhere in Ireland, 2022



Note: with only nine classifications available, industrial classifications in POWSCCAR are less detailed than normal classifications in other Census outputs.

*'Manufacturing' = 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.

*For some percentage change figures there may be very minor rounding issues (0.1%) due to the fact that the graphic displays data at one decimal point only.

3. Galway City Labour Catchment

3.12 Socio-Economic comparison of all seven labour catchments

The graphic below details the socio-economic characteristics of resident workers within the Galway City labour catchment and the other six main labour catchments in the Western Region; Carrick-on-Shannon, Castlebar, Ennis, Letterkenny, Roscommon town and Sligo town. These graphics allow comparisons of theme variables across all seven labour catchments and the State. For instance, the graphic below on education attainment reveals that the Galway City labour catchment has the highest proportion of resident workers with a third level qualification (67.6%) whereas the rate within the Ennis labour catchment is 62.5%.

3.12.1 Industry of Employment

Labour catchment	Agriculture, forestry and fishing	Manufacturing*	Construction	Wholesale, Retail & Commerce**	ICT and Professional Services***
Carrick-on-Shannon	3.9%	14.9%	3.6%	22.7%	15.5%
Castlebar	3.5%	15.8%	4.3%	24.7%	11.5%
Ennis	3.5%	17.6%	3.9%	22.2%	15.3%
Galway City	2.6%	19.2%	3.2%	21.0%	18.0%
Letterkenny	4.5%	8.7%	3.0%	23.6%	17.6%
Roscommon town	5.2%	13.8%	4.3%	21.7%	12.8%
Sligo town	3.5%	14.3%	2.7%	22.1%	13.5%
State	2.8%	13.4%	3.7%	22.6%	23.0%

Note: with only nine classifications available, industrial classifications in POWSCCAR are less detailed than normal classifications in other Census outputs.

*'Manufacturing' = 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.

Labour catchment	Public Administration and Defence	Education, Human Health and Social Work	Other Service Activities	Not Stated
Carrick-on-Shannon	10.9%	23.9%	4.3%	0.3%
Castlebar	8.0%	27.9%	4.1%	0.3%
Ennis	8.1%	25.0%	4.0%	0.3%
Galway City	4.9%	27.3%	3.6%	0.2%
Letterkenny	7.9%	29.9%	4.4%	0.4%
Roscommon town	11.0%	27.2%	3.7%	0.2%
Sligo town	9.8%	29.6%	4.2%	0.4%
State	6.1%	23.8%	4.4%	0.2%

3.12.2 Education Attainment

Labour catchment	Secondary	Third
Carrick-on-Shannon	37.0%	62.2%
Castlebar	41.2%	58.1%
Ennis	37.0%	62.5%
Galway City	31.8%	67.6%
Letterkenny	42.2%	57.2%
Roscommon town	41.9%	57.0%
Sligo town	36.3%	63.2%
State	36.2%	63.1%

3. Galway City Labour Catchment

3.12.3 Socio-Economic Group (SEG)

Labour catchment	Employers and managers	Higher professional	Lower professional	Non-manual	Manual-skilled
Carrick-on-Shannon	12.1%	1.5%	8.2%	51.6%	7.7%
Castlebar	12.0%	1.3%	8.0%	50.0%	8.4%
Ennis	13.0%	1.5%	8.5%	50.0%	8.3%
Galway City	13.3%	1.5%	11.7%	48.2%	6.4%
Letterkenny	10.7%	1.3%	7.0%	55.9%	7.0%
Roscommon town	11.3%	1.4%	6.4%	50.1%	10.4%
Sligo town	11.3%	1.6%	9.3%	53.6%	6.4%
State	15.0%	1.5%	9.5%	49.5%	7.8%

Labour catchment	Semi-skilled	Unskilled	Own account workers	Farmers + Agricultural workers	All others gainfully occupied and unknown
Carrick-on-Shannon	9.2%	2.4%	3.1%	4.0%	0.2%
Castlebar	11.2%	2.9%	2.5%	3.5%	0.2%
Ennis	9.3%	2.7%	2.9%	3.7%	0.2%
Galway City	11.7%	2.3%	2.1%	2.6%	0.2%
Letterkenny	8.4%	2.8%	2.3%	4.2%	0.3%
Roscommon town	9.9%	2.4%	2.4%	5.4%	0.4%
Sligo town	9.2%	2.4%	2.5%	3.5%	0.2%
State	9.0%	2.6%	2.1%	2.8%	0.3%

3.12.4 Means of Travel

Labour catchment	Active	Public Transport	Private (Vehicle)
Carrick-on-Shannon	6.8%	1.4%	80.0%
Castlebar	7.1%	0.9%	82.4%
Ennis	6.1%	1.2%	80.8%
Galway City	10.1%	4.4%	72.0%
Letterkenny	6.4%	1.1%	77.2%
Roscommon town	5.8%	1.4%	83.7%
Sligo town	9.7%	1.5%	73.5%
State	11.4%	8.6%	66.7%

3. Galway City Labour Catchment

3.12.5 Age Profile

Labour catchment	<30	30-44	45-64	65+
Carrick-on-Shannon	13.9%	39.1%	43.4%	3.6%
Castlebar	13.5%	37.5%	45.4%	3.6%
Ennis	14.1%	37.1%	45.6%	3.3%
Galway City	17.2%	39.1%	40.8%	2.9%
Letterkenny	16.4%	39.3%	41.7%	2.5%
Roscommon town	13.5%	38.4%	44.3%	3.8%
Sligo town	15.5%	37.0%	43.9%	3.5%
State	17.6%	39.7%	39.8%	2.9%

3.12.6 Gender Profile

Labour catchment	Female	Male
Carrick-on-Shannon	51.2%	48.8%
Castlebar	51.1%	48.9%
Ennis	51.4%	48.6%
Galway City	50.9%	49.1%
Letterkenny	51.4%	48.6%
Roscommon town	50.0%	50.0%
Sligo town	51.7%	48.3%
State	49.7%	50.3%

3.12.7 Time of Departure

Labour catchment	Before 07:00	07:01-08:30	08:31-09:30	Not Stated*
Carrick-on-Shannon	21.7%	48.8%	11.0%	18.4%
Castlebar	23.0%	47.9%	12.8%	16.3%
Ennis	24.6%	47.6%	9.9%	17.9%
Galway City	24.7%	43.4%	12.0%	19.9%
Letterkenny	19.6%	51.6%	11.8%	17.0%
Roscommon town	21.8%	50.1%	10.1%	17.9%
Sligo town	21.0%	49.8%	12.4%	16.8%
State	25.8%	43.8%	9.8%	20.6%

*In POWSCCAR 2022, those travelling after 09:30 are included within the Not Stated category. This differs from previous reports in this series and in the full Census dataset where they are categorised separately.



**WESTERN
DEVELOPMENT
COMMISSION**



**People
& Place**



Western Development Commission
Dillon House, Ballaghaderreen,
Co. Roscommon, Ireland.
Tel: +353 (0) 94 9861441
Email: info@wdc.ie

www.westerndevelopment.ie