



WESTERN
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People
& Place

Travel to Work and Labour Catchments in the Western Region



Letterkenny Labour Catchment

2024

5. Letterkenny Labour Catchment

1. A graphical illustration of travel to work patterns and commuting flows (Section 5.5) and the overall labour catchment of the town (Section 5.6);
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 5.7); 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, Galway City, Roscommon town and Sligo town) (Section 5.8-5.12).

5.3 The importance of Letterkenny as a place of work

The official CSO settlement of Letterkenny had a population of 22,549 persons recorded in the 2022 Census. Letterkenny is the third largest urban centre within the Western Region (Galway City is the largest, followed by Ennis) and the 21st largest in the State. Since 2006, the population residing within the town of Letterkenny has increased by +28.2% (+4,963)².

Population

In the most recent intercensal period 2016 to 2022, the population of Letterkenny has increased by +17% (+3,275). This rate of growth is much higher than that of the State (+8.1%) and higher than the Western Region (+7%) between 2016 and 2022. A number of other towns across Donegal have seen significant population growth since 2016 with the highest rates in Bundoran (+32%) and Ballybofey/Stranorlar (+11%).

Labour Force

Since Census 2016 there has been an increase in the numbers living in Letterkenny that are in the labour force (those at work and unemployed) and those classed as being at work³. Between 2016 and 2022, the labour force in Letterkenny has increased by +15.5% (from 9,522 to 10,994). The number of residents at work has increased by +25.3% (from 7,761 to 9,723). Conversely, the number classed as unemployed has decreased by -27.8% (from 1,761 to 1,271). The +25.3% increase in those at work in Letterkenny has been much higher than in the State (+15.6%), the Western Region (+14.6%) and County Donegal (+16.5%).

Daytime Working Population

According to POWSCCAR 2022, the total number of jobs located within the Letterkenny boundary was 13,109 and accounted for 4.8% of all jobs located within the Western Region (272,860)⁴. Of all cities and towns in Ireland, Letterkenny has the twelfth highest number of jobs located within the town boundary and accounted for 28.2% of all jobs located within County Donegal (46,498). Relative to the six other main towns/city in this report, Letterkenny has the third highest number of jobs with higher numbers in Galway City (51,211) and Sligo town (13,562) and lower numbers in Ennis (10,628), Castlebar (9,911), Roscommon town (4,315) and Carrick-on-Shannon (3,145). The ratio of local jobs (13,109) to resident workers (9,647) in the town is 1.36 indicating the importance of the town to the regional labour market.

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| Census and POWSCCAR data only capture those who are resident in Ireland and does not include for example those living in Northern Ireland and commuting to Letterkenny for work.

4| 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 town of Letterkenny.

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Between 2016 and 2022, there was an increase of +15% (+1,714) jobs located in Letterkenny. This was the second highest increase of the seven main towns/city within this report with the highest rate of jobs growth in Galway City (+15.4%) and lower increases in Roscommon town (+10.2%), Carrick-on-Shannon (+9.7%), Castlebar (+9.6%), Ennis (+4.5%) and Sligo town (+4.1%)⁵. Over the same period, the number of jobs in County Donegal increased by +17% (+6,771) and the Western Region as a whole by +12.4% (+30,148) from 242,712 to 272,860. Letterkenny accounted for 25.3% of the total new jobs in Donegal since 2016.

5.4 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 legislation⁶. 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%)⁷. 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 County Donegal a total of 7,010 (10.5%) resident workers were recorded as mainly working from home in Census 2022. This represents a +91% (+3,340) increase from the number in 2016 (3,670 or 6.5% of resident workers). Resulting from the increased incidence in working from home, the employment base in Donegal 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.

As the data will show, there is considerable commuting between Ireland and Northern Ireland (and vice versa). Capturing the detail of this and flows from Ireland to Northern Ireland is beyond the scope of this report. For example, the CSO reported that in 2022, 7,777 people commuted across the border for work. This was an increase of +11% since 2016. The most popular county was Derry, with 38% of the commuters working here (see [CSO](#)). Most of these (95%) came from Donegal. Separately, the Northern Ireland Census (2021) provided data on commuting from Northern Ireland to Ireland. For example, 10,884 persons residing in Northern Ireland are working or studying in Ireland (see [NISRA](#)).

5 | 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.

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

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

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5.5 Employment based commuting patterns to Letterkenny

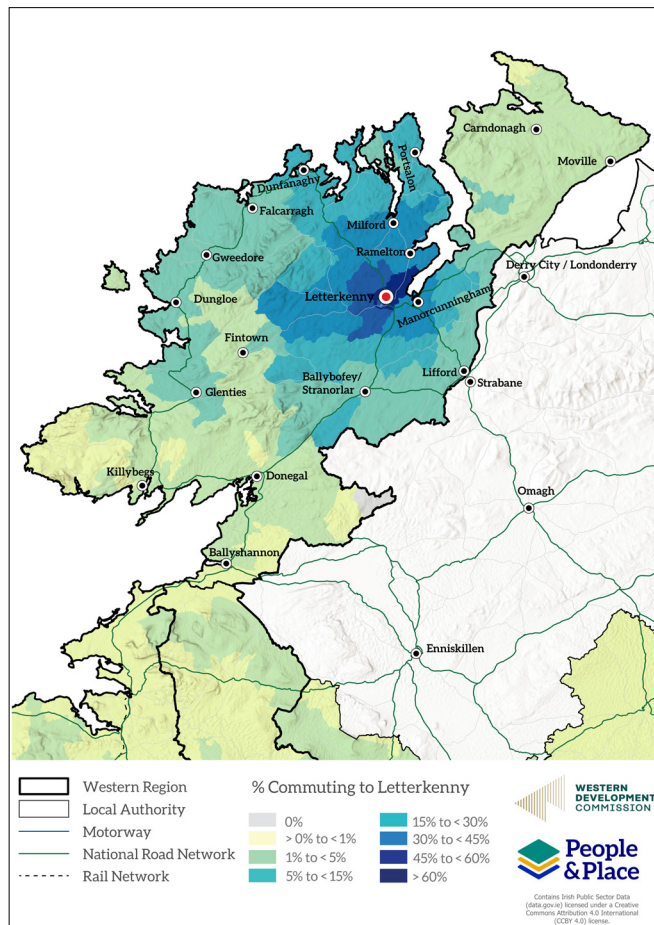
Map 5.2 shows the extent of commuting flows to Letterkenny for work opportunities. The colours represent the proportions of people at work who live in each ED and travel to work in Letterkenny.

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. Letterkenny, Galway City 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 5.2: Commuting Flows into Letterkenny, 2022



Source: CSO POWSCCAR

As 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 perimeter (30% to >60%). Beyond these areas, the proportion travelling to the town gradually declines and is illustrated on the map; graduating from the darker green areas (Portsalon and Dunfanaghy) where between 15% and 30% of resident workers in those EDs work in Letterkenny, through to medium green (Falcarragh, Lifford, Ballybofey/Stranorlar, Fintown, Glenties, Dungloe and Gweedore) where between 5% and 15% of resident workers in those EDs commute to work in Letterkenny. The remainder of Donegal has relatively low rates of commuting to Letterkenny with rates in Carndonagh, Moville, Ballyshannon, Donegal town and Killybegs all below 5%.

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5.6 Identifying the Letterkenny labour catchment

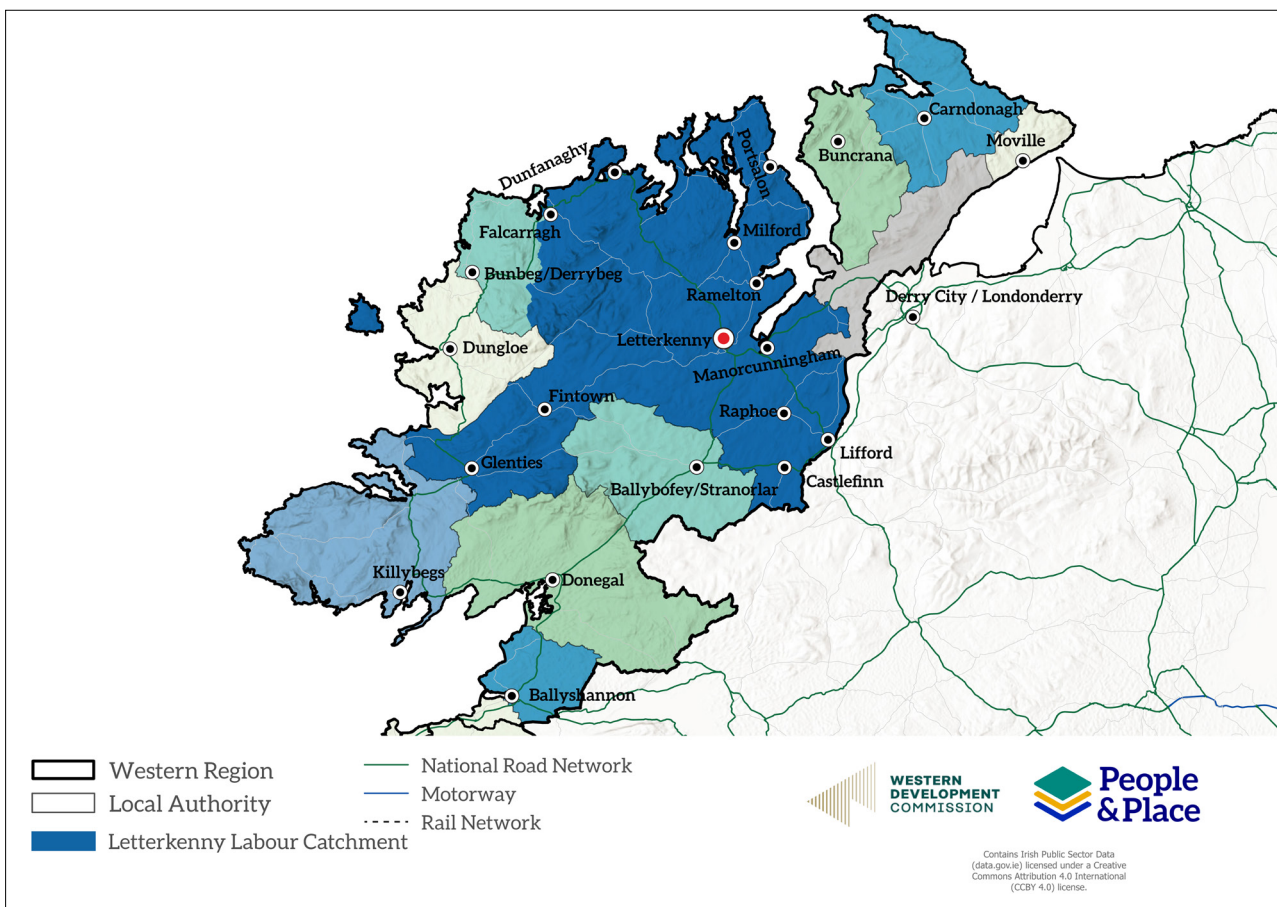
While Map 5.2 shows EDs from where even one person commuted to Letterkenny, all of these EDs are not included in the Letterkenny labour catchment. The Letterkenny labour catchment is based on only those EDs for which Letterkenny is the most popular work destination for resident workers. Other EDs, whose 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 ED⁸.

Map 5.3 shows the Letterkenny labour catchment as depicted by the dark blue colour. While the labour catchment extends to large parts of the county, it excludes southeast areas of Donegal, which form part of the Ballybofey/Stranorlar labour catchment and northern and eastern Donegal, which includes the smaller labour catchments of Bunrana, Carndonagh, Merville (new labour catchment since 2016). The grey area along the eastern border is part of the Northern Ireland (Derry) labour catchment. Bunbeg/Derrybeg and Dungloe labour catchments are along the west coast of Donegal.

Map 5.3: Letterkenny labour catchment, 2022



Source: CSO POWSCCAR

⁸ For a more detailed explanation of the methodology, see Appendix.

5. Letterkenny Labour Catchment

In summary, Letterkenny is an important employment destination, but its influence is mainly within central Donegal. In particular, Letterkenny is the key economic attraction for the immediate areas surrounding the town, central and east Donegal (Ramelton, Manorcunningham, Lifford etc.) and then the midwest coastal areas stretching from Glenveagh to Portsalon (see Section 5.9).

In 2022, there were 23,503 people classified as at work and living within the Letterkenny labour catchment (8% of all Western Region resident workers). Interestingly, Letterkenny is now the third largest labour catchment in the Western Region, behind only Galway City (88,253) and Sligo town (24,382). The Letterkenny labour catchment has a population at work 2.4 times larger than the town of Letterkenny (23,503 to 9,647 respectively). While the geographical size of the Letterkenny labour catchment has remained relatively static since 2016, the total resident workers residing in the labour catchment has increased by +19.2% since 2016 (from 19,717) and by +31.4% since 2006 (from 17,886).

5.7 Profile of the Letterkenny labour catchment

Map 5.3 above identified the Letterkenny 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 Letterkenny town in April 2022. This is important as including those who live in the labour catchment and working elsewhere provides a more complete assessment of the potential labour supply for Letterkenny.

The Letterkenny labour catchment is therefore composed of those who live in and are employed within the town (**Working in Letterkenny**) and those who live in the labour catchment but work outside the town e.g. other towns such as Ballybofey/Stranorlar, rural areas and locations outside the Western Region such as Northern Ireland etc. (**Working elsewhere in Ireland**)⁹.

This profile is further supported by an analysis of changes in the labour catchment between 2016 and 2022 (Section 5.8 and Section 5.9), both in terms of geography and socio-economic characteristics, a comparison profile of the Letterkenny labour catchment relative to the State (Section 5.10), a comparison profile of those 'Working in Letterkenny' and 'Working elsewhere in Ireland' (Section 5.11) and a comparison profile of the Letterkenny labour catchment and the six other main towns/city within the Western Region (Section 5.12).

5.7.1 Place of Work

The Letterkenny labour catchment can be seen to include large parts of Donegal, but is mainly contained within central areas and the northwest. In Figures 5.1 and 5.2 the main work locations for those who live in the Letterkenny labour catchment are set out. Those who work mainly from home in the Letterkenny labour catchment (n=3,500)¹⁰ are coded with their home location as their place of work i.e., a resident worker from Letterkenny who works mainly from home is coded with their place of work as Letterkenny.

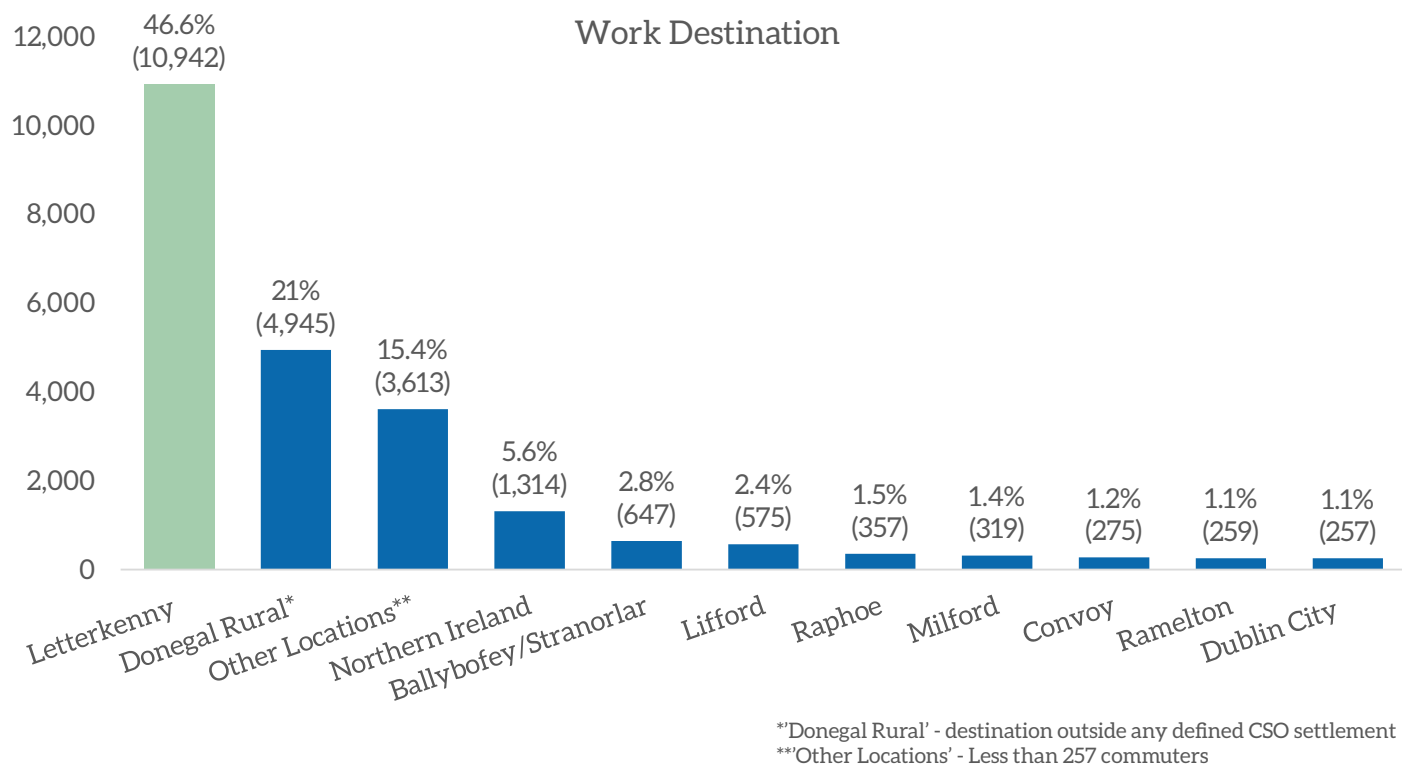
⁹ | Note: 'Working elsewhere in Ireland' refers to working anywhere beyond the town boundary, which could include suburbs outside the town boundary to more distant locations such as Dublin City.

¹⁰ | Of the 3,500 coded as working from home in the Letterkenny labour catchment, 1,270 are coded as both living in and working in the Letterkenny settlement.

5. Letterkenny Labour Catchment

As expected, Letterkenny town is the principal place of employment for those living in the labour catchment, accounting for 10,942 (46.6%) of all employment - although this share has decreased since 2016 (47.5%). Of the seven labour catchments reviewed here, the Letterkenny labour catchment has the second highest proportion of resident workers commuting to its' centre, with only Galway City higher at 51.5%. Higher rates indicate that the town/city is a particularly attractive employment centre to the resident workers in the labour catchment. Conversely, lower rates suggest that alternative employment locations play a more important role than the key town/city (i.e., Letterkenny). Employment in rural parts of County Donegal (destination outside any defined CSO settlement) is the next most popular destination and accounted for just over a fifth of all resident workers (21% or 4,945).

Figure 5.1: Key Destinations of resident workers in the Letterkenny labour catchment, 2022



The other large employment destinations for residents within the Letterkenny labour catchment are important towns in close proximity to Letterkenny; Ballybofey/Stranorlar, Lifford, Raphoe, Milford, Convoay and Ramelton.

Both Northern Ireland (1,314 or 5.6%) and Dublin City (257 or 1.1%) are also highlighted as key destinations for Letterkenny labour catchment residents. Dublin City has an increased in prominence as an employment destination (+29.8% or +59 additional workers) and Northern Ireland has increased slightly in prevalence as an employment destination from 2016 (+17.6% or +197 additional workers) (see Figure 5.2 below). Many of these are likely to work 1-2 days a week from home. Those who work mainly from home are recorded as working at their place of residence, therefore of the 7,010 in County Donegal reported as working from home, their actual office base may be much further away, for example, Dublin City, across Northern Ireland and elsewhere.

In total, 3,613 resident workers in the Letterkenny labour catchment are employed across a range of other settlements with commuting flows less than 257. This accounted for 15.4% of all resident workers in the labour catchment.

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In summary, the Letterkenny labour catchment comprises nearly half (46.6% or 10,942) of resident workers who are employed in Letterkenny town with the remaining workers (53.4%) employed in locations outside of the town.

Figure 5.2: 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
Letterkenny	10,942	1,568	16.7%	46.6%	-1.0%
Donegal Rural*	4,945	573	13.1%	21.0%	-1.1%
Other Locations**	3,613	935	N/A	15.4%	N/A
Northern Ireland	1,314	197	17.6%	5.6%	-0.1%
Ballybofey/Stranorlar	647	79	13.9%	2.8%	-0.1%
Lifford	575	44	8.3%	2.4%	-0.2%
Raphoe	357	13	3.8%	1.5%	-0.2%
Milford	319	11	3.6%	1.4%	-0.2%
Convoy	275	85	44.7%	1.2%	0.2%
Ramelton	259	81	45.5%	1.1%	0.2%
Dublin City	257	59	29.8%	1.1%	0.1%
Total	23,503	3,786	19.2%		

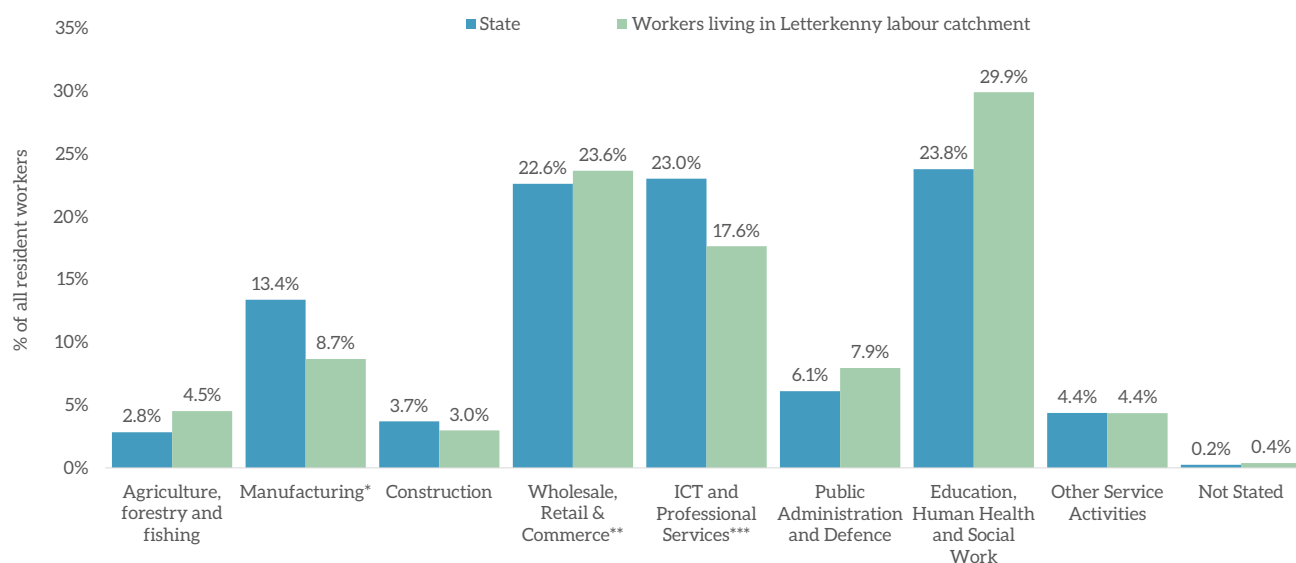
5.7.2 Employment by Industrial Group

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 Letterkenny labour catchment is shown in Figure 5.3. The 'Education, Human Health and Social Work' sector is the most important employer and accounted for nearly thirty percent of all resident workers (29.9%). The second largest sector is the 'Wholesale, Retail Trade, Transportation and Storage, Accommodation and Food Service Activities' sector which accounted for nearly a quarter of resident workers (23.6%) in the Letterkenny labour catchment. The 'Information and Communication, Financial, Real Estate, Professional, administration and support service activities' sector (17.6%) and the 'Manufacturing, mining and quarrying, Electricity, Gas, Water supply and Waste Management' sector (8.7%) and are the next largest sectors for labour catchment resident workers with all other sectors accounting for 8% or less.

5. Letterkenny Labour Catchment

Figure 5.3: Industrial Profile of the Letterkenny labour catchment and the State, 2022



Relative to the national picture, the ‘Education, Human Health and Social Work’, ‘Public Administration and Defence’ and the ‘Wholesale, Retail and Commerce’ sectors play a more important role in the overall employment base. The ‘Education, Human Health and Social Work’ sector’s share of employment (29.9%) is 6.1 percentage points higher than the State average (23.8%) and the other two sectors are 1.8 percentage points and 1 percentage points higher respectively. The ‘Manufacturing’ sector (8.7%) is 4.7 percentage points lower than the State average (13.4%) and the ‘ICT and Professional Services’ sector recorded a rate of 17.6% whereas the State average was 23%¹¹.

Across the seven labour force catchments, Letterkenny does not appear to have any particular industrial specialisation although it recorded the highest proportion in the ‘Education, Human Health and Social Work’ sector and recorded the lowest proportion employed in the ‘Manufacturing’ sector and the second highest in ‘ICT and Professional Services’ sector. As such, the labour catchment is quite heavily reliant on public sector employment.

As seen in Figure 5.4 below, the industrial groups which saw the largest proportional increases between 2016 and 2022 were the ‘ICT and Professional Services’ sector (+2.3 percentage points), the ‘Manufacturing’ sector (+0.6 percentage points) and the ‘Education, Human Health and Social Work’ sector (+0.6 percentage points). In contrast, the largest proportionate declines have been in the ‘Agriculture, forestry and fishing’ sector (-1.2 percentage points) and the ‘Wholesale, Retail & Commerce’ sector (-3.4 percentage points). These declines also occurred nationally with Agriculture, Retail and Wholesale sectors all witnessing the largest declines in employment share.

¹¹ | 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 5.4: Industrial Profile of the Letterkenny labour catchment in 2016 and 2022

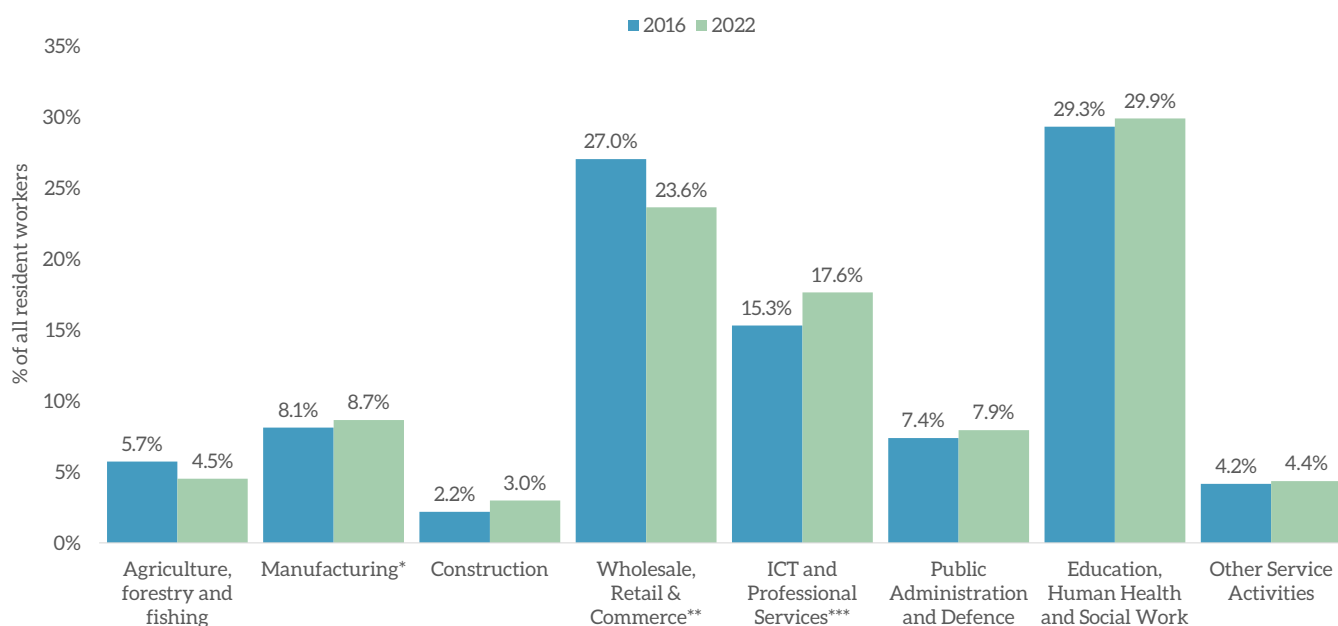


Figure 5.5 below details the industry of employment of the Letterkenny labour catchment by the location of employment – working within Letterkenny town or working elsewhere. Employment in the ‘Education, Human Health and Social Work’ (35%), ‘Wholesale, Retail and Commerce’ (24%) and ‘ICT and Professional Services’ (21.3%) sectors are more dominant among those employed within Letterkenny town. The ‘Manufacturing’ (10.1%) and ‘Agriculture, forestry and fishing’ (8.1%) sectors have a higher share of employment outside the town than within.

Figure 5.5: Industrial Profile of the Letterkenny labour catchment, 2022

Industry	Workers living in the Letterkenny labour catchment							
	Total		Working in Letterkenny town		Working elsewhere in Ireland			
Agriculture, forestry and fishing	1,063	4.5%	52	0.5%	1,011	8.1%		
Manufacturing*	2,035	8.7%	775	7.0%	1,260	10.1%		
Construction	701	3.0%	143	1.3%	558	4.5%		
Wholesale, Retail & Commerce**	5,555	23.6%	2,646	24.0%	2,909	23.3%		
ICT and Professional Services***	4,145	17.6%	2,344	21.3%	1,801	14.4%		
Public Administration and Defence	1,867	7.9%	729	6.6%	1,138	9.1%		
Education, Human Health & Social Work	7,024	29.9%	3,853	35.0%	3,171	25.4%		
Other Service Activities	1,023	4.4%	449	4.1%	574	4.6%		
Not Stated	90	0.4%	19	0.2%	71	0.6%		
Total	23,503	100%	11,010	100%	12,493	100%		

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5.7.3 Socio-Economic Group

The socio-economic structure of employment in the Letterkenny labour catchment is set out in Figure 5.6. 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 structure¹².

The socio-economic structure of the labour catchment of Letterkenny is broadly similar to that of the State with the largest group by far being 'Non-manual'¹³ (55.9%), although this category is 6.4 percentage points higher than the State average at 49.5%. As with the State, the next largest category in the Letterkenny labour catchment is 'Employers and Managers' at 10.7%. Relative to the other six key labour catchments, the Letterkenny labour catchment recorded the smallest proportion of resident workers classed as 'Employers and Managers' (Galway City labour catchment is the highest at 13.3%). Following these, the three categories of 'Semi-skilled', 'Manual-skilled' and 'Lower professional' all account for approximately 7-8% of the resident workforce. 'Farmers and Agricultural Workers' account for 4.2% of all resident workers in the labour catchment.

Figure 5.6: Socio-Economic Group (SEG) Profile of the Letterkenny labour catchment and the State, 2022

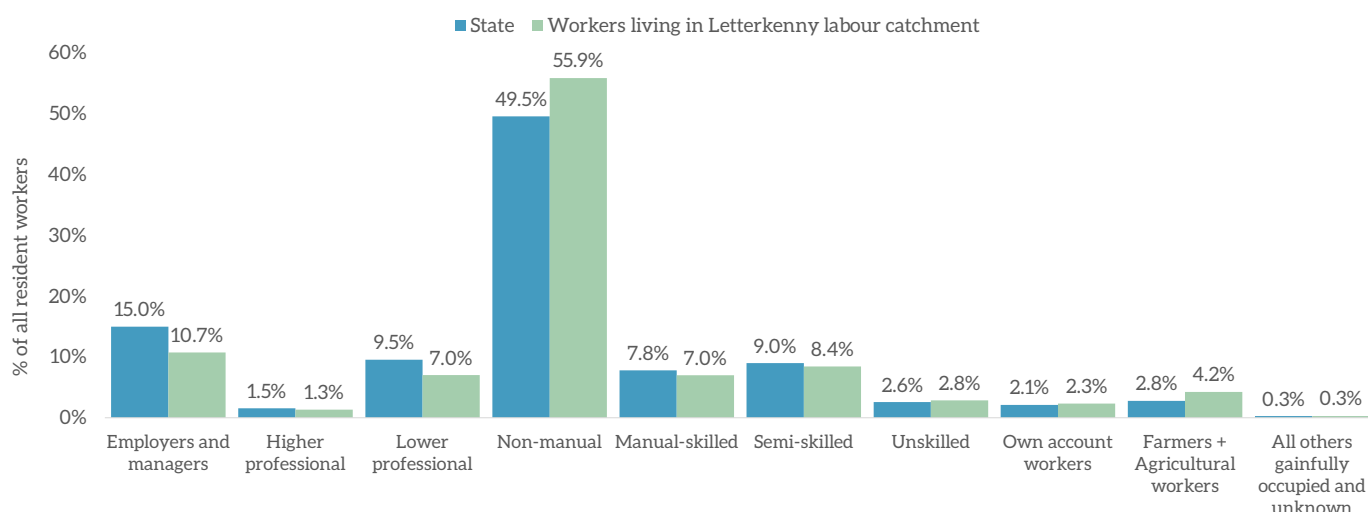


Figure 5.7 below details the socio-economic structure breakdown for those working within Letterkenny town and those working outside Letterkenny town. The largest difference between the 'town' and 'elsewhere' group is within the 'Non-manual' group (62.9% in Letterkenny town vs 49.7% in job locations outside Letterkenny town) which relates to persons working in retail, government, banking and other areas fulfilling administrative roles. Those working outside Letterkenny town, in mostly rural areas, also have a higher proportion of workers as part of the 'Farmers and Agricultural workers' grouping (7.6% working outside the town vs 0.4% working in the town).

12 | 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).

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

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Figure 5.7: Socio-Economic Group (SEG) Profile of the Letterkenny labour catchment, 2022

Socio-Economic Group (SEG)	Workers living in the Letterkenny labour catchment							
	Total		Working in Letterkenny town		Working elsewhere in Ireland			
Employers and managers	2,523	10.7%	1,135	10.3%	1,388	11.1%		
Higher professional	312	1.3%	133	1.2%	179	1.4%		
Lower professional	1,647	7.0%	855	7.8%	792	6.3%		
Non-manual	13,127	55.9%	6,922	62.9%	6,205	49.7%		
Manual-skilled	1,641	7.0%	549	5.0%	1,092	8.7%		
Semi-skilled	1,981	8.4%	878	8.0%	1,103	8.8%		
Unskilled	668	2.8%	315	2.9%	353	2.8%		
Own account workers	547	2.3%	154	1.4%	393	3.1%		
Farmers + Agricultural workers	993	4.2%	47	0.4%	946	7.6%		
All others gainfully occupied and unknown	64	0.3%	22	0.2%	42	0.3%		
Total	23,503	100%	11,010	100%	12,493	100%		

5.7.4 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 5.8 details the average education profile among those resident workers in the Letterkenny labour catchment with 57.2% having completed third level education - this is lower than the rate of 63.1% for workers nationally. The rate for the Western Region was recorded at 61%¹⁴.

14 | At the local authority level, Galway City recorded the second highest rate in the State at 72%. The rate for County Donegal resident workers was recorded at 54.8% - this is the 6th lowest rate in the State. 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).

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Figure 5.8 below details the education attainment levels for all workers, those employed within the town and those employed elsewhere. There is a difference between the education attainment of those who are employed within Letterkenny town (61.1% with third level) and those employed elsewhere (53.8% with third level). This relates to the industrial profile of jobs located with the town in the public sector and 'ICT and Professional Services'.

Figure 5.8: Education Attainment Profile of the Letterkenny labour catchment, 2022

Education Attainment	Workers living in the Letterkenny labour catchment								
	Total			Working in Letterkenny town			Working elsewhere in Ireland		
Secondary	9,918	42.2%		4,216	38.3%		5,702	45.6%	
Third	13,446	57.2%		6,729	61.1%		6,717	53.8%	
Not Stated	139	0.6%		65	0.6%		74	0.6%	
Total	23,503	100%		11,010	100%		12,493	100%	

Relative to the other main labour catchments in this analysis, Letterkenny has the third highest level of third level attainment of those employed within the town. With a recorded rate of 61.1% with third level education employed in Letterkenny town only Galway City (71.1%) and Sligo town (65.6%) labour catchments have higher rates of third level educated workers employed within the town. 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.

5.7.5 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 in the Western Region as follows: Roscommon County (13.7%), Leitrim (13.9%), Mayo (13.9%), Clare (15%) and Sligo County (15.3%). With the exception of Galway City, Donegal recorded the highest rate in the Western Region at 16%.













The age profile of those at work and over 15 years who live in the Letterkenny labour catchment is shown in Figure 5.9. The proportion of young workers (<30 years) residing within the Letterkenny labour catchment (16.4%) is lower than the overall State average of 17.6%. Relative to other towns in this analysis, the age profile of the Letterkenny labour catchment is younger than the other larger labour catchments. Within the Letterkenny labour catchment, 16.4% of resident workers are aged <30 years only Galway City labour catchment has a higher rate (17.2%).

5. Letterkenny Labour Catchment

The slightly younger age profile in Letterkenny may be explained by a number of factors. Letterkenny has a third level institute within the town (ATU Donegal). There are also significant employment opportunities in adjacent centres such as Derry City, which mean people may continue to live in the labour catchment but commute to employment opportunities beyond.

The age profile is broadly similar for those employed within Letterkenny town and those employed elsewhere, shown in the data presented in Figure 5.9 below. A total of 16.9% (down from 18.3% in 2016) of all Letterkenny labour catchment workers employed in Letterkenny town are aged 'less than 30 years' whereas the rate for workers elsewhere is 16% (+0.3 higher than the 2016 rate).







Figure 5.9: Age Profile of the Letterkenny labour catchment, 2022

Age	Workers living in the Letterkenny labour catchment								
	Total			Working in Letterkenny town			Working elsewhere in Ireland		
<30	3,855	16.4%		1,857	16.9%		1,998	16.0%	
30-45	9,240	39.3%		4,526	41.1%		4,714	37.7%	
45-64	9,811	41.7%		4,437	40.3%		5,374	43.0%	
65+	597	2.5%		190	1.7%		407	3.3%	
Total	23,503	100%		11,010	100%		12,493	100%	

5.7.6 Gender

The gender composition of resident workers 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 51.4% and 48.6% 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 5.10: Gender Profile of the Letterkenny labour catchment, 2022

Gender	Workers living in the Letterkenny labour catchment								
	Total			Working in Letterkenny town			Working elsewhere in Ireland		
Female	12,091	51.4%		6,206	56.4%		5,885	47.1%	
Male	11,412	48.6%		4,804	43.6%		6,608	52.9%	
Total	23,503	100%		11,010	100%		12,493	100%	

5. Letterkenny Labour Catchment

There is a variation between males and females in terms of the location of their work. A larger proportion of those residing in the Letterkenny labour catchment and employed in Letterkenny town are female and account for 56.4% of all resident workers (Figure 5.10).

In contrast to this, those residing in the Letterkenny labour catchment and employed elsewhere are more likely to be males - accounting for 52.9% 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 town. In addition, employment sectors which are traditionally female sectors are concentrated in the town, 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).

5.7.7 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.

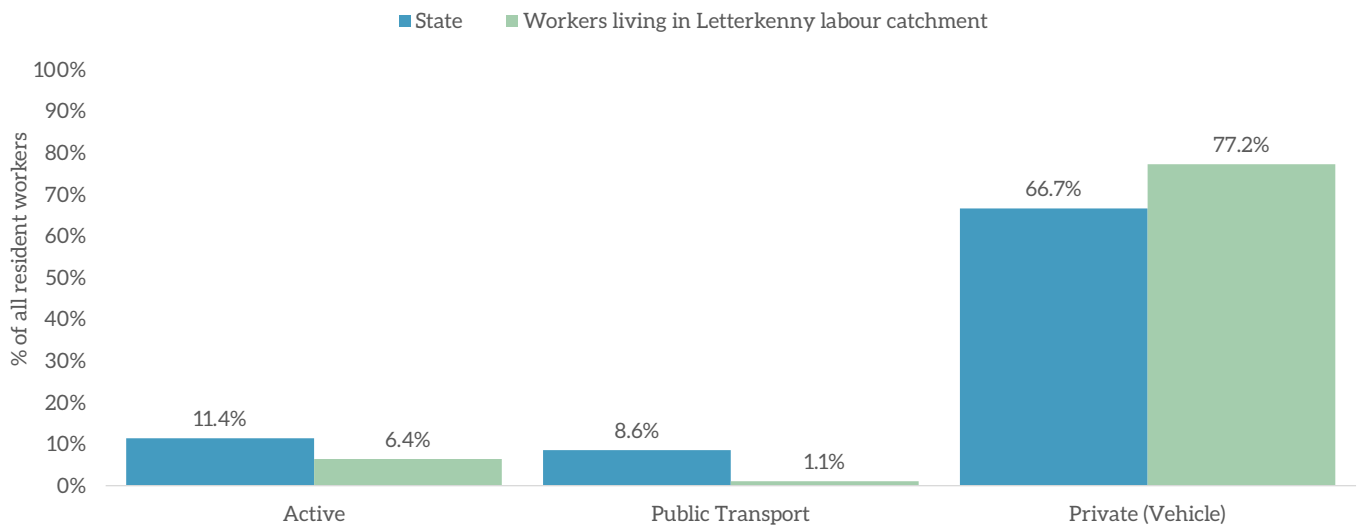
As with the State trend, commuting to work by car (driver and car passenger) is by far the most dominant means of travel across the Western Region (71%). In fact, six of the eight Western Region local authorities are within the top ten highest rates across the State - Galway County (74.8%), Roscommon (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 Letterkenny labour catchment, a total of 6.4% (1,507) used 'Active' modes, 1.1% (247) used 'Public' modes and 77.2% (18,156) used 'Private' modes of transport to employment destinations. This is the third lowest rate amongst the seven labour catchments, see Figures 5.11 and 5.12 below.

5. Letterkenny Labour Catchment

Figure 5.11: Means of Travel for Resident Workers, 2022



As expected, there is a variation in the modes used by resident workers who are employed in Letterkenny town and those employed elsewhere. Those employed in Letterkenny town have a higher propensity to use ‘Active’ modes (7.9%) as opposed to those employed elsewhere (5.1%).

Figure 5.12: Means of Travel for Resident Workers - Working in the town vs elsewhere, 2022

Means of Travel	Workers living in the Letterkenny labour catchment								
	Total			Working in Letterkenny town			Working elsewhere in Ireland		
Active	1,507	6.4%		874	7.9%		633	5.1%	
Public Transport	247	1.1%		97	0.9%		150	1.2%	
Private (Vehicle)	18,156	77.2%		8,739	79.4%		9,417	75.4%	
Total	19,910	84.7%		9,710	88.2%		10,200	81.6%	

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.

5.7.8 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 travelled¹⁵. Figure 5.13 below details the overall ‘travel time departure’ distribution of all Letterkenny labour catchment resident workers.

The most common travel time departures are within the ‘07:01-08:30’ band and accounted for 51.6% of all resident workers in the labour catchment. The next most popular departure time is ‘Before 07:00’ - recorded at one in five 19.6% of all workers in the Letterkenny labour catchment and just over one in four 25.8%, for the State.

¹⁵ 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 5.13: Departure Times for Resident Workers, 2022¹⁶

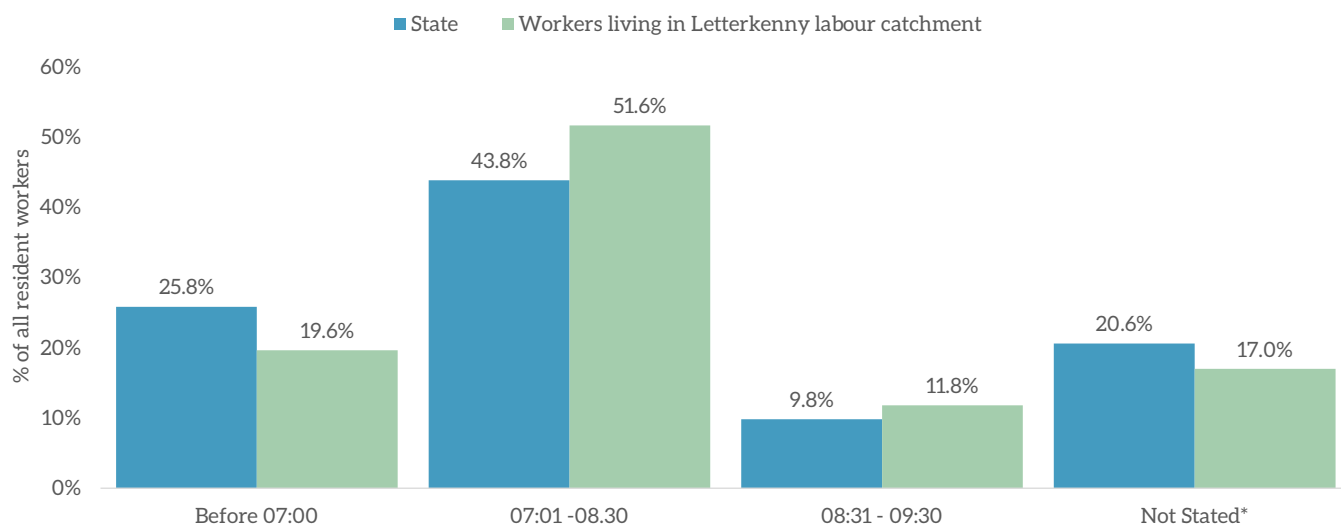


Figure 5.14 below shows a comparison of the ‘travel-time departures’ of those working in Letterkenny town and those working elsewhere. Comparing these two groups there are some differences across the departure times. There is a higher share commuting to Letterkenny town between ‘08:31-09:30’ than those commuting elsewhere. A total of 18.1% of Letterkenny bound workers residing in the labour catchment depart for work ‘Before 07:00’, lower than the rate for workers travelling to other destinations (21%). This is as a result of the multiple commuting destinations within the overall Letterkenny labour catchment where a total of 53.4% commute to destinations other than Letterkenny town (‘Donegal Rural’, Ballybofey/Stranorlar, Northern Ireland etc.).

Figure 5.14: Departure Times for Resident Workers - Working in the town vs elsewhere, 2022

Departure Time	Workers living in the Letterkenny labour catchment								
	Total			Working in Letterkenny town			Working elsewhere in Ireland		
Before 07:00	4,615	19.6%	<div style="width: 19.6%;"></div>	1,990	18.1%	<div style="width: 18.1%;"></div>	2,625	21.0%	<div style="width: 21.0%;"></div>
07:01-08:30	12,129	51.6%	<div style="width: 51.6%;"></div>	6,119	55.6%	<div style="width: 55.6%;"></div>	6,010	48.1%	<div style="width: 48.1%;"></div>
08:31-09:30	2,770	11.8%	<div style="width: 11.8%;"></div>	1,454	13.2%	<div style="width: 13.2%;"></div>	1,316	10.5%	<div style="width: 10.5%;"></div>
Not Stated*	3,989	17.0%	<div style="width: 17.0%;"></div>	1,447	13.1%	<div style="width: 13.1%;"></div>	2,542	20.3%	<div style="width: 20.3%;"></div>
Total	23,503	100%		11,010	100%		12,493	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 5.14 above).

16 | *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.

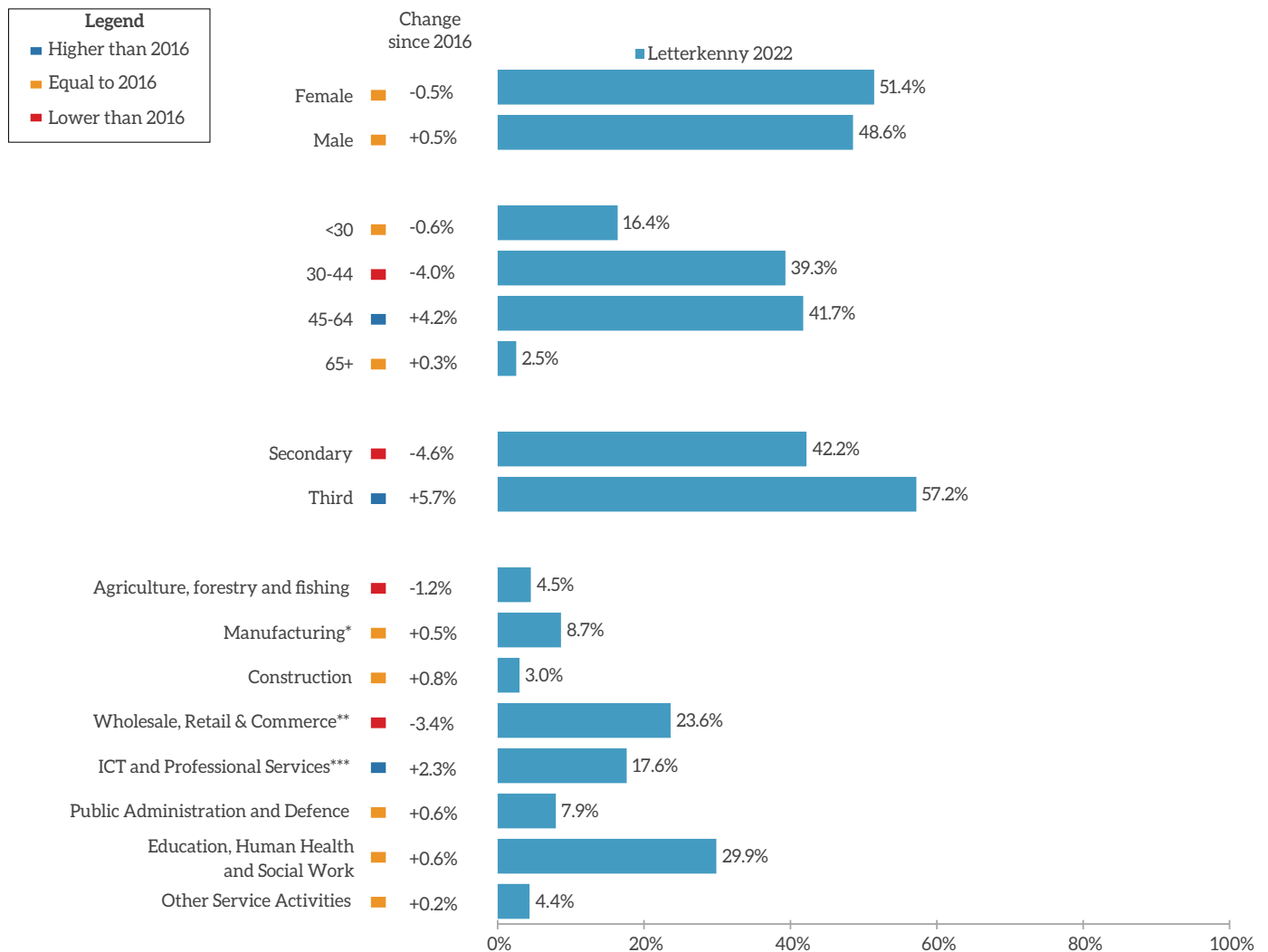
5. Letterkenny Labour Catchment

5.8 Analysis of change between 2016 and 2022

The graphic below details the change that has occurred across the Letterkenny 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 Letterkenny labour catchment is still the dominant labour catchment for large parts of central and midwest coastal Donegal, see maps in Section 5.9. While the geographical size of the Letterkenny labour catchment has remained relatively static since 2016, the total resident workers residing in the labour catchment has increased to 23,503 from 19,717 in 2016 (+19.2% or +3,786) and from 17,886 in 2006 (+31.4% or +5,617).

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 'ICT and Professional Services' related industries. As with the changing State profile, the Letterkenny labour catchment has also seen a decline in employment in 'Agriculture, forestry and fishing' and 'Wholesale, Retail & Commerce'.

Figure 5.15: 2022 Profile indication of change in key indicators since 2016 (comparison of % rates)



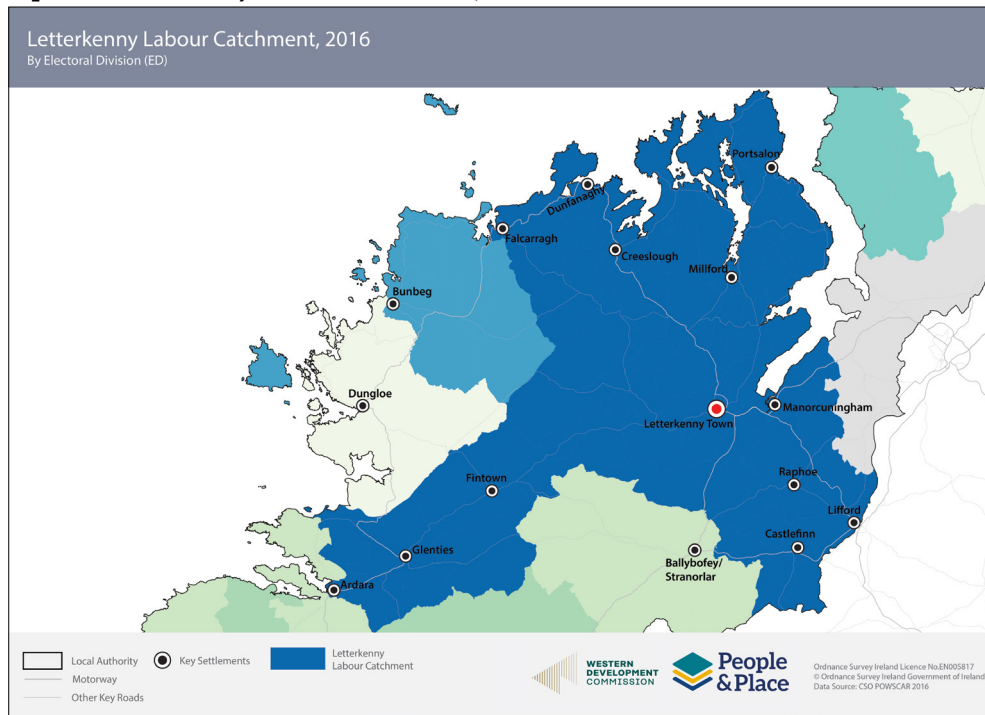
Note: with only nine classifications available, industrial classifications in POWSCCAR are less detailed than normal classifications in other Census outputs.
 *Manufacturing = Manufacturing, mining and quarrying, Electricity, Gas, Water supply and Waste Management
 **Wholesale, Retail etc. = Wholesale, 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.

5. Letterkenny Labour Catchment

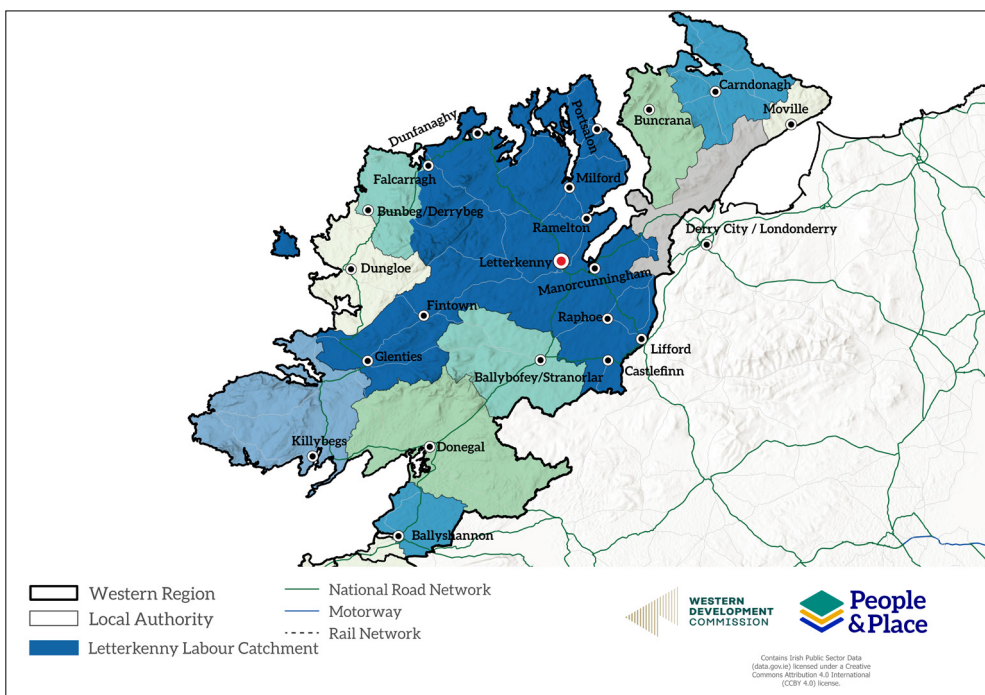
5.9 Analysis of labour catchment change between 2016 and 2022

The maps below detail the geographical changes that have taken place within the Letterkenny labour catchment and neighbouring labour catchments between 2016 and 2022. While the labour catchment extends to large parts of the county, it excludes southeast areas of Donegal, which form part of the Ballybofey/Stranorlar labour catchment and northern and eastern Donegal, which includes the smaller labour catchments of Buncrana, Carndonagh, Merville (new labour catchment since 2016). The grey area along the eastern border is part of the Northern Ireland (Derry) labour catchment. Bunbeg/Derrybeg and Dungloe labour catchments are along the west coast of Donegal.

Map 5.4: Letterkenny labour catchment, 2016



Map 5.5: Letterkenny labour catchment, 2022

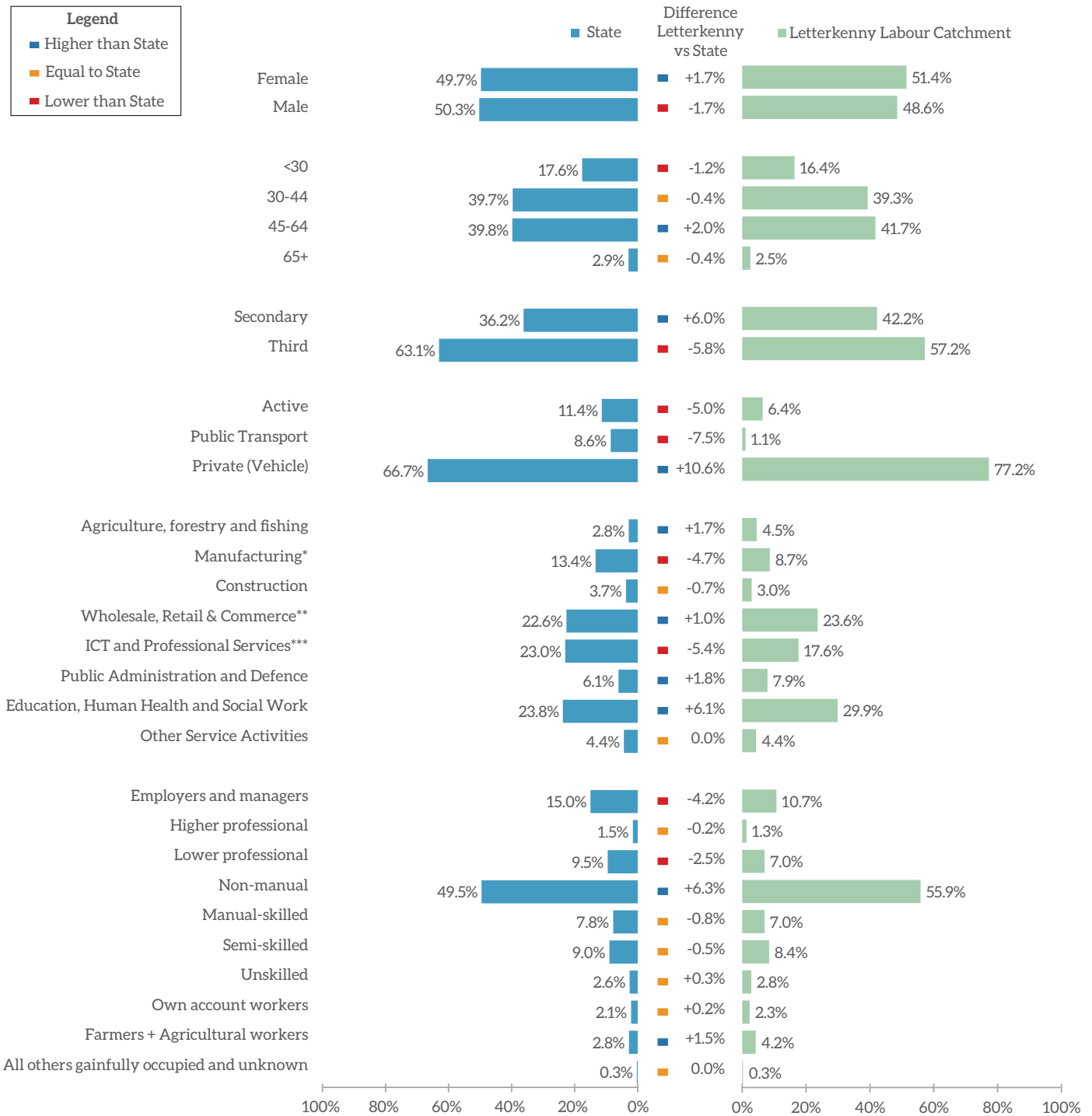


5. Letterkenny Labour Catchment

5.10 Letterkenny labour catchment comparison with the State, 2022

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

Figure 5.16: Comparison between State and Letterkenny labour catchment data for selected indicators



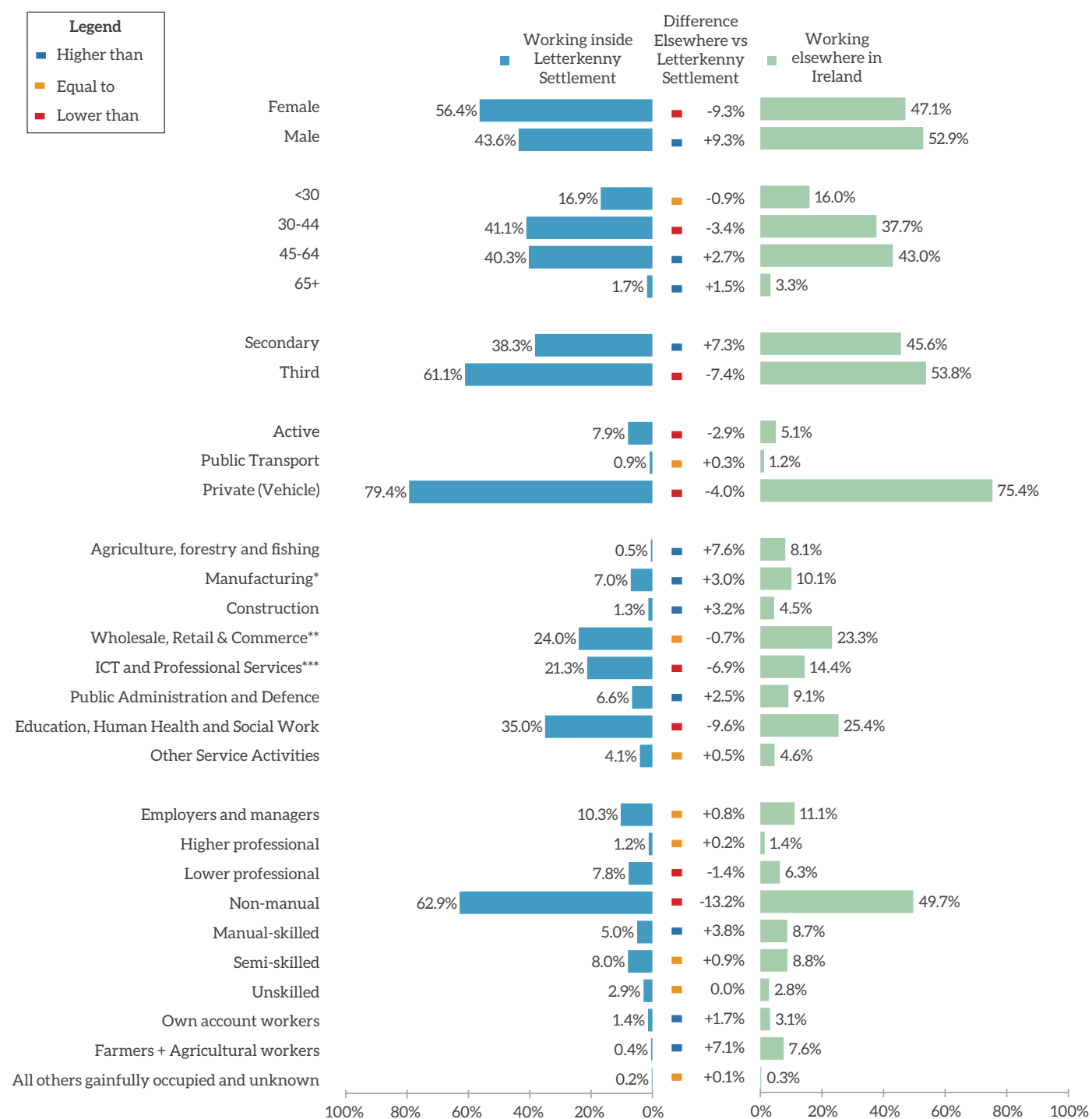
Note: with only nine classifications available, industrial classifications in POWSCCAR are less detailed than normal classifications in other Census outputs.
 Manufacturing = Manufacturing, mining and quarrying, Electricity, Gas, Water supply and Waste Management
 **Wholesale, Retail etc. = Wholesale, 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.

5. Letterkenny Labour Catchment

5.11 Letterkenny labour catchment - Employed within Letterkenny town and elsewhere in Ireland comparison

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

Figure 5.17: Comparison between those working within Letterkenny town 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.

5. Letterkenny Labour Catchment

5.12 Socio-Economic comparison of all seven labour catchments

The graphic below details the socio-economic characteristics of resident workers within the Letterkenny labour catchment and the other six main labour catchments in the Western Region; Carrick-on-Shannon, Castlebar, Ennis, Galway City, Roscommon town and Sligo town. These graphics allow comparisons of theme variables across all seven main 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 Letterkenny labour catchment is 57.2%.

5.12.1 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%

5.12.2 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%

5. Letterkenny Labour Catchment

5.12.3 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%

5.12.4 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%

5. Letterkenny Labour Catchment

5.12.5 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%

5.12.6 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%

5.12.7 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.



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