



WESTERN
DEVELOPMENT
COMMISSION



People
& Place

Travel to Work and Labour Catchments in the Western Region

A Profile of Seven Town Labour Catchments



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Foreword

Foreword

The Western Development Commission (WDC) is pleased to release *Travel to Work and Labour Catchments in the Western Region: A Profile of Seven Town Labour Catchments*. Drawing from the 2022 Census of Population, this report offers crucial insights into the labour market dynamics across the Western Region, shaped by work travel patterns. This is the third report in our series examining labour catchments. Each iteration builds on previous work, allowing for comparative analysis and providing stakeholders with valuable perspectives on regional workforce trends.

The WDC remains committed to advancing the economic and social growth of the Western Region, covering Donegal, Sligo, Leitrim, Roscommon, Mayo, Galway and Clare. Our role is unique. We drive regional development strategies, invest through the Western Investment Fund (WIF) and provide essential research and consultation to inform government policy. We are equally committed to fostering balanced regional development by actively engaging with communities, the business sector and by building networks that drive meaningful change.

Key initiatives include the establishment of the Connected Hubs network and management of the WDC Investment Fund, which provides critical financing to businesses and communities across the region. The 2022 Census data, particularly the Place of Work, School, College, or Childcare Census of Anonymised Records (POWSCCAR), serves as the foundation of this analysis. It allows us to map travel to work patterns, providing a detailed understanding of labour markets within our principal towns. This knowledge is crucial for policymakers, local authorities and businesses as they plan for sustainable growth, especially given the ongoing revision of the National Planning Framework (NPF) and other regional and national policies.

We believe this analysis is timely and important. As government policy evolves, particularly around regional and rural development, understanding labour supply and key employment centres in the Western Region will guide future investments and policy decisions at both national and regional levels. This project was led by Deirdre Frost, with the WDC Policy Analysis team providing vital research and analysis. The WDC extends its thanks to the Central Statistics Office for providing the POWSCCAR data and to Justin Gleeson and Claire Reilly at People and Place for their expertise in delivering this analysis.

For further information, please visit www.westerndevelopment.ie.



Allan Mulrooney, CEO WDC
Western Development Commission
September 2024

1.0 Executive Summary

1. Executive Summary

1.1 Introduction

The WDC commissioned People and Place Limited, a consulting unit linked to the All-Island Research Observatory (AIRO) at Maynooth University, to undertake an analysis of the Census 2022 POWSCCAR dataset. This was to provide a detailed understanding of the travel to work patterns of workers living in the Western Region by creating a series of labour catchments - the areas from which a town/city draws most of its workforce. The study also examined the changes in the travel to work patterns that have occurred since the WDC produced previous iterations of this analysis based on the results of POWSCAR 2016 and POWCAR 2006.

To undertake this analysis, a series of maps were produced to define and illustrate the labour catchments of all towns with a population greater than 1,000 in the Western Region as of April 2022 (n=74). The final list of labour catchments and underlying statistical analysis were then used to examine in detail the travel to work patterns of seven towns/city areas; Galway City, Sligo town, Letterkenny, Ennis, Castlebar, Roscommon town and Carrick-on-Shannon. Except for Letterkenny, each are the administrative centres of the seven counties in the Western Region. The methodology employed to define the town/city labour catchments is detailed in the Appendix of this report.

This report provides a profile of the labour catchment of the largest town/city in each of the seven counties which comprise the Western Region. This will provide information for prospective employers and development agencies. These data can also be used in determining labour catchments for various services including transport, which will be of interest to transport providers, planners and local authorities. The outputs of the report will also be a useful evidence base for researchers and planners engaged with County and City Development Plans (CDPs), Local Economic and Community Plans (LECPs), Local Authority Climate Action Plans (LACAP) and the Regional Spatial and Economic Strategies (RSES) for both the Northern and Western Regional Assembly (NWRA) and the Southern Regional Assembly (SRA) and also for the revised National Planning Framework (NPF) (Q4 2024).

1.2 Key Findings

- A city/town's labour catchment is that area from which a city/town draws most of its workforce. All the city/town labour catchments reviewed in this report have significantly more people at work than the census population at work and residing in that city/town.
- According to POWSCCAR 2022, there were a total of 294,878 people living within the Western Region and at work. This figure has increased by +13.3% (+34,617) from the total of 260,261 outlined within POWSCAR 2016. As expected and due to the strong economic conditions in employment rates in Ireland in recent years, the growth rate of those living within the Western Region and at work has increased far more significantly between 2016 and 2022 (+13.3%) than the rate of change between 2006 and 2016 (+14,712 or +6%).
- As with the results from the 2006 and 2016 analysis, the Galway City labour catchment is by far the largest with 88,253 people living within the labour catchment and at work (51.5% actually employed within Galway City). This labour catchment accounted for 29.9% of the total population at work and residing within the Western Region, a proportional increase of 3% from 2016 (27%). The labour catchment is larger, in terms of population at work, than the combined labour catchments of Sligo town, Letterkenny, Ennis and Castlebar.

1. Executive Summary

- The Sligo town labour catchment is the second largest in 2022 with 24,382 resident workers. In a change from the 2016 results, Letterkenny now has the third largest labour catchment in the Western Region with a population at work of 23,503 which is marginally higher than the Ennis labour catchment (22,342) which is now the fourth largest. In general and detailed in Table 2.1 (page 22), the largest labour catchments are all based on the county towns/city within each local authority area. The exceptions to this are the labour catchments of Limerick City (10,630) and Ballina in Mayo (9,875) which are the sixth and seventh largest labour catchments in the region (both rising one place in the ranking from 2016) and marginally larger than the Roscommon town (eighth largest) and Carrick-on-Shannon (tenth largest) labour catchments.
- In 2022, the seven key towns/city labour catchments account for nearly two-thirds (64.9%) of all resident workers in the Western Region. This proportion is +2.6% higher than the overall proportional share in 2016.
- As with the results from previous iterations of the report, the non-county towns of Limerick City, Ballina and Westport play a significant part in the spatial distribution of labour catchments within their respective regional areas. All three account for 9.3% of the total resident workers in the Western Region.
- The population at work residing within the larger labour catchments are quite contained. In most labour catchments, the majority of the population at work, approximately 75% plus, work in just seven to ten different locations. Of all seven labour catchments, Galway City is the most self-contained labour catchment and the city attracts 51.5% of all labour catchment workers.
- The most interesting aspect to the change in socio-economic characteristics of main labour catchments is the continual increase in third level attainment levels with the State rate increasing from 43% in 2006, to 56.1% in 2016 and currently at 63.1% in 2022. Increases in education attainment levels within the seven key town labour catchments are recorded at between +5.7% and +10% over the five-year period since Census 2016.
- An examination of employment by industrial group in each of the seven labour catchments shows some similarities. In each of the seven labour catchments, the most significant employment sector is the 'Education, Human Health and Social Work Activities', ranging from 23.9% of all employment in the Carrick-on-Shannon labour catchment to 29.9% in Letterkenny labour catchment.
- 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 (based on Q36 in Census 2022 form) increased by +133%, from 111,744 workers in 2016 (5.7%) to 260,821 in 2022 (11.4%). 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.

2.0 Introduction

2. Introduction

2.1 Introduction

2.1.1 Introduction

As part of its remit in promoting the economic and social development of the Western Region, the WDC is interested in examining the nature and extent of economic and labour market activity at the regional and sub-regional level.

In 2007, the CSO released data from the Census of Population 2006 on where people live and work and what they work at, at a detailed geographic level (electoral division, ED). Known as the Place of Work - Census of Anonymised Records (POWCAR), this dataset allows for analysis of commuting patterns and other labour market characteristics. These data provide for a much better understanding of what work people do and where they do it, at a level that can better inform policy for enterprise, education, training and transport. Since then, the CSO have released two subsequent Place of Work, School or College - Census of Anonymised Records (POWSCAR) datasets based on the results from Census 2011 and Census 2016 and now the Place of Work, School, College or Childcare - Census of Anonymised Records (POWSCCAR) based on the results from Census 2022. This dataset is regularly used by national, regional and local authorities as well as many State agencies for the spatial analysis of commuting patterns in Ireland.

Following the release of POWCAR 2006 and POWSCAR 2016 the WDC commissioned the National Institute for Spatial and Regional Analysis (NIRSA) at NUI Maynooth and the All-Island Research Observatory (AIRO) respectively to examine in detail the commuting patterns of those at work in the Western Region. Based on this research, the WDC published the 'Travel to Work and Labour Catchments in the Western Region - A Profile of Seven Town Labour Catchments' report in 2009 and an updated report under the same name in 2018. This report provided important research insights into the commuting patterns within the Western Region in 2006 is available [here](#) and in 2016 is available [here](#) which:

- showed where people were employed, the profile of employment as it existed in April 2006 and April 2016 and provided a baseline for future research;
- illustrated the possible likely geographic spread of future employment activity, though the sectoral composition is likely to be somewhat different; and
- highlighted the various policy implications of where people live and work, from transport to employment and education.

With the publication of POWSCCAR 2022, it is now possible to review the previous analysis and provide an update on the travel to work and labour catchments that are in place within the Western Region in 2022. To undertake this process the WDC have commissioned People and Place Limited, a consulting unit linked to the All-Island Research Observatory (AIRO) at Maynooth University to produce and update this important research. The following sections will provide some background on the Census POWSCCAR dataset, the methodology, scope and use of the report and its structure and layout.

2. Introduction

2.1.2 The Census POWSCCAR dataset

In 2007, the CSO compiled and made available a dataset from the 2006 Census of Population, which is referred to as the Place of Work Census of Anonymised Records (POWCAR). This dataset contains a complete count of all residents over the age of 15 years who travelled to work in April 2006, along with details of their place of residence and place of work at ED level. In 2011, 2016 and 2022 the CSO published new datasets that also included details on the movements of students to schools, colleges and childcare – the Place of Work, School, College or Childcare - Census of Anonymised Records (POWSCCAR). This report uses the results from the work-based trips as recorded in Census 2022¹.

The location of the place of work was coded for each person on the basis of the reply to Question 36 on the Census Form (What is the FULL NAME and ADDRESS of your place of work, school, college or childcare?). The address of the place of work was matched against the national address database and assigned the relevant Small Area code. Approximately 79.3% (1.81m) of the total 2.29m work trips in POWSCCAR 2022 were coded with an accurate location, the remaining 20.7% (474k) were classed as either ‘mobile’ workers (no fixed place of work) or ‘blank’ as they did not have a codable address (see Appendix for more detail). The analysis in this report is based on those 78.3% in the Western Region with a coded, accurate workplace location.

The analysis of data from POWSCCAR in this report identifies the geographic extent of travel to work patterns for various towns which allows us to build a picture of each city/town’s labour catchment. With these data we can identify the numbers commuting to and from various destinations as well as key characteristics such as their age, education and employment profile.

2.1.3 Method, scope and use of the report

A detailed analysis of the POWSCCAR data¹ was carried out by the research team at People and Place and a series of maps were produced to define and illustrate the labour catchments of all towns with a population greater than 1,000 in the Western Region as of April 2022. The final list of labour catchments and underlying statistical analysis were then used to examine in detail the travel to work patterns of seven towns/city; Galway City, Sligo town, Letterkenny, Ennis, Castlebar, Roscommon town and Carrick-on-Shannon. Except for Letterkenny, each are the administrative centres of the seven counties in the Western Region. The methodology employed to define the town/city labour catchments is detailed in the Appendix.

This report provides a profile of the labour catchment of the largest town/city in each of the seven counties which comprise the Western Region. This will provide information for prospective employers, development agencies and regional and local authorities. These data can also be used in determining labour catchments for various services including transport, which will be of interest to transport providers, planners and local authorities. The outputs of the report will also be a useful evidence base for researchers and planners engaged with the Regional Spatial and Economic Strategies (RSES) for both the Northern and Western Regional Assembly (NWRA) and the Southern Regional Assembly (SRA) and also for the revision of the National Planning Framework (NPF).

¹ All POWSCCAR Data analysis was carried out by Justin Gleeson who is a registered user of the database on the CSO secure portal. All data outputs were reviewed by CSO statisticians in advance of use within this registered POWSCCAR data analysis project for the Western Development Commission.

2. Introduction

2.1.4 Structure and Layout

In this report we present an overview of all 43 labour catchments in the Western Region with subsequent chapters (3 to 9) focusing on the main seven towns'/city labour catchments. The layout of each of these chapters is as follows:

1. Both the travel to work patterns (commuting flows) and the overall labour catchment of the town/city is graphically illustrated;
2. Once the spatial extent of each labour catchment is defined, there is then a detailed discussion of the labour market characteristics of all the people at work who are living in that labour catchment;
3. Each town/city labour catchment profile concludes with details on the changes that have taken place since 2016, a comparison with State averages and a comparison across all seven key labour force catchments.

Chapter 10 sets out some conclusions and implications and, finally, the Appendix provides detail on the methodology with additional details on POWSCCAR.

It is assumed that many readers will only consult particular sections as they may have an interest in a particular town/city, rather than read the entire report. Therefore, it was considered important to explain each section in full. As a result, there may be some repetition for those reading the full report.

2. Introduction

2.2 Introduction to labour catchments

In this section, 43 labour catchments across the Western Region are identified and considered. Employment in each of the city/town's labour catchments is reviewed and recent intercensal trends in the seven labour catchments profiled in this report are examined.

Map 2.1 (page 21) shows the 43 labour catchments within the Western Region. These are the labour catchments of city/towns in the Western Region with a population greater than 1,000 persons in 2022. The city/town labour catchments show the geographical area from which a city/town draws most of its labour supply – each labour catchment is based on the inclusions of Electoral Divisions (EDs) that are assigned to a city/town based on maximum flows (see Appendix for more detail on this). For the purpose of this report, towns with a labour catchment of less than three EDs were also re-assigned to the next most dominant town. This is described in more detail in Appendix.

The geographic scale of each of the labour catchments varies enormously, with the Galway City labour catchment by far the largest. Other geographically large labour catchments are Sligo town, Letterkenny, Ennis, Castlebar, Ballina, Limerick City, Roscommon town and Carrick-on-Shannon. The centre of the region, in areas such as east Mayo, west Roscommon and south Leitrim, contains many small towns which is evident in the numerous small labour catchments around towns such as Ballyhaunis, Castlerea, Ballaghaderreen, Swinford, Charlestown/Knock, Tubbercurry, Mohill and Ballinamore.

The map shows that the vast majority of EDs in the Western Region were linked to towns within the Western Region with the exception of a number of EDs along the southern and eastern border of the Western Region. These were primarily linked to employment destinations such as Limerick City, Portumna, Athlone, Longford town, Derry (Northern Ireland) and Cavan town. Seven of these 43 labour catchments are examined in detail in this report. These are the labour catchments of the largest town/city in each of the seven counties which comprise the Western Region – Galway City, Sligo town, Letterkenny, Ennis, Castlebar, Roscommon town and Carrick-on-Shannon.

2.3 Employment in each labour catchment

Table 2.1 (page 22) shows the number employed and living in each of the 43 labour catchments. Each labour catchment includes all those living in the labour catchment and at work, regardless of where they work². As discussed, the labour catchment of a city/town is that area from which a city/town draws most of its workforce.

According to POWSCCAR 2022³, there were a total of 294,878 people living within the Western Region and at work. This figure has increased by +13.3% (+34,617) from the total of 260,261 outlined within POWSCCAR 2016. As expected and due to the strong economic conditions in employment rates in Ireland in recent years, the growth rate of those living within the Western Region and at work has increased far more significantly between 2016 and 2022 (+13.3%) than the rate of change between 2006 and 2016 (+14,712 or +6%).

This is an important point of interest when comparing the labour catchments within the Western Region as of 2022 with those as profiled in previous iterations of this report (2006 and 2016). Since 2006, Ireland and indeed the Western Region, has witnessed a major economic transformation with those in employment in Ireland increasing by +20% (+390k) from 1.93 million in 2006 to 2.32 million in 2022. Much of this growth has occurred in recent years with those in employment increasing by +15.2% between 2016 and 2022 (+313k from just over 2 million in 2016 to 2.32 million in 2022). Similarly, unemployment rates have declined sharply across the State with the census unemployment rate in April 2022 at 8% and down from 13% in Census 2016. As such, while undertaking a like for like comparison of the labour catchments in 2006, 2016 and 2022 may be interesting, the comparison should be treated with caution as the economic baseline across the three census periods is very different.

2| The place of work may be either (i) in the town, (ii) outside the town, but within the catchment or (iii) outside the catchment.

3| This figure relates to those with a known work destination and includes those who work from home. However, it does not include those with a 'blank' destination or those classed as being 'mobile' workers.

2. Introduction

As with the results from the 2006 and 2016 POWSCAR analysis, the Galway City labour catchment is by far the largest with 88,253 people living within the labour catchment and at work (51.5% actually employed within Galway City). This labour catchment accounted for 29.9% of the total population at work and residing within the Western Region, a proportional increase of 3% from 2016 (27%). The catchment is larger, in terms of population at work, than the combined labour catchments of Sligo town, Letterkenny, Ennis and Castlebar, the next four largest labour catchments in the Western Region.

The Sligo town labour catchment is the second largest in 2022 with 24,382 resident workers. In a change from the 2016 results, Letterkenny now has the third largest labour catchment in the Western Region with a population at work of 23,503 which is marginally higher than the Ennis labour catchment (22,342) which is now the fourth largest.

In general and detailed in Table 2.1, the largest labour catchments are all based on the county towns/city within each local authority area. The exceptions to this are the labour catchments of Limerick City (10,630) and Ballina in Mayo (9,875) which are the sixth and seventh largest labour catchments in the region (both rising one place in the ranking from 2016) and marginally larger than the Roscommon town (eighth largest) and Carrick-on-Shannon (tenth largest) labour catchments. Interestingly, the Westport labour catchment is now larger (it was smaller in 2006 and 2016) than the Carrick-on-Shannon labour catchment – while the population at work in the Westport labour catchment has increased, the main reason for this is the decline in the Carrick-on-Shannon labour catchment is due to the emergence of the Ballinamore and Mohill labour catchments (east of Carrick-on-Shannon) as they are now settlements with a population in excess of 1,000 and thereby included in the 2022 analysis.

A number of general observations can be made in relation to the city/town labour catchments in the Western Region:

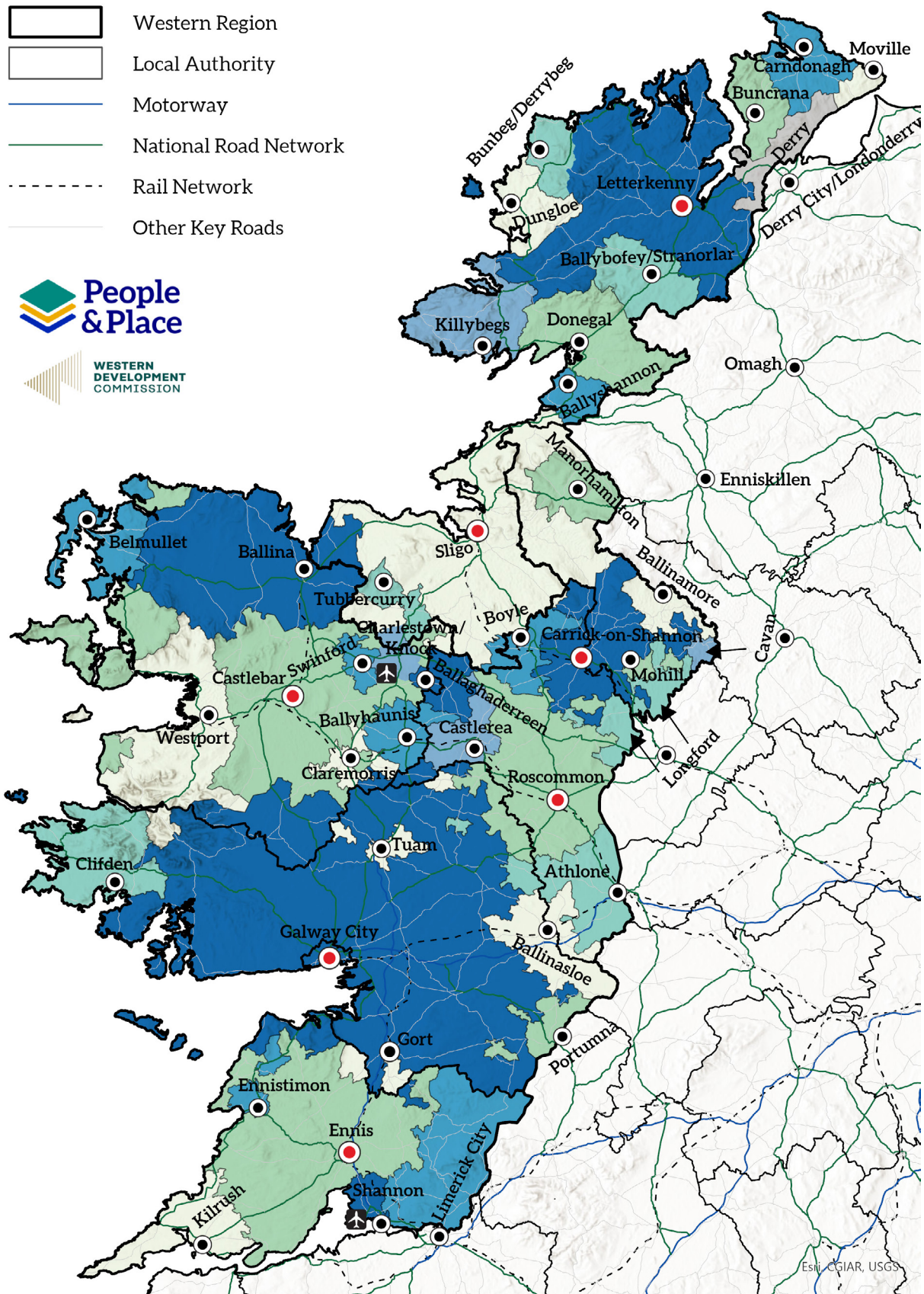
1. The geographic spread of each of the labour catchments varies enormously, as shown in Map 2.1. As expected, the Galway City labour catchment is by far the largest and contrasts greatly with the dense distribution of small labour catchments in west Mayo and north Roscommon. The strength of employment opportunities in larger settlements such as Galway City, Limerick City, Sligo town, Ennis, Shannon town and Letterkenny has a major impact on the spatial distribution of labour catchments, both size and scale, within close proximity of these employment centres – such as the labour catchments in counties Galway, Clare, Donegal and Mayo etc. In contrast, areas within the Western Region that are further away from large employment centres tend to have a larger number of labour catchments that are smaller both in geographical size and population size – such as labour catchments in counties Roscommon, Leitrim and eastern Mayo.
2. The relative proximity of some of the selected towns also plays a role in determining the spatial extent of a labour catchment. For example, Castlebar, Westport and Ballina are relatively close to each other and so limit the geographic extent of their respective labour catchments. In contrast to this, Ennis and Kilrush are further apart and as such Ennis has a far more extensive western labour catchment. Therefore, the closer a town is to another, the less extensive its labour catchment will be, as one town's labour catchment will provide the boundary for the other.
3. There is also a wide variation in the numbers of people at work in each labour catchment, as shown in Table 2.1. The Galway City labour catchment accounted for 29.9% of all workers within the Western Region – and the next four largest labour catchments (Sligo town, Letterkenny, Ennis and Castlebar) account for a further 29.6% combined (similar levels to 2016). Some other labour catchments cover geographically large areas, but have relatively small working populations, e.g. Kilrush (2,890) and Clifden (1,887).

2. Introduction

4. Travel distances are an important determinant of commuting patterns. As would be expected, the extent of commuting declines the further the distance, so that places far away from a town will have fewer residents commuting to that town to work. Additionally, the further the travel destination is the more likely commuters use private modes of transport rather than active/public modes.
5. Generally, the larger the town/city and its labour catchment, the greater the proportion of residents who work within the labour catchment. Larger urban centres can be described as self-contained or highly contained labour catchments as most workers living there also work in the same area and most people who work there also live there. This is discussed in later sections.
6. In general, there has been little change between the size, relating to both percentage of overall population and geographic extent and overall ranking order of the labour catchments between 2016 and 2022. The ten largest catchments within the Western Region are still the seven county towns/city, Limerick City (sixth largest), Ballina (seventh largest) and Westport (ninth largest).
7. The most notable change amongst the largest four catchments has been the growth of the Letterkenny labour catchment which is now third largest and surpassed the Ennis labour catchment which is now the fourth largest labour catchment. Over the period from 2016 to 2022 the Letterkenny labour catchment has increased in population by +19.2% whereas Ennis only increased by +4.4%. Lower growth rates in the Ennis labour catchment can be attributed to the significant increase in the Shannon labour catchment in Clare which increased by +22.8% (due to a change in the CSO boundary definition for Shannon to include the Shannon Free Zone).
8. In 2022, the seven main county town/city labour catchments account for nearly two-thirds (64.9%) of all resident workers in the Western Region. This proportion is +2.6% higher than the overall proportional share in 2016, indicating an increase in employment share within the larger labour catchments.
9. As with the results from previous iterations of the report, the non-county towns of Limerick City, Ballina and Westport play a significant part in the spatial distribution of labour catchments within their respective regional areas. All three account for 9.3% of the total resident workers in the Western Region.

2. Introduction

Map 2.1: Labour Catchments of 43 towns/cities in the Western Region, 2022



(Source: CSO POWSCAR)

2. Introduction

Table 2.1: Population at work and living in each labour catchment in the Western Region, 2022 and 2016

Labour Catchment (* Settlement outside the Western Region)	Total at Work and living in Labour Catchment, 2022	Total at Work and living in Labour Catchment, 2016	Change in Resident Workers 2016 - 2022		Overall ranking (# of resident workers)	
	Percent (Number)	Percent (Number)	Number	Percent	2022	2016
Galway City (Chapter 3)	29.9% (88,253)	27% (70,170)	18,083	25.8%	1	1
Sligo town (Chapter 4)	8.3% (24,382)	8.4% (21,834)	2,548	11.7%	2	2
Letterkenny (Chapter 5)	8% (23,503)	7.6% (19,717)	3786	19.2%	3	4
Ennis (Chapter 6)	7.6% (22,342)	8.2% (21,409)	933	4.4%	4	3
Castlebar (Chapter 7)	5.8% (16,992)	5.4% (13,931)	3061	22.0%	5	5
Limerick City*	3.6% (10,630)	3.7% (9,647)	983	10.2%	6	6
Ballina	3.3% (9,875)	3.5% (9,034)	841	9.3%	7	7
Roscommon town (Chapter 8)	3.1% (9,168)	2.8% (7,235)	1933	26.7%	8	9
Westport	2.4% (7,056)	2.5% (6,380)	676	10.6%	9	10
Carrick-on-Shannon (Chapter 9)	2.2% (6,600)	3.0% (7,785)	-1185	-15.2%	10	8
Athlone*	2.0% (5,868)	2.1% (5,506)	362	6.6%	11	11
Shannon	2.0% (5,796)	1.8% (4,718)	1078	22.8%	12	15
Ballinasloe	1.5% (4,498)	1.8% (4,804)	-306	-6.4%	13	14
Donegal town	1.4% (4,085)	1.5% (3,908)	177	4.5%	14	16
Buncrana	1.4% (3,984)	1.1% (2,948)	1036	35.1%	15	19
Tuam	1.3% (3,856)	2.1% (5,454)	-1598	-29.3%	16	12
Ballybofey-Stranorlar	1.2% (3,618)	1.1% (2,969)	649	21.9%	17	18
Derry*	1.1% (3,160)	1.9% (5,056)	-1896	-37.5%	18	13
Killybegs	1.0% (3,053)	0.9% (2,352)	701	29.8%	19	23
Kilrush	1.0% (2,890)	1.1% (2,750)	140	5.1%	20	21
Carndonagh	0.9% (2,738)	0.9% (2,299)	439	19.1%	21	24
Claremorris	0.9% (2,624)	1.1% (2,871)	-247	-8.6%	22	20
Ballyhaunis	0.8% (2,234)	1.0% (2,601)	-367	-14.1%	23	22
Dungloe	0.7% (1,988)	0.6% (1,686)	302	17.9%	24	28
Longford town*	0.7% (1,935)	0.5% (1,329)	606	45.6%	25	33
Clifden	0.6% (1,887)	0.8% (2,100)	-213	-10.1%	26	25
Boyle	0.6% (1,857)	0.6% (1,452)	405	27.9%	27	31
Belmullet	0.6% (1,786)	0.7% (1,751)	35	2.0%	28	27
Ballyshannon	0.6% (1,660)	0.5% (1,188)	472	39.7%	29	36
Ballaghaderreen	0.5% (1,603)	0.6% (1,632)	-29	-1.8%	30	29
Bunbeg	0.5% (1,593)	0.6% (1,493)	100	6.7%	31	30
Castlerea	0.5% (1,586)	0.6% (1,448)	138	9.5%	32	32
Gort	0.4% (1,321)	0.5% (1,270)	51	4.0%	33	35
Ennistimon	0.4% (1,313)	0% (0)	1313	N/A	34	N/A
Manorhamilton	0.4% (1,301)	0.5% (1,290)	11	0.9%	35	34
Moville	0.4% (1,251)	0% (0)	1251	N/A	36	N/A
Portumna*	0.4% (1,214)	0.3% (892)	322	36.1%	37	39
Ballinamore	0.4% (1,163)	0% (0)	1163	N/A	38	N/A
Tubbercurry	0.4% (1,149)	0% (0)	1149	N/A	39	N/A
Swinford	0.4% (1,100)	0.4% (1,118)	-18	-1.6%	40	37
Charlestown/Knock	0.3% (978)	0.4% (962)	16	1.7%	41	38
Mohill	0.2% (592)	0% (0)	592	N/A	42	N/A
Cavan*	0.1% (396)	0.1% (256)	140	54.7%	43	40
Total	100% (294,878)	100% (260,261)	34,617	13.3%	N/A	N/A

(Source: CSO POWSCCAR)

3.0 Galway City Labour Catchment

3. Galway City Labour Catchment

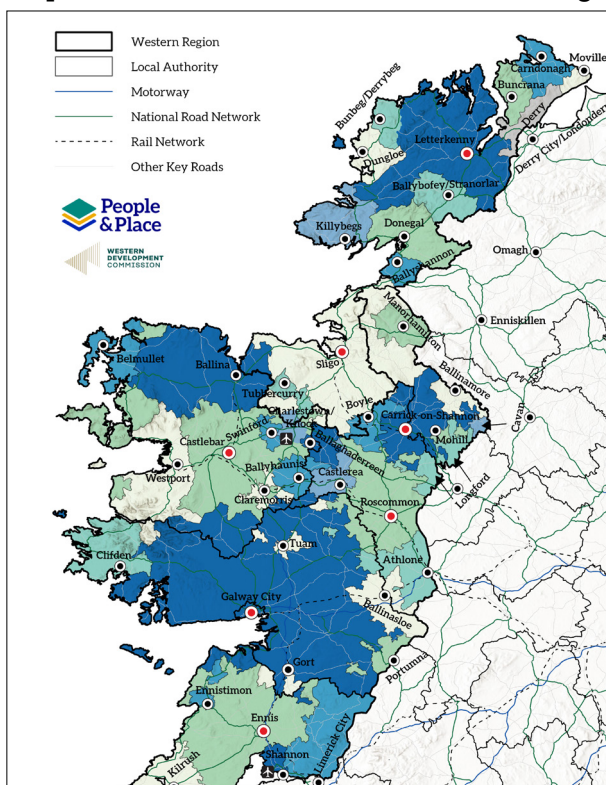
3.1 Introduction

The Western Development Commission (WDC) continues its series of regional labour market analyses with this new publication, *Travel to Work and Labour Catchments in the Western Region: A Profile of Seven Town Labour Catchments*. Based on Census of Population 2022 (POWSCCAR)¹ data, it provides unique insights into the key labour market centres in the Western Region through an analysis of the travel to work patterns of workers living in the Western Region. This is the third time the WDC has undertaken this analysis, previous reports based on 2006 Census data is available [here](#) and 2016 Census data is available [here](#).

This work is particularly timely given developments in government policy such as the National Planning Framework (NPF) and NPF Revision (2024), which sets out regional targets for where population and jobs growth should occur and associated plans and policies such as the Regional Spatial and Economic Strategies (RSES), County and City Development Plans (CDPs), Local Economic and Community Plans (LECPs) and Climate Action Plans for the seven local authorities within the Western Region.

The report and analysis identify the town labour catchments for the Western Region, comprising counties Clare, Donegal, Galway, Leitrim, Mayo, Roscommon and Sligo (see Map 3.1 below). The town labour catchment is the area from which a town draws most of its' workforce. At a regional level, the report also assists with the identification of the key employment centres in the Western Region and identifies changes since 2016. It maps and visualises the size and scale of employment based commuting patterns, highlights the potential labour supply available for future growth and, as such, provides important insights for employers and policymakers - nationally, regionally and locally.

Map 3.1: Labour Catchments in the Western Region, 2022



Source: CSO POWSCCAR

3.2 About this Profile - Galway City

As part of its remit in promoting the economic and social development of the Western Region, the WDC is interested in examining the nature and extent of economic and labour market activity at the regional and sub-regional level. The full report presents an overview of all 43 labour catchments in the Western Region with subsequent sections focusing on the main seven towns'/city catchments.

This section examines the city of Galway as an employment destination for resident workers in the Western Region and provides detailed mapping and descriptive analysis of the Galway City labour catchment. Following a discussion on Galway City data in 2022 (Section 3.3) and the impact of working from home (Section 3.4), the profile presents the following:

1 | Census 2022 Place of Work, School, College or Childcare - Census of Anonymised Records (POWSCCAR).

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

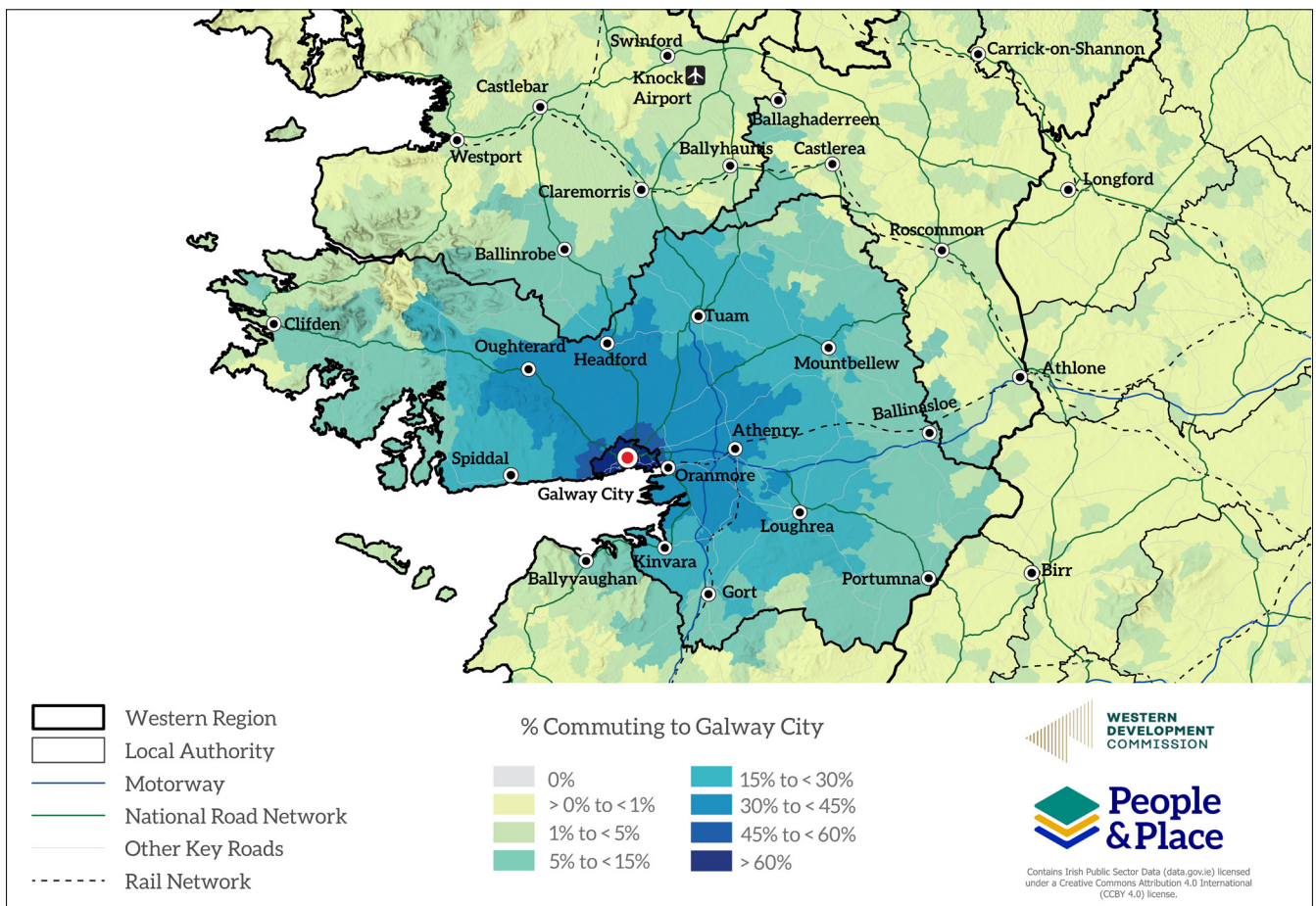
Map 3.2 shows the extent of commuting flows to Galway City for work opportunities. The colours represent the proportions of people at work who live in each ED and travel to work in Galway City.

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

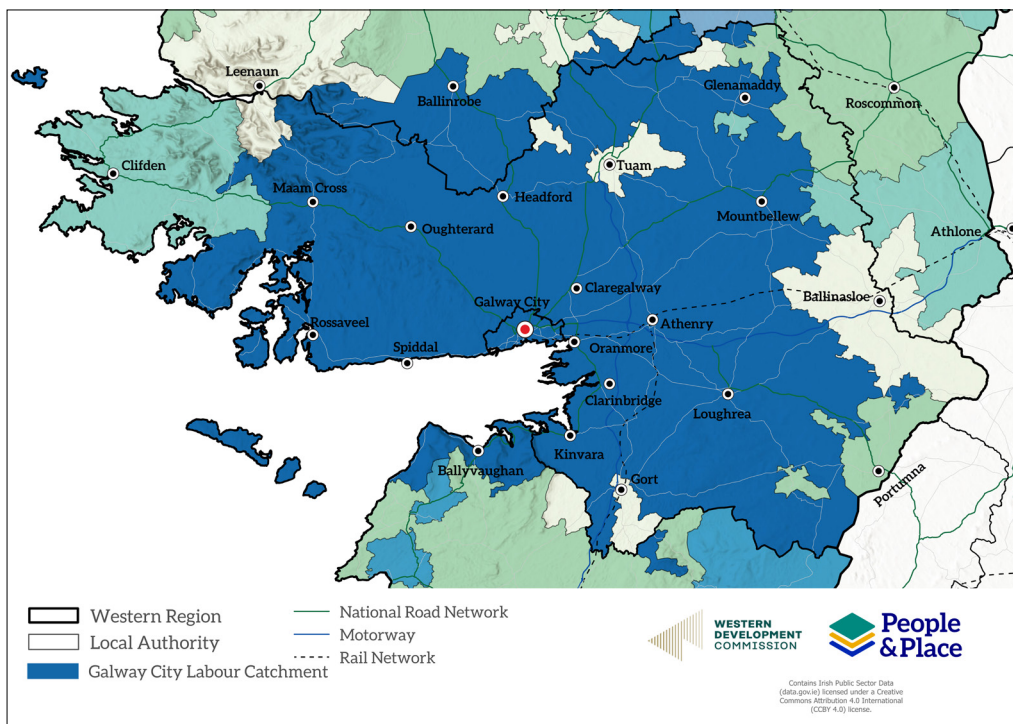
While Map 3.2 shows EDs from where even one person commuted to Galway City, all of these EDs are not included in the Galway City labour catchment. The Galway City labour catchment is based on only those EDs for which Galway City is the most popular work destination for resident workers. Other EDs, whose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



Source: CSO POWSCCAR

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.

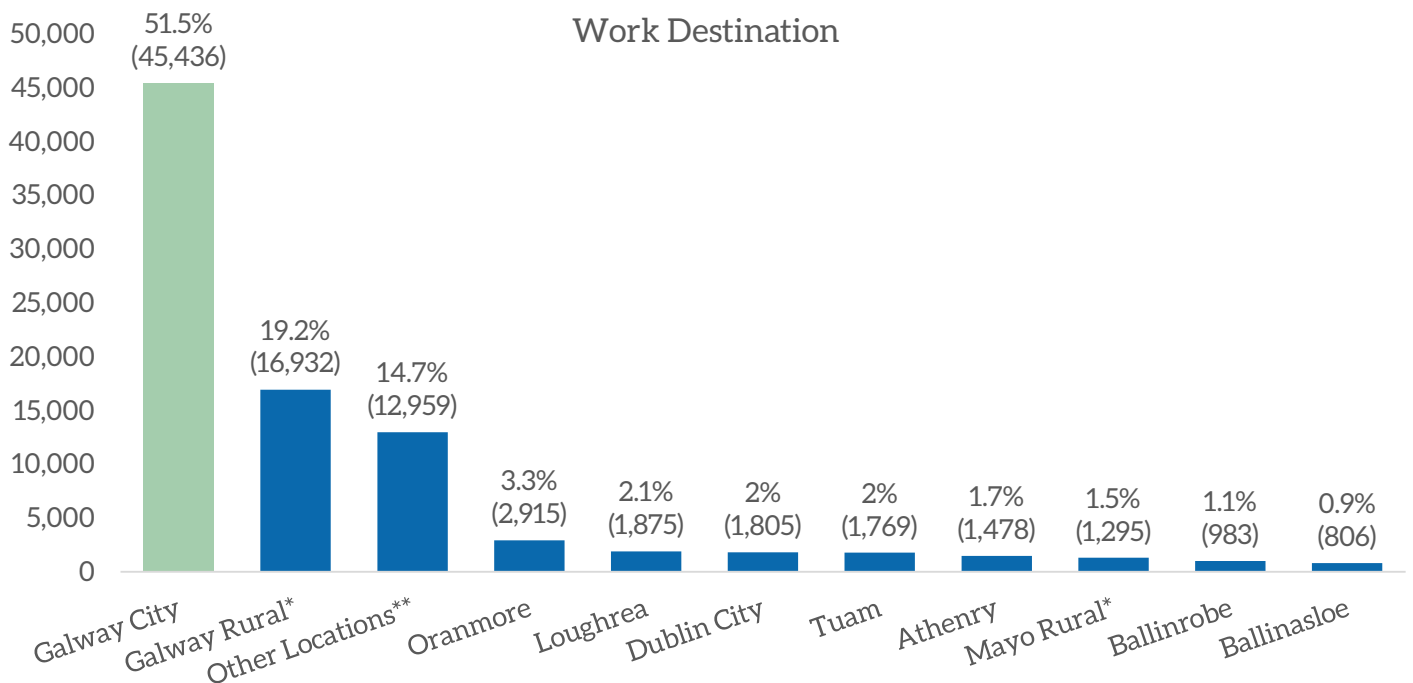
⁹ | Of the 13,891 coded as working from home in the Galway City labour catchment, 4,848 are coded as both living in and working in the Galway City settlement.

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

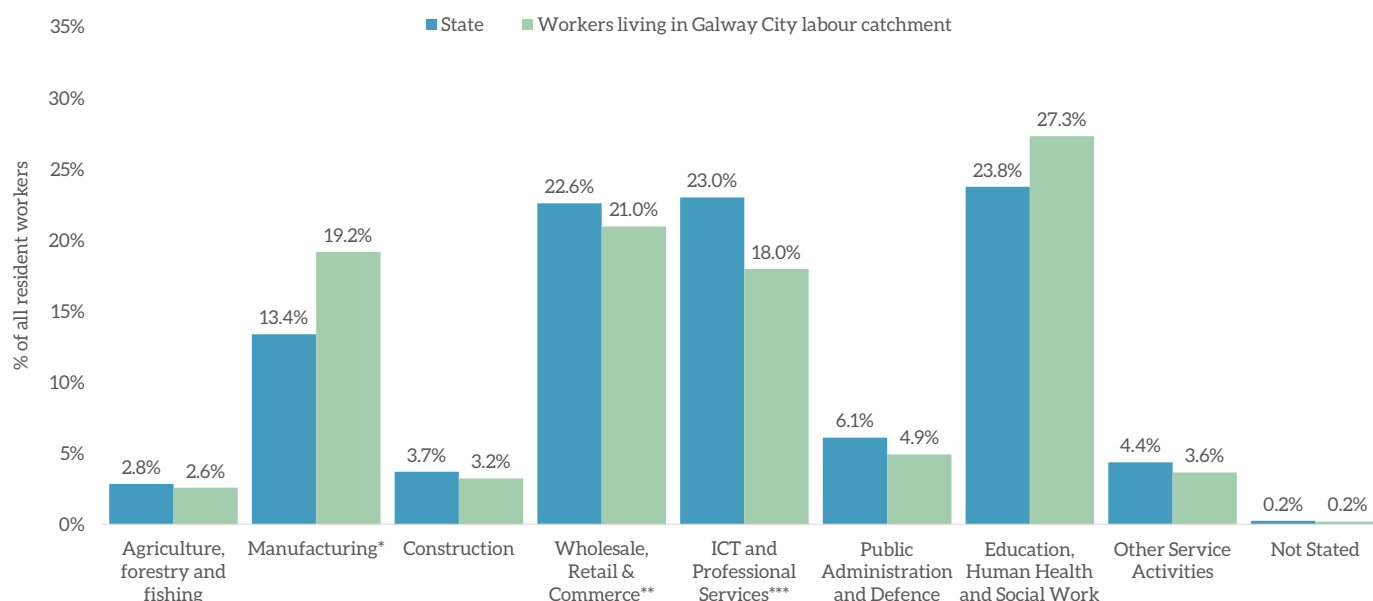
Work Destination	Resident Workers	Change 2016-2022	% Change 2016-2022	Proportional Share 2022	Proportional Share Change 2016-2022
Galway City	45,436	6,628	17.1%	51.5%	-3.8%
Galway Rural*	16,932	1,312	8.4%	19.2%	-3.1%
Other Locations**	12,959	4,186	N/A	14.7%	N/A
Oranmore	2,915	1,925	194.4%	3.3%	1.9%
Loughrea	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

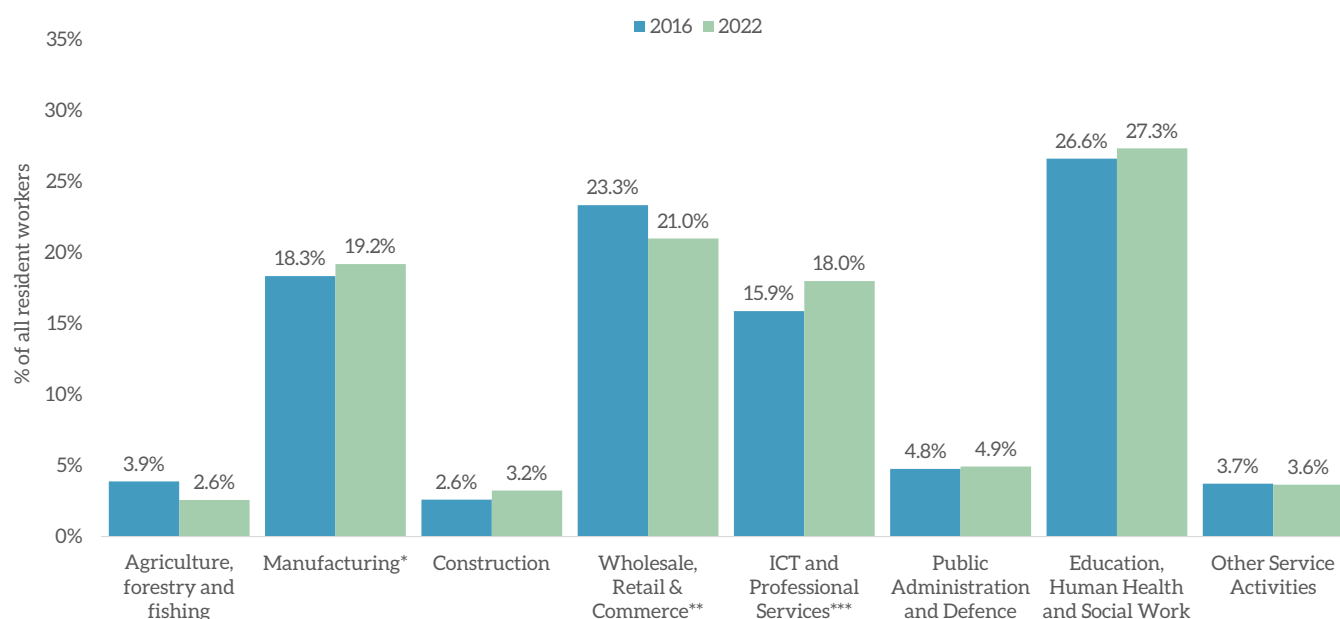


Figure 3.5 below details the industry of employment of the Galway City labour catchment by the location of employment – working within Galway City or working elsewhere. Employment in the ‘Education, Human Health and Social Work’ (29.6%) and ‘Manufacturing’ (21.8%) sectors are more dominant among those 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

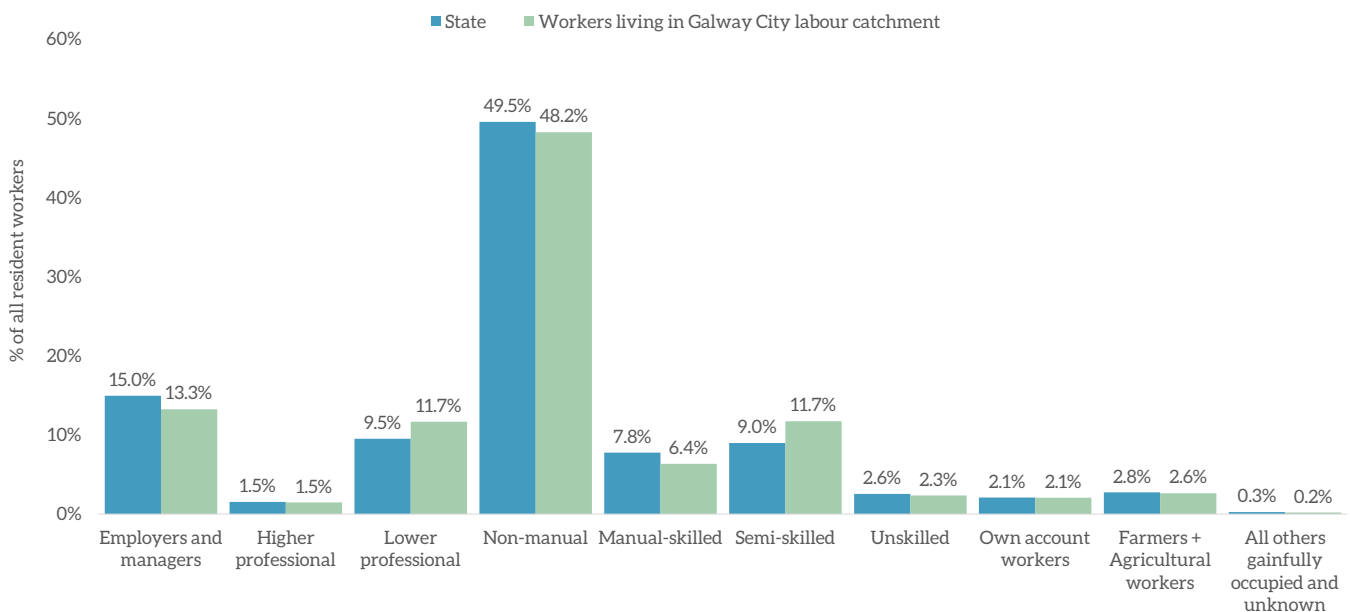


Figure 3.7 below details the socio-economic structure breakdown for those working within Galway City and those working outside Galway City. There are somewhat notable differences in rates with a higher proportion of those employed inside Galway City classed as 'Lower professional', 'Non-manual' and 'Semi-skilled' - 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

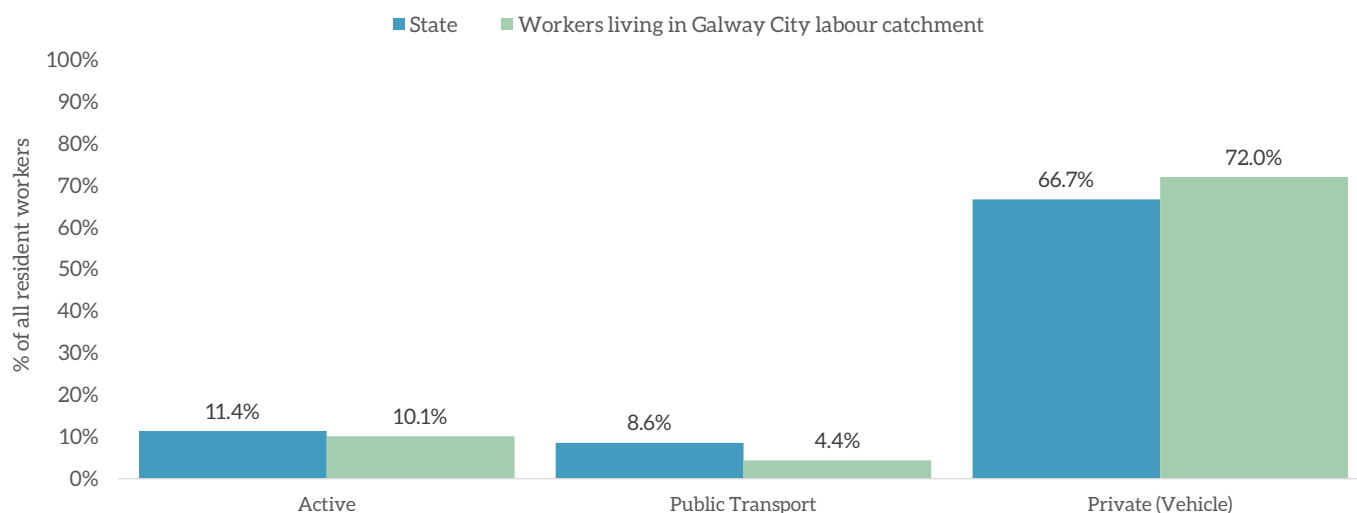
Nationally in 2022, commuting to work by car in Ireland was still the most popular means of travel, with 59% driving and a further 4% travelling as a passenger in a car. The proportion commuting by car did however fall slightly from 66% in 2016 to 63% in 2022. The second most popular way of getting to 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.

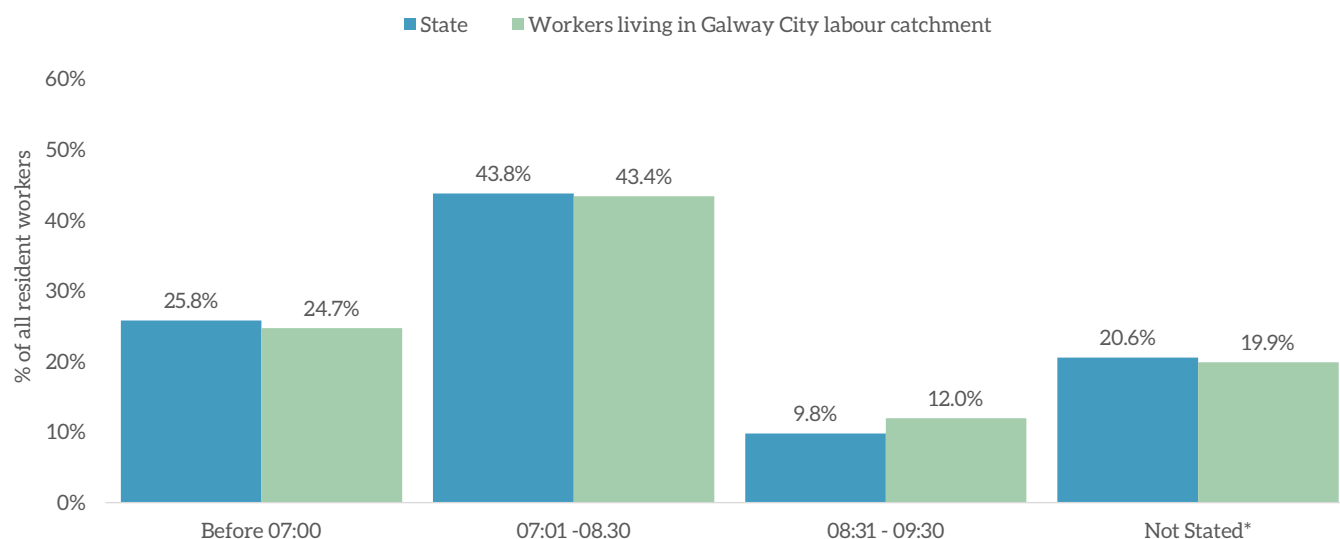
3.7.8 Travel Departure Times

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%		12,225	26.3%		9,594	23.0%	
07:01-08:30	38,314	43.4%		19,343	41.6%		18,971	45.5%	
08:31-09:30	10,558	12.0%		6,456	13.9%		4,102	9.8%	
Not Stated*	17,562	19.9%		8,508	18.3%		9,054	21.7%	
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 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.

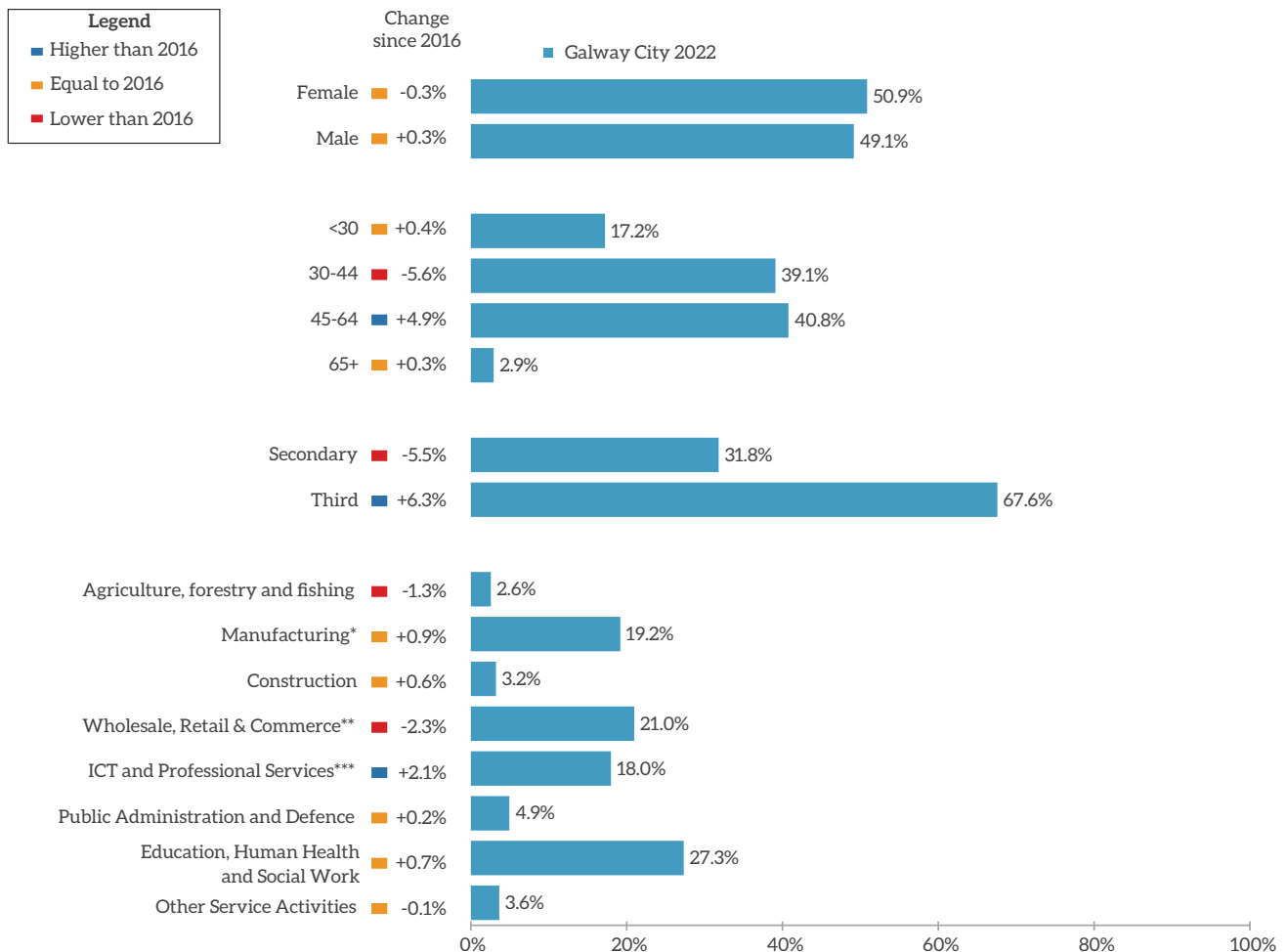
3. Galway City Labour Catchment

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)



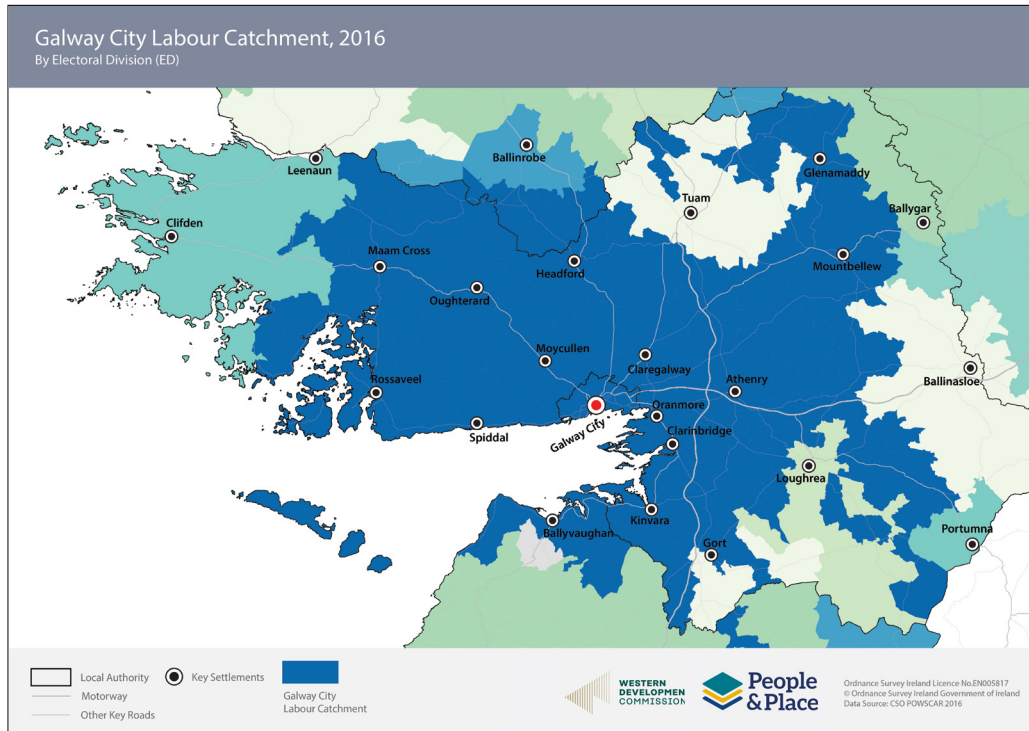
Note: with only nine classifications available, industrial classifications in POWSCCAR are less detailed than normal classifications in other Census outputs.
 *Manufacturing = Manufacturing, mining and quarrying, Electricity, Gas, Water supply and Waste Management
 **Wholesale, Retail etc. = Wholesale,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

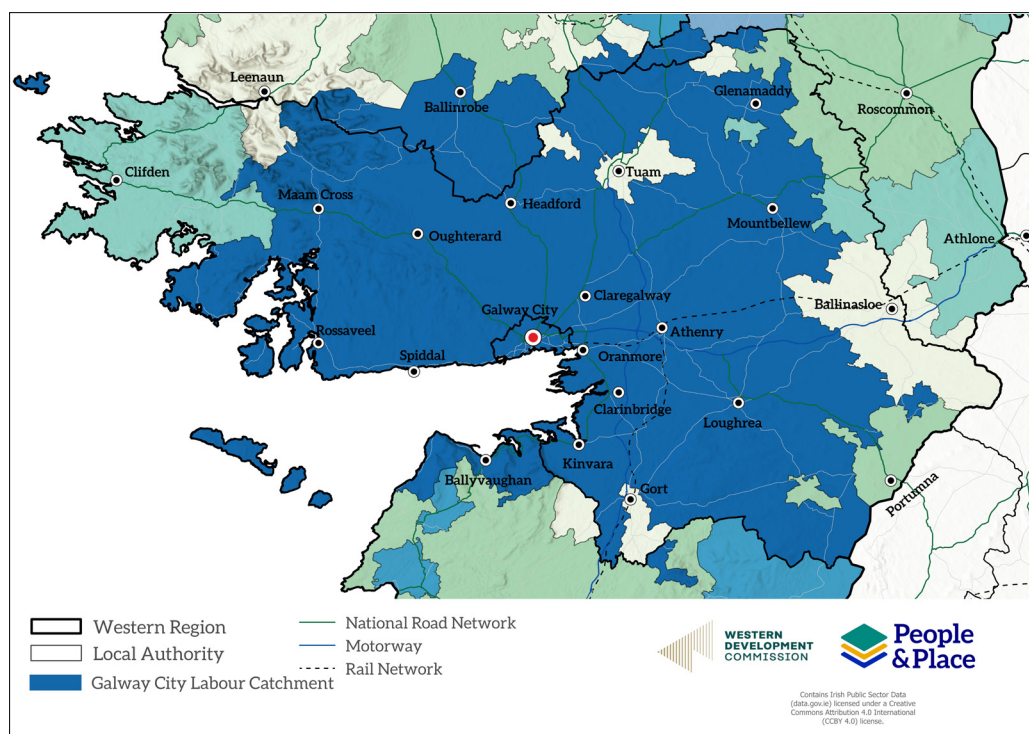
3.9 Analysis of labour catchment change between 2016 and 2022

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

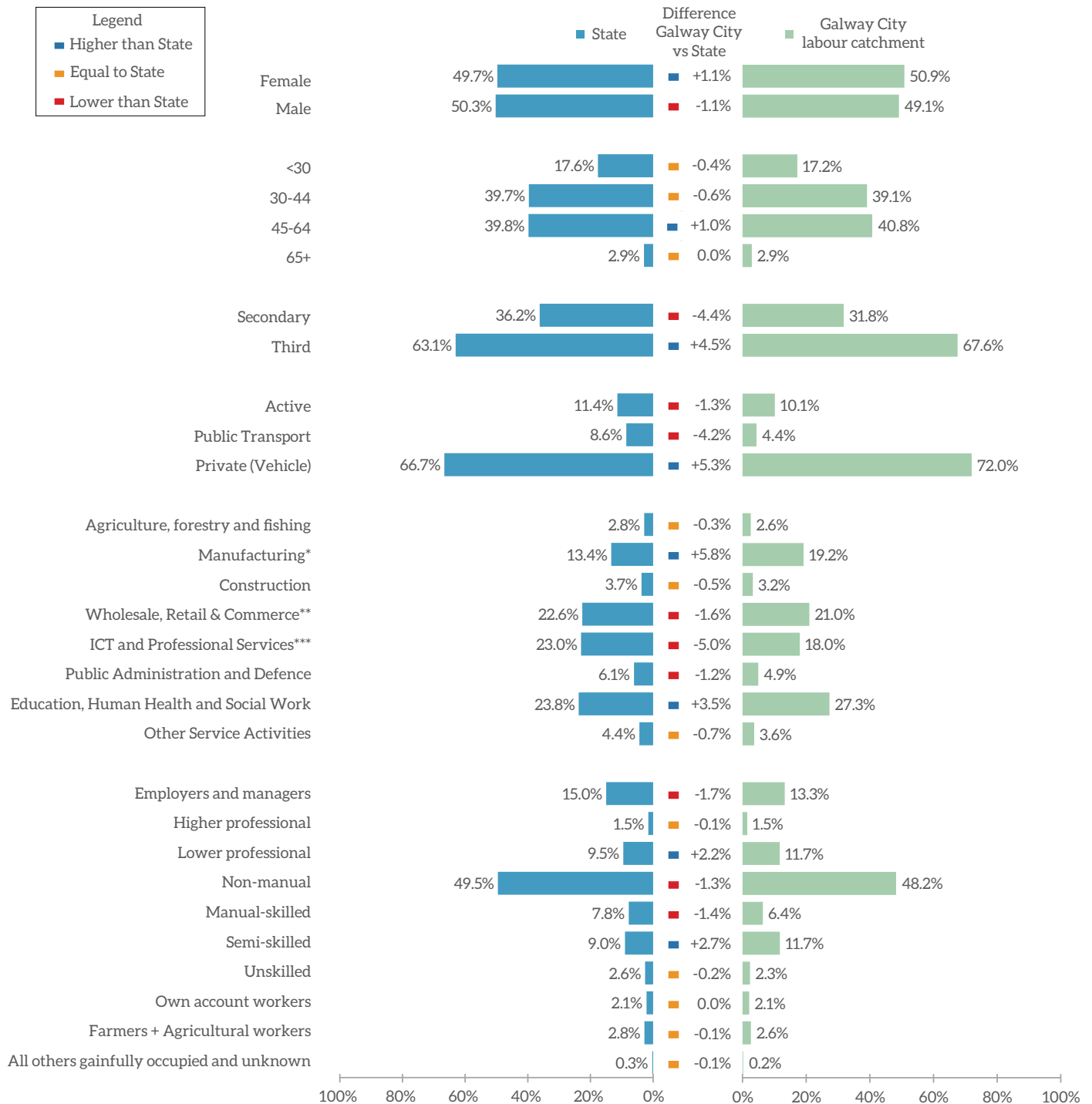


3. Galway City Labour Catchment

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.

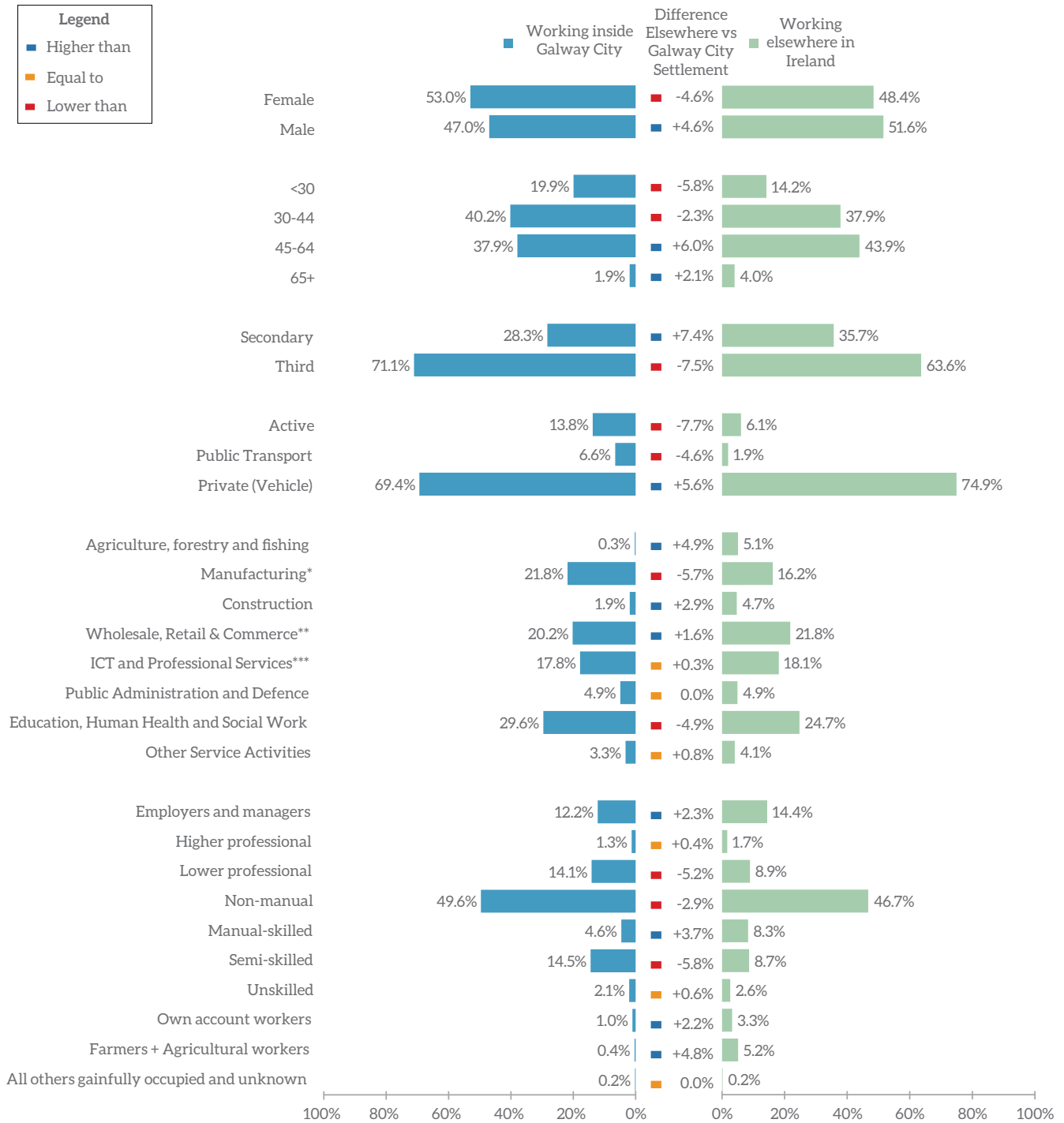
*For some percentage change figures there may be very minor rounding issues (0.1%) due to the fact that the graphic displays data at one decimal point only.

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.

4.0 Sligo town Labour Catchment

4. Sligo town Labour Catchment

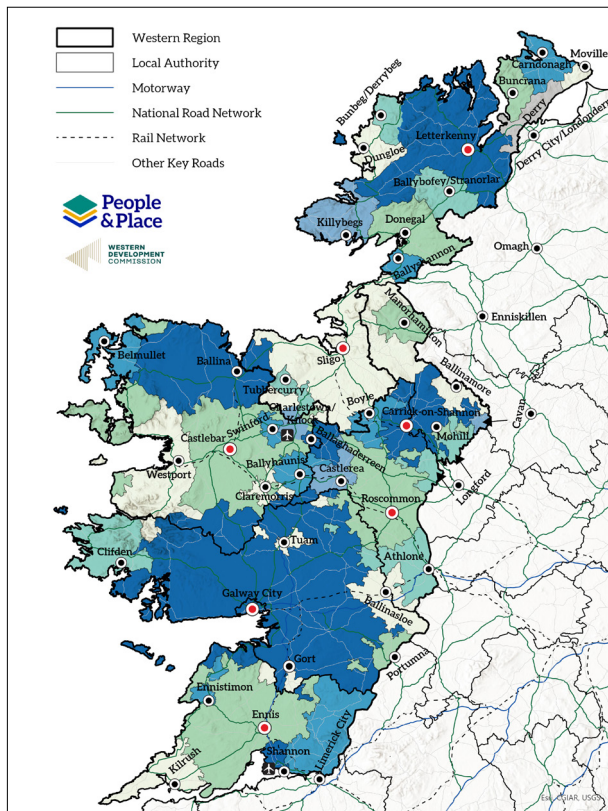
4.1 Introduction

The Western Development Commission (WDC) continues its series of regional labour market analyses with this new publication, *Travel to Work and Labour Catchments in the Western Region: A Profile of Seven Town Labour Catchments*. Based on Census of Population 2022 (POWSCCAR)¹ data, it provides unique insights into the key labour market centres in the Western Region through an analysis of the travel to work patterns of workers living in the Western Region. This is the third time the WDC has undertaken this analysis, previous reports based on 2006 Census data is available [here](#) and 2016 Census data is available [here](#).

This work is particularly timely given developments in government policy such as the National Planning Framework (NPF) and NPF Revision (2024), which sets out regional targets for where population and jobs growth should occur and associated plans and policies such as the Regional Spatial and Economic Strategies (RSES), County and City Development Plans (CDPs), Local Economic and Community Plans (LECPs) and Climate Action Plans for the seven local authorities within the Western Region.

The report and analysis identify the town labour catchments for the Western Region, comprising counties Clare, Donegal, Galway, Leitrim, Mayo, Roscommon and Sligo (see Map 4.1 below). The town labour catchment is the area from which a town draws most of its' workforce. At a regional level, the report also assists with the identification of the key employment centres in the Western Region and identifies changes since 2016. It maps and visualises the size and scale of employment based commuting patterns, highlights the potential labour supply available for future growth and, as such, provides important insights for employers and policymakers - nationally, regionally and locally.

Map 4.1: Labour Catchments in the Western Region, 2022



Source: CSO POWSCCAR

4.2 About this Profile - Sligo town

As part of its remit in promoting the economic and social development of the Western Region, the WDC is interested in examining the nature and extent of economic and labour market activity at the regional and sub-regional level. The full report presents an overview of all 43 labour catchments in the Western Region with subsequent sections focusing on the main seven towns/city catchments.

This section examines the town of Sligo as an employment destination for resident workers in the Western Region and provides detailed mapping and descriptive analysis of the Sligo town labour catchment. Following a discussion on Sligo town data in 2022 (Section 4.3) and the impact of working from home (Section 4.4), the profile presents the following:

¹ Census 2022 Place of Work, School, College or Childcare - Census of Anonymised Records (POWSCCAR).

4. Sligo town Labour Catchment

1. A graphical illustration of travel to work patterns and commuting flows (Section 4.5) and the overall labour catchment of the town (Section 4.6);
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 4.7); 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, Letterkenny and Roscommon town) (Section 4.8-4.12).

4.3 The importance of Sligo town as a place of work

The official CSO settlement of Sligo town had a population of 20,608 persons recorded in the 2022 Census. Sligo town is the fourth largest urban centre within the Western Region (Galway City is the largest, followed by Ennis and Letterkenny respectively) and the 24th largest in the State. Since 2006, the population residing within the town of Sligo has increased by +6.2% (+1,206)².

Population

In the most recent intercensal period 2016 to 2022, the population of Sligo town has increased by +7.3% (+1,409). This rate of growth is less than the State (+8.1%) and similar to the Western Region (+7%) between 2016 and 2022. A number of other towns across Sligo County have seen significant population growth since 2016 with the highest rates in Tubbercurry (+16%), Strandhill (+13%) and Collooney (+12%).

Labour Force

Since Census 2016 there has been an increase in the numbers living in Sligo town 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 Sligo town has increased by +12.1% (from 8,815 to 9,883). The number of residents at work has increased by +22.7% (from 7,133 to 8,752). Conversely, the number classed as unemployed has decreased by -32.8% (from 1,682 to 1,131). The +22.7% increase in those at work in Sligo town is significantly higher than the change in the State (+15.6%), the Western Region (+14.6%) and County Sligo (+16.8%).

Daytime Working Population

According to POWSCCAR 2022, the total number of jobs located within the Sligo town boundary was 13,562 and this accounted for 5% of all jobs located within the Western Region (272,860)³. Of all cities and towns in Ireland, Sligo town has the 10th highest number of jobs located within the town boundary and this accounted for 56.2% of all jobs located within County Sligo (24,120). Relative to the six other main towns/city in this report, Sligo town has the second highest number of jobs with higher numbers in Galway City (51,211) and lower numbers in Letterkenny (13,109), Ennis (10,628), Castlebar (9,911), Roscommon town (4,315) and Carrick-on-Shannon (3,145). The ratio of local jobs in Sligo town (13,562) to resident workers (8,544) in the town is 1.59 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 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 Sligo.

4. Sligo town Labour Catchment

Between 2016 and 2022, there was an increase of +4.1% (+538) jobs located in Sligo town. This was the lowest increase of the seven main towns/city within this report with the highest rate of jobs growth in Galway City (+15.4%), Letterkenny (+15%), Roscommon town (+10.2%), Carrick-on-Shannon (+9.7%), Castlebar (+9.6%) and Ennis (+4.5%)⁴. Over the same period, the number of jobs in County Sligo increased by +14.5% (+3,046) and the Western Region as a whole by +12.4% (+30,148) from 242,712 to 272,860. Sligo town accounted for 17.7% of the total new jobs in County Sligo since 2016.

4.4 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 County Sligo a total of 3,601 (12.1%) resident workers were recorded as mainly working from home in Census 2022. This represents a +109.7% (+1,884) increase from the number in 2016 (1,717 or 6.7% of resident workers).

Resulting from the increased incidence in working from home, the employment base in Sligo town 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.

4. Sligo town Labour Catchment

4.5 Employment based commuting patterns to Sligo town

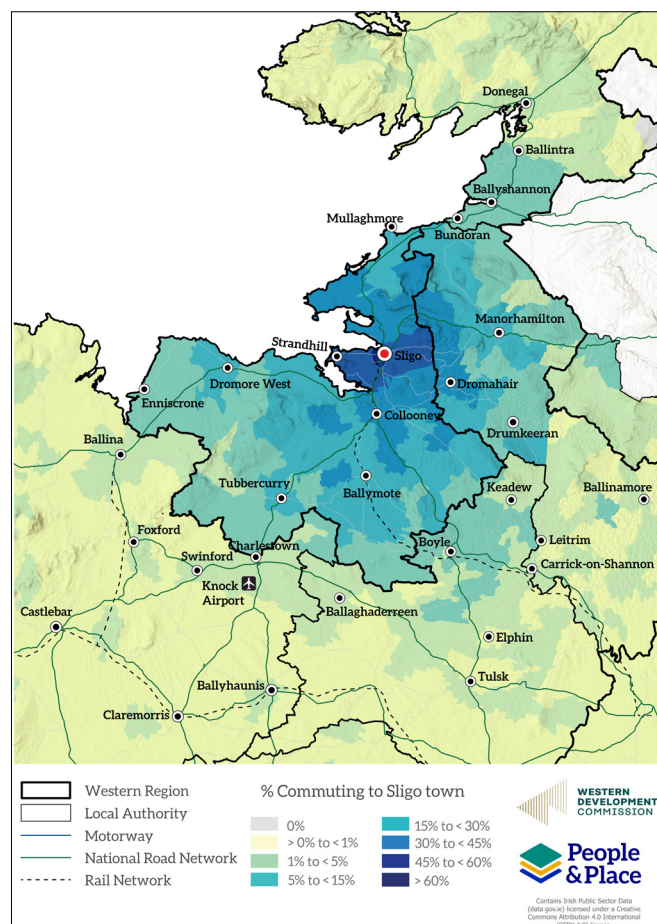
Map 4.2 shows the extent of commuting flows to Sligo town for work opportunities. The colours represent the proportions of people at work who live in each ED and travel to work in Sligo town.

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. Sligo town, 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 4.2: Commuting Flows into Sligo town, 2022



As expected, the EDs closest to Sligo town 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 (Mullaghmore, Manorhamilton, Ballymote, Tubbercurry and Dromore West) where between 15% and 30% of resident workers in those EDs work in Sligo town, through to medium green (Bundoran, Ballyshannon, Drumkeeran, Boyle, Charlestown and Enniscrone) where between 5% and 15% of resident workers in those EDs commute to work in Sligo town. There is only one ED in the county that is below 5%.

4. Sligo town Labour Catchment

4.6 Identifying the Sligo town labour catchment

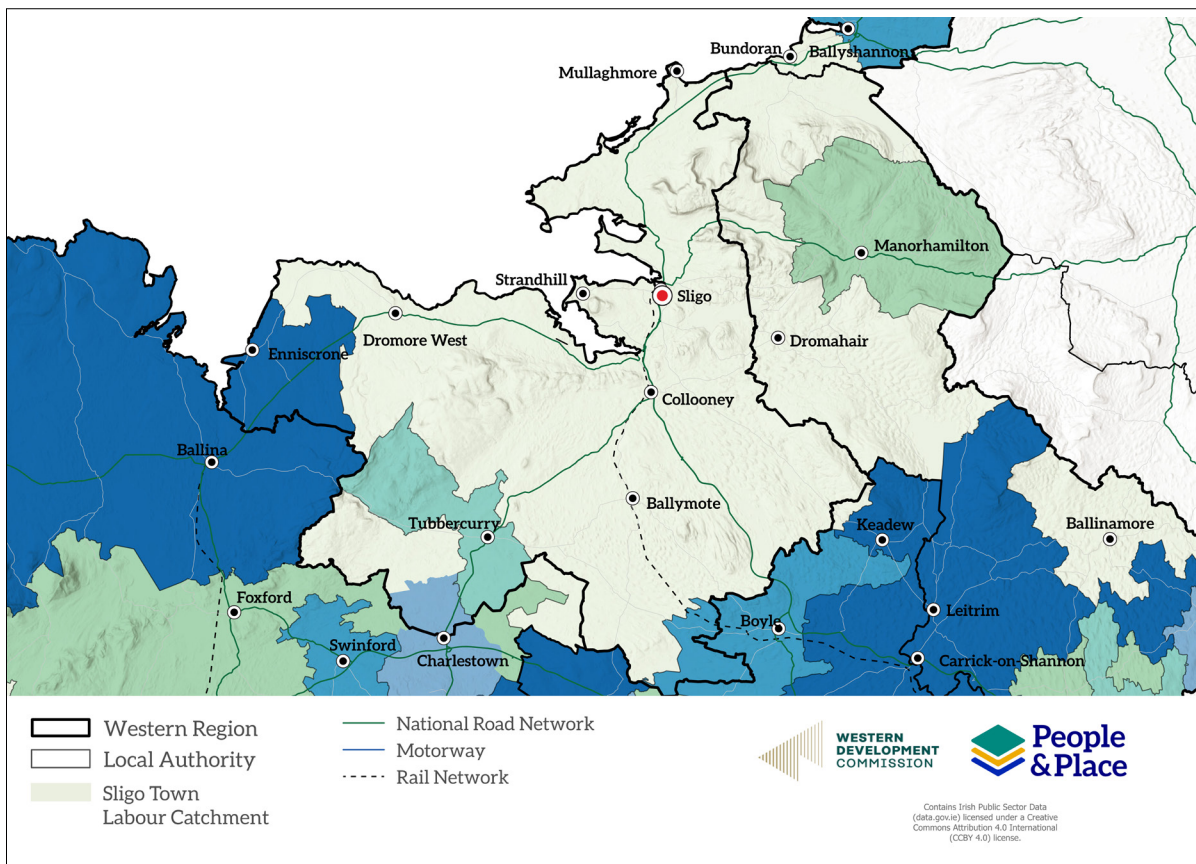
While Map 4.2 shows EDs from where even one person commuted to Sligo town, all of these EDs are not included in the Sligo town labour catchment. The Sligo town labour catchment is based on only those EDs for which Sligo town is the most popular work destination for resident workers. Other EDs, whose 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 4.3 shows the Sligo town labour catchment as depicted by the cream colour. The labour catchment extends to the majority of the county, except for EDs in the southeast that are part of the Boyle labour catchment in County Roscommon and EDs in the west that are part of both the Tubbercurry and Ballina labour catchments. Since 2016, Tubbercurry is now its own labour catchment rather than part of the larger Sligo town labour catchment. Large parts of northern Leitrim, with the exception of the Manorhamilton labour catchment, also form part of the Sligo town labour catchment.

Map 4.3: Sligo town labour catchment, 2022



Source: CSO POWSCCAR

⁷ For a more detailed explanation of the methodology, see [Appendix](#).

4. Sligo town Labour Catchment

In summary, Sligo town remains the dominant labour catchment for the majority of Sligo County, extending into northern Leitrim and a small part of southern Donegal (Bundoran). In particular, Sligo town is the key economic driver for the immediate areas surrounding the town, central County Sligo (Collooney, Ballymote etc.) and then the west coastal areas stretching from Dromore West to Mullaghmore (see Section 4.9).

In 2022, there were 24,382 people classified as at work and living within the Sligo town labour catchment (8.3% of all Western Region resident workers). The Sligo town labour catchment is the second largest in the Western Region with only Galway City (88,253) with a higher resident workforce. The Sligo town labour catchment has a population at work 2.9 times larger than the town of Sligo (24,382 to 8,544 respectively). The geographical size of the Sligo town labour catchment has changed slightly - and now includes larger areas around Manorhamilton but has declined in the Tubbercurry area (see Section 4.9). The total resident workers residing in the labour catchment has increased by +11.7% since 2016 (from 21,834) and by +20% since 2006 (from 20,321).

4.7 Profile of the Sligo town labour catchment

Map 4.3 above identified the Sligo town labour catchment (in cream). 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 Sligo town 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 Sligo town.

The Sligo town labour catchment is therefore composed of those who live in and are employed within the town (**Working in Sligo town**) and those who live in the labour catchment but work outside the town e.g. other towns such as Bundoran, rural areas and locations outside the Western Region such as Dublin 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 4.8 and Section 4.9), both in terms of geography and socio-economic characteristics, a comparison profile of the Sligo town labour catchment relative to the State (Section 4.10), a comparison profile of those 'Working in Sligo town' and 'Working elsewhere in Ireland' (Section 4.11) and a comparison profile of the Sligo town labour catchment and the six other main towns/city within the Western Region (Section 4.12).

4.7.1 Place of Work

The Sligo town labour catchment can be seen to include most of County Sligo with the exception of the Manorhamilton and Tubbercurry labour catchments in the east and west respectively. In Figures 4.1 and 4.2 the main work locations for those who live in the Sligo town labour catchment are set out. Those who work mainly from home in the Sligo town labour catchment (n=3,762)⁹ are coded with their home location as their place of work i.e., a resident worker from Sligo town who works mainly from home is coded with their place of work as Sligo town.

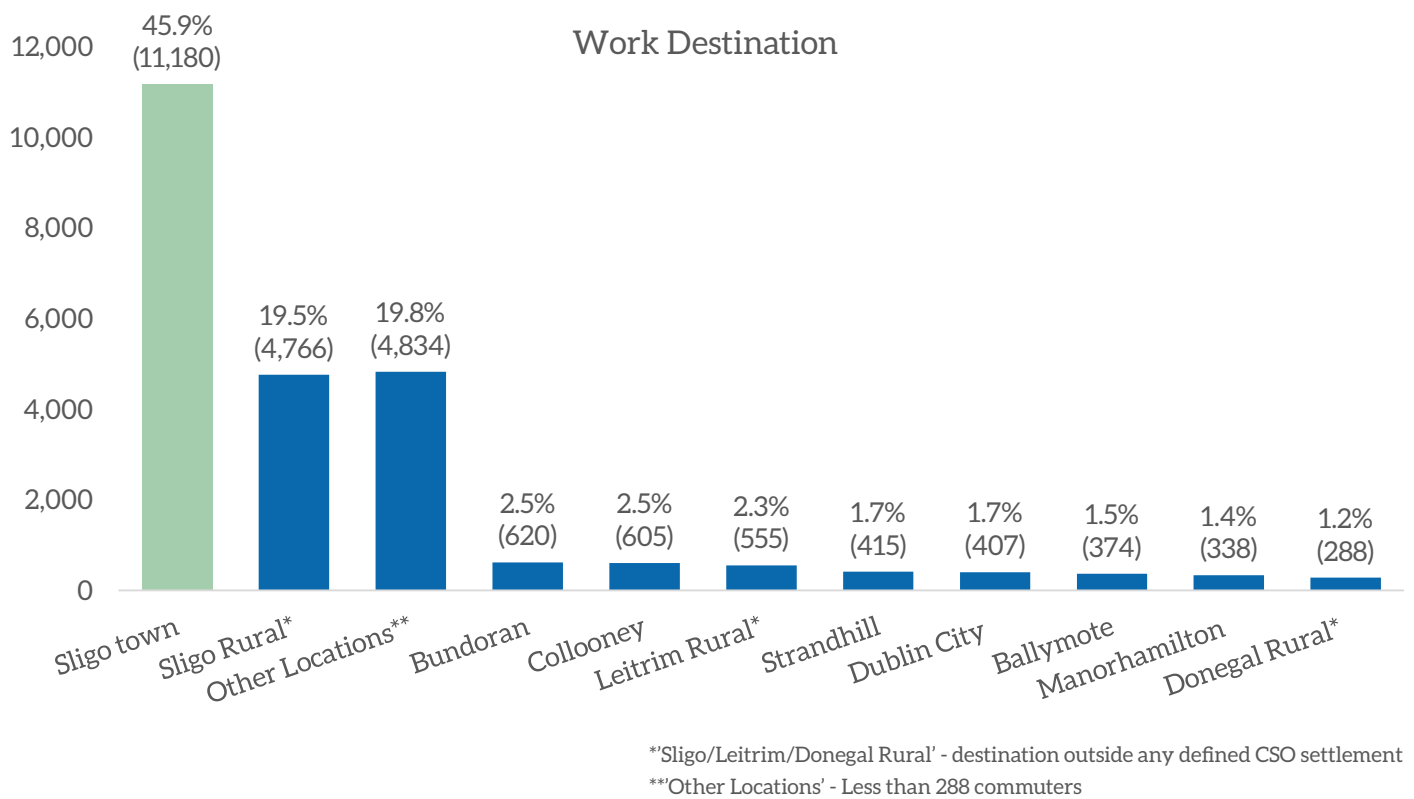
8 | Note: 'Working elsewhere in Ireland' refers to working anywhere beyond the town boundary, which could include suburbs outside the town boundary to more distant locations such as Dublin City.

9 | Of the 3,762 coded as working from home in the Sligo town labour catchment, 818 are coded as both living in and working in the Sligo town settlement.

4. Sligo town Labour Catchment

As expected, Sligo town is the principal place of employment for those living in the labour catchment, accounting for 11,180 (45.9%) of all employment - although this share has declined since 2016 (51%). Of the seven labour catchments reviewed here, the Sligo town labour catchment has the third highest proportion of resident workers commuting to its' centre, with only Galway City and Letterkenny higher at 51.5% and 46.6% respectively. 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., Sligo town). Employment in 'Sligo Rural' (destination outside any defined CSO settlement) is the next most popular destination and this accounted for just under a fifth of all resident workers (19.5% or 4,766). Since 2016, flows to 'Rural' destinations have increased by +4.5% (possibly due to higher numbers classed as working mainly from home in rural and peripheral parts of the county) (see Figure 4.2).

Figure 4.1: Key Destinations of resident workers in the Sligo town labour catchment, 2022



The other large employment destinations for residents within the Sligo town labour catchment are towns in close proximity to Sligo town; Bundoran, Collooney, Strandhill, Ballymote and Manorhamilton.

Both 'Sligo Rural' (4,766 or 19.5%) and 'Leitrim Rural' (555 or 2.3%) are also highlighted as key destinations for Sligo town labour catchment residents. Both rural destinations have increased in prominence as employment destinations with over +45.3% and +42.7% increase in resident workers since 2016 respectively (as illustrated in Figure 4.2)

4. Sligo town Labour Catchment

In summary, the Sligo town labour catchment comprises nearly half (45.9% or 11,180) of resident workers who are employed in Sligo town with the remaining 54.1% employed in locations outside of the town.

Figure 4.2: 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
Sligo town	11,180	51	0.5%	45.9%	-5.1%
Sligo Rural*	4,766	1,486	45.3%	19.5%	4.5%
Other Locations**	4,834	772	N/A	19.8%	N/A
Bundoran	620	181	41.2%	2.5%	0.5%
Collooney	605	55	10.0%	2.5%	0.0%
Leitrim Rural*	555	166	42.7%	2.3%	0.5%
Strandhill	415	148	55.4%	1.7%	0.5%
Dublin City	407	78	23.7%	1.7%	0.2%
Ballymote	374	-54	-12.6%	1.5%	-0.4%
Manorhamilton	338	23	7.3%	1.4%	-0.1%
Donegal Rural*	288	17	6.3%	1.2%	-0.1%
Total	24,382	2,548	11.7%		

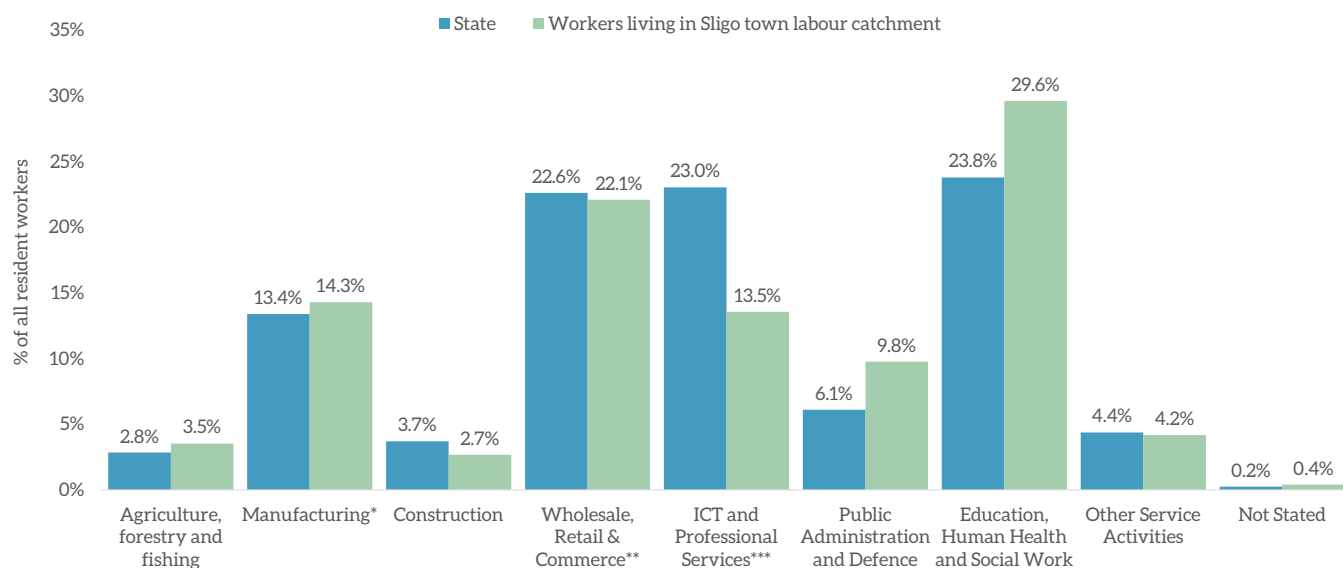
4.7.2 Employment by Industrial Group

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 Sligo town labour catchment is shown in Figure 4.3. The 'Education, Human Health and Social Work' sector is the most important employer and this accounted for almost a third of all resident workers (29.6%). The 'Wholesale, Retail Trade, Transportation and Storage, Accommodation and Food Service Activities' sector accounted for just over a fifth of resident workers (22.1%) in the Sligo town labour catchment. The 'Manufacturing, mining and quarrying, Electricity, Gas, Water supply and Waste Management' sector (14.3%) and 'Information and Communication, Financial, Real Estate, Professional, administration and support service activities' sector (13.5%) are the next biggest sectors in the labour catchment with all other sectors accounting for 10% or less.

4. Sligo town Labour Catchment

Figure 4.3: Industrial Profile of the Sligo town 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 (29.6%) is 5.8 percentage points higher than the State average (23.8%) and the ‘Manufacturing’ sector (14.3%) is 0.9 percentage points higher than the State average (13.4%). The ‘ICT and Professional Services’ sector recorded a rate of 13.5% whereas the State average was 23% - 9.5 percentage points lower¹⁰.

Across the seven labour force catchments, Sligo town has the second highest proportion in the ‘Education, Human Health and Social Work’ sector, the third lowest proportion employed in the ‘Manufacturing’ sector and the third lowest in the ‘ICT and Professional Services’ sector.

As seen in Figure 4.4 below, the industrial groups which saw the largest proportional increases between 2016 and 2022 were the ‘ICT and Professional Services’ (+2.8 percentage points), ‘Manufacturing’ (+0.4 percentage points) and the ‘Education, Human Health and Social Work’ (+0.5 percentage points) sectors. In contrast, the largest proportionate declines have been in the ‘Agriculture, forestry and fishing’ sector (-1.7 percentage points) and the ‘Wholesale, Retail & Commerce’ sector (-2.8 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.

4. Sligo town Labour Catchment

Figure 4.4: Industrial Profile of the Sligo town labour catchment in 2016 and 2022

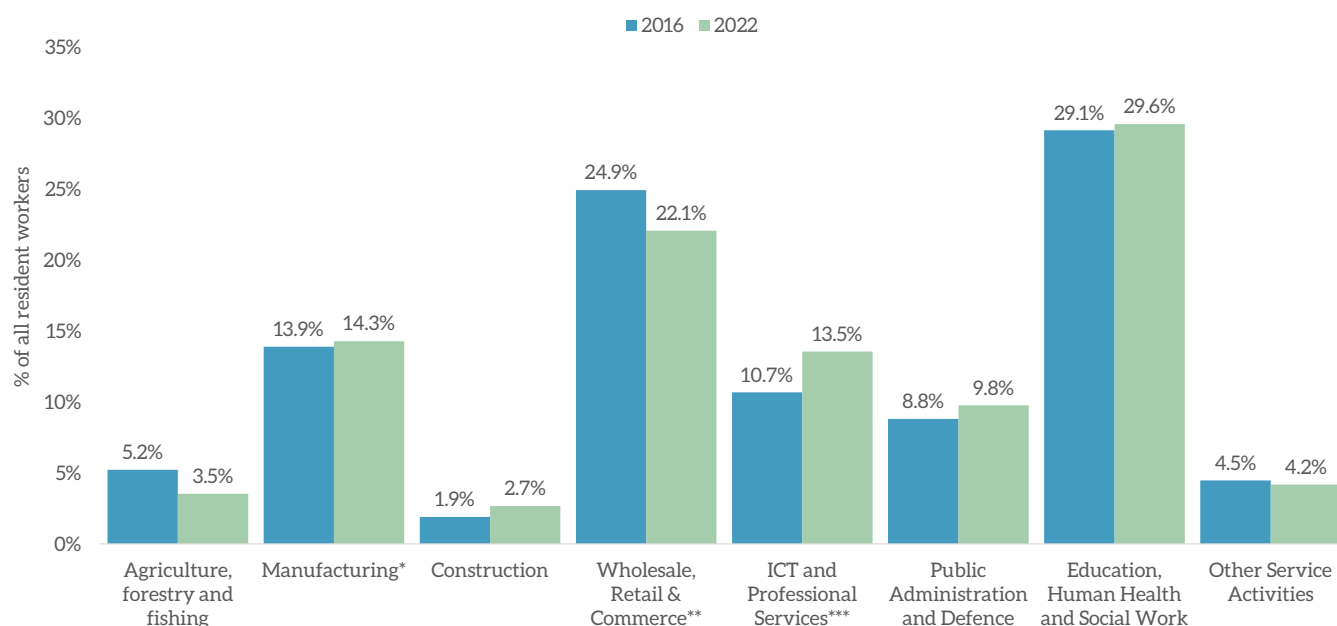


Figure 4.5 below details the industry of employment of the Sligo town labour catchment by the location of employment – working within Sligo town or working elsewhere. Employment in the ‘Education, Human Health and Social Work’ (35%) and ‘Manufacturing’ (16.7%) sectors are more dominant among those employed within Sligo town. The ‘Wholesale, Retail & Commerce’ (23.6%) and ‘Agriculture, forestry and fishing’ (6.1%) sectors have a higher share of employment outside the town than within.

Figure 4.5: Industrial Profile of the Sligo town labour catchment, 2022

Industry	Workers living in the Sligo town labour catchment							
	Total		Working in Sligo town				Working elsewhere in Ireland	
Agriculture, forestry and fishing	860	3.5%	86	0.7%	774	6.1%		
Manufacturing*	3,482	14.3%	1,963	16.7%	1,519	12.0%		
Construction	651	2.7%	167	1.4%	484	3.8%		
Wholesale, Retail & Commerce**	5,380	22.1%	2,394	20.4%	2,986	23.6%		
ICT and Professional Services***	3,303	13.5%	1,570	13.4%	1,733	13.7%		
Public Administration and Defence	2,378	9.8%	998	8.5%	1,380	10.9%		
Education, Human Health & Social Work	7,213	29.6%	4,108	35.0%	3,105	24.6%		
Other Service Activities	1,017	4.2%	439	3.7%	578	4.6%		
Not Stated	98	0.4%	18	0.2%	80	0.6%		
Total	24,382	100%	11,743	100%	12,639	100%		

4. Sligo town Labour Catchment

4.7.3 Socio-Economic Group

The socio-economic structure of employment in the Sligo town labour catchment is set out in Figure 4.6. 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 Sligo town is broadly similar to that of the State with the largest group by far being ‘Non-manual’¹² (53.6%), although this grouping is 4.1 percentage points higher than the State average at 49.5%. As with the State, the next largest grouping in the Sligo town labour catchment is ‘Employers and Managers’ at 11.3%. Relative to the other six key labour catchments, the Sligo town labour catchment recorded the second smallest proportion of resident workers classed as ‘Employers and Managers’ (Galway City labour catchment is the highest at 13.3%). Following these, the three groupings of ‘Semi-skilled’, ‘Manual-skilled’ and ‘Lower professional’ all account for approximately 6-10% of the resident workforce. ‘Farmers and Agricultural Workers’ account for 3.5% of all resident workers in the labour catchment.

Figure 4.6: Socio-Economic Group (SEG) Profile of the Sligo town labour catchment and the State, 2022

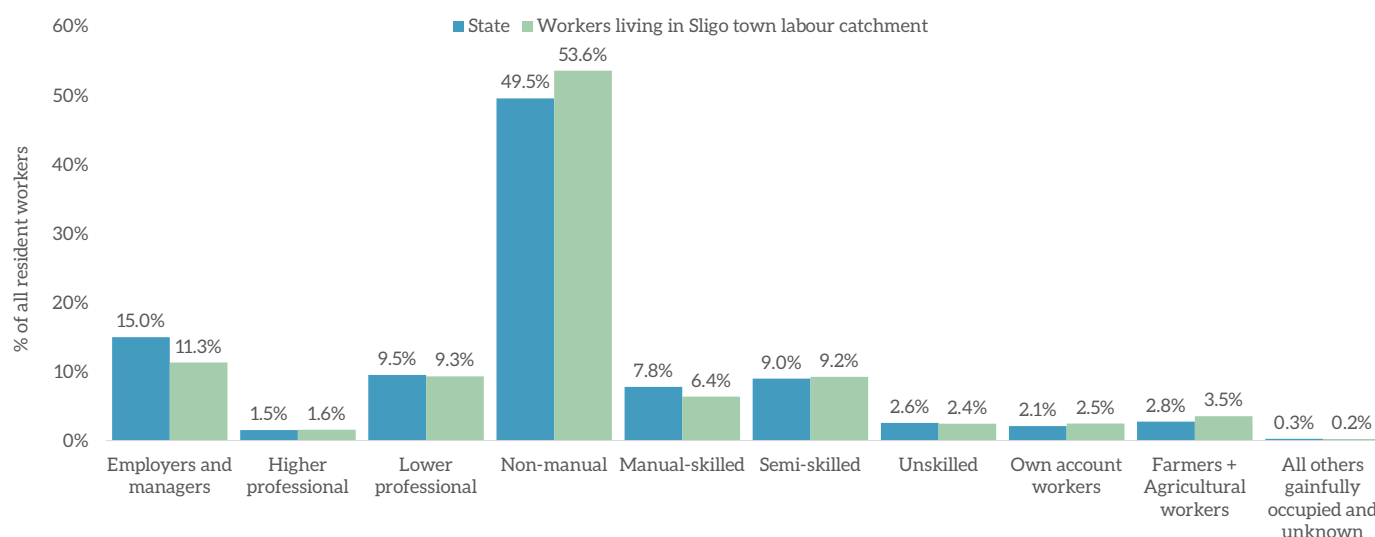


Figure 4.7 below details the socio-economic structure breakdown for those working within Sligo town and those working outside Sligo town. The largest difference between the ‘town’ and ‘elsewhere’ group is within the ‘Non-manual’ group (57.1% in Sligo town vs 50.3% in job locations outside Sligo town) which relates to persons working in retail, government, banking and other areas fulfilling administrative roles. Those working outside Sligo town, in mostly rural areas, also have a higher proportion of workers as part of the ‘Farmers and Agricultural workers’ grouping (6.2% working outside the town vs 0.7% working in the town).

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.

4. Sligo town Labour Catchment

Figure 4.7: Socio-Economic Group (SEG) Profile of the Sligo town labour catchment, 2022

Socio-Economic Group (SEG)	Workers living in the Sligo town labour catchment							
	Total		Working in Sligo town			Working elsewhere in Ireland		
Employers and managers	2,754	11.3%	1,175	10.0%	1,579	12.5%		
Higher professional	383	1.6%	165	1.4%	218	1.7%		
Lower professional	2,265	9.3%	1,374	11.7%	891	7.0%		
Non-manual	13,061	53.6%	6,702	57.1%	6,359	50.3%		
Manual-skilled	1,554	6.4%	550	4.7%	1,004	7.9%		
Semi-skilled	2,250	9.2%	1,225	10.4%	1,025	8.1%		
Unskilled	596	2.4%	293	2.5%	303	2.4%		
Own account workers	603	2.5%	160	1.4%	443	3.5%		
Farmers + Agricultural workers	860	3.5%	79	0.7%	781	6.2%		
All others gainfully occupied and unknown	56	0.2%	20	0.2%	36	0.3%		
Total	24,382	100%	11,743	100%	12,639	100%		

4.7.4 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 4.8 details the average education profile among those resident workers in the Sligo town labour catchment with 63.2% having completed third level education - this is similar to the rate of 63.1% for workers nationally. The rate for the Western Region was recorded at 61%. Relative to all seven labour catchments, Sligo town has the second most educated workforce with only Galway City (67.6%) having a higher rate. This can be partly attributed to the presence of a third level institute (ATU Sligo)¹³.

13 | At the local authority level, Galway City recorded the second highest rate in the State at 72%. The rate for County Sligo resident workers was recorded at 63.1%, the ninth highest 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).

4. Sligo town Labour Catchment

Figure 4.8 below details the education attainment levels for all workers, those employed within the town and those employed elsewhere. There is a small difference between the education attainment of those who are employed within Sligo town (65.6% with third level) and those employed elsewhere (61% with third level). This relates to the industry profile of the jobs available within Sligo town (both public sector and 'Manufacturing' jobs in IDA supported industries).

Figure 4.8: Education Attainment Profile of the Sligo town labour catchment, 2022

Education Attainment	Workers living in the Sligo town labour catchment								
	Total			Working in Sligo town			Working elsewhere in Ireland		
Secondary	8,844	36.3%		3,981	33.9%		4,863	38.5%	
Third	15,418	63.2%		7,704	65.6%		7,714	61.0%	
Not Stated	120	0.5%		58	0.5%		62	0.5%	
Total	24,382	100%		11,743	100%		12,639	100%	

Relative to the other main labour catchments, Sligo town has the second highest level of third level attainment of those employed within the town. With a recorded rate of 65.6% with third level education employed in Sligo town, only Galway City (71.1%) labour catchment has a higher rate of highly educated workers. 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.

4.7.5 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%, at 15.3% Sligo County recorded the third highest rate in the Western Region with other local authorities as follows: Roscommon County (13.7%), Leitrim (13.9%), Mayo (13.9%), Clare (15%) and Donegal (16%).

The age profile of those at work and over 15 years who live in the Sligo town labour catchment is shown in Figure 4.9. The proportion of young workers (<30 years) residing within the Sligo town labour catchment (15.5%) is lower than the overall State average of 17.6%. This is higher only in the Galway City (17.2%) and Letterkenny (16.4%) labour catchments. The relatively young age profile in Sligo town labour catchment could be explained by the presence of a third level institute within the town (ATU Sligo), similar to the Galway City and Letterkenny labour catchments.

4. Sligo town Labour Catchment

The age profile is marginally higher for those employed within Sligo town than those employed elsewhere and is evident in the data presented in Figure 4.9 below. A total of 16.9% (up from 13.9% in 2016) of all Sligo town labour catchment workers employed in Sligo town are aged 'less than 30 years' whereas the rate for workers elsewhere is 14.3% (down from 15.1% in 2016).







Figure 4.9: Age Profile of the Sligo town labour catchment, 2022

Age	Workers living in the Sligo town labour catchment								
	Total			Working in Sligo town			Working elsewhere in Ireland		
<30	3,786	15.5%		1,984	16.9%		1,802	14.3%	
30-45	9,033	37.0%		4,379	37.3%		4,654	36.8%	
45-64	10,710	43.9%		5,079	43.3%		5,631	44.6%	
65+	853	3.5%		301	2.6%		552	4.4%	
Total	24,382	100%		11,743	100%		12,639	100%	

4.7.6 Gender

The gender composition of residents in the Sligo town labour catchment is shown below. Within the Sligo town labour catchment, female workers account for a larger proportion of the total workforce than their male counterparts with rates of 51.7% and 48.3% 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 4.10: Gender Profile of the Sligo town labour catchment, 2022

Gender	Workers living in the Sligo town labour catchment								
	Total			Working in Sligo town			Working elsewhere in Ireland		
Female	12,616	51.7%		6,497	55.3%		6,119	48.4%	
Male	11,766	48.3%		5,246	44.7%		6,520	51.6%	
Total	24,382	100%		11,743	100%		12,639	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 Sligo town labour catchment and employed in Sligo town are female and account for 55.3% of all resident workers (Figure 4.10).

4. Sligo town Labour Catchment

In contrast to this, those residing in the Sligo town 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 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).

4.7.7 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.

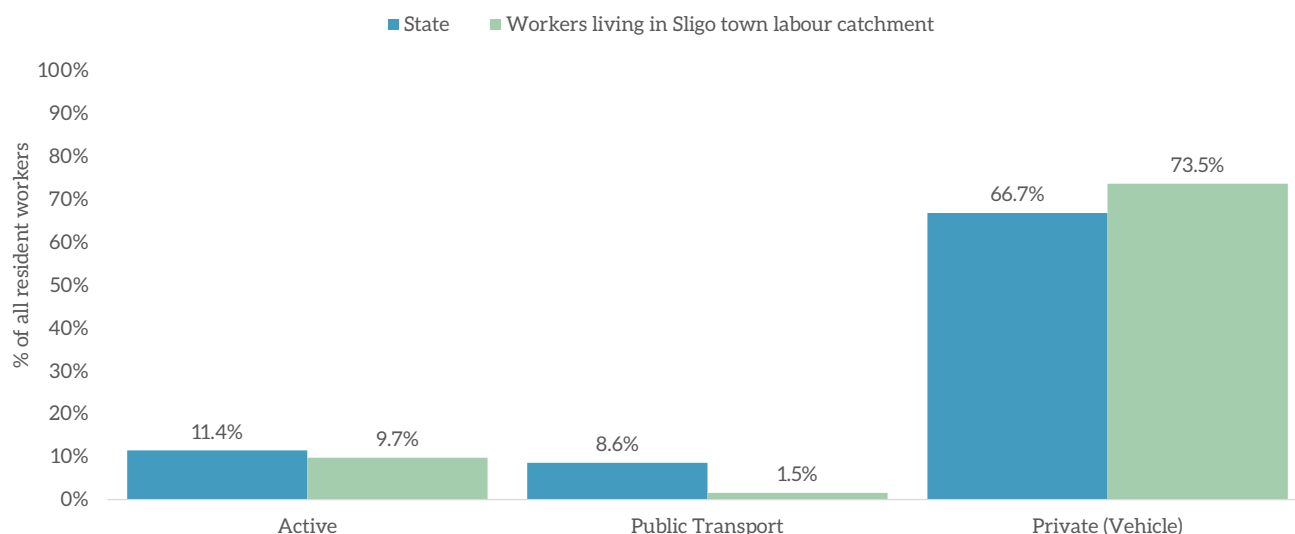
As with the State trend, commuting to work by car (driver and car passenger) is by far the most dominant means of travel across the Western Region (71%). In fact, six of the eight Western Region local authorities are within the top ten highest rates across the State - Galway County (74.8%), Roscommon (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 Sligo town labour catchment, a total of 9.7% (2,372) used 'Active' modes, 1.5% (377) used 'Public' modes and 73.5% (17,916) used 'Private' modes of transport to employment destinations. This is the second lowest rate amongst the seven labour catchments, see Figures 4.11 and 4.12 below.

4. Sligo town Labour Catchment

Figure 4.11: 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 Sligo town and those employed elsewhere. Those employed in Sligo town have a much higher propensity to use ‘Active’ modes (13.7%) as opposed to those employed elsewhere (6%).

Figure 4.12: Means of Travel for Resident Workers - Working in the town vs elsewhere, 2022

Means of Travel	Workers living in the Sligo town labour catchment								
	Total			Working in Sligo town			Working elsewhere in Ireland		
Active	2,372	9.7%		1,613	13.7%		759	6.0%	
Public Transport	377	1.5%		167	1.4%		210	1.7%	
Private (Vehicle)	17,916	73.5%		9,084	77.4%		8,832	69.9%	
Total	20,665	84.8%		10,864	92.5%		9,801	77.5%	

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.

4.7.8 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 4.13 below details the overall ‘travel time departure’ distribution of all Sligo town labour catchment resident workers.

The most common travel time departures are within the ‘07:01-08:30’ band and this accounted for 49.8% of all resident workers in the labour catchment. The next most popular departure time is ‘Before 07:00’ - recorded at just over one in five of all workers respectively 21% in the Sligo town labour catchment and just over one in four, 25.8% in the State.

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.

4. Sligo town Labour Catchment

Figure 4.13: Departure Times for Resident Workers, 2022¹⁵

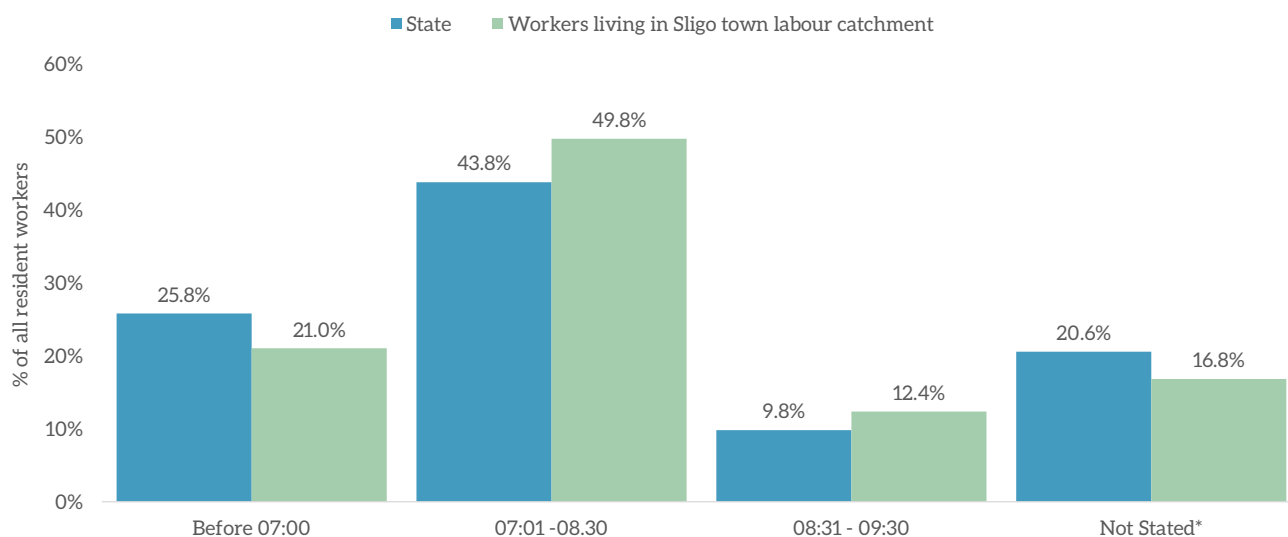


Figure 4.14 below shows a comparison of the ‘travel-time departures’ of those working in Sligo town and those working elsewhere. Comparing these two groups there are some differences across the departure times. There is a higher share commuting to Sligo town between ‘07:01-08:30’ than those commuting elsewhere. A total of 22.2% of Sligo town bound workers residing in the labour catchment depart for work ‘Before 07:00’, higher than the rate for workers travelling to other destinations (20%). These are as a result of the large geographical area the Sligo town labour catchment covers with commuters travelling from all parts of the county and as far as south Donegal and central Leitrim.

Figure 4.14: Departure Times for Resident Workers - Working in the town vs elsewhere, 2022

Departure Time	Workers living in the Sligo town labour catchment							
	Total		Working in Sligo town		Working elsewhere in Ireland			
Before 07:00	5,130	21.0%	2,608	22.2%	2,522	20.0%		
07:01-08:30	12,135	49.8%	6,245	53.2%	5,890	46.6%		
08:31-09:30	3,013	12.4%	1,527	13.0%	1,486	11.8%		
Not Stated*	4,104	16.8%	1,363	11.6%	2,741	21.7%		
Total	24,382	100%	11,743	100%	12,639	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 4.14 above).

¹⁵ | 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.

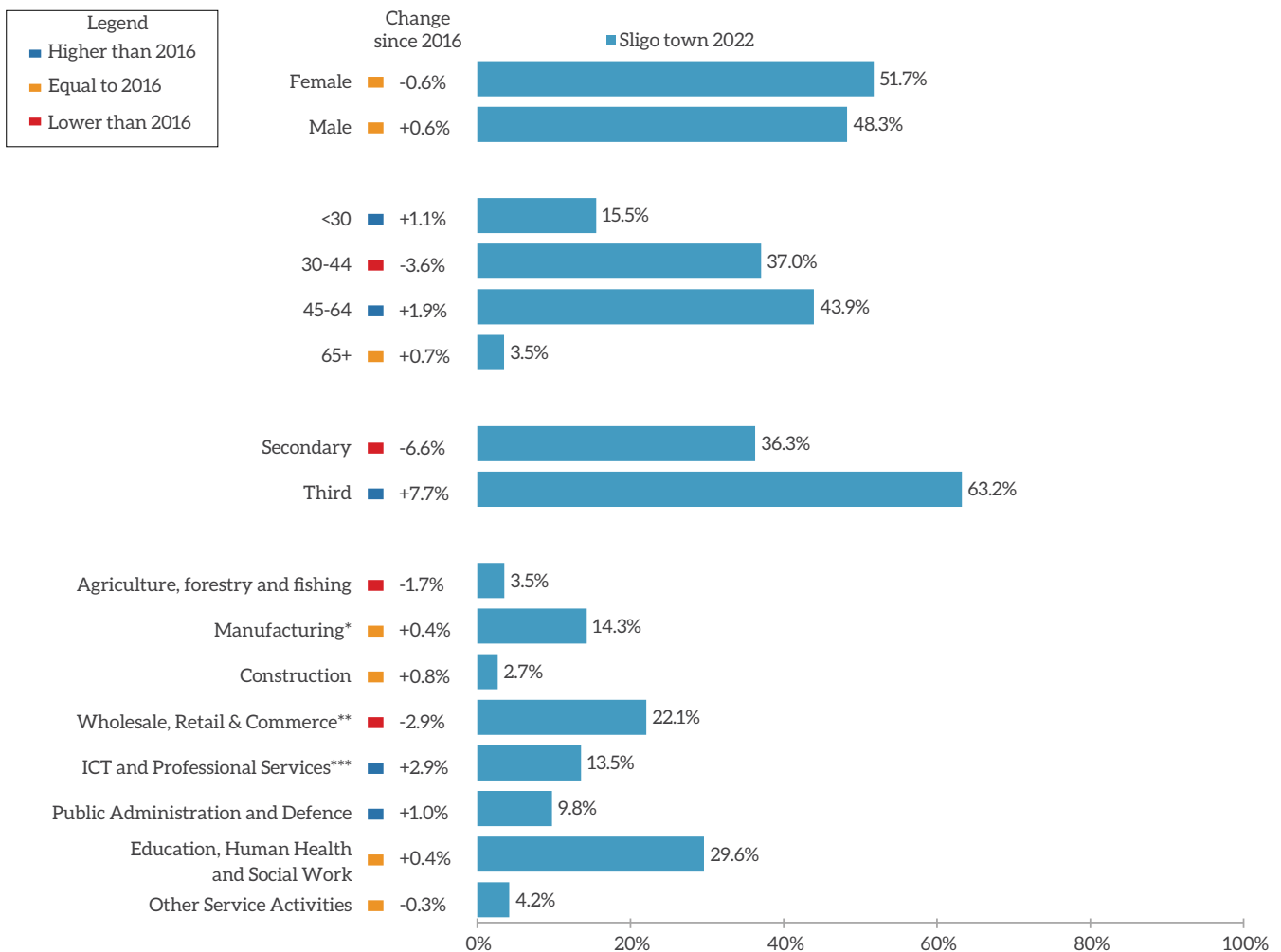
4. Sligo town Labour Catchment

4.8 Analysis of change between 2016 and 2022

The graphic below details the change that has occurred across the Sligo town 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 Sligo town labour catchment is still the dominant labour catchment for large parts of the county. The geographical size of the Sligo town labour catchment has changed slightly - and now includes larger areas around Manorhamilton but no longer includes the Tubbercurry area, see maps in Section 4.9. The total resident workers residing in the labour catchment has increased to 24,382 from 21,834 in 2016 (+11.7% or +2,548) and from 20,321 in 2006 (+20% or +4,061).

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

Figure 4.15: 2022 Profile indication of change in key indicators since 2016 (comparison of % rates)



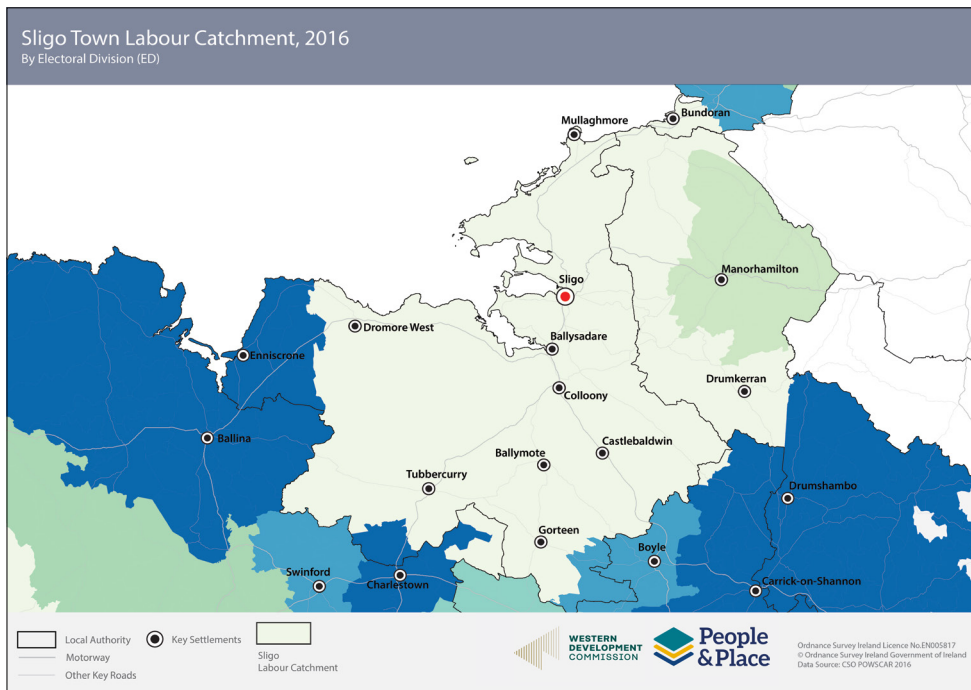
Note: with only nine classifications available, industrial classifications in POWSCCAR are less detailed than normal classifications in other Census outputs.
 Manufacturing = Manufacturing, mining and quarrying, Electricity, Gas, Water supply and Waste Management
 **Wholesale, Retail etc. = Wholesale,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

4. Sligo town Labour Catchment

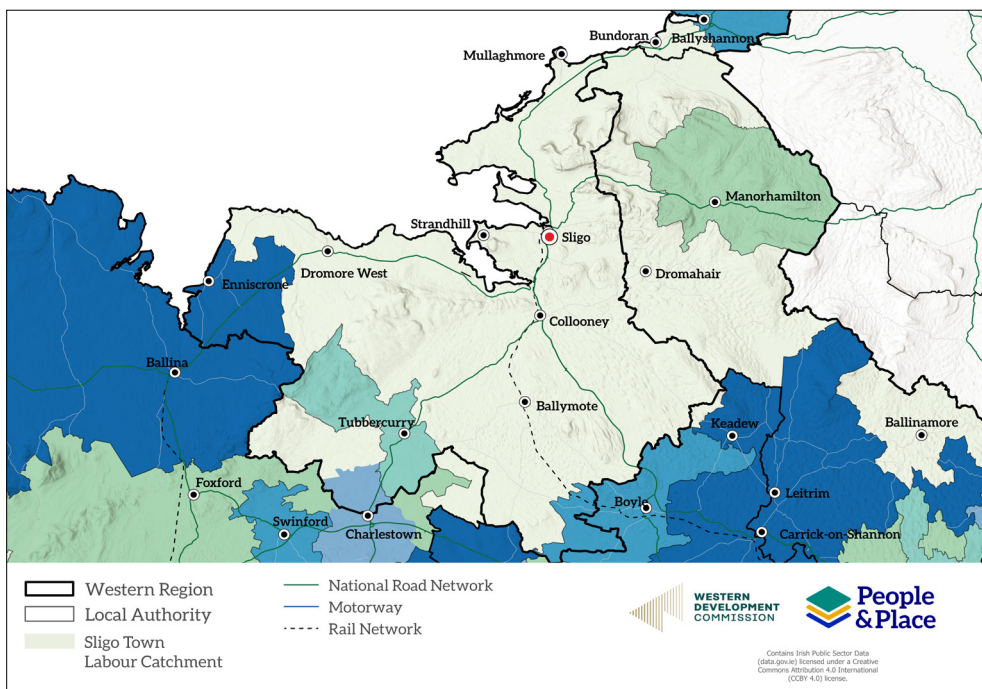
4.9 Analysis of labour catchment change between 2016 and 2022

The maps below detail the geographical changes that have taken place within the Sligo town labour catchment and neighbouring labour catchments between 2016 and 2022. The Sligo town labour catchment extends to the majority of the county, except for EDs in the southeast that are part of the Boyle labour catchment in County Roscommon and EDs in the west that are part of both the Tubbercurry and Ballina labour catchments. Since 2016, Tubbercurry is now its own labour catchment rather than part of the larger Sligo town labour catchment. Large parts of northern Leitrim, with the exception of the Manorhamilton labour catchment, also form part of the Sligo town labour catchment.

Map 4.4: Sligo town labour catchment, 2016



Map 4.5: Sligo town labour catchment, 2022

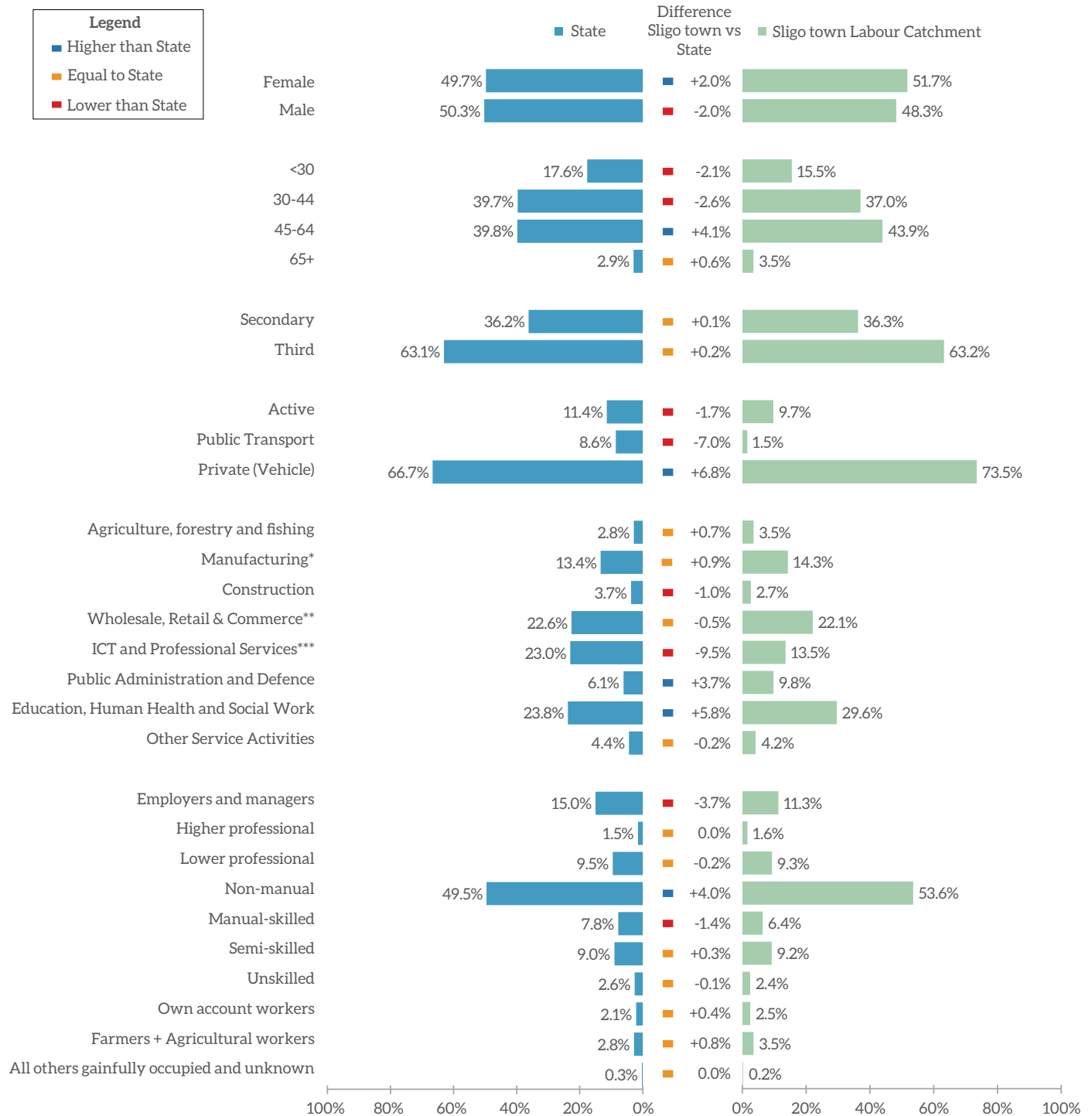


4. Sligo town Labour Catchment

4.10 Sligo town labour catchment comparison with the State, 2022

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

Figure 4.16: Comparison between State and Sligo town 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.

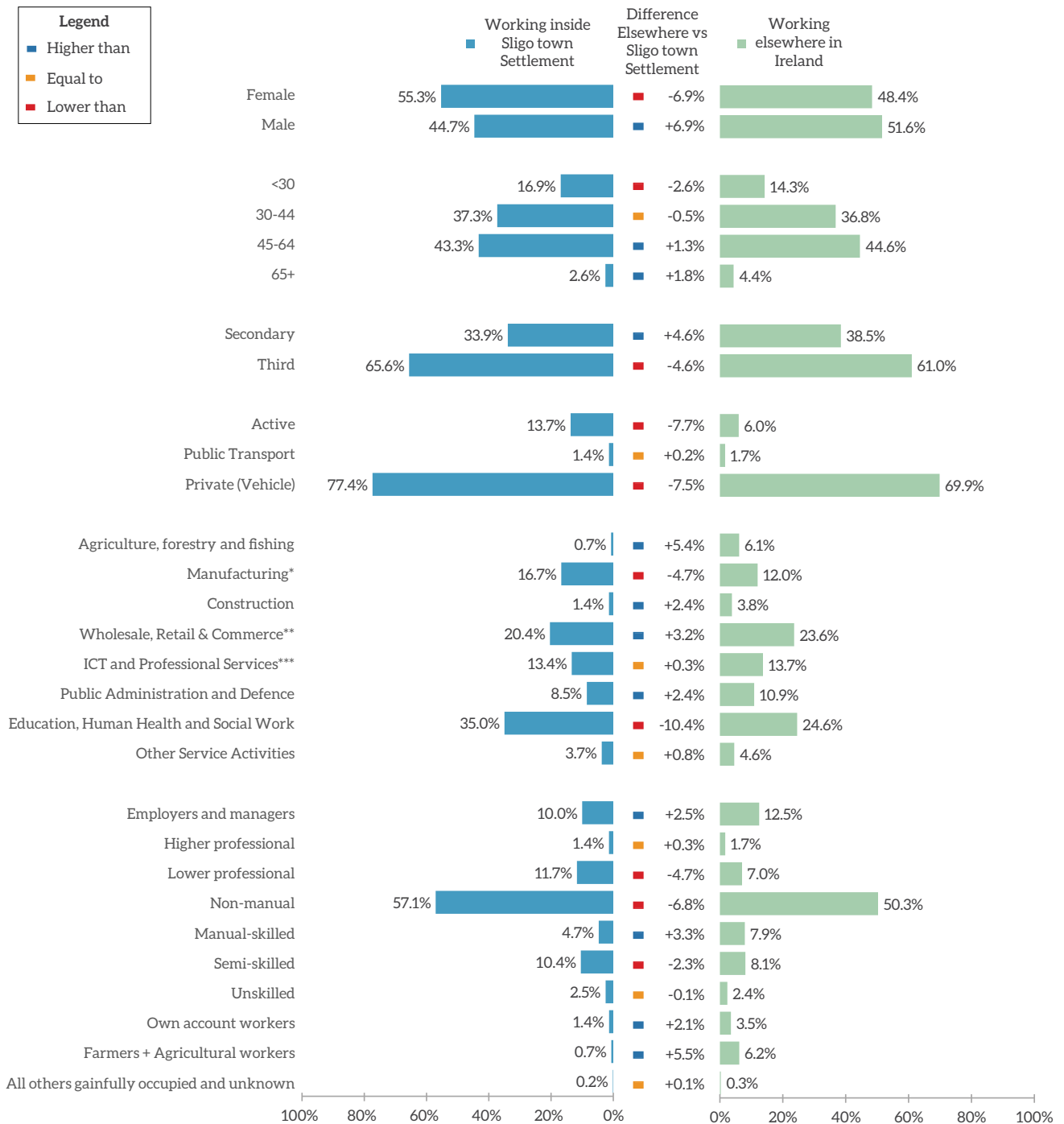
*For some percentage change figures there may be very minor rounding issues (0.1%) due to the fact that the graphic displays data at one decimal point only.

4. Sligo town Labour Catchment

4.11 Sligo town labour catchment - Employed within Sligo town and elsewhere in Ireland comparison

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

Figure 4.17: Comparison between those working within Sligo 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.

4. Sligo town Labour Catchment

4.12 Socio-Economic comparison of all seven labour catchments

The graphic below details the socio-economic characteristics of resident workers within the Sligo town labour catchment and the other six main labour catchments in the Western Region; Carrick-on-Shannon, Castlebar, Ennis, Galway City, Letterkenny and Roscommon 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 Sligo town labour catchment is 63.2%.

4.12.1 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%

4.12.2 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%

4. Sligo town Labour Catchment

4.12.3 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%

4.12.4 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%

4. Sligo town Labour Catchment

4.12.5 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%

4.12.6 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%

4.12.7 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.

5.0 Letterkenny Labour Catchment

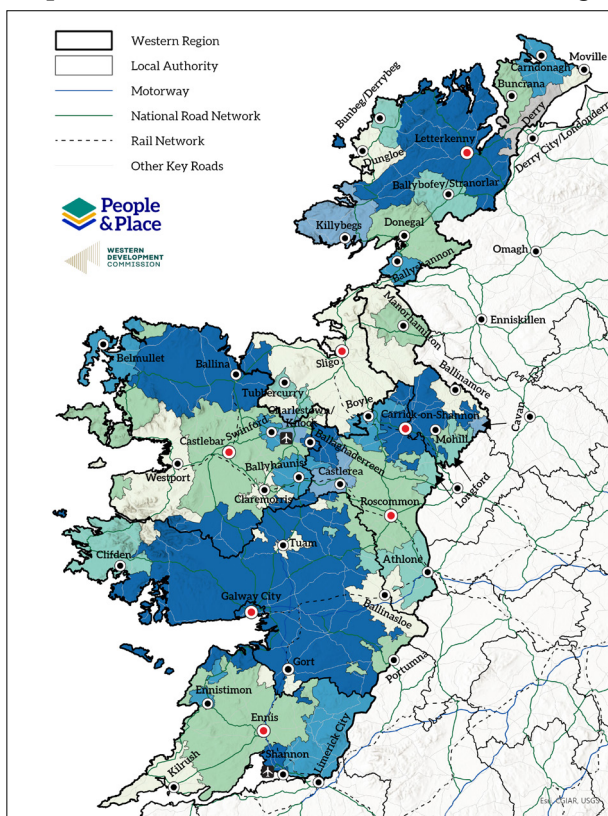
5.1 Introduction

The Western Development Commission (WDC) continues its series of regional labour market analyses with this new publication, *Travel to Work and Labour Catchments in the Western Region: A Profile of Seven Town Labour Catchments*. Based on Census of Population 2022 (POWSCCAR)¹ data, it provides unique insights into the key labour market centres in the Western Region through an analysis of the travel to work patterns of workers living in the Western Region. This is the third time the WDC has undertaken this analysis, previous reports based on 2006 Census data is available [here](#) and 2016 Census data is available [here](#).

This work is particularly timely given developments in government policy such as the National Planning Framework (NPF) and NPF Revision (2024), which sets out regional targets for where population and jobs growth should occur and associated plans and policies such as the Regional Spatial and Economic Strategies (RSES), County and City Development Plans (CDPs), Local Economic and Community Plans (LECPs) and Climate Action Plans for the seven local authorities within the Western Region.

The report and analysis identify the town labour catchments for the Western Region, comprising counties Clare, Donegal, Galway, Leitrim, Mayo, Roscommon and Sligo (see Map 5.1 below). The town labour catchment is the area from which a town draws most of its' workforce. At a regional level, the report also assists with the identification of the key employment centres in the Western Region and identifies changes since 2016. It maps and visualises the size and scale of employment based commuting patterns, highlights the potential labour supply available for future growth and, as such, provides important insights for employers and policymakers - nationally, regionally and locally.

Map 5.1: Labour Catchments in the Western Region, 2022



Source: CSO POWSCCAR

5.2 About this Profile - Letterkenny

As part of its remit in promoting the economic and social development of the Western Region, the WDC is interested in examining the nature and extent of economic and labour market activity at the regional and sub-regional level. The full report presents an overview of all 43 labour catchments in the Western Region with subsequent sections focusing on the main seven towns'/city catchments.

This section examines the town of Letterkenny as an employment destination for resident workers in the Western Region and provides detailed mapping and descriptive analysis of the Letterkenny labour catchment. Following a discussion on Letterkenny data in 2022 (Section 5.3) and the impact of working from home (Section 5.4), the profile presents the following:

¹ Census 2022 Place of Work, School, College or Childcare - Census of Anonymised Records (POWSCCAR).

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.

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.

5. Letterkenny Labour Catchment

5.5 Employment based commuting patterns to Letterkenny

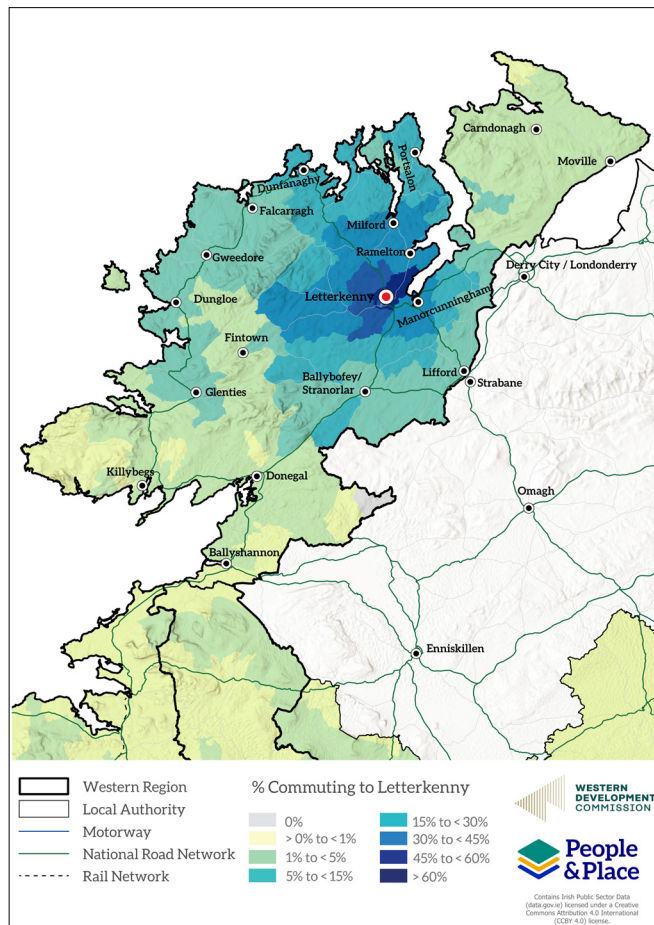
Map 5.2 shows the extent of commuting flows to Letterkenny for work opportunities. The colours represent the proportions of people at work who live in each ED and travel to work in Letterkenny.

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%.

5. Letterkenny Labour Catchment

5.6 Identifying the Letterkenny labour catchment

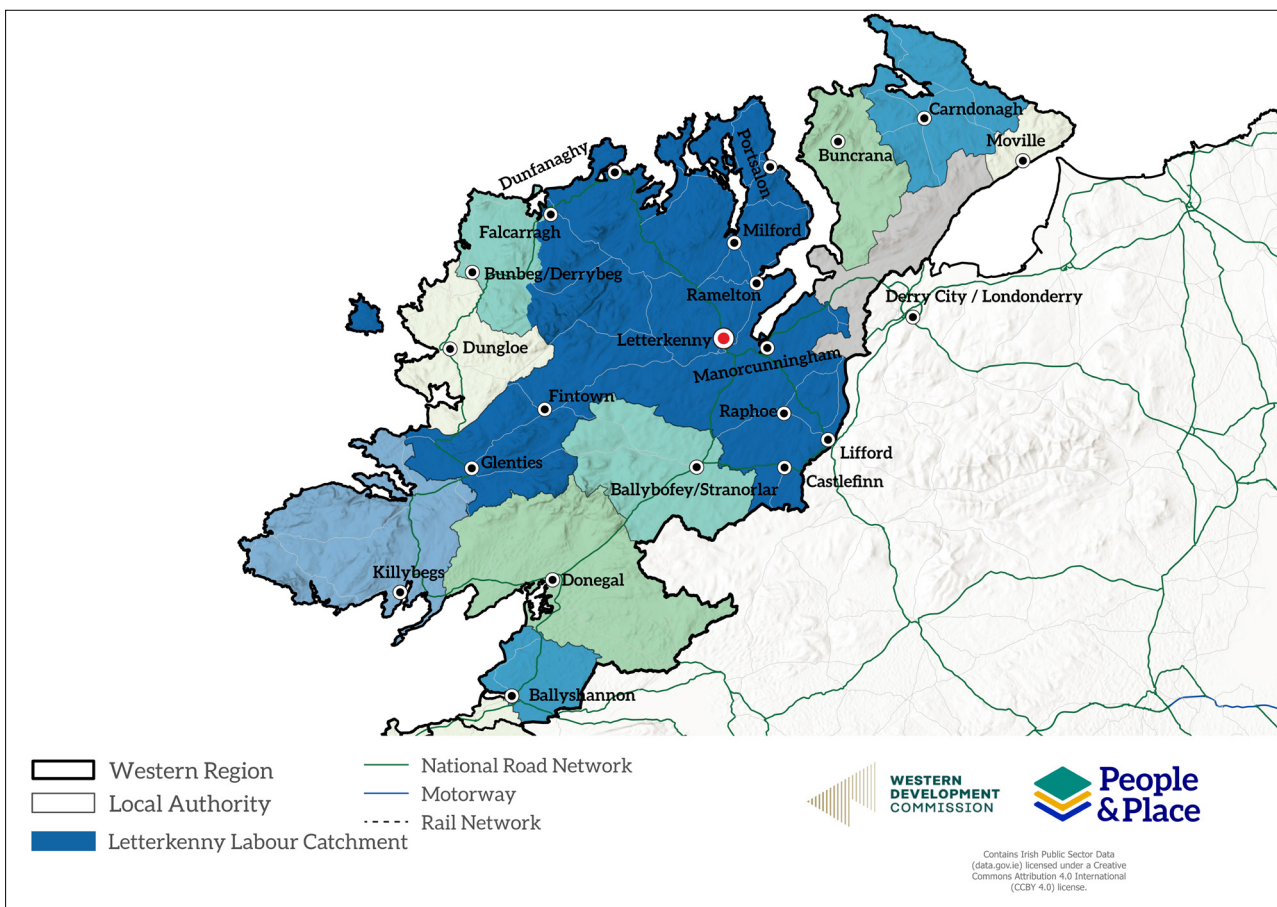
While Map 5.2 shows EDs from where even one person commuted to Letterkenny, all of these EDs are not included in the Letterkenny labour catchment. The Letterkenny labour catchment is based on only those EDs for which Letterkenny is the most popular work destination for resident workers. Other EDs, whose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

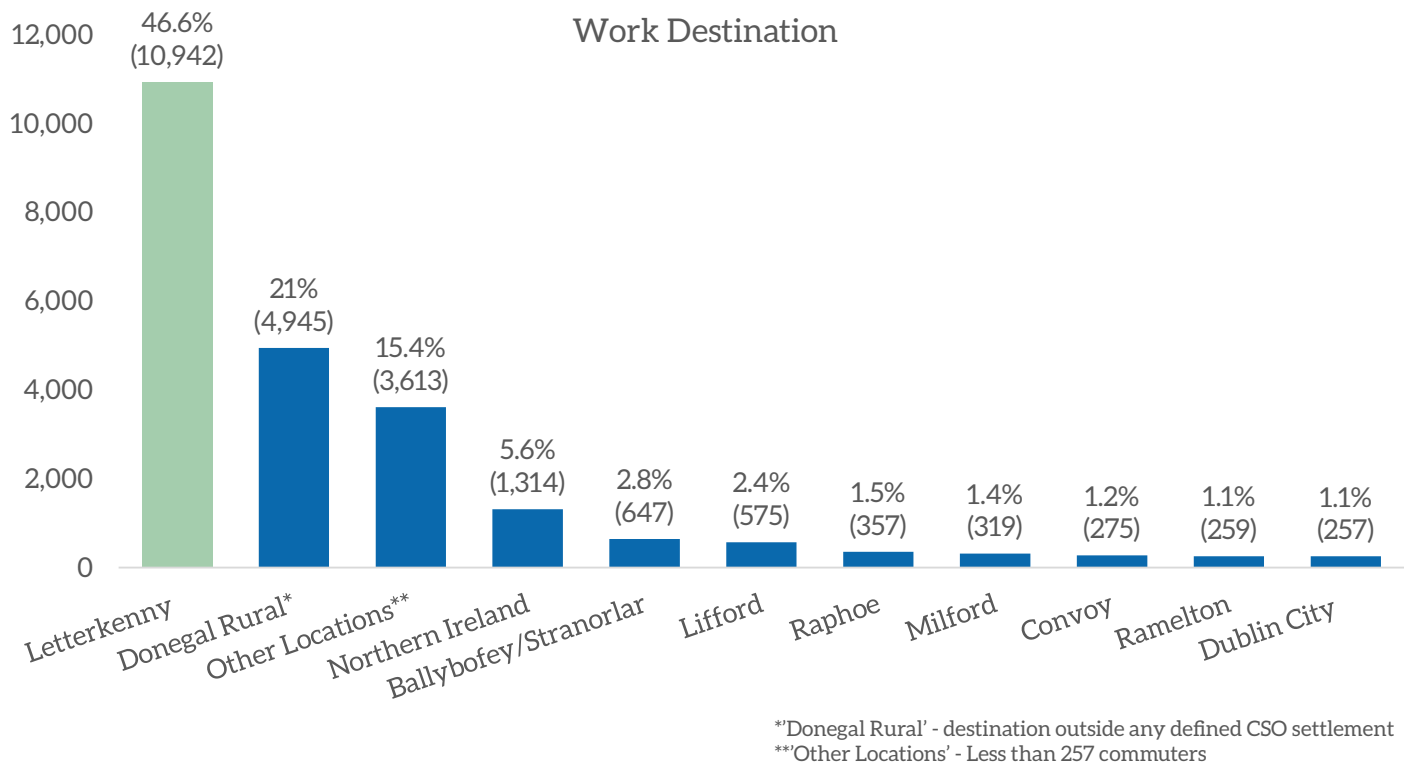
⁹ | Note: 'Working elsewhere in Ireland' refers to working anywhere beyond the town boundary, which could include suburbs outside the town boundary to more distant locations such as Dublin City.

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, Convo 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.

5. Letterkenny Labour Catchment

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%		

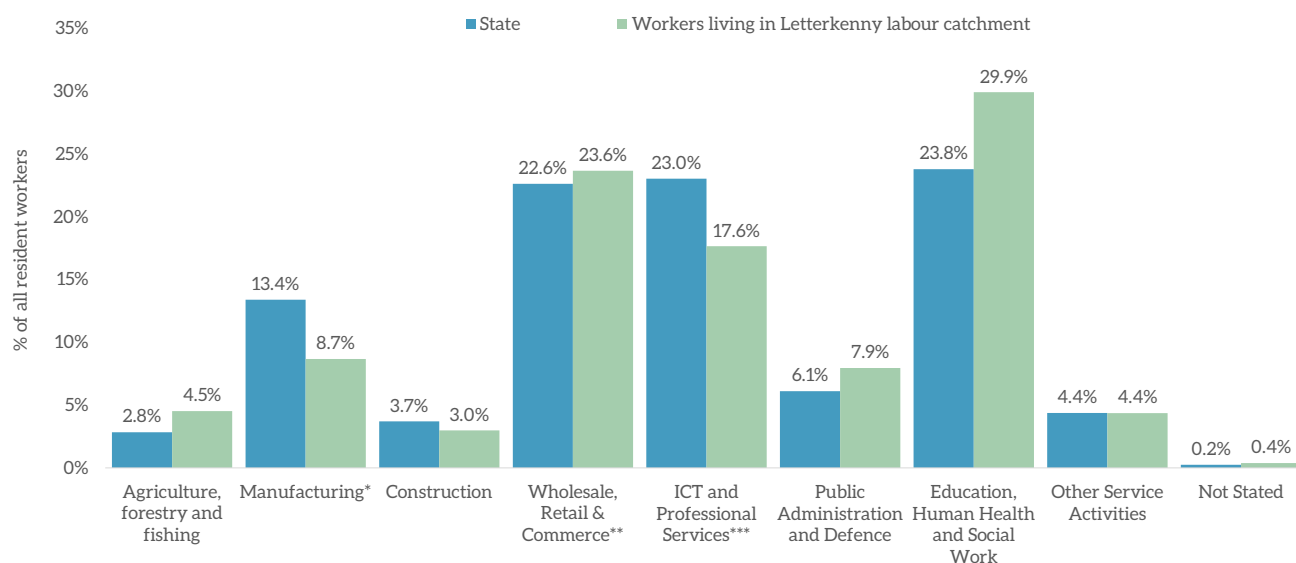
5.7.2 Employment by Industrial Group

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

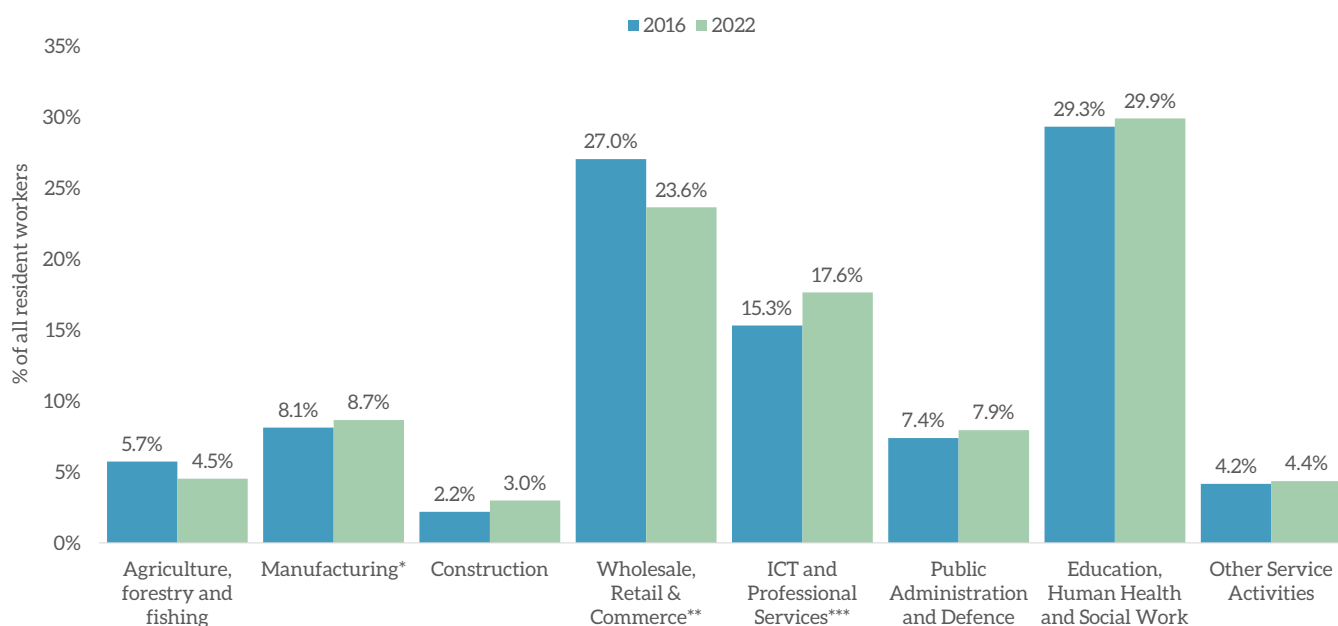


Figure 5.5 below details the industry of employment of the Letterkenny labour catchment by the location of employment – working within Letterkenny town or working elsewhere. Employment in the ‘Education, Human Health and Social Work’ (35%), ‘Wholesale, Retail and Commerce’ (24%) and ‘ICT and Professional 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%		

5. Letterkenny Labour Catchment

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

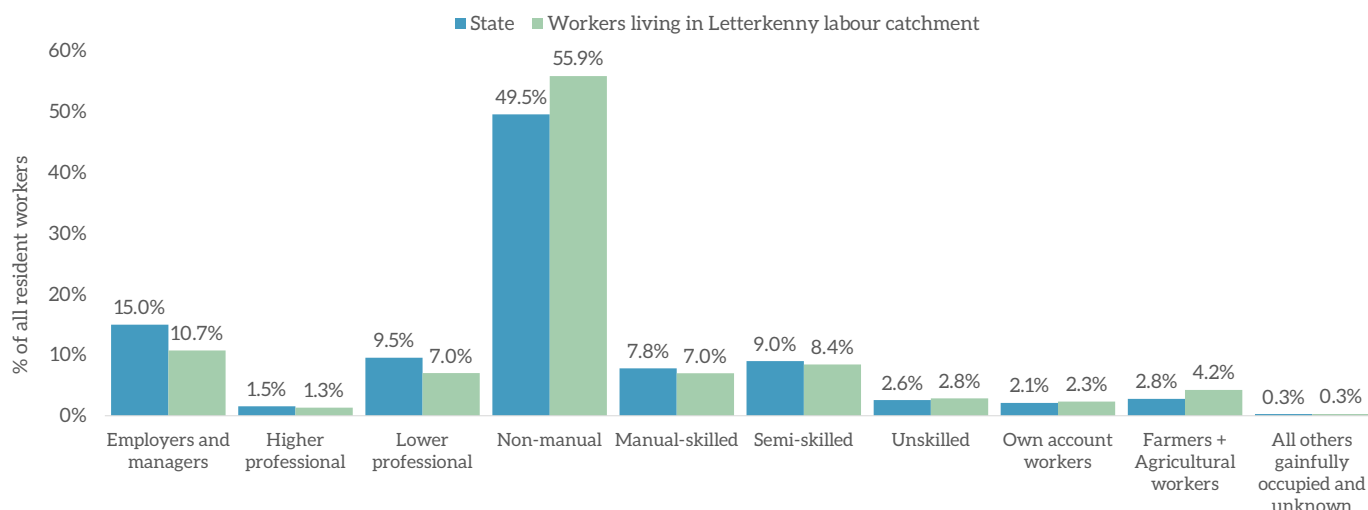


Figure 5.7 below details the socio-economic structure breakdown for those working within Letterkenny town and those working outside Letterkenny town. The largest difference between the 'town' and 'elsewhere' group is within the 'Non-manual' group (62.9% in Letterkenny town vs 49.7% in job locations outside 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.

5. Letterkenny Labour Catchment

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).

5. Letterkenny Labour Catchment

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.

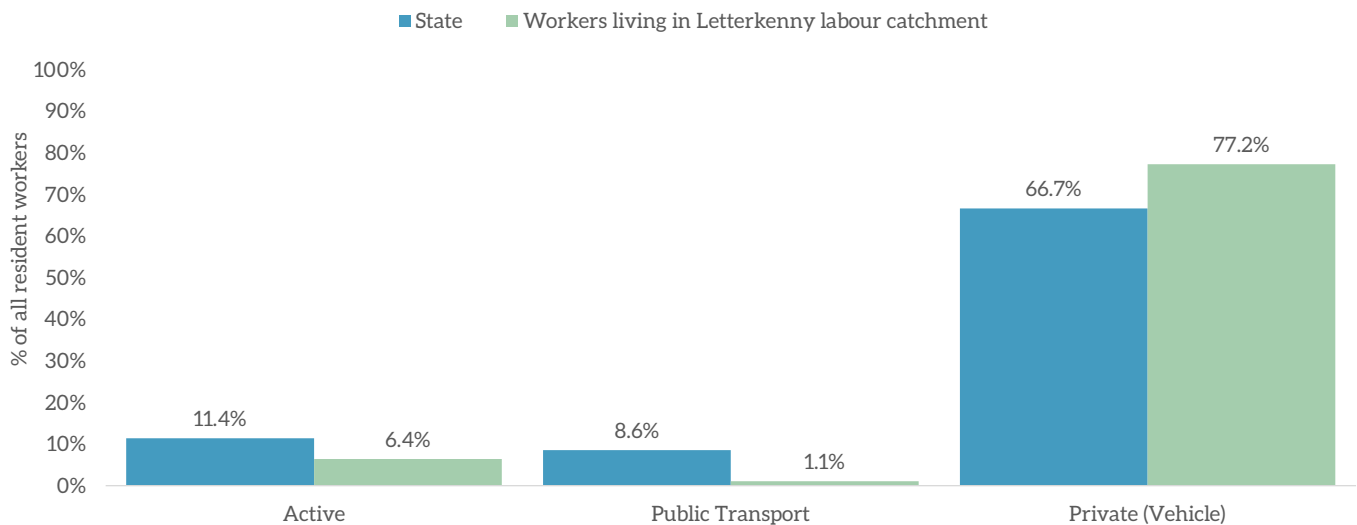
As with the State trend, commuting to work by car (driver and car passenger) is by far the most dominant means of travel across the Western Region (71%). In fact, six of the eight Western Region local authorities are within the top ten highest rates across the State - Galway County (74.8%), Roscommon (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

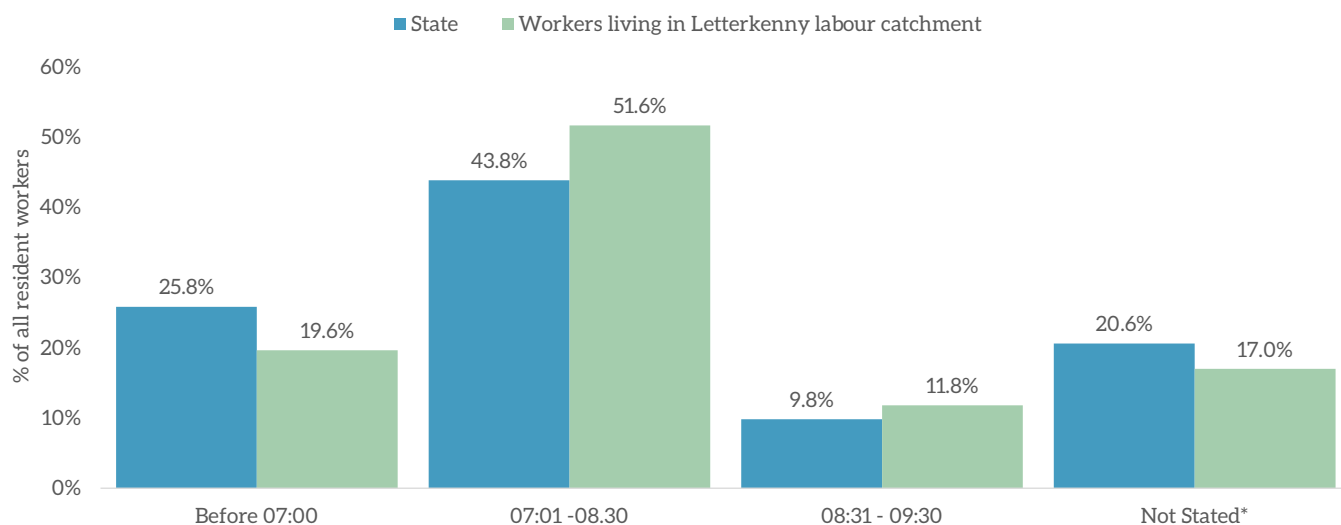


Figure 5.14 below shows a comparison of the ‘travel-time departures’ of those working in Letterkenny town and those working elsewhere. Comparing these two groups there are some differences across the departure times. There is a higher share commuting to Letterkenny town between ‘08:31-09:30’ than those 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%	1,990	18.1%	2,625	21.0%		
07:01-08:30	12,129	51.6%	6,119	55.6%	6,010	48.1%		
08:31-09:30	2,770	11.8%	1,454	13.2%	1,316	10.5%		
Not Stated*	3,989	17.0%	1,447	13.1%	2,542	20.3%		
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.

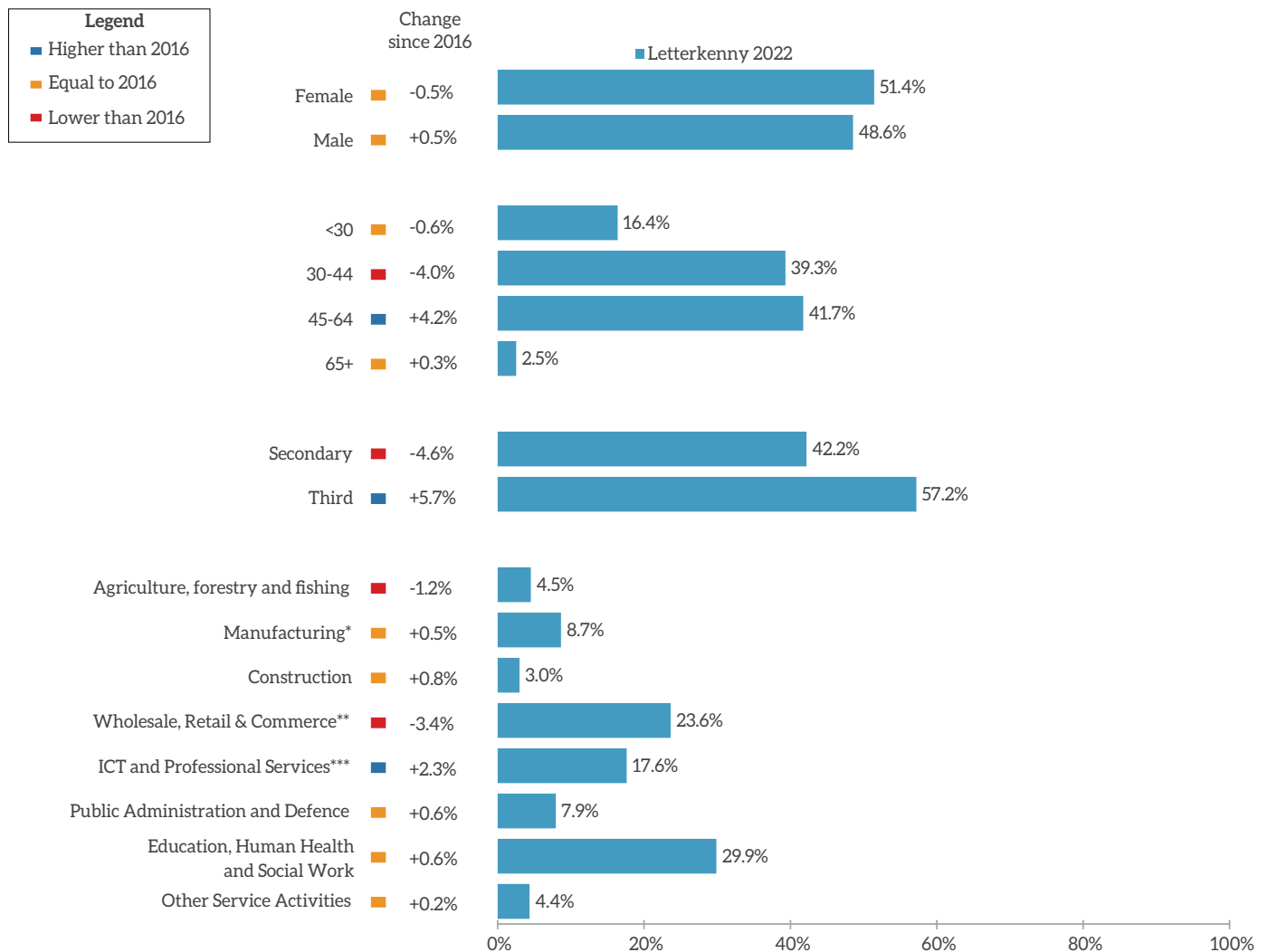
5. Letterkenny Labour Catchment

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)



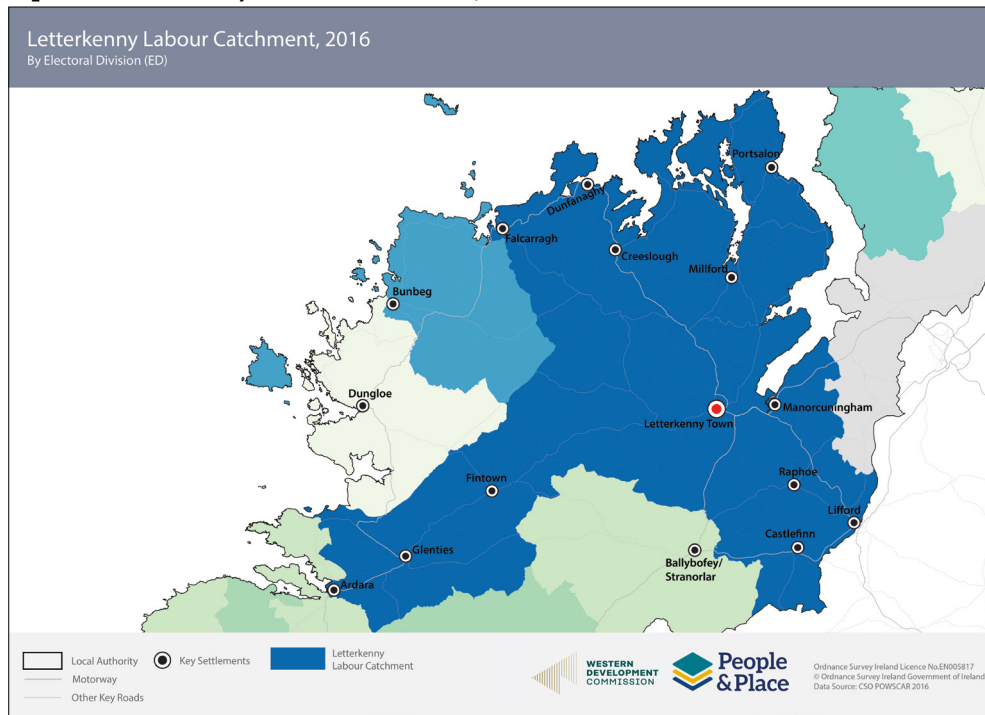
Note: with only nine classifications available, industrial classifications in POWSCCAR are less detailed than normal classifications in other Census outputs.
 *Manufacturing = Manufacturing, mining and quarrying, Electricity, Gas, Water supply and Waste Management
 **Wholesale, Retail etc. = Wholesale,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

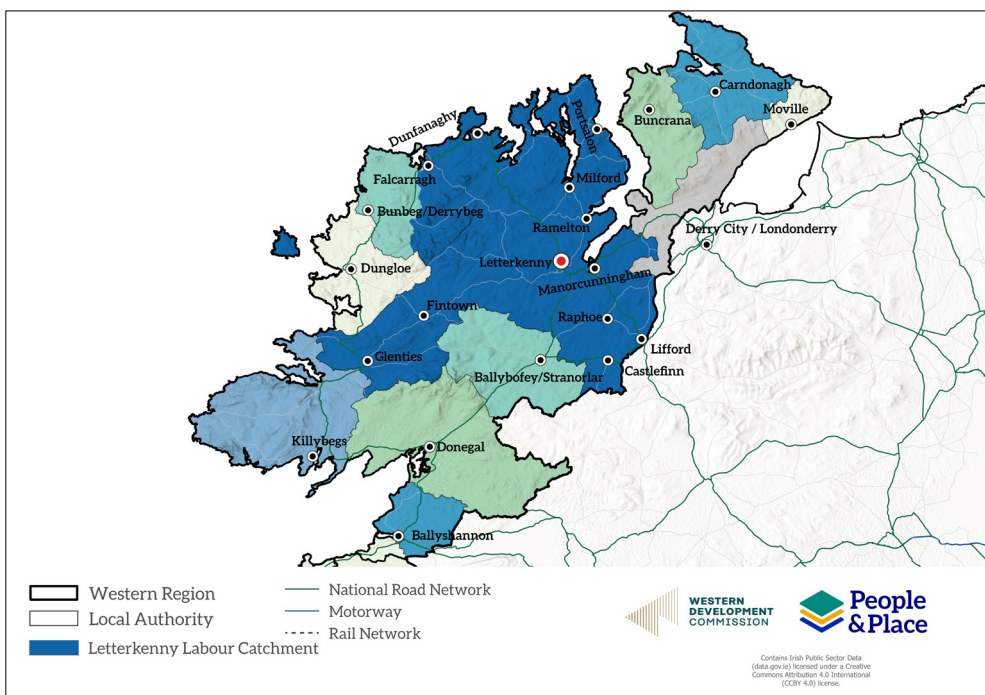
5.9 Analysis of labour catchment change between 2016 and 2022

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

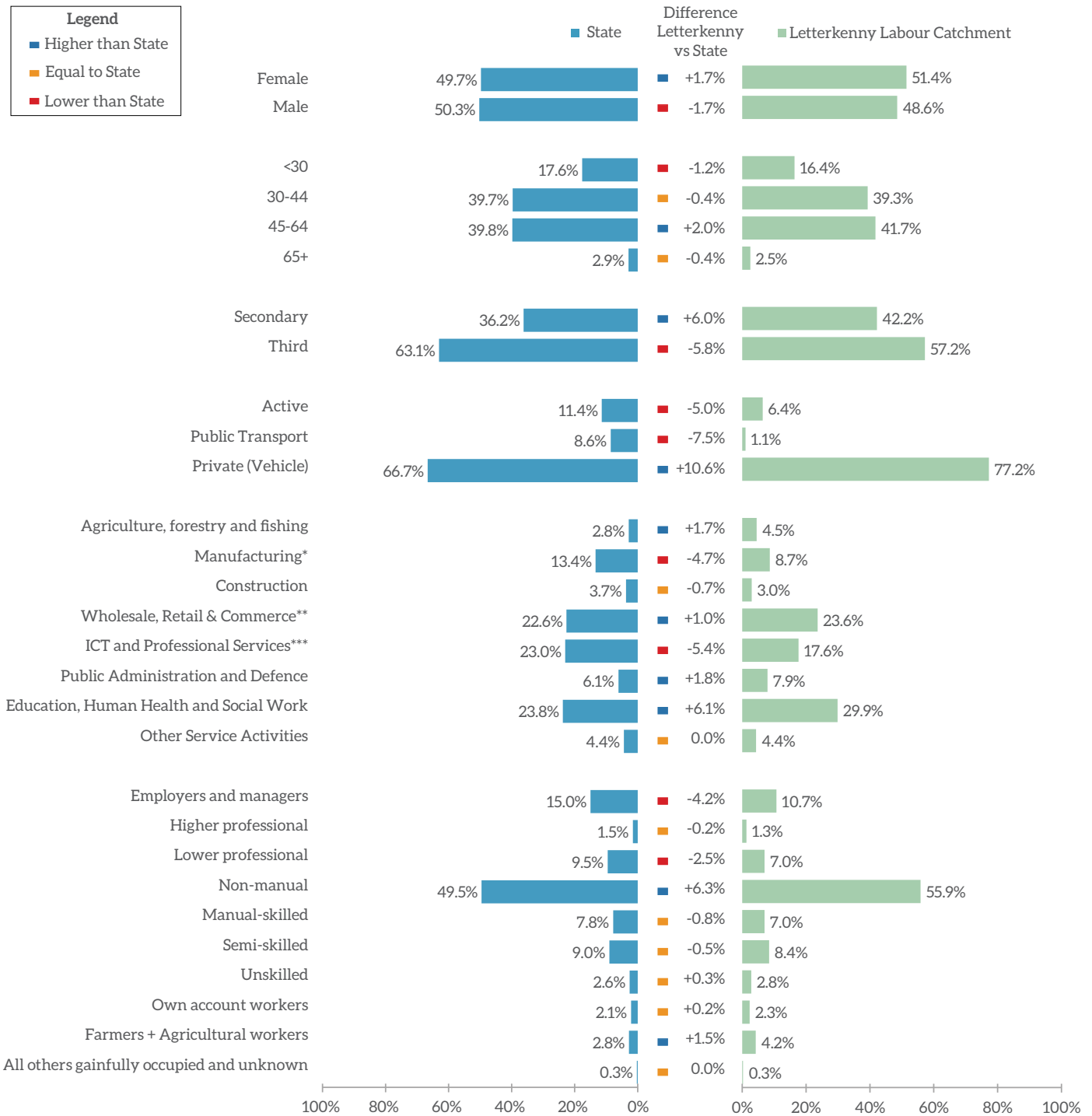


5. Letterkenny Labour Catchment

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



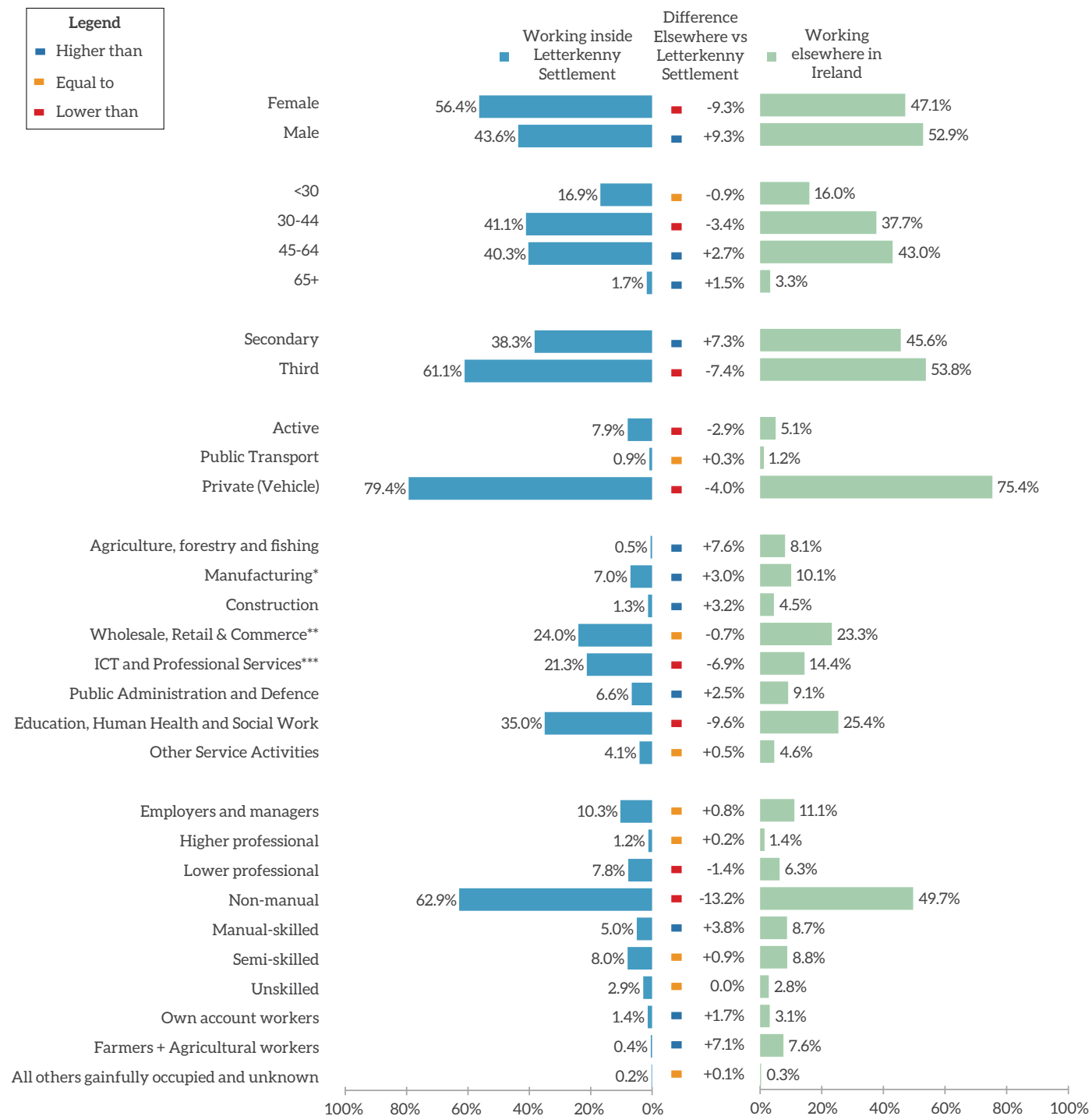
Note: with only nine classifications available, industrial classifications in POWSCCAR are less detailed than normal classifications in other Census outputs.
 Manufacturing = Manufacturing, mining and quarrying, Electricity, Gas, Water supply and Waste Management
 **Wholesale, Retail etc. = Wholesale,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

6.0 Ennis Labour Catchment

6. Ennis Labour Catchment

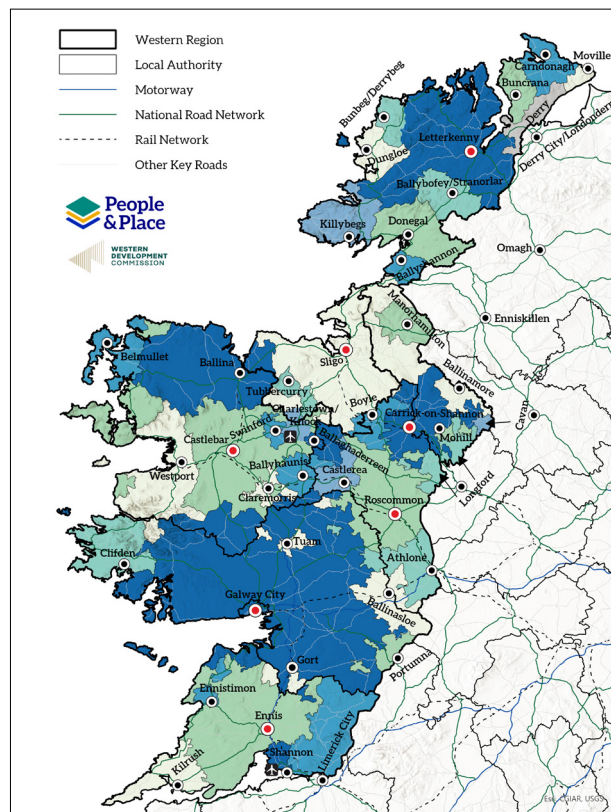
6.1 Introduction

The Western Development Commission (WDC) continues its series of regional labour market analyses with this new publication, *Travel to Work and Labour Catchments in the Western Region: A Profile of Seven Town Labour Catchments*. Based on Census of Population 2022 (POWSSCAR)¹ data, it provides unique insights into the key labour market centres in the Western Region through an analysis of the travel to work patterns of workers living in the Western Region. This is the third time the WDC has undertaken this analysis, previous reports based on 2006 Census data is available [here](#) and 2016 Census data is available [here](#).

This work is particularly timely given developments in government policy such as the National Planning Framework (NPF) and NPF Revision (2024), which sets out regional targets for where population and jobs growth should occur and associated plans and policies such as the Regional Spatial and Economic Strategies (RSES), County and City Development Plans (CDPs), Local Economic and Community Plans (LECPs) and Climate Action Plans for the seven local authorities within the Western Region.

The report and analysis identify the town labour catchments for the Western Region, comprising counties Clare, Donegal, Galway, Leitrim, Mayo, Roscommon and Sligo (see Map 6.1 below). The town labour catchment is the area from which a town draws most of its' workforce. At a regional level, the report also assists with the identification of the key employment centres in the Western Region and identifies changes since 2016. It maps and visualises the size and scale of employment based commuting patterns, highlights the potential labour supply available for future growth and, as such, provides important insights for employers and policymakers - nationally, regionally and locally.

Map 6.1: Labour Catchments in the Western Region, 2022



Source: CSO POWSSCAR

6.2 About this Profile - Ennis

As part of its remit in promoting the economic and social development of the Western Region, the WDC is interested in examining the nature and extent of economic and labour market activity at the regional and sub-regional level. The full report presents an overview of all 43 labour catchments in the Western Region with subsequent sections focusing on the main seven towns/city catchments.

This section examines the town of Ennis as an employment destination for resident workers in the Western Region and provides detailed mapping and descriptive analysis of the Ennis labour catchment. Following a discussion on Ennis data in 2022 (Section 6.3) and the impact of working from home (Section 6.4), the profile presents the following:

1| Census 2022 Place of Work, School, College or Childcare - Census of Anonymised Records (POWSSCAR).

6. Ennis Labour Catchment

1. A graphical illustration of travel to work patterns and commuting flows (Section 6.5) and the overall labour catchment of the town (Section 6.6);
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 6.7); 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, Galway City, Letterkenny, Roscommon town and Sligo town) (Section 6.8-6.12).

6.3 The importance of Ennis as a place of work

The official CSO settlement of Ennis had a population of 27,923 persons recorded in the 2022 Census. Ennis is the second largest urban centre within the Western Region (Galway City is the largest) and the 11th largest in the State. Since 2006, the population residing within the town of Ennis has increased by +15.1% (+3,670)².

Population

In the most recent intercensal period 2016 to 2022, the population of Ennis has increased by +10.5% (+2,647). 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 Clare have seen significant population growth since 2016 with the highest rates in Lahinch (+59%), Cratloe (+29%), Kilkee (+24%), Killaloe (+12%), Scarriff/Tuamgraney (+11%) and Sixmilebridge (+8%).

Labour Force

Since Census 2016 there has been an increase in the numbers living in Ennis 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 Ennis has increased by +10.4% (from 12,430 to 13,727). The number of residents at work has increased by +17.4% (from 10,566 to 12,404). Conversely, the number classed as unemployed has decreased by -29% (from 1,864 to 1,323). The +17.4% increase in those at work in Ennis has been higher than in the State (+15.6%), the Western Region (+14.6%) and County Clare (+13.4%).

Daytime Working Population

According to POWSCCAR 2022, the total number of jobs located within the Ennis boundary was 10,628 and this accounted for 3.9% of all jobs located within the Western Region (272,860)³. Of all cities and towns in Ireland, Ennis has the 15th highest number of jobs located within the town boundary and this accounted for 28.8% of all jobs located within County Clare (36,872). Relative to the six other main towns/city in this report, Ennis has the fourth highest number of jobs with higher numbers in Galway City (51,211), Sligo town (13,562) and Letterkenny (13,109) and lower numbers in Castlebar (9,911), Roscommon town (4,315) and Carrick-on-Shannon (3,145). The ratio of local jobs (10,628) to resident workers (12,269) in the town is 0.87 indicating that the town has a high level of resident workers commuting to employment opportunities elsewhere.

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 town of Ennis.

6. Ennis Labour Catchment

Between 2016 and 2022, there was an increase of +4.5% (+456) jobs located in Ennis. This was the second smallest increase of the seven main towns/city within this report with the highest rate of jobs growth in Galway City (+15.4%), Letterkenny (+15%), Roscommon town (+10.2%), Carrick-on-Shannon (+9.7%) and Castlebar (+9.6%)⁴. At +4.1%, only Sligo town had a lower proportional increase in local jobs. Over the same period, the number of jobs in County Clare increased by +6.1% (+2,111) and the Western Region as a whole by +12.4% (+30,148) from 242,712 to 272,860. Ennis accounted for 21.6% of the new job growth of County Clare.

6.4 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 County Clare a total of 5,420 (9.8%) resident workers were recorded as mainly working from home in Census 2022. This represents a +40.9% (+1,573) increase from the number in 2016 (3,847 or 8% of resident workers).

Resulting from the increased incidence in working from home, the employment base in Clare 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.

6. Ennis Labour Catchment

6.5 Employment based commuting patterns to Ennis

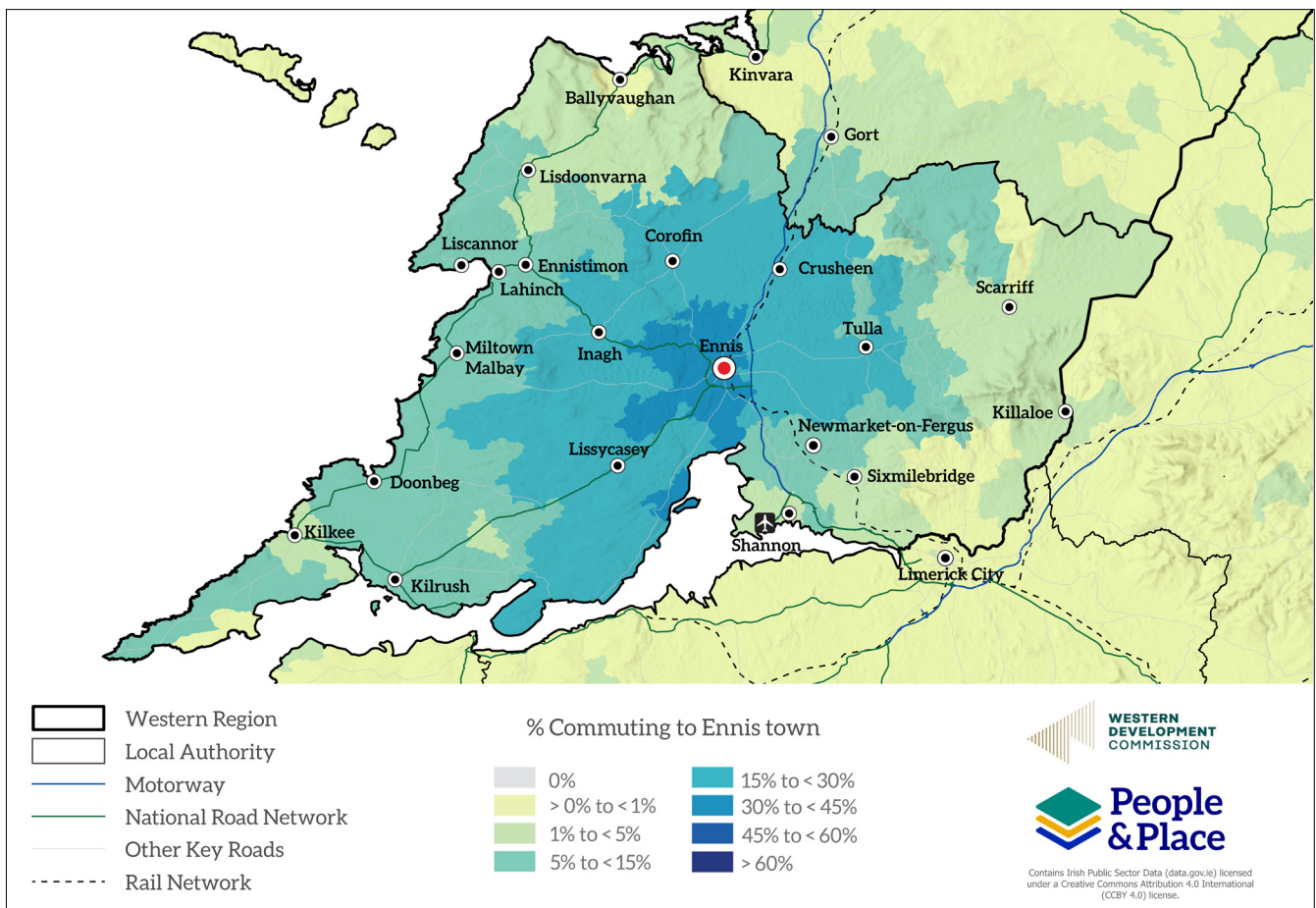
Map 6.2 shows the extent of commuting flows to Ennis for work opportunities. The colours represent the proportions of people at work who live in each ED and travel to work in Ennis.

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. Ennis, 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 6.2: Commuting Flows into Ennis, 2022



As expected, the EDs closest to Ennis 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 <45%). Beyond these areas, the proportion travelling to the town gradually declines and is illustrated on the map; graduating from the darker green areas (Lissycasey, Inagh, Corofin, Crusheen and Tulla) where between 15% and 30% of resident workers in those EDs work in Ennis, through to medium green (Ennistimon, Lahinch, Liscannor, Lisdoonvarna, Newmarket-on-Fergus, Kilrush, Doonbeg and Miltown Malbay) where between 5% and 15% of resident workers in those EDs commute to work in Ennis. The remainder of Clare has relatively low rates of commuting to Ennis with rates in Ballyvaughan, Scarriff, Killaloe, Sixmilbridge, Shannon and Kilkee all below 5%. Indeed, these areas to the north and east/southeast of the county are under a much higher level of urban influence from employment opportunities in both Galway City and the Limerick-Shannon Metropolitan Area.

6. Ennis Labour Catchment

6.6 Identifying the Ennis labour catchment

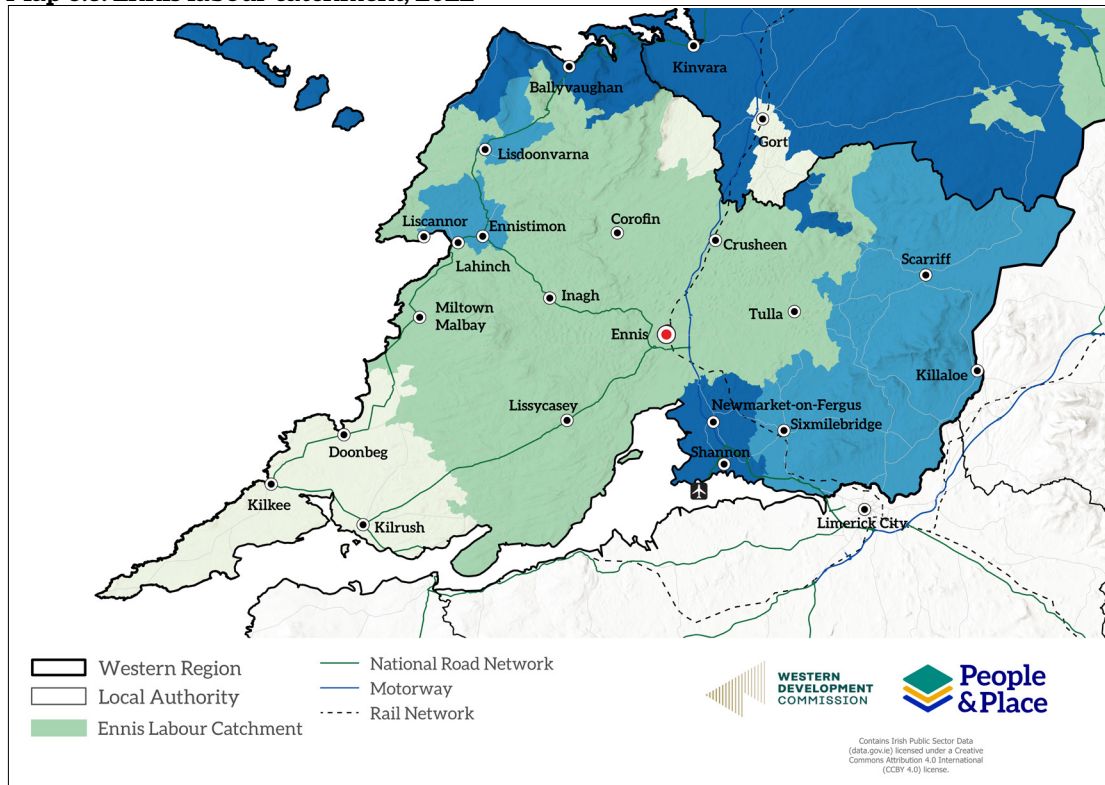
While Map 6.2 shows EDs from where even one person commuted to Ennis, all of these EDs are not included in the Ennis labour catchment. The Ennis labour catchment is based on only those EDs for which Ennis is the most popular work destination for resident workers. Other EDs, whose commuters travel in 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 6.3 shows the Ennis labour catchment as depicted by the green colour. While the labour catchment extends to large parts of the county, it excludes southwest areas of Clare, which form part of the Kilrush labour catchment and northwest Clare in areas close to Fanore and Ballyvaughan, which form part of the Galway City labour catchment. Since 2016, parts of west Clare in the areas of Lahinch, Liscannor and Lisdoonvarna are now part of the Ennistimon labour catchment rather than the Ennis labour catchment. Much of east Clare including Scarriff/Tuamgraney, Killaloe and Sixmilebridge are part of the Limerick-Shannon Metropolitan Area. Since 2016, both the towns of Ennistimon (+19% local jobs and +9% population) and Lahinch (+30% local jobs and +60% population) have seen very strong demographic and economic growth and this has influenced local labour catchments.

Map 6.3: Ennis labour catchment, 2022



Source: CSO POWSCCAR

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

6. Ennis Labour Catchment

Ennis is still the dominant labour catchment for some parts of east Clare and extends past Tulla. However, the remainder of east Clare from the County Galway border in the north to County Limerick in the south including Scarriff/Tuamgraney, Killaloe and Sixmilebridge (the area shaded in blue to the east), is under the influence of Limerick City which acts as the main employment destination for this part of the county. Very strong job growth since 2016 in both Limerick City and the wider Shannon area has resulted in both of these locations becoming more important destinations for resident workers in County Clare. As such, the importance of Ennis town as the dominant employment destination in parts of east Clare has declined (see Section 6.9).

In summary, Ennis is an important employment destination but its influence is mainly within County Clare. In particular, Ennis is the key economic attraction for the immediate areas surrounding the town, central Clare (Inagh, Corofin, Lisseycasey etc.) and then the midwest coastal areas to Miltown Malbay.

In 2022, there were 22,342 people classified as at work and living within the Ennis labour catchment (7.6% of all Western Region resident workers). Interestingly, this is the fourth largest in the Western Region, behind Galway City (88,253), Sligo town (24,382) and Letterkenny (23,503). The Ennis labour catchment has a population at work 1.8 times larger than the town of Ennis (22,342 to 12,269 respectively). Although the geographical size of the Ennis labour catchment has contracted (mainly east Clare and parts of west Clare), the total resident workers residing in the labour catchment has increased by +4.4% since 2016 (from 21,409) and by +4.7% since 2016 (from 21,333).

6.7 Profile of the Ennis labour catchment

Map 6.3 above identified the Ennis labour catchment (in green). 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 Ennis town 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 Ennis.

The Ennis labour catchment is therefore composed of those who live in and are employed within the town (**Working in Ennis**) and those who live in the labour catchment but work outside the town e.g. other towns such as Shannon, 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 6.8 and Section 6.9), both in terms of geography and socio-economic characteristics, a comparison profile of the Ennis labour catchment relative to the State (Section 6.10), a comparison profile of those 'Working in Ennis' and 'Working elsewhere in Ireland' (Section 6.11) and a comparison profile of the Ennis labour catchment and the six other main towns/city within the Western Region (Section 6.12).

⁸ | 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.

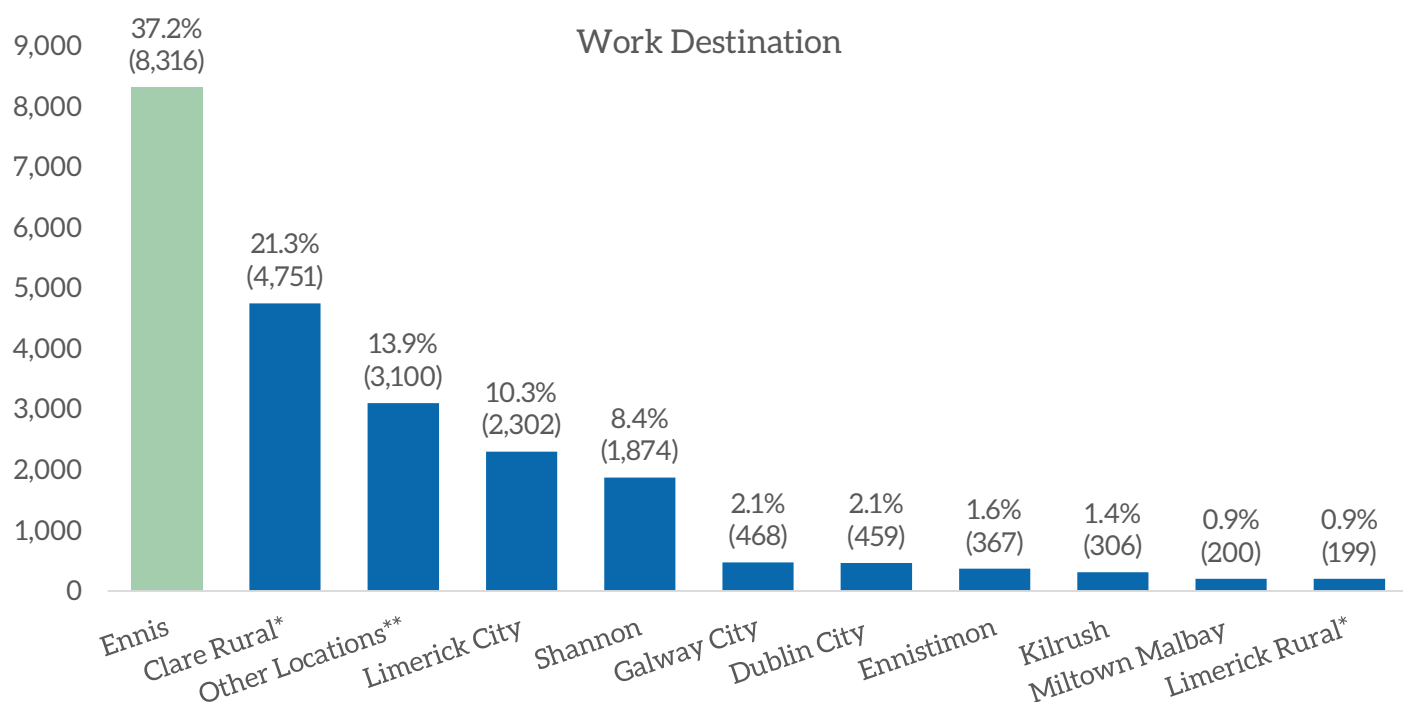
6. Ennis Labour Catchment

6.7.1 Place of Work

The Ennis labour catchment can be seen to include most of County Clare, but is mainly contained within central areas and the midwest. In Figures 6.1 and 6.2 the main work locations for those who live in the Ennis labour catchment are set out. Those who work mainly from home in the Ennis labour catchment (n=2,823)⁹ are coded with their home location as their place of work i.e., a resident worker from Ennis who works mainly from home is coded with their place of work as Ennis.

As expected, Ennis town is the principal place of employment for those living in the labour catchment, accounting for 8,316 (37.2%) of all employment - although this share has declined since 2016 (38.8%). Of the seven labour catchments reviewed here, the Ennis labour catchment has the third lowest proportion of resident workers commuting to its' centre. 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., Ennis). Employment in rural parts of County Clare (destination outside any defined CSO settlement) is the next most popular destination and this accounted for just over a fifth of all resident workers (21.3% or 4,751). Since 2016, flows to 'Rural' areas (destination outside any defined CSO settlement) have declined by -5.6% and this is partly explained by the expansion of the Shannon town boundary by the CSO which previously did not include parts of the Shannon Free Zone (jobs in this area were previously classed as 'Rural') (see Figure 6.2).

Figure 6.1: Key Destinations of resident workers in the Ennis labour catchment, 2022



*'Clare/Limerick Rural' - destination outside any defined CSO settlement
 **'Other Locations' - Less than 199 commuters

The growing importance of the Limerick-Shannon Metropolitan Area (a strategic planning area within the National Planning Framework) as an employment destination for Clare resident workers has already been highlighted. This growth has resulted in a contraction of the overall Ennis labour catchment since 2016 and an expansion of both the Limerick and Shannon labour catchments.

⁹ Of the 2,823 coded as working from home in the Ennis labour catchment, 1,048 are coded as both living in and working in the Ennis settlement.

6. Ennis Labour Catchment

However, even for those residing within the Ennis labour catchment, both towns are still key employment destinations with Limerick City accounting for 10.3% (2,302) and Shannon accounting for 8.4% (1,874) of all employment.

Since 2016, the largest increase in employment destination has been to Shannon town, which has seen an overall increase in 'local jobs' in the town from 4,484 in 2016 to 8,185 in 2022 (+82%)¹⁰. As such, Shannon now plays a far more important role in the defined labour catchments in the south of the Western Region. The other large employment destinations for residents within the Ennis labour catchment are important towns in close proximity to Ennis; Ennistimon, Kilrush, Miltown Malbay, Lahinch and Lisdoonvarna. Both Galway City (468 or 2.1%) and Dublin City (459 or 2.1%) are key destinations for Ennis labour catchment residents (as illustrated in Figure 6.2 below). Both destinations have increased in importance since 2016. Recent improvements to the motorway network (M18 and M7), reduced travel times and more flexible working from home arrangements are contributory factors. It is clear from examining the change between 2016 and 2022 in the proportional share of employment in key destinations, that the centres of Limerick City and Shannon have grown in importance, while 'Clare Rural' has declined (due to reclassification of Shannon Free Zone by CSO).

In summary, the Ennis labour catchment comprises just over a third (37.2% or 8,316) of resident workers who are employed in Ennis town with the remaining almost two thirds (62.8%) employed in locations outside of the town. As such, the Ennis labour catchment is a heavily contested economic space with resident workers availing of job opportunities both in the town and other nearby economic centres (Limerick City, Shannon and Galway City).

Figure 6.2: 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
Ennis	8,316	11	0.1%	37.2%	-1.6%
Clare Rural*	4,751	-1,008	-17.5%	21.3%	-5.6%
Other Locations**	3,100	927	N/A	13.9%	N/A
Limerick City	2,302	347	17.7%	10.3%	1.2%
Shannon	1,874	837	80.7%	8.4%	3.5%
Galway City	468	98	26.5%	2.1%	0.4%
Dublin City	459	194	73.2%	2.1%	0.8%
Ennistimon	367	-185	-33.5%	1.6%	-0.9%
Kilrush	306	-23	-7.0%	1.4%	-0.2%
Miltown Malbay	200	-2	-1.0%	0.9%	0.0%
Limerick Rural*	199	49	32.7%	0.9%	0.2%
Total	22,342	933	4.4%		

6.7.2 Employment by Industrial Group

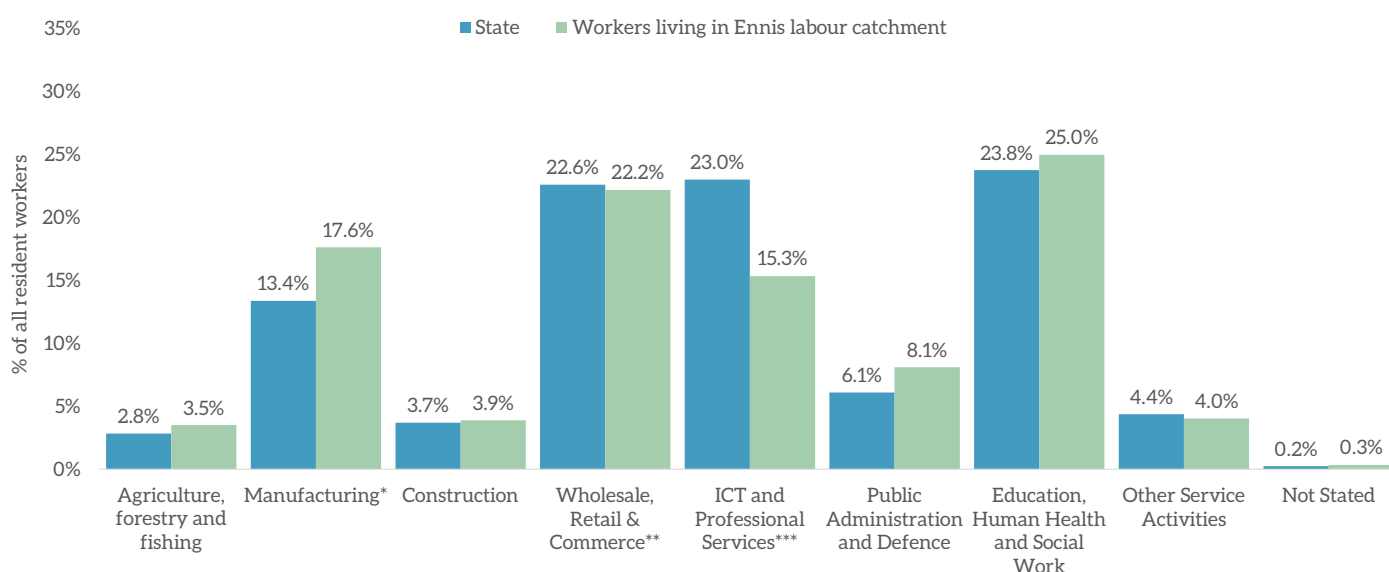
An analysis of the profile of employment by industrial group provides an indication of the structure of the local economy and the type of employment that it sustains, as well as the skills profile of the labour catchment. It is particularly instructive to compare the profile of a region or local area to that of the State average as it can highlight differences as well as strengths and weaknesses of the local economic base.

¹⁰ | It should be noted that while there has been increases in job numbers, the main reason for the increase in numbers relates to the redefinition of the Shannon town boundary by the CSO which previously did not include parts of the Shannon Free Zone.

6. Ennis Labour Catchment

Employment by industrial group for all those living in the Ennis labour catchment is shown in Figure 6.3. The 'Education, Human Health and Social Work' sector is the most important employer and this accounted for a quarter of all resident workers (25%). The 'Wholesale, Retail Trade, Transportation and Storage, Accommodation and Food Service Activities' sector accounted for just over a fifth of resident workers (22.2%) in the Ennis labour catchment. The 'Manufacturing, mining and quarrying, Electricity, Gas, Water supply and Waste Management' sector (17.6%) and 'Information and Communication, Financial, Real Estate, Professional, administration and support service activities' sector (15.3%) are the next biggest sectors in the labour catchment with all other sectors accounting for 8.1% or less.

Figure 6.3: Industrial Profile of the Ennis 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 (25%) is 1.2 percentage points higher than the State average (23.8%) and the 'Manufacturing' sector (17.6%) is 4.2 percentage points higher than the State average (13.4%). The 'ICT and Professional Services' sector recorded a rate of 15.3% whereas the State average was 23%¹¹.

Across the seven labour force catchments, Ennis does not appear to have any particular industrial specialisation although it recorded the second highest proportion employed in 'Manufacturing', the fourth highest in 'ICT and Professional Services' and the second lowest proportion in the 'Education, Human Health and Social Work'.

As seen in Figure 6.4 below, the industrial groups which saw the largest proportional increases between 2016 and 2022 were 'ICT and Professional Services' (+1.7 percentage points). 'Manufacturing' (+2.2 percentage points) and the 'Education, Human Health and Social Work' (+2 percentage points). In contrast, the largest proportionate declines have been in the 'Agriculture, forestry and fishing' sector (-3 percentage points) and the 'Wholesale, Retail & Commerce' sector (-3.6 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.

6. Ennis Labour Catchment

Figure 6.4: Industrial Profile of the Ennis labour catchment in 2016 and 2022

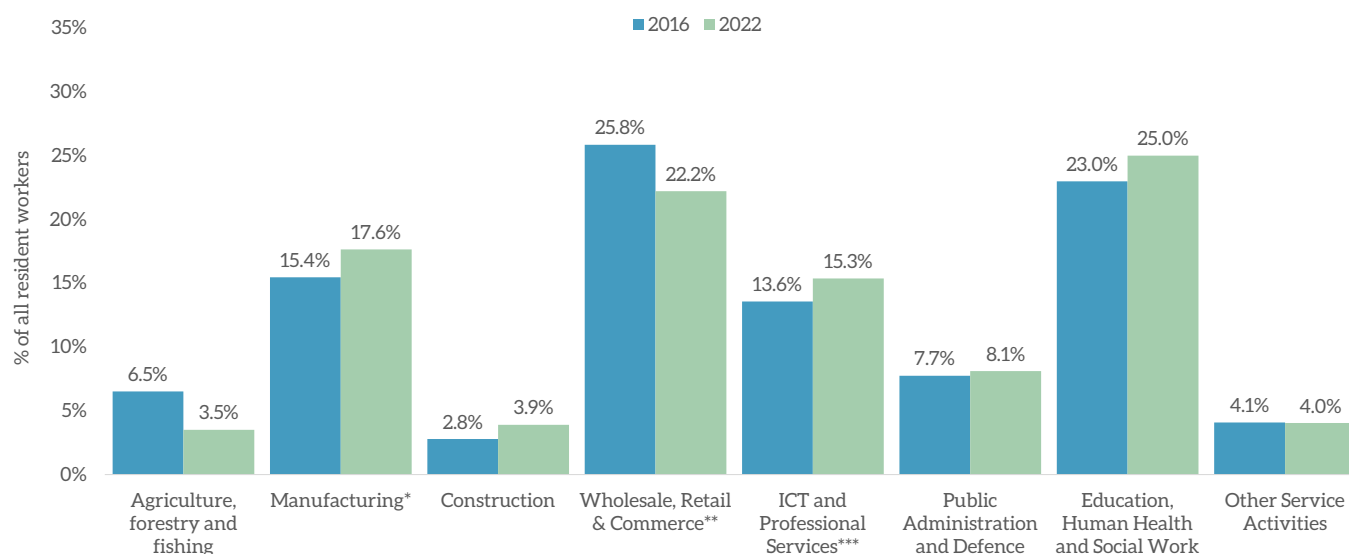


Figure 6.5 below details the industry of employment of the Ennis labour catchment by the location of employment – working within Ennis town or working elsewhere. Employment in the ‘Education, Human Health and Social Work’ (28.2%) and ‘Wholesale, Retail and Commerce’ (26.5%) are more dominant among those employed within Ennis town. The ‘ICT and Professional Services’ (16.2%), ‘Manufacturing’ (20.4%) and ‘Agriculture, forestry and fishing’ (5.3%) sectors have a higher share of employment outside the town. There is a greater share of ICT and ‘Manufacturing’ in urban locations such as Shannon Free Zone, Limerick City and Galway City while agricultural based employment is in rural locations.

Figure 6.5: Industrial Profile of the Ennis labour catchment, 2022

Industry	Workers living in the Ennis labour catchment							
	Total		Working in Ennis town		Working elsewhere in Ireland			
Agriculture, forestry and fishing	783	3.5%	66	0.7%	717	5.3%		
Manufacturing*	3,938	17.6%	1,178	13.4%	2,760	20.4%		
Construction	869	3.9%	231	2.6%	638	4.7%		
Wholesale, Retail & Commerce**	4,956	22.2%	2,330	26.5%	2,626	19.4%		
ICT and Professional Services***	3,429	15.3%	1,234	14.0%	2,195	16.2%		
Public Administration and Defence	1,809	8.1%	822	9.3%	987	7.3%		
Education, Human Health & Social Work	5,580	25.0%	2,486	28.2%	3,094	22.9%		
Other Service Activities	902	4.0%	440	5.0%	462	3.4%		
Not Stated	76	0.3%	21	0.2%	55	0.4%		
Total	22,342	100%	8,808	100%	13,534	100%		

6. Ennis Labour Catchment

6.7.3 Socio-Economic Group

The socio-economic structure of employment in the Ennis labour catchment is set out in Figure 6.6. 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 Ennis is broadly similar to that of the State with the largest group by far being 'Non-manual'¹³ (50%) which is similar to the State average at 49.5%. As with the State, the next largest category in the Ennis labour catchment is 'Employers and Managers' at 13%. Relative to the other six key labour catchments, the Ennis labour catchment recorded the second largest 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 8-9% of the resident workforce. 'Farmers and Agricultural Workers' accounted for 3.7% of all resident workers in the labour catchment.

Figure 6.6: Socio-Economic Group (SEG) Profile of the Ennis labour catchment and the State, 2022

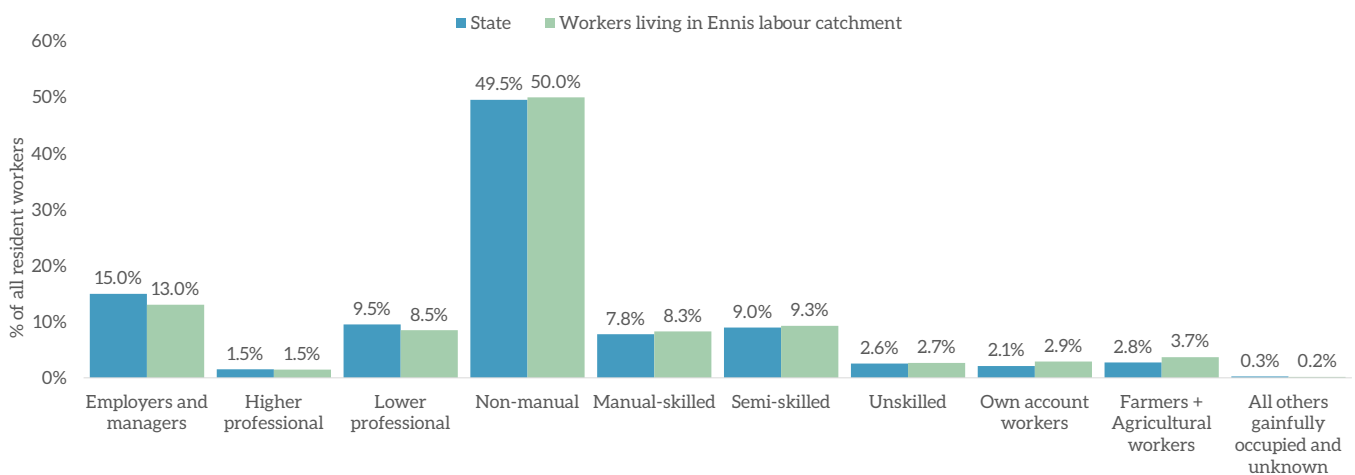


Figure 6.7 below details the socio-economic structure breakdown for those working within Ennis town and those working outside Ennis town. The largest difference between the 'town' and 'elsewhere' group is within the 'Non-manual' group (56.2% in Ennis town vs 45.9% in job locations outside Ennis town) which relates to persons working in retail, government, banking and other areas fulfilling administrative roles.

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.

6. Ennis Labour Catchment

As a follow on to previous indicators on the high level of external commuting to employment opportunities (i.e., beyond the labour catchment such as Shannon or Limerick), there are somewhat notable differences in rates with a higher proportion of those employed outside Ennis town classed as 'Lower professional' and 'Employers and Managers' - the majority of these jobs being located in the Limerick-Shannon Metropolitan Area and Galway City. Those working outside Ennis town, in mostly rural areas, also have a higher proportion of workers as part of the 'Farmers and Agricultural workers' grouping (5.5% working outside the town vs 0.9% working in the town).

Figure 6.7: Socio-Economic Group (SEG) Profile of the Ennis labour catchment, 2022

Socio-Economic Group (SEG)	Workers living in the Ennis labour catchment							
	Total		Working in Ennis town		Working elsewhere in Ireland			
Employers and managers	2,914	13.0%	1,077	12.2%	1,837	13.6%		
Higher professional	329	1.5%	167	1.9%	162	1.2%		
Lower professional	1,896	8.5%	568	6.4%	1,328	9.8%		
Non-manual	11,171	50.0%	4,953	56.2%	6,218	45.9%		
Manual-skilled	1,847	8.3%	575	6.5%	1,272	9.4%		
Semi-skilled	2,074	9.3%	894	10.1%	1,180	8.7%		
Unskilled	597	2.7%	226	2.6%	371	2.7%		
Own account workers	647	2.9%	235	2.7%	412	3.0%		
Farmers + Agricultural workers	826	3.7%	83	0.9%	743	5.5%		
All others gainfully occupied and unknown	41	0.2%	30	0.3%	11	0.1%		
Total	22,342	100%	8,808	100%	13,534	100%		

6.7.4 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 6.8 details the average education profile among those resident workers in the Ennis labour catchment with 62.5% having completed third level education - this is similar to the rate of 63.1% for workers nationally. The rate for the Western Region was recorded at 61%. Relative to all seven labour catchments, Ennis has the third most educated workforce with only Galway City (67.6%) and Sligo town (63.2%) having higher rates of third level education¹⁴.

¹⁴ At the local authority level, Galway City recorded the second highest rate in the State at 72% whereas the rate for County Clare resident workers was recorded at 61.4%, the 13th highest 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).

6. Ennis Labour Catchment

Figure 6.8 below details the education attainment levels for all workers, those employed within the town and those employed elsewhere. There is a significant difference between the education attainment of those who are employed within Ennis town (57.4% with third level) and those employed elsewhere (65.8% with third level). This relates to the high level of commuting from within the labour catchment to highly qualified employment opportunities within Limerick City, Shannon, Galway City and other locations.

Figure 6.8: Education Attainment Profile of the Ennis labour catchment, 2022

Education Attainment	Workers living in the Ennis labour catchment								
	Total			Working in Ennis town			Working elsewhere in Ireland		
Secondary	8,258	37.0%		3,689	41.9%		4,569	33.8%	
Third	13,964	62.5%		5,058	57.4%		8,906	65.8%	
Not Stated	120	0.5%		61	0.7%		59	0.4%	
Total	22,342	100%		8,808	100%		13,534	100%	

Relative to the other main labour catchments, Ennis has the second lowest level of third level attainment of labour catchment workers employed within the town. With a recorded rate of 57.4% with third level education employed in Ennis, Galway City (71.1%), Sligo town (65.6%), Letterkenny (61.1%), Carrick-on-Shannon (59.6%) and Castlebar (58.1%) have higher rates of highly educated workers. 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 where companies tend to employ more third level graduates.

6.7.5 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%, Clare recorded a rate of 15% with other local authorities as follows: Roscommon County (13.7%), Leitrim (13.9%), Mayo (13.9%), Sligo County (15.3%) and Donegal (16%).













The age profile of those at work and over 15 years who live in the Ennis labour catchment is shown in Figure 6.9. The proportion of young workers (<30 years) residing within the Ennis labour catchment (14.1%) is lower than the overall State average of 17.6%. Relative to other towns in this analysis, the age profile of the Ennis labour catchment is older than the other larger labour catchments. Within the Ennis labour catchment, 14.1% of resident workers are aged <30 years whereas the rate is higher in the Galway City (17.2%), Letterkenny (16.4%) and Sligo town (15.5%) labour catchments.

6. Ennis Labour Catchment

The slightly older age profile in Ennis may be explained by a number of factors. While Ennis has the MTU Campus - Social Care Work level 7 and 8 - many may still go to other universities for a wider range of third level education. As with other smaller labour catchments, many may choose employment in larger urban centres following completion of education.

The age profile is marginally higher for those employed within Ennis town than those employed elsewhere and is evident in the data presented in Figure 6.9 below. A total of 15% (up from 13.8% in 2016) of all Ennis labour catchment workers employed in Ennis town are aged 'less than 30 years' whereas the rate for workers elsewhere is 13.5% (up from 13.1% in 2016).







Figure 6.9: Age Profile of the Ennis labour catchment, 2022

Age	Workers living in the Ennis labour catchment								
	Total			Working in Ennis town			Working elsewhere in Ireland		
<30	3,143	14.1%		1,318	15.0%		1,825	13.5%	
30-45	8,283	37.1%		3,130	35.5%		5,153	38.1%	
45-64	10,189	45.6%		4,074	46.3%		6,115	45.2%	
65+	727	3.3%		286	3.2%		441	3.3%	
Total	22,342	100%		8,808	100%		13,534	100%	

6.7.6 Gender

The gender composition of residents in the Ennis labour catchment is shown below. Within the Ennis 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 6.10: Gender Profile of the Ennis labour catchment, 2022

Gender	Workers living in the Ennis labour catchment								
	Total			Working in Ennis town			Working elsewhere in Ireland		
Female	11,488	51.4%		5,166	58.7%		6,322	46.7%	
Male	10,854	48.6%		3,642	41.3%		7,212	53.3%	
Total	22,342	100%		8,808	100%		13,534	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 Ennis labour catchment and employed in Ennis town are female and account for 58.7% of all resident workers (Figure 6.10).

6. Ennis Labour Catchment

In contrast to this, those residing in the Ennis labour catchment and employed elsewhere are more likely to be males - accounting for 53.3% 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).

6.7.7 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.

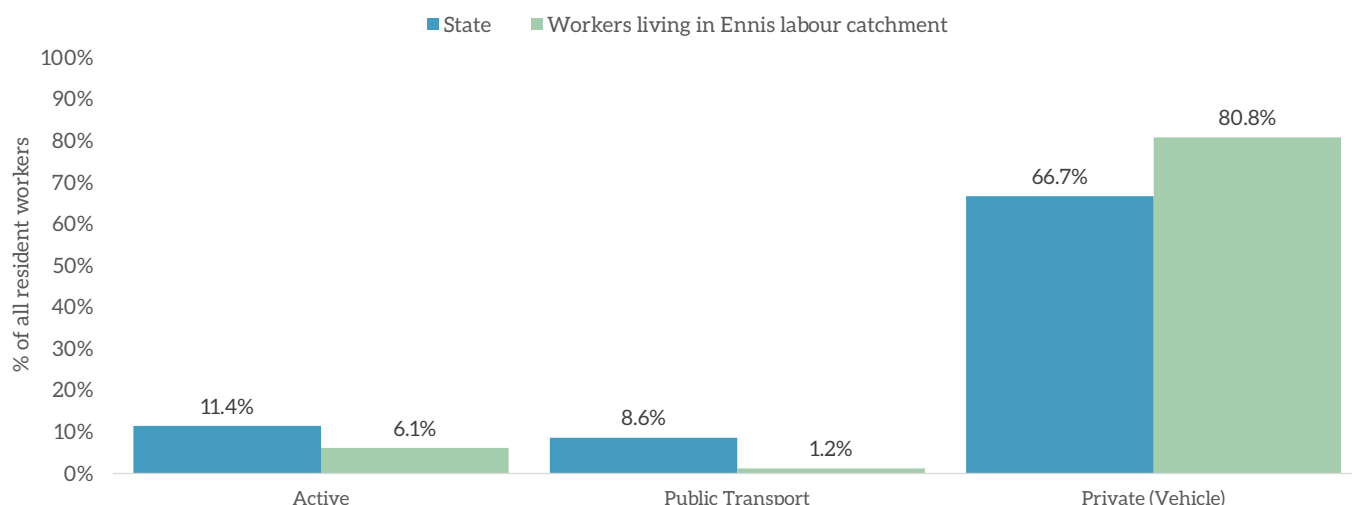
As with the State trend, commuting to work by car (driver and car passenger) is by far the most dominant means of travel across the Western Region (71%). In fact, six of the eight Western Region local authorities are within the top ten highest rates across the State - Galway County (74.8%), Roscommon (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 Ennis labour catchment, a total of 6.1% (1,371) used 'Active' modes, 1.2% (273) used 'Public' modes and 80.8% (18,055) used 'Private' modes of transport to employment destinations. This is the third highest rate amongst the seven labour catchments, see Figures 6.11 and 6.12 below.

6. Ennis Labour Catchment

Figure 6.11: 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 Ennis town and those employed elsewhere. Those employed in Ennis town have a much higher propensity to use ‘Active’ modes (11.4%) as opposed to those employed elsewhere (2.7%).

Figure 6.12: Means of Travel for Resident Workers - Working in the town vs elsewhere, 2022

Means of Travel	Workers living in the Ennis labour catchment							
	Total		Working in Ennis town		Working elsewhere in Ireland			
Active	1,371	6.1%	1,002	11.4%	369	2.7%		
Public Transport	273	1.2%	80	0.9%	193	1.4%		
Private (Vehicle)	18,055	80.8%	6,948	78.9%	11,107	82.1%		
Total	19,699	88.2%	8,030	91.2%	11,669	86.2%		

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.

6.7.8 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 6.13 below details the overall ‘travel time departure’ distribution of all Ennis labour catchment resident workers.

The most common travel time departures are within the ‘07:01-08:30’ band and this accounted for 47.6% of all resident workers in the labour catchment. The next most popular departure time is ‘Before 07:00’ - with both the Ennis labour catchment (24.6%) and the State (25.8%) recorded at approximately one in four of all workers.

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.

6. Ennis Labour Catchment

Figure 6.13: Departure Times for Resident Workers, 2022¹⁶

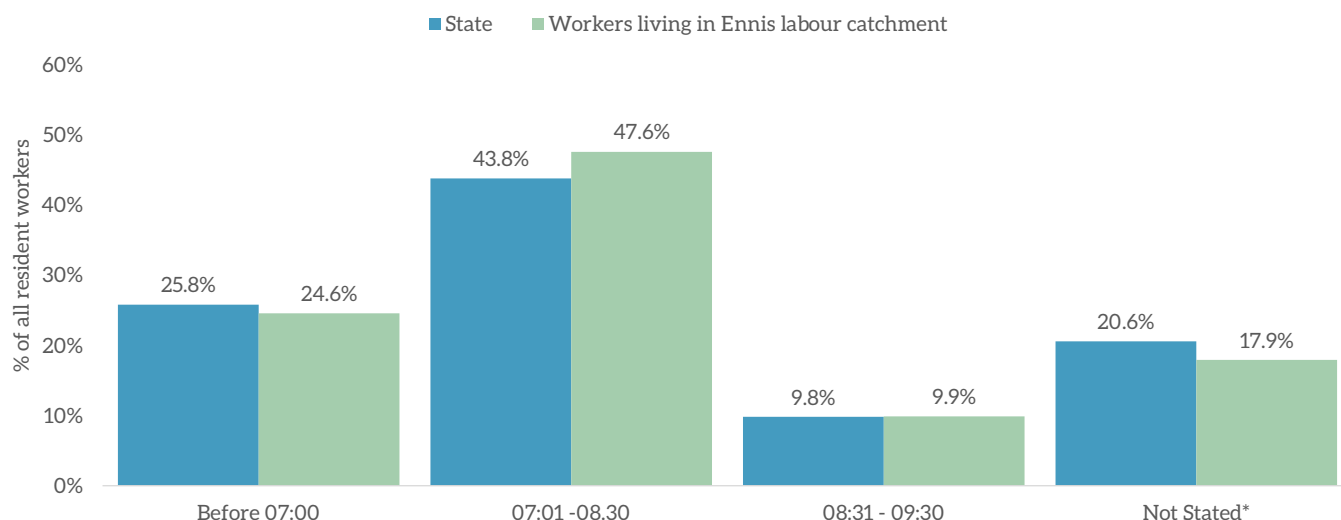


Figure 6.14 below shows a comparison of the ‘travel-time departures’ of those working in Ennis town and those working elsewhere. Comparing these two groups there are some differences across the departure times. There is a higher share commuting to Ennis between ‘08:31-09:30’ than those commuting elsewhere. A total of 18.4% of Ennis bound workers residing in the labour catchment depart for work ‘Before 07:00’, considerably lower than the rate for workers travelling to other destinations (28.6%). This is as a result of the multiple commuting destinations within the overall Ennis labour catchment where a total of 62.8% commute to destinations other than Ennis town (Limerick City, Shannon, Galway City etc.).

Figure 6.14: Departure Times for Resident Workers - Working in the town vs elsewhere, 2022

Departure Time	Workers living in the Ennis labour catchment								
	Total			Working in Ennis town			Working elsewhere in Ireland		
Before 07:00	5,494	24.6%		1,620	18.4%		3,874	28.6%	
07:01-08:30	10,633	47.6%		4,780	54.3%		5,853	43.2%	
08:31-09:30	2,208	9.9%		1,170	13.3%		1,038	7.7%	
Not Stated*	4,007	17.9%		1,238	14.1%		2,769	20.5%	
Total	22,342	100%		8,808	100%		13,534	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 6.14 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.

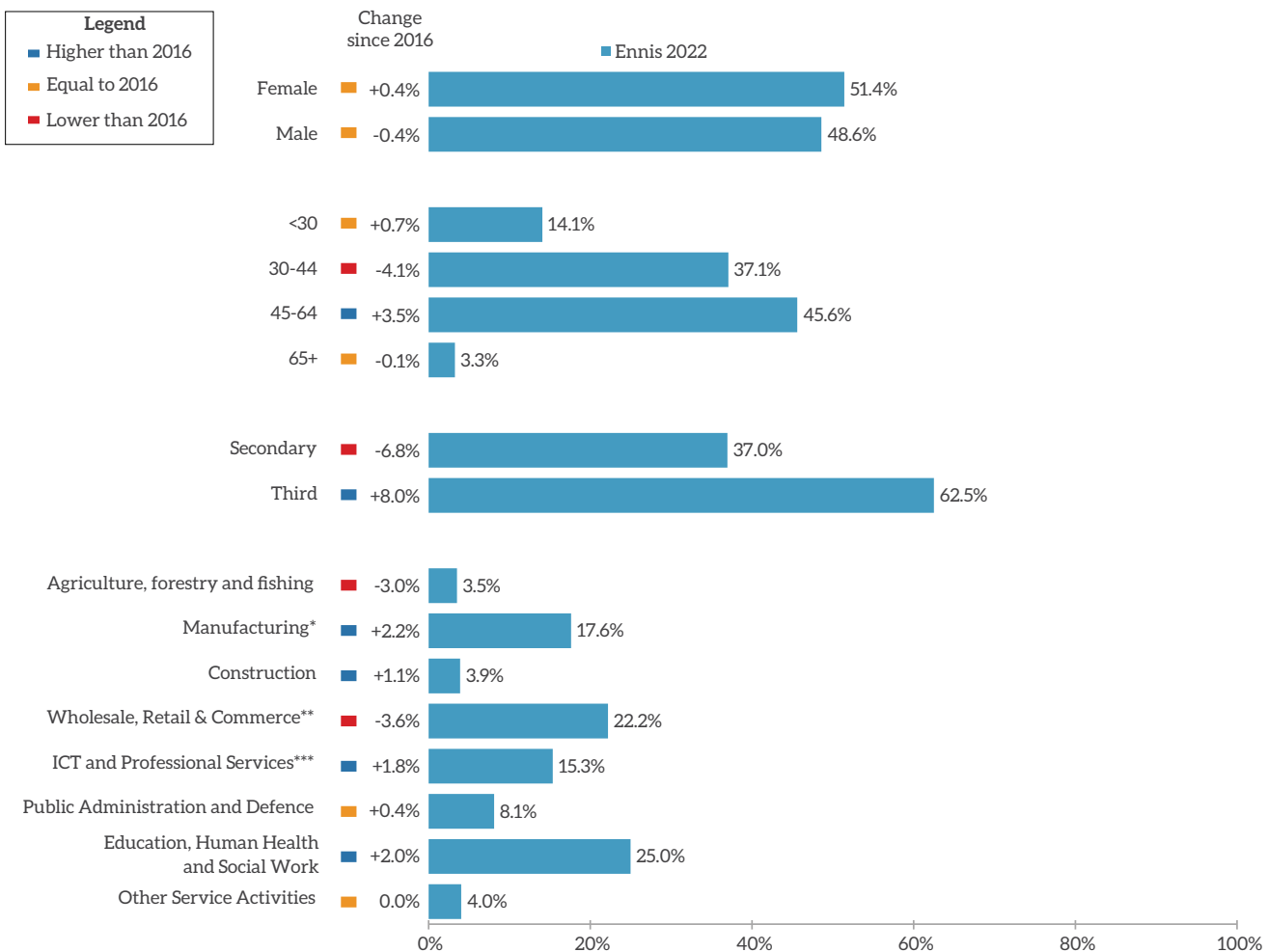
6. Ennis Labour Catchment

6.8 Analysis of change between 2016 and 2022

The graphic below details the change that has occurred across the Ennis 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 Ennis labour catchment is still the dominant labour catchment for large parts of central and midwest Clare, see maps in Section 6.9. However, since 2016 the labour catchment has contracted in the east of the county as a result of the growing importance of both the Limerick City and Shannon labour catchments. The total resident workers residing in the labour catchment has increased to 22,342 from 21,409 in 2016 (+4.4% or +933) and from 21,333 in 2006 (+4.7% or +1,009).

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

Figure 6.15: 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.

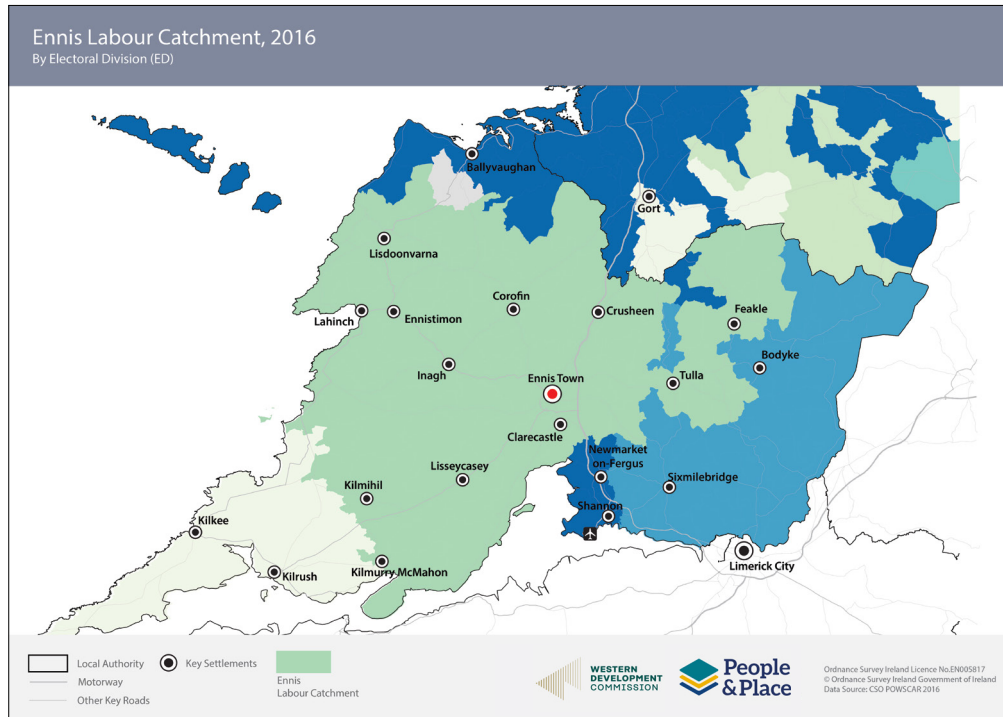
*For some percentage change figures there may be very minor rounding issues (0.1%) due to the fact that the graphic displays data at one decimal point only.

6. Ennis Labour Catchment

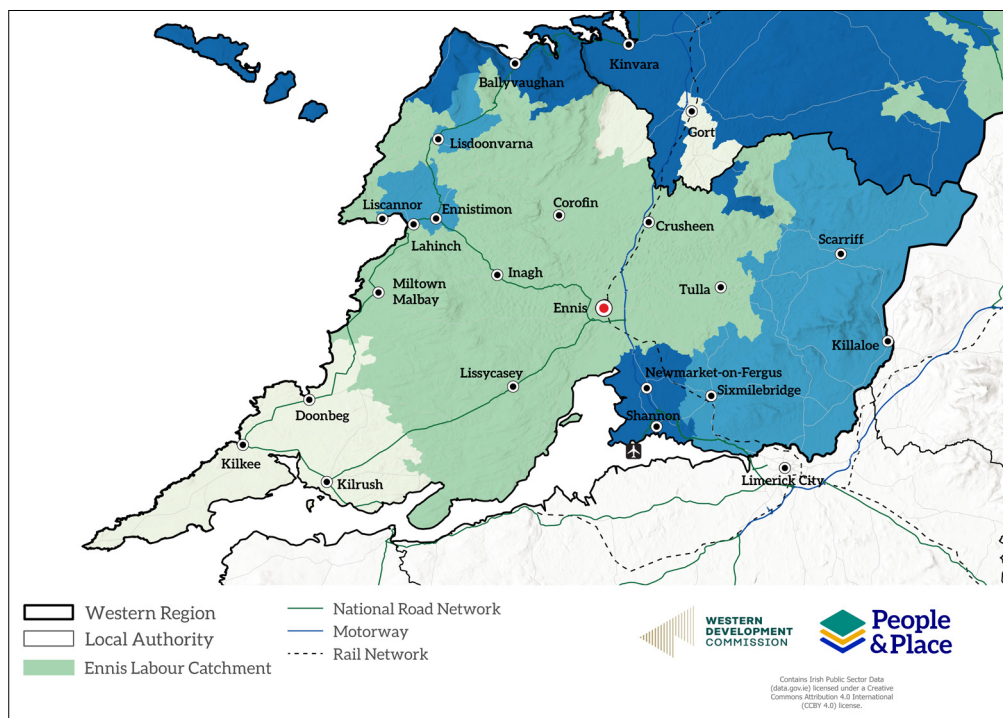
6.9 Analysis of labour catchment change between 2016 and 2022

The maps below detail the geographical changes that have taken place within the Ennis labour catchment and neighbouring labour catchments between 2016 and 2022. Since 2016, parts of west Clare in the areas of Lahinch, Liscannor and Lisdoonvarna are now part of the Ennistimon labour catchment rather than the Ennis labour catchment. Much of east Clare including Scarriff/Tuamgraney, Killaloe and Sixmilebridge are part of the Limerick-Shannon Metropolitan Area.

Map 6.4: Ennis labour catchment, 2016



Map 6.5: Ennis labour catchment, 2022

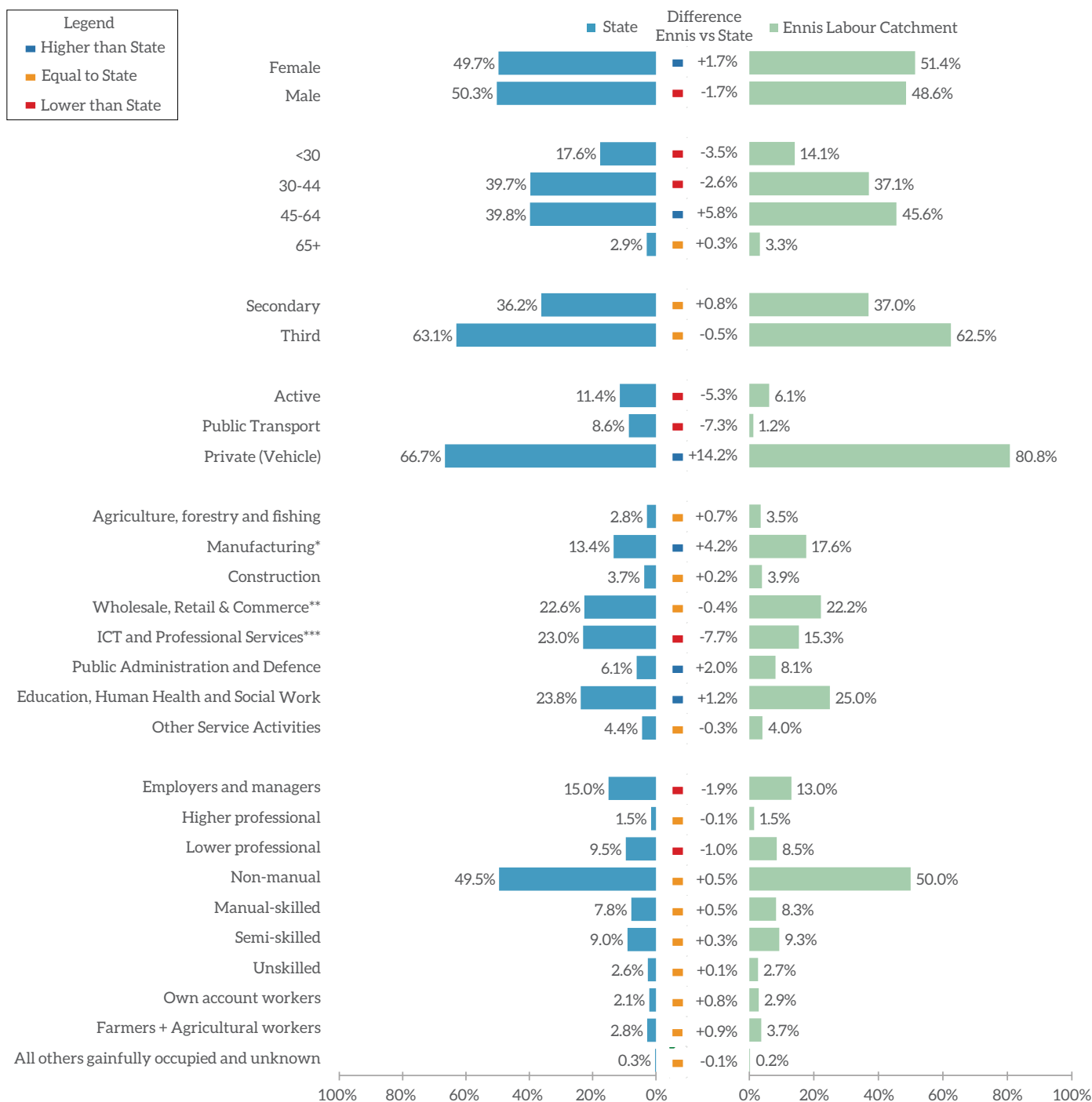


6. Ennis Labour Catchment

6.10 Ennis labour catchment comparison with the State, 2022

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

Figure 6.16: Comparison between State and Ennis 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.

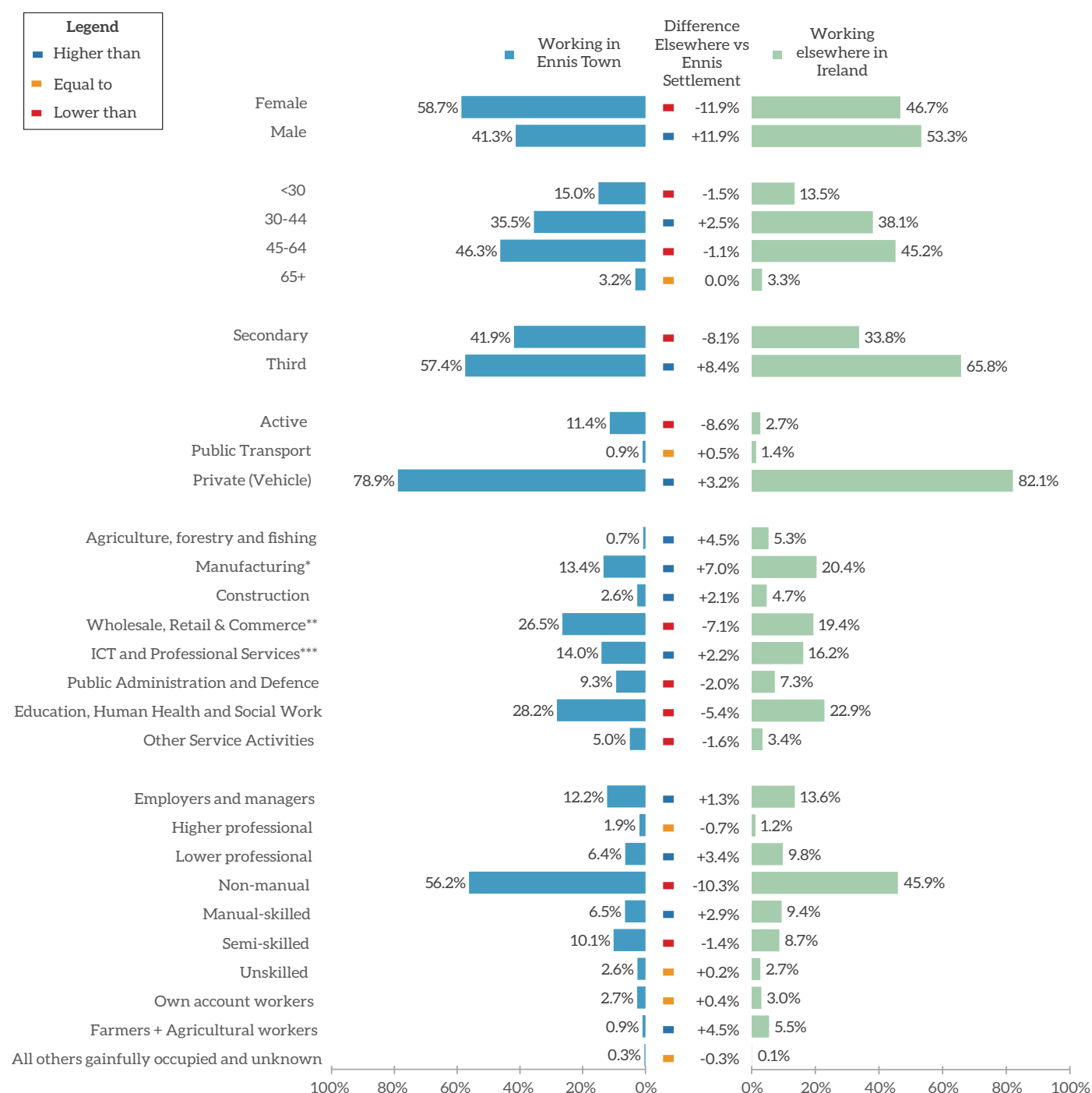
*For some percentage change figures there may be very minor rounding issues (0.1%) due to the fact that the graphic displays data at one decimal point only.

6. Ennis Labour Catchment

6.11 Ennis labour catchment - Employed within Ennis town and elsewhere in Ireland comparison

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

Figure 6.17: Comparison between those working within Ennis 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.

6. Ennis Labour Catchment

6.12 Socio-Economic comparison of all seven labour catchments

The graphic below details the socio-economic characteristics of resident workers within the Ennis labour catchment and the other six main labour catchments in the Western Region; Carrick-on-Shannon, Castlebar, Galway City, Letterkenny, 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 Ennis labour catchment is 62.5%.

6.12.1 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%

6.12.2 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%

6. Ennis Labour Catchment

6.12.3 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%

6.12.4 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%

6. Ennis Labour Catchment

6.12.5 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%

6.12.6 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%

6.12.7 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.

7.0 Castlebar Labour Catchment

7. Castlebar Labour Catchment

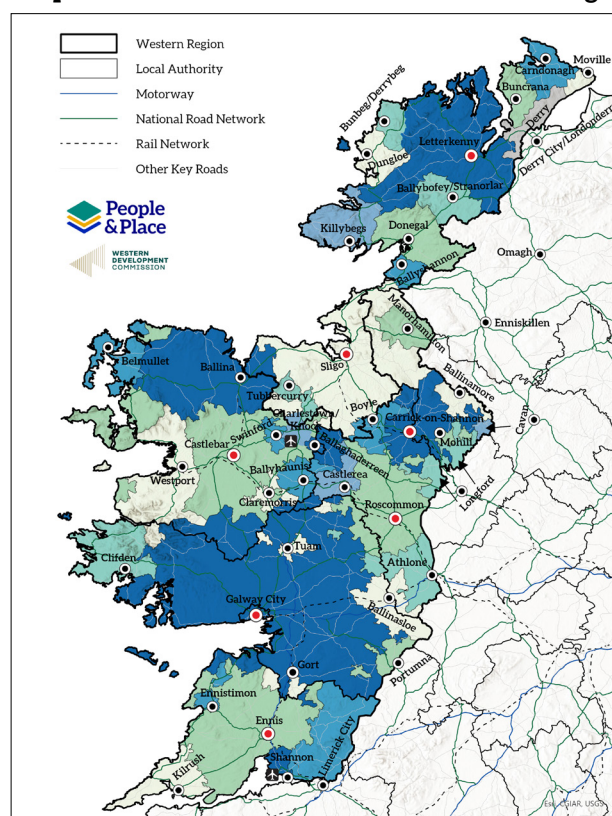
7.1 Introduction

The Western Development Commission (WDC) continues its series of regional labour market analyses with this new publication, *Travel to Work and Labour Catchments in the Western Region: A Profile of Seven Town Labour Catchments*. Based on Census of Population 2022 (POWSCCAR)¹ data, it provides unique insights into the key labour market centres in the Western Region through an analysis of the travel to work patterns of workers living in the Western Region. This is the third time the WDC has undertaken this analysis, previous reports based on 2006 Census data is available [here](#) and 2016 Census data is available [here](#).

This work is particularly timely given developments in government policy such as the National Planning Framework (NPF) and NPF Revision (2024), which sets out regional targets for where population and jobs growth should occur and associated plans and policies such as the Regional Spatial and Economic Strategies (RSES), County and City Development Plans (CDPs), Local Economic and Community Plans (LECPs) and Climate Action Plans for the seven local authorities within the Western Region.

The report and analysis identify the town labour catchments for the Western Region, comprising counties Clare, Donegal, Galway, Leitrim, Mayo, Roscommon and Sligo (see Map 7.1 below). The town labour catchment is the area from which a town draws most of its' workforce. At a regional level, the report also assists with the identification of the key employment centres in the Western Region and identifies changes since 2016. It maps and visualises the size and scale of employment based commuting patterns, highlights the potential labour supply available for future growth and, as such, provides important insights for employers and policymakers - nationally, regionally and locally.

Map 7.1: Labour Catchments in the Western Region, 2022



Source: CSO POWSCCAR

7.2 About this Profile - Castlebar

As part of its remit in promoting the economic and social development of the Western Region, the WDC is interested in examining the nature and extent of economic and labour market activity at the regional and sub-regional level. The full report presents an overview of all 43 labour catchments in the Western Region with subsequent sections focusing on the main seven towns/city catchments.

This section examines the town of Castlebar as an employment destination for resident workers in the Western Region and provides detailed mapping and descriptive analysis of the Castlebar labour catchment. Following a discussion on Castlebar data in 2022 (Section 7.3) and the impact of working from home (Section 7.4), the profile presents the following:

1| Census 2022 Place of Work, School, College or Childcare - Census of Anonymised Records (POWSCCAR).

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1. A graphical illustration of travel to work patterns and commuting flows (Section 7.5) and the overall labour catchment of the town (Section 7.6);
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 7.7); 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, Ennis, Galway City, Letterkenny, Roscommon town and Sligo town) (Section 7.8-7.12).

7.3 The importance of Castlebar as a place of work

The official CSO settlement of Castlebar had a population of 13,054 persons recorded in the 2022 Census. Castlebar is the fifth largest urban centre within the Western Region (Galway City is the largest) and the 39th largest in the State. Since 2006, the population residing within the town of Castlebar has increased by +9.8% (+1,163)².

Population

In the most recent intercensal period 2016 to 2022, the population of Castlebar has increased by +8.2% (+986). This rate of growth is slightly 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 Mayo have seen significant population growth since 2016 with the highest rates in Ballyhaunis (+17%), Kiltimagh (15%) and Ballinrobe (13%).

Labour Force

Since Census 2016 there has been an increase in the numbers living in Castlebar 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 Castlebar has increased by +9.4% (from 5,852 to 6,403). The number of residents at work has increased by +17.4% (from 4,847 to 5,692). Conversely, the number classed as unemployed has decreased by -29.3% (from 1,005 to 711). The +9.4% increase in those at work in Castlebar has been significantly lower than in the State (+15.6%), the Western Region (+14.6%) and County Mayo (+13.4%).

Daytime Working Population

According to POWSCCAR 2022, the total number of jobs located within the Castlebar boundary was 9,911 and accounted for 3.6% of all jobs located within the Western Region (272,860)³. Of all cities and towns in Ireland, Castlebar has the 17th highest number of jobs located within the town boundary and accounted for 23.3% of all jobs located within County Mayo (42,475). Relative to the six other main towns/city in this report, Castlebar has the third lowest number of jobs with higher numbers in Galway City (51,211), Sligo town (13,562), Letterkenny (13,109) and Ennis (10,628) and lower numbers in Roscommon town (4,315) and Carrick-on-Shannon (3,145). The ratio of local jobs (9,911) to resident workers (5,623) in the town is 1.76 indicating that the employment catchment stretches beyond the town boundary and that Castlebar is an important economic destination for 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 town of Castlebar.

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Between 2016 and 2022, there was an increase of +9.6% (+866) jobs located in Castlebar. This was the third lowest increase of the seven main towns/city within this report with the highest rate of jobs growth in Galway City (+15.4%), Letterkenny (+15%), Roscommon town (+10.2%) and Carrick-on-Shannon (+9.7%)⁴. Only Ennis (+4.5%) and Sligo town (+4.1%) had lower proportional increases in local jobs. Over the same period, the number of jobs in County Mayo increased by +10.7% (+4,106) and the Western Region as a whole by +12.4% (+30,148) from 242,712 to 272,860. Castlebar accounted for 21.1% of the job growth in County Mayo.

7.4 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 County Mayo a total of 4,910 (8.6%) resident workers were recorded as mainly working from home in Census 2022. This represents a +32.4% (+1,202) increase from the number in 2016 (3,708 or 7.4% of resident workers).

Resulting from the increased incidence in working from home, the employment base in Mayo 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.

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7.5 Employment based commuting patterns to Castlebar

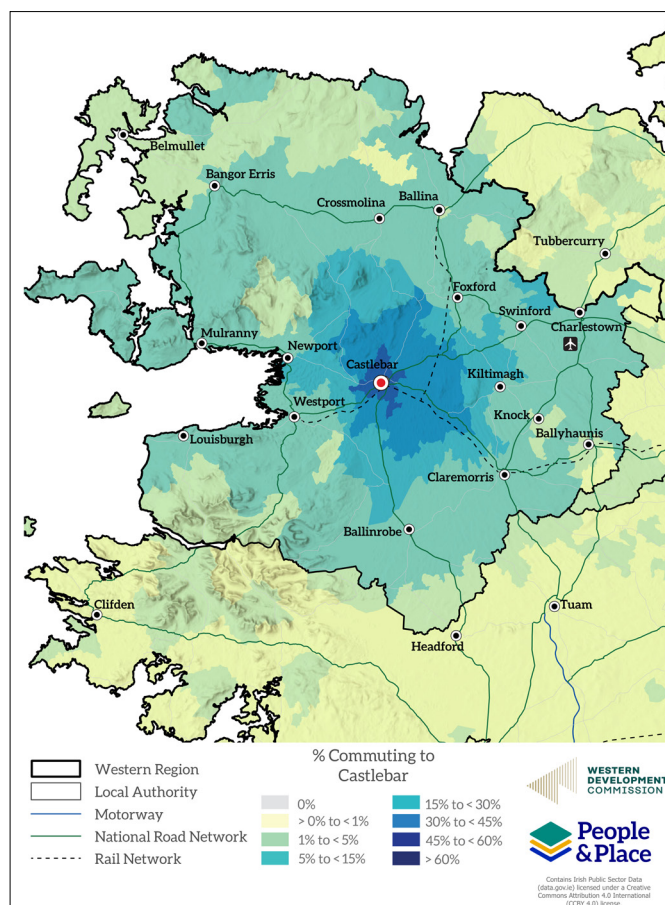
Map 7.2 shows the extent of commuting flows to Castlebar for work opportunities. The colours represent the proportions of people at work who live in each ED and travel to work in Castlebar.

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. Castlebar, 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 7.2: Commuting Flows into Castlebar, 2022



Source: CSO POWSCCAR

As expected, the EDs closest to Castlebar 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 (Newport and areas just to the west of Kiltimagh) where between 15% and 30% of resident workers in those EDs work in Castlebar, through to medium green (Mulranny, Achill Island, Bangor Erris, Crossmolina, Foxford, Swinford, Charlestown, Knock, Claremorris, Ballinrobe, Louisburgh and Westport) where between 5% and 15% of resident workers in those EDs commute to work in Castlebar. The remainder of Mayo and some nearby areas in the surrounding counties of Galway, Roscommon and Sligo have relatively low rates (<5%) of commuting to Castlebar.

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7.6 Identifying the Castlebar labour catchment

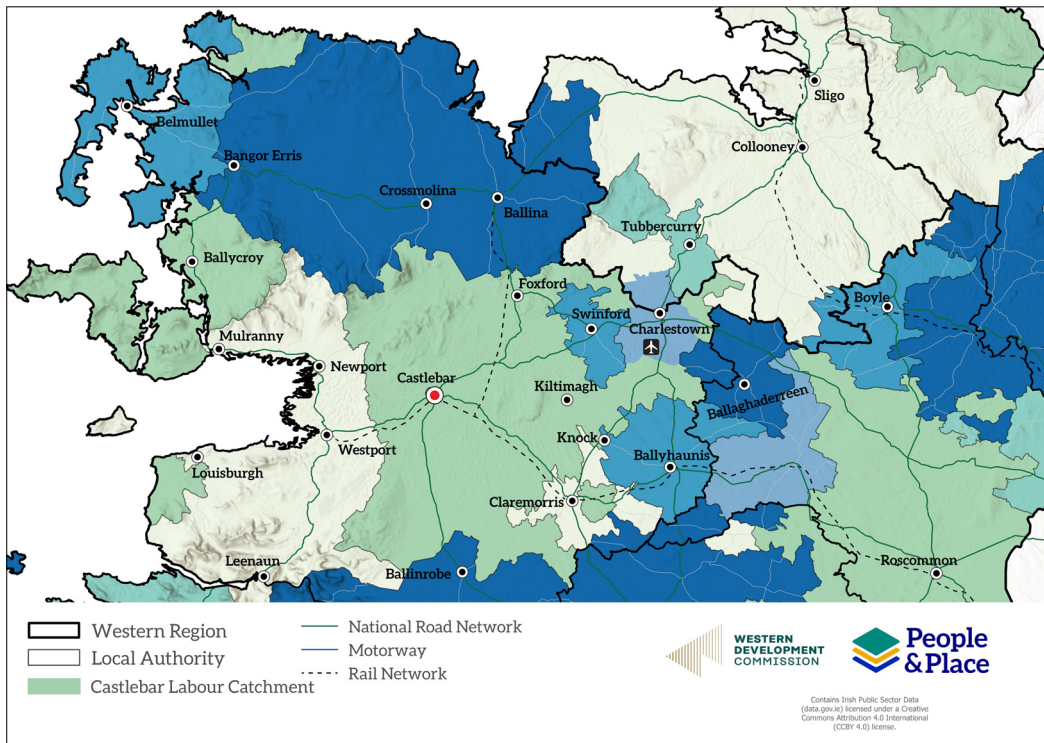
While Map 7.2 shows EDs from where even one person commuted to Castlebar, all of these EDs are not included in the Castlebar labour catchment. The Castlebar labour catchment is based on only those EDs for which Castlebar is the most popular work destination for resident workers. Other EDs, whose commuters 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 7.2 shows the Castlebar labour catchment as depicted by the green colour. While the labour catchment extends to large parts of the county, it excludes areas in the north of Mayo which form part of the Belmullet and Ballina labour catchments. The Castlebar labour catchment also extends to the areas west of Mulranny and the Westport labour catchment. Due to the extensive spatial distribution of medium-sized settlements across Mayo (population > 1,000), the east of the county is comprised of the individual labour markets of Swinford, Charlestown/Knock, Ballaghaderreen, Ballyhaunis, Claremorris and parts of the Sligo town labour catchment. The influence of Galway City as a competing employment destination for Mayo resident workers is evident by the allocation of many EDs in south Mayo to the Galway City labour catchment.

Map 7.3: Castlebar labour catchment, 2022



Source: CSO POWSCCAR

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

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Since 2016, the neighbouring labour catchment of Ballina in north Mayo has extended and this has resulted in a contraction of the Castlebar labour catchment. In the east of the county, the labour catchment has become slightly more dominant in areas close to Foxford, Knock, Ballyhaunis and Claremorris (see Section 7.9).

In summary, Castlebar acts as the key economic driver for the county but is supported by numerous other strong and growing regional economic centres such as Ballina (5,049 jobs) and Westport (4,539 jobs) – both higher in employment opportunities than Roscommon and Carrick-on-Shannon (both of which are county towns).

In 2022, there were 16,992 people classified as at work and living within the Castlebar labour catchment (5.8% of all Western Region resident workers). Interestingly, this is the fifth largest in the Western Region, behind Galway City (88,253), Sligo town (24,382), Letterkenny (23,503) and Ennis (22,342) with the nearby settlement of Ballina in seventh place at 9,875 resident workers. The Castlebar labour catchment has a population at work 3 times larger than the town of Castlebar (16,992 to 5,623 respectively). The geographical size of the Castlebar labour catchment has changed since 2016 (contracted in the north and extended in the southeast) and the total resident workers residing in the labour catchment has increased by +22% since 2016 (from 13,931) and by +23.5% since 2006 (from 13,757).

7.7 Profile of the Castlebar labour catchment

Map 7.3 above identified the Castlebar labour catchment (in green). 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 Castlebar town 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 Castlebar.

The Castlebar labour catchment is therefore composed of those who live in and are employed within the town (**Working in Castlebar**) and those who live in the labour catchment but work outside the town e.g. other towns such as Westport, rural areas and locations outside the Western Region such as Dublin 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 7.8 and Section 7.9), both in terms of geography and socio-economic characteristics, a comparison profile of the Castlebar labour catchment relative to the State (Section 7.10), a comparison profile of those 'Working in Castlebar' and 'Working elsewhere in Ireland' (Section 7.11) and a comparison profile of the Castlebar labour catchment and the six other main towns/city within the Western Region (Section 7.12).

⁸ | 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.

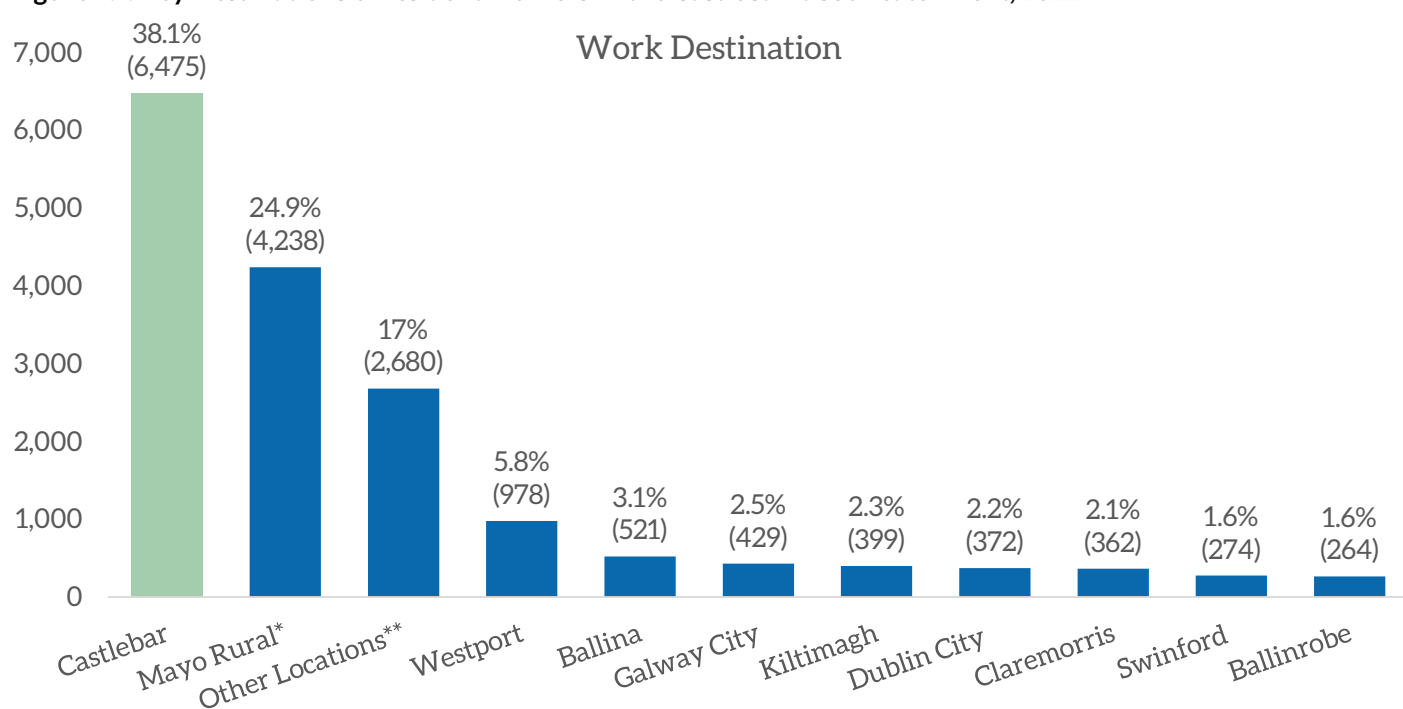
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7.7.1 Place of Work

The Castlebar labour catchment can be seen to include most of County Mayo, but is mainly contained within central areas and the midwest. In Figures 7.1 and 7.2 the main work locations for those who live in the Castlebar labour catchment are set out. Those who work mainly from home in the Castlebar labour catchment (n=1,873)⁹ are coded with their home location as their place of work i.e., a resident worker from Castlebar who works mainly from home is coded with their place of work as Castlebar.

As expected, Castlebar town is the principal place of employment for those living in the labour catchment, accounting for 6,475 (38.1%) of all employment - although this share has declined since 2016 (43.1%). Of the seven labour catchments reviewed here, the Castlebar labour catchment has the fourth lowest proportion of resident workers commuting to its' centre, with only Ennis, Roscommon town and Carrick-on-Shannon lower at 37.2%, 29.9% and 29.5% respectively. 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., Castlebar). Employment in rural parts of County Mayo (destination outside any defined CSO settlement) is the next most popular destination and accounted for just under a quarter of all resident workers (24.9% or 4,238). Since 2016, flows to 'Rural' areas has increased by +1.2% (see Figure 7.2).

Figure 7.1: Key Destinations of resident workers in the Castlebar labour catchment, 2022



*'Mayo Rural' - destination outside any defined CSO settlement
 **'Other Locations' - Less than 264 commuters

The other large employment destinations for residents within the Castlebar labour catchment are important towns in close proximity to Castlebar; Westport, Ballina, Kiltimagh, Claremorris, Swinford and Ballinrobe.

⁹ Of the 1,873 coded as working from home in the Castlebar labour catchment, 398 are coded as both living in and working in the Castlebar settlement.

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Both Galway City (429 or 2.5%) and Dublin City (372 or 2.2%) are also highlighted as key destinations for Castlebar labour catchment residents. Both destinations have increased in prominence as employment destinations since 2016 with recent changes to road networks, reduced travel times and more flexible working from home arrangements contributory factors to this.

In summary, the Castlebar labour catchment comprises just over a third (38.1% or 6,475) of resident workers who are employed in Castlebar town with the remaining almost two thirds (61.9%) employed in locations outside of the town.

Figure 7.2: 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
Castlebar	6,475	475	7.9%	38.1%	-5.0%
Mayo Rural*	4,238	924	27.9%	24.9%	1.2%
Other Locations**	2,680	771	N/A	17.0%	N/A
Westport	978	138	16.4%	5.8%	-0.3%
Ballina	521	112	27.4%	3.1%	0.1%
Galway City	429	99	30.0%	2.5%	0.2%
Kiltimagh	399	78	24.3%	2.3%	0.0%
Dublin City	372	199	115.0%	2.2%	0.9%
Claremorris	362	61	20.3%	2.1%	0.0%
Swinford	274	-11	-3.9%	1.6%	-0.4%
Ballinrobe	264	42	18.9%	1.6%	0.0%
Total	16,992	3,061	22.0%		

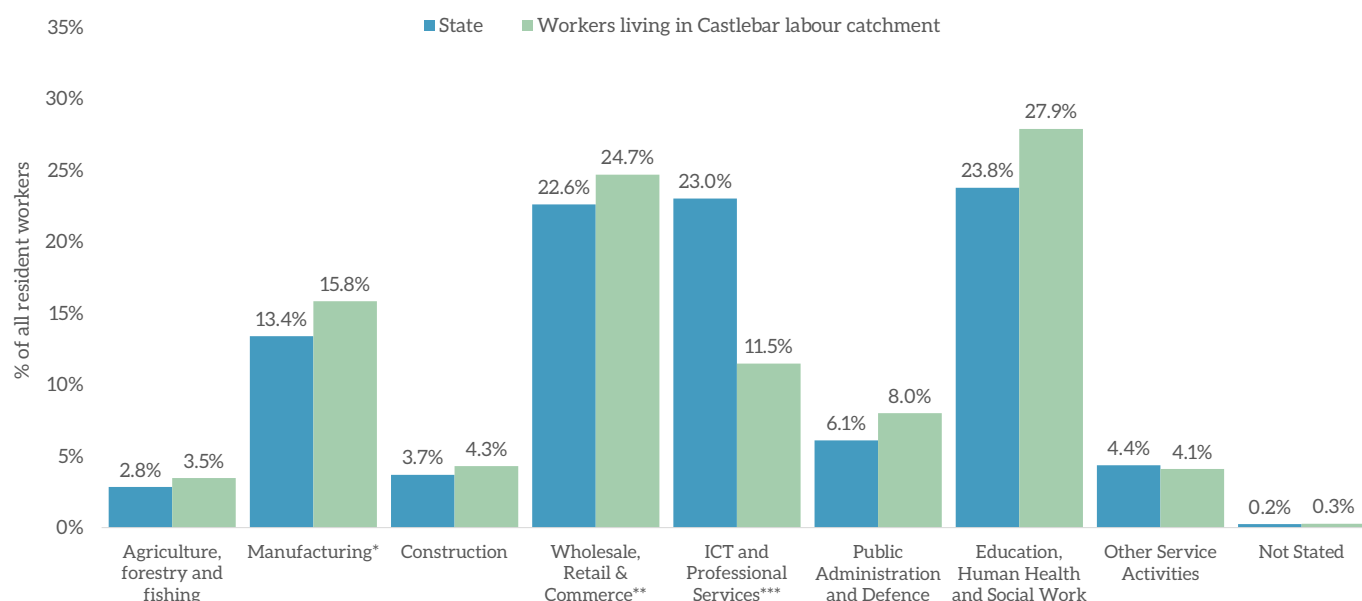
7.7.2 Employment by Industrial Group

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 Castlebar labour catchment is shown in Figure 7.3. The 'Education, Human Health and Social Work' sector is the most important employer and accounted for over a quarter of all resident workers (27.9%). The 'Wholesale, Retail Trade, Transportation and Storage, Accommodation and Food Service Activities' sector accounted for nearly a quarter of resident workers (24.7%) in the Castlebar labour catchment. The 'Manufacturing, mining and quarrying, Electricity, Gas, Water supply and Waste Management' sector (15.8%) and 'Information and Communication, Financial, Real Estate, Professional, administration and support service activities' sector (11.5%) are the next biggest sectors in the labour catchment with all other sectors accounting for 8% or less.

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Figure 7.3: Industrial Profile of the Castlebar 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 (27.9%) is 4.1 percentage points higher than the State average (23.8%) and the ‘Manufacturing’ sector (15.8%) is 2.4 percentage points higher than the State average (13.4%). The ‘ICT and Professional Services’ sector recorded a rate of 11.5% whereas the State average was 23%¹⁰.

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

As seen in Figure 7.4 below, the industrial groups which saw the largest proportional increases between 2016 and 2022 were the ‘ICT and Professional Services’ (+2.3 percentage points), ‘Manufacturing’ (+1.2 percentage points) and the ‘Education, Human Health and Social Work’ (+1.0 percentage points) sectors. In contrast, the largest proportionate declines have been in the ‘Agriculture, forestry and fishing’ sector (-2.8 percentage points) and the ‘Wholesale, Retail & Commerce’ sector (-2.2 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.

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Figure 7.4: Industrial Profile of the Castlebar labour catchment in 2016 and 2022

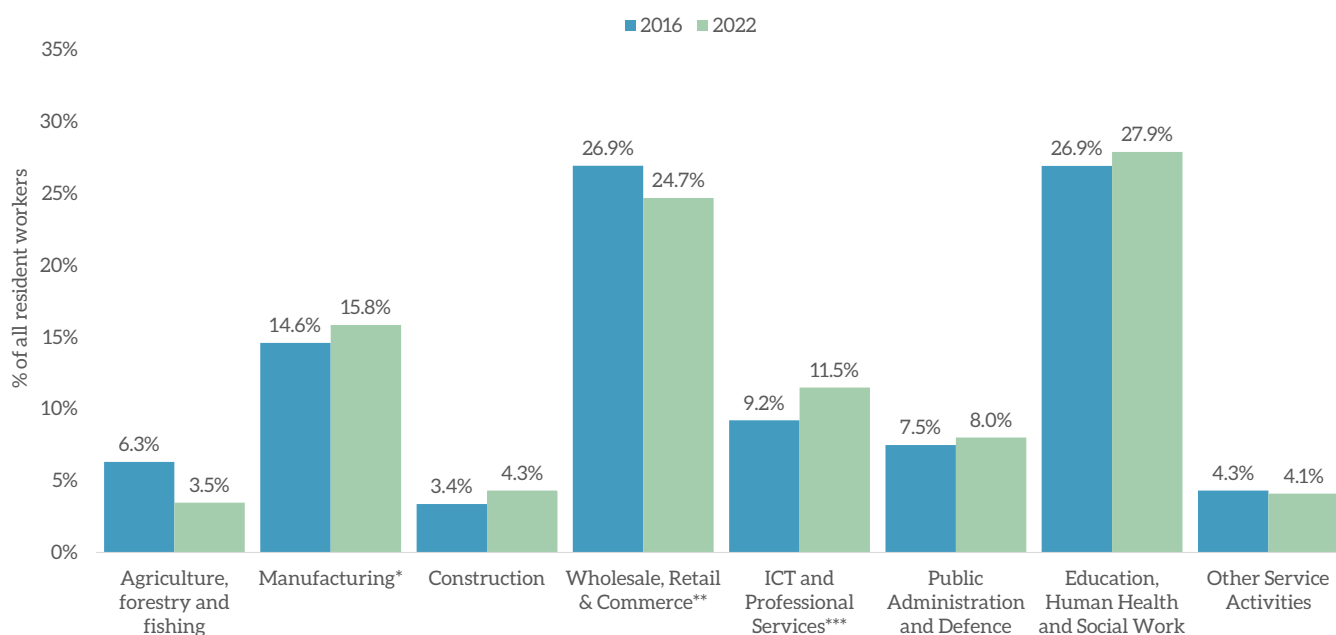


Figure 7.5 below details the industry of employment of the Castlebar labour catchment by the location of employment – working within Castlebar town or working elsewhere. Employment in the ‘Education, Human Health and Social Work’ (34.1%) and ‘Wholesale, Retail and Commerce’ (25.1%) sectors are more dominant among those employed within Castlebar town. The ‘ICT and Professional Services’ (13%), ‘Manufacturing’ (16.8%) and ‘Agriculture, forestry and fishing’ (5.4%) sectors have a higher share of employment outside the town than within.

Figure 7.5: Industrial Profile of the Castlebar labour catchment, 2022

Industry	Workers living in the Castlebar labour catchment							
	Total		Working in Castlebar town		Working elsewhere in Ireland			
Agriculture, forestry and fishing	589	3.5%	50	0.7%	539	5.4%		
Manufacturing*	2,690	15.8%	1,029	14.5%	1,661	16.8%		
Construction	731	4.3%	132	1.9%	599	6.0%		
Wholesale, Retail & Commerce**	4,193	24.7%	1,779	25.1%	2,414	24.4%		
ICT and Professional Services***	1,949	11.5%	666	9.4%	1,283	13.0%		
Public Administration and Defence	1,360	8.0%	769	10.8%	591	6.0%		
Education, Human Health & Social Work	4,737	27.9%	2,415	34.1%	2,322	23.5%		
Other Service Activities	696	4.1%	243	3.4%	453	4.6%		
Not Stated	47	0.3%	8	0.1%	39	0.4%		
Total	16,992	100%	7,091	100%	9,901	100%		

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7.7.3 Socio-Economic Group

The socio-economic structure of employment in the Castlebar labour catchment is set out in Figure 7.6. 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 Castlebar is broadly similar to that of the State with the largest group by far being ‘Non-manual’¹² (50%) similar to the State average at 49.5%. As with the State, the next largest category in the Castlebar labour catchment is ‘Employers and Managers’ at 12%. Relative to the other six key labour catchments, the Castlebar labour catchment recorded the fourth largest proportion of resident workers classed as ‘Employers and Managers’ (Galway City, Ennis and Carrick-on-Shannon labour catchments recorded highest at 13.3%, 13% and 12.1% respectively). Following these, the three categories of ‘Semi-skilled’, ‘Manual-skilled’ and ‘Lower Professional’ all account for approximately 8-11% of the resident workforce. ‘Farmers and Agricultural Workers’ account for 3.5% of all resident workers in the labour catchment.

Figure 7.6: Socio-Economic Group (SEG) Profile of the Castlebar labour catchment and the State, 2022

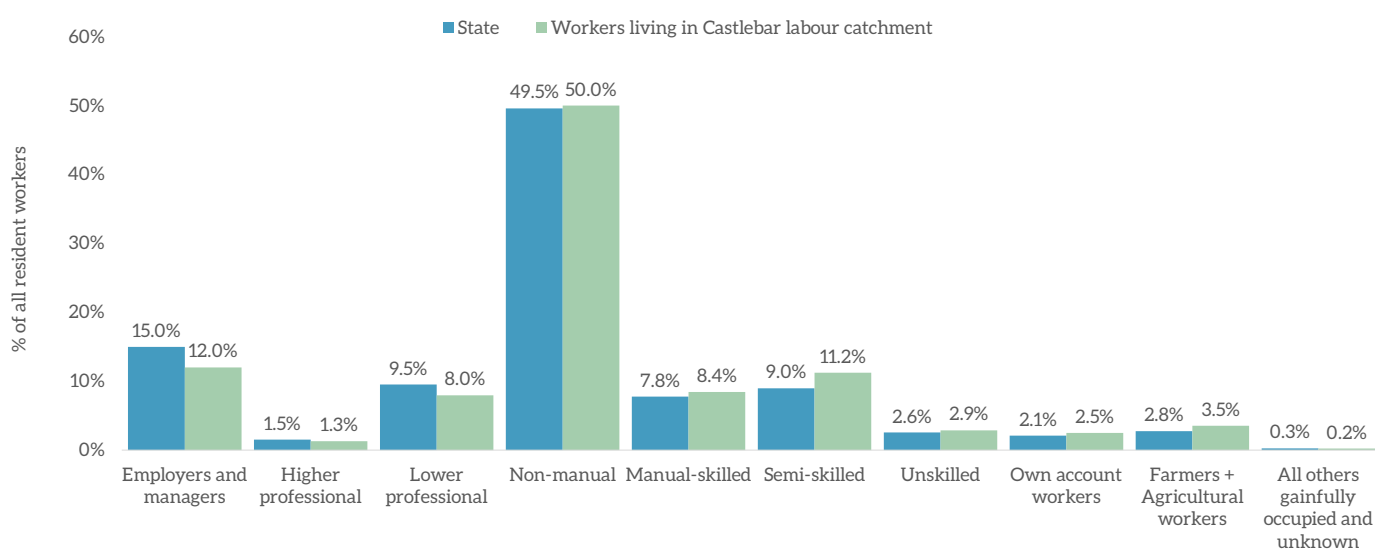


Figure 7.7 below details the socio-economic structure breakdown for those working within Castlebar town and those working outside Castlebar town.

The largest difference between the ‘town’ and ‘elsewhere’ group is within the ‘Non Manual’ group (55.5% in Castlebar town vs 46% in job locations outside Castlebar town) which relates to persons working in retail, government, banking and other areas fulfilling administrative roles.

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.

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As a follow on to previous indicators on the high level of external commuting to employment opportunities (i.e., beyond the labour catchment such as Ballina, Westport, 'Rural Mayo', Galway City), there are somewhat notable differences in rates with a higher proportion of those employed outside Castlebar town classed as 'Employers and Managers' - the majority of these jobs being located in other urban centres and distant locations such as Galway or Dublin City. Those working outside Castlebar town, in mostly rural areas, also have a higher proportion of workers as part of the 'Farmers and Agricultural workers' grouping (5.4% working outside the town vs 0.9% working in the town).

Figure 7.7: Socio-Economic Group (SEG) Profile of the Castlebar labour catchment, 2022

Socio-Economic Group (SEG)	Workers living in the Castlebar labour catchment							
	Total		Working in Castlebar town		Working elsewhere in Ireland			
Employers and managers	2,038	12.0%	744	10.5%	1,294	13.1%		
Higher professional	220	1.3%	90	1.3%	130	1.3%		
Lower professional	1,352	8.0%	643	9.1%	709	7.2%		
Non-manual	8,490	50.0%	3,935	55.5%	4,555	46.0%		
Manual-skilled	1,432	8.4%	430	6.1%	1,002	10.1%		
Semi-skilled	1,907	11.2%	894	12.6%	1,013	10.2%		
Unskilled	488	2.9%	182	2.6%	306	3.1%		
Own account workers	426	2.5%	94	1.3%	332	3.4%		
Farmers + Agricultural workers	600	3.5%	61	0.9%	539	5.4%		
All others gainfully occupied and unknown	39	0.2%	18	0.3%	21	0.2%		
Total	16,992	100%	7,091	100%	9,901	100%		

7.7.4 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 7.8 details the average education profile among those resident workers in the Castlebar labour catchment with 58.1% 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%. Relative to all seven labour catchments, Castlebar has the fifth most educated workforce with Galway City (67.6%), Sligo town (63.2%), Ennis (62.5%) and Carrick-on-Shannon (62.2%) having higher rates of third level education¹³.

¹³ At the local authority level, Galway City recorded the second highest rate in the State at 72%. The rate for County Mayo resident workers was recorded at 56.4%. 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).

7. Castlebar Labour Catchment

Figure 7.8 below details the education attainment levels for all workers, those employed within the town and those employed elsewhere. There are similar education attainment levels of those who are employed within Castlebar town (58.1% with third level) and those employed elsewhere (58% with third level).

Figure 7.8: Education Attainment Profile of the Castlebar labour catchment, 2022

Education Attainment	Workers living in the Castlebar labour catchment								
	Total			Working in Castlebar town			Working elsewhere in Ireland		
Secondary	7,005	41.2%		2,914	41.1%		4,091	41.3%	
Third	9,866	58.1%		4,120	58.1%		5,746	58.0%	
Not Stated	121	0.7%		57	0.8%		64	0.6%	
Total	16,992	100%		7,091	100%		9,901	100%	

Relative to the other main labour catchments, Castlebar has the third lowest level of third level attainment of those employed within the town. With a recorded rate of 58.1% with third level education employed in Castlebar, Galway City (71.1%), Sligo town (65.6%), Letterkenny (61.1%) and Carrick-on-Shannon (59.6%) have higher rates of highly educated workers. Only Ennis (57.4%) and Roscommon town (55.1%) labour catchments have lower rates. This reflects the type of local employment opportunities in these towns (Castlebar, Ennis and Roscommon), compared to larger centres with employers such as third level institutes and large multinational employers.

7.7.5 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%, Mayo recorded a rate of 13.9% with other local authorities as follows: Roscommon County (13.7%), Leitrim (13.9%), Clare (15%), Sligo County (15.3%) and Donegal (16%).













The age profile of those at work and over 15 years who live in the Castlebar labour catchment is shown in Figure 7.9. The proportion of young workers (<30 years) residing within the Castlebar labour catchment (13.5%) is lower than the overall State average of 17.6%. Relative to other towns in this analysis, the age profile of the Castlebar labour catchment is the oldest of the other larger labour catchments. Within the Castlebar labour catchment, 13.5% of resident workers are aged <30 years whereas the rate is higher in the Galway City (17.2%), Letterkenny (16.4%), Sligo town (15.5%), Ennis (14.1%) and Carrick-on-Shannon (13.9%) labour catchments.

7. Castlebar Labour Catchment

The slightly older age profile in Castlebar may be explained by a number of factors. While Castlebar has the MSLETB Campus - full-time courses cover topics in Health Science, Well-being and Society at levels 6-8 and Atlantic Technological University Mayo Campus - offering courses in Outdoor Education, Nursing, History & Geography, Early Childhood Education & Care and Social Care, many may still go to other universities for a wider range of third level education. As with other smaller labour catchments, many may choose employment in larger urban centres following completion of education.

The age profile is broadly similar to those employed within Castlebar town and those employed elsewhere as presented in Figure 7.9 below. A total of 13.6% (up from 12.8% in 2016) of all Castlebar labour catchment workers employed in Castlebar town are aged 'less than 30 years' whereas the rate for workers elsewhere is 13.3% (down from 14% in 2016).







Figure 7.9: Age Profile of the Castlebar labour catchment, 2022

Age	Workers living in the Castlebar labour catchment								
	Total			Working in Castlebar town			Working elsewhere in Ireland		
<30	2,287	13.5%		967	13.6%		1,320	13.3%	
30-45	6,377	37.5%		2,715	38.3%		3,662	37.0%	
45-64	7,714	45.4%		3,222	45.4%		4,492	45.4%	
65+	614	3.6%		187	2.6%		427	4.3%	
Total	16,992	100%		7,091	100%		9,901	100%	

7.7.6 Gender

The gender composition of residents in the Castlebar labour catchment is shown below. Within the Castlebar labour catchment, female workers account for a larger proportion of the total workforce than their male counterparts with rates of 51.1% and 48.9% respectively. The 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 7.10: Gender Profile of the Castlebar labour catchment, 2022

Gender	Workers living in the Castlebar labour catchment								
	Total			Working in Castlebar town			Working elsewhere in Ireland		
Female	8,680	51.1%		4,038	56.9%		4,642	46.9%	
Male	8,312	48.9%		3,053	43.1%		5,259	53.1%	
Total	16,992	100%		7,091	100%		9,901	100%	

7. Castlebar 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 Castlebar labour catchment and employed in Castlebar town are female and account for 56.9% of all resident workers (Figure 7.10). In contrast to this, those residing in the Castlebar labour catchment and employed elsewhere are more likely to be males - accounting for 53.1% 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).

7.7.7 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.

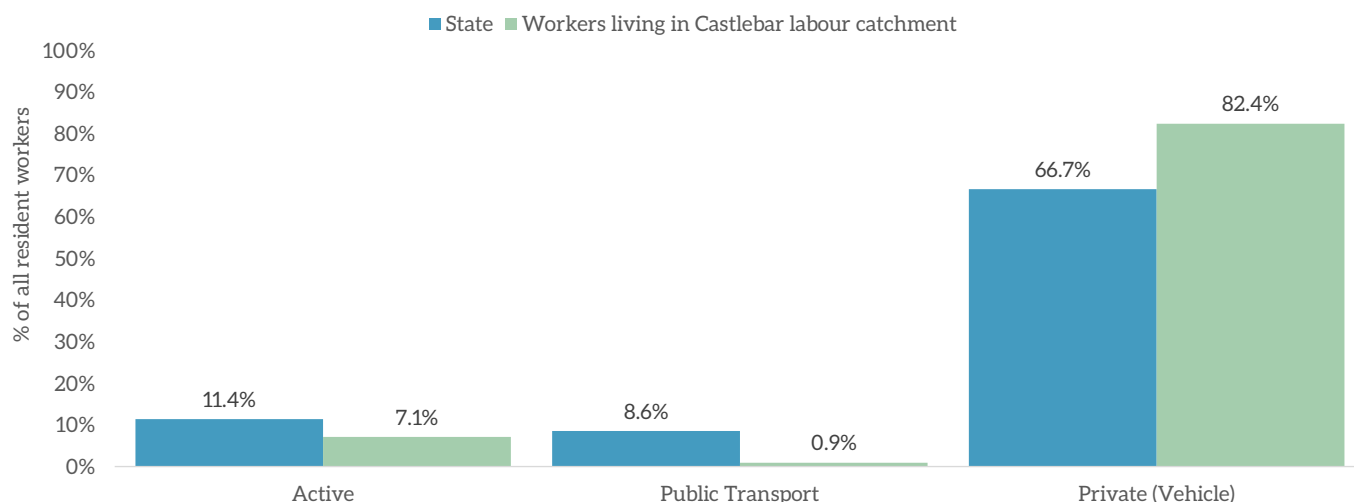
As with the State trend, commuting to work by car (driver and car passenger) is by far the most dominant means of travel across the Western Region (71%). In fact, six of the eight Western Region local authorities are within the top ten highest rates across the State - Galway County (74.8%), Roscommon (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 Castlebar labour catchment, a total of 7.1% (1,210) used 'Active' modes, 0.9% (157) used 'Public' modes (lowest rate amongst seven key towns/city) and 82.4% (13,993) used 'Private' modes of transport to employment destinations. This is the second highest rate amongst the seven labour catchments, see Figures 7.11 and 7.12 below.

7. Castlebar Labour Catchment

Figure 7.11: 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 Castlebar town and those employed elsewhere. Those employed in Castlebar town have a much higher propensity to use ‘Active’ modes (11.4%) as opposed to those employed elsewhere (4.1%).

Figure 7.12: Means of Travel for Resident Workers - Working in the town vs elsewhere, 2022

Means of Travel	Workers living in the Castlebar labour catchment								
	Total			Working in Castlebar town			Working elsewhere in Ireland		
Active	1,210	7.1%		805	11.4%		405	4.1%	
Public Transport	157	0.9%		41	0.6%		116	1.2%	
Private (Vehicle)	13,993	82.4%		5,898	83.2%		8,095	81.8%	
Total	15,360	90.4%		6,744	95.1%		8,616	87.0%	

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.

7.7.8 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 7.13 below details the overall ‘travel time departure’ distribution of all Castlebar labour catchment resident workers.

The most common travel time departures are within the ‘07:31-08:30’ band and accounted for 47.9% of all resident workers in the labour catchment. The next most popular departure time is ‘Before 07:00’ - recorded at under one in four of all workers, 23% in the Castlebar labour catchment and just over one in four 25.8%, for the State.

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.

7. Castlebar Labour Catchment

Figure 7.13: Departure Times for Resident Workers, 2022¹⁵

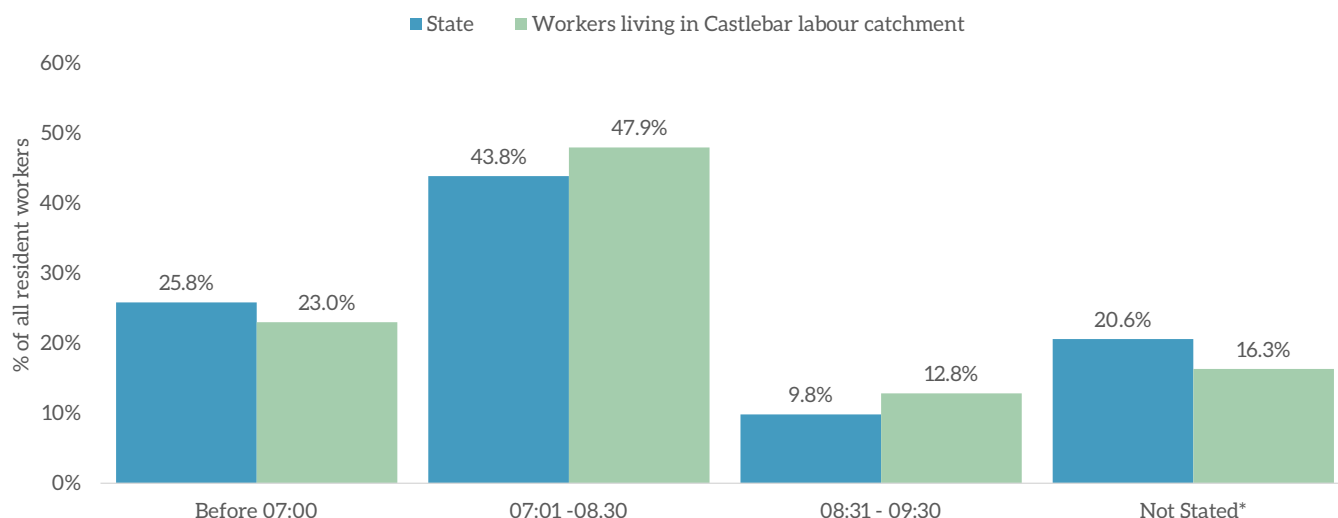


Figure 7.14 below shows a comparison of the ‘travel-time departures’ of those working in Castlebar town and those working elsewhere. Comparing these two groups there are some differences across the departure times. There is a higher share commuting to Castlebar between ‘08:31-09:30’ than those commuting elsewhere. A total of 22.6% of Castlebar town bound workers residing in the labour catchment depart for work ‘Before 07:00’, somewhat lower than the rate for workers travelling to other destinations (23.3%). This is as a result of the multiple commuting destinations within the overall Castlebar labour catchment where a total of 61.9% commute to destinations other than Castlebar town - rural locations, towns across Mayo and more distant locations such as Galway City.

Figure 7.14: Departure Times for Resident Workers - Working in the town vs elsewhere, 2022

Departure Time	Workers living in the Castlebar labour catchment							
	Total		Working in Castlebar town		Working elsewhere in Ireland			
Before 07:00	3,905	23.0%	1,601	22.6%	2,304	23.3%		
07:01-08:30	8,138	47.9%	3,505	49.4%	4,633	46.8%		
08:31-09:30	2,179	12.8%	1,112	15.7%	1,067	10.8%		
Not Stated*	2,770	16.3%	873	12.3%	1,897	19.2%		
Total	16,992	100%	7,091	100%	9,901	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 7.14 above).

15 | *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.

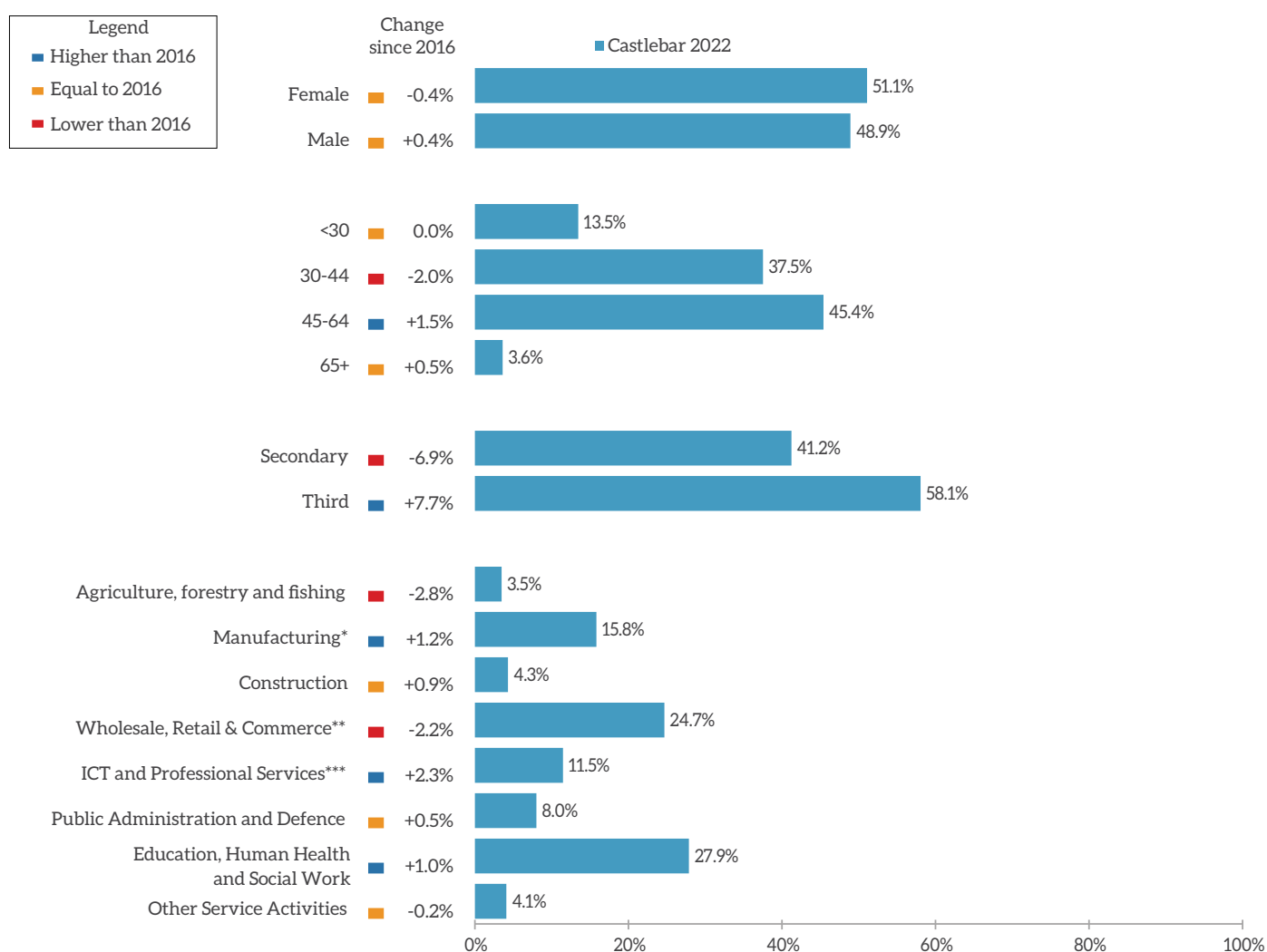
7. Castlebar Labour Catchment

7.8 Analysis of change between 2016 and 2022

The graphic below details the change that has occurred across the Castlebar 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 Castlebar labour catchment is still the dominant labour catchment for large parts of central and southeast County Mayo, see maps in Section 7.9. The geographical size of the Castlebar labour catchment has changed since 2016 (contracted in the north and extended in the southeast) and the total resident workers residing in the labour catchment has increased to 16,922 from 13,931 in 2016 (+22% or +3,061) and from 13,757 in 2006 (+23.5% or +3,235).

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

Figure 7.15: 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.

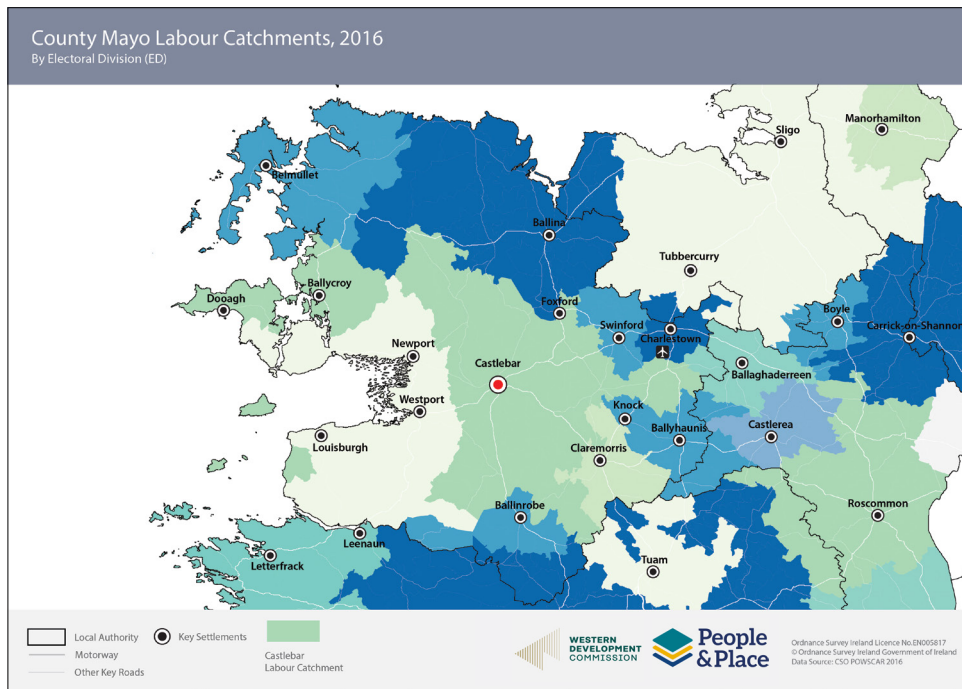
*For some percentage change figures there may be very minor rounding issues (0.1%) due to the fact that the graphic displays data at one decimal point only.

7. Castlebar Labour Catchment

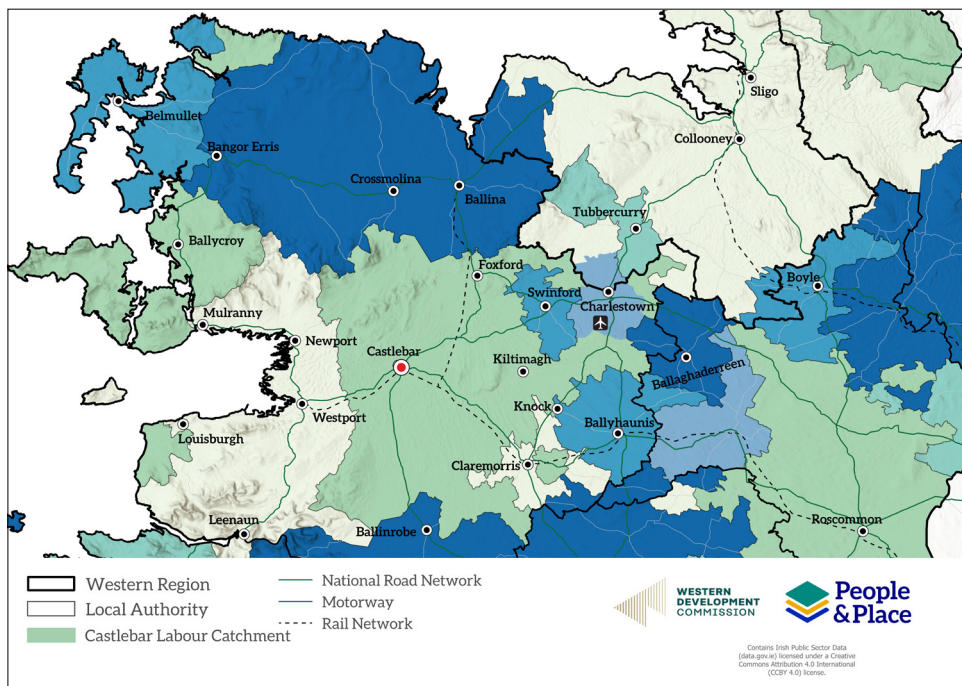
7.9 Analysis of labour catchment change between 2016 and 2022

The maps below detail the geographical changes that have taken place within the Castlebar labour catchment and neighbouring labour catchments between 2016 and 2022. Due to the extensive spatial distribution of medium-sized settlements across Mayo, the east of the county is comprised of the individual labour markets of Swinford, Charlestown/Knock, Ballaghaderreen, Ballyhaunis, Claremorris and parts of the Sligo town labour catchment. The influence of Galway City as a competing employment destination for Mayo resident workers is evident by the allocation of many EDs in south Mayo to the Galway City labour catchment.

Map 7.4: Castlebar labour catchment, 2016



Map 7.5: Castlebar labour catchment, 2022

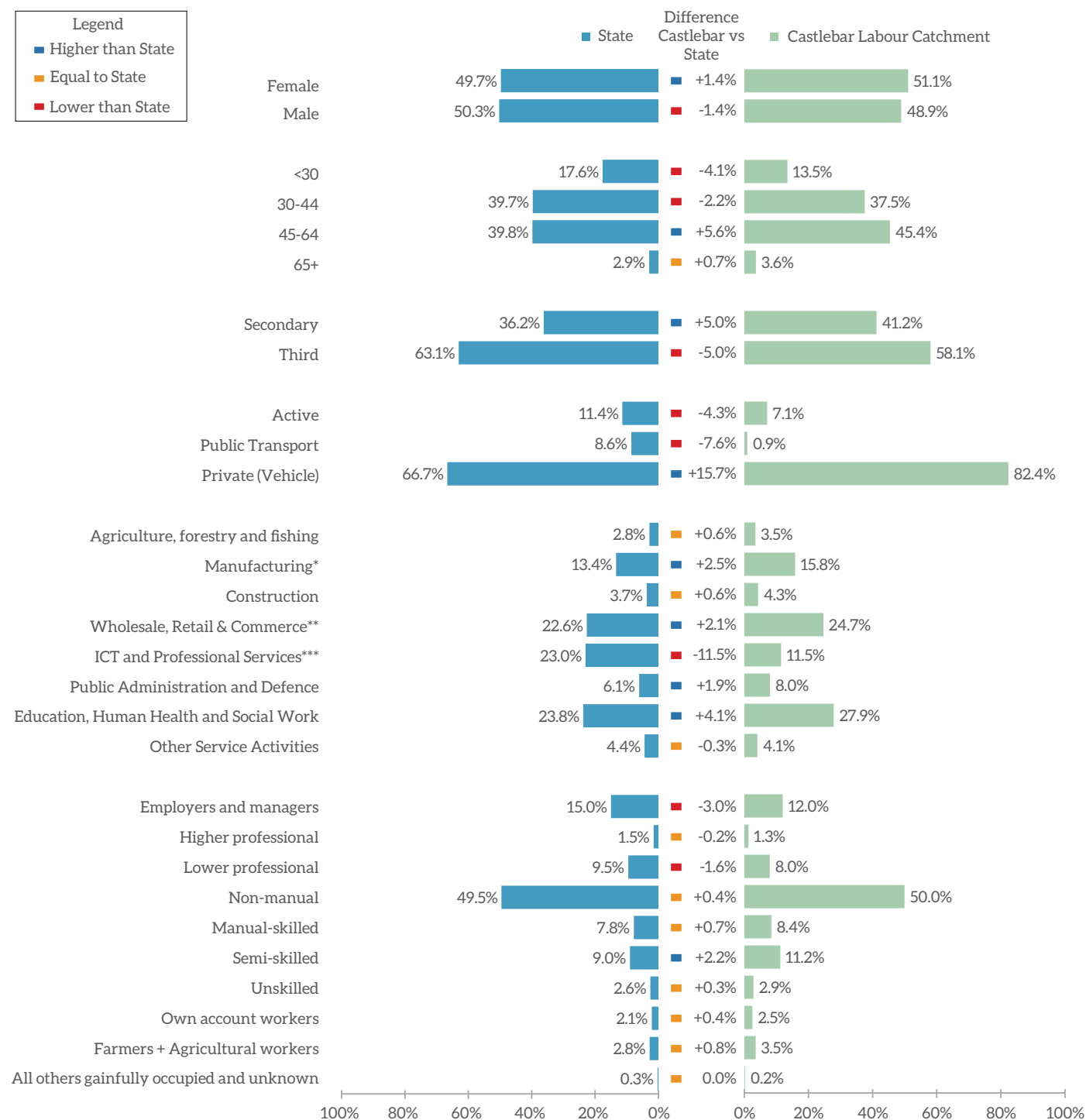


7. Castlebar Labour Catchment

7.10 Castlebar labour catchment comparison with the State, 2022

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

Figure 7.16: Comparison between State and Castlebar 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.

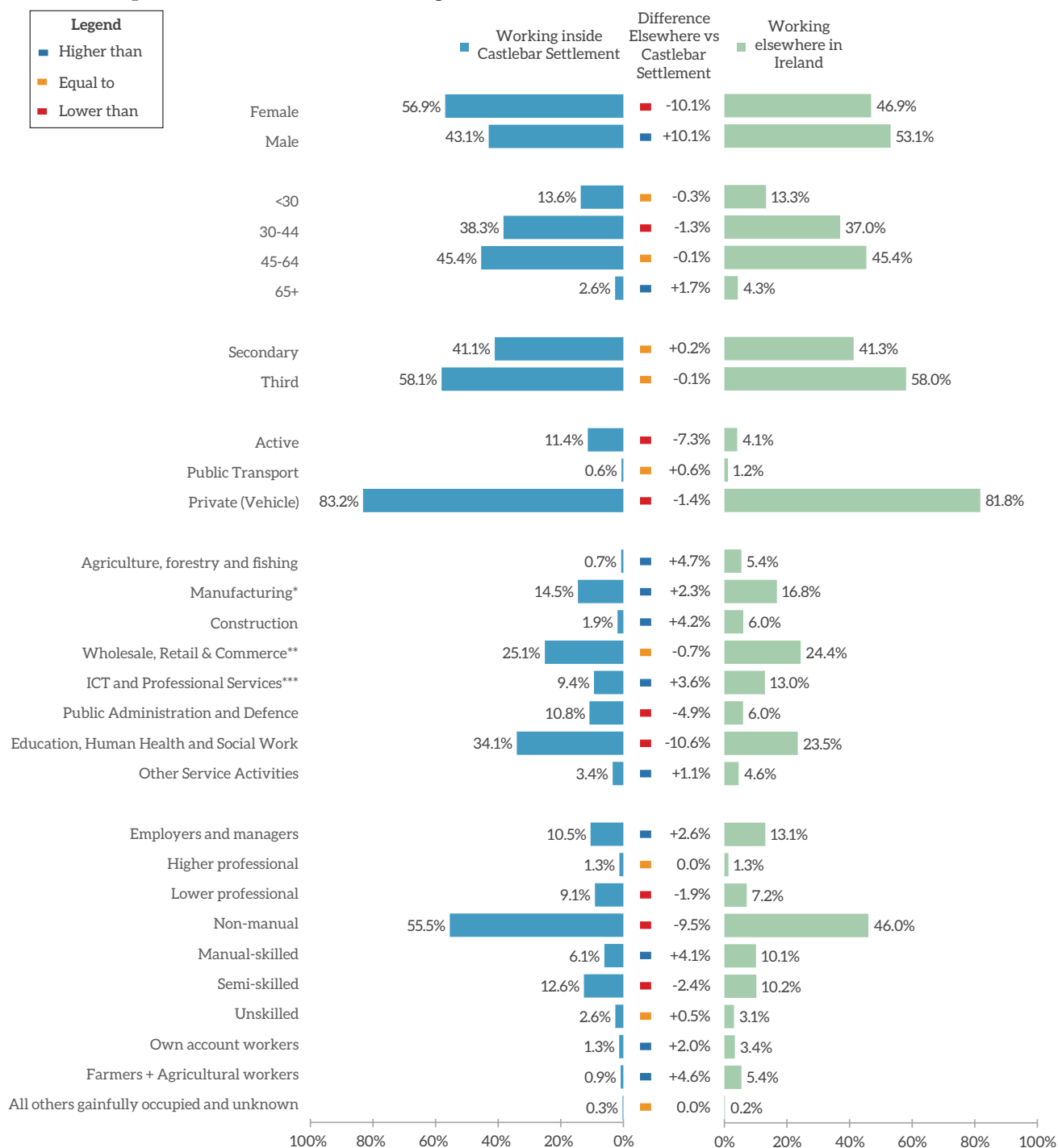
*For some percentage change figures there may be very minor rounding issues (0.1%) due to the fact that the graphic displays data at one decimal point only.

7. Castlebar Labour Catchment

7.11 Castlebar labour catchment - Employed within Castlebar town and elsewhere in Ireland comparison

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

Figure 7.17: Comparison between those working within Castlebar 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.

7. Castlebar Labour Catchment

7.12 Socio-Economic comparison of all seven labour catchments

The graphic below details the socio-economic characteristics of resident workers within the Castlebar labour catchment and the other six main labour catchments in the Western Region; Carrick-on-Shannon, Ennis, Galway City, Letterkenny, 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 Castlebar labour catchment is 58.1%.

7.12.1 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%

7.12.2 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%

7. Castlebar Labour Catchment

7.12.3 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%

7.12.4 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%

7. Castlebar Labour Catchment

7.12.5 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%

7.12.6 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%

7.12.7 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.

8.0 Roscommon town Labour Catchment

8. Roscommon town Labour Catchment

1. A graphical illustration of travel to work patterns and commuting flows (Section 8.5) and the overall labour catchment of the town (Section 8.6);
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 8.7); 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, Letterkenny and Sligo town) (Section 8.8-8.12).

8.3 The importance of Roscommon town as a place of work

The official CSO settlement of Roscommon town had a population of 6,555 persons recorded in the 2022 Census. Roscommon town is the twelfth largest urban centre within the Western Region (Galway City is the largest, followed by Ennis etc.) and the 78th largest in the State. Since 2006, the population residing within the town of Roscommon has increased by +30.7% (+1,538)².

Population

In the most recent intercensal period 2016 to 2022, the population of Roscommon town has increased by +11.6% (+679). 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 Roscommon County have seen significant population growth since 2016 with the highest rates in Termonbarry (+58%), Coothill (+56%), Roosky (+39%) and Ballaghaderreen (+32%).

Labour Force

Since Census 2016 there has been an increase in the numbers living in Roscommon town 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 Roscommon town has increased by +8.4% (from 2,659 to 2,882). The number of residents at work has increased by +13.6% (from 2,264 to 2,573). Conversely, the number classed as unemployed has decreased by -21.8% (from 395 to 309). The +13.6% increase in those at work in Roscommon town is lower than that in the State (+15.6%), the Western Region (+14.6%) and County Roscommon (+14.7%).

Daytime Working Population

According to POWSCCAR 2022, the total number of jobs located within the Roscommon town boundary was 4,315 and this accounted for 1.6% of all jobs located within the Western Region (272,860)³. Of all cities and towns in Ireland, Roscommon town has the 41st highest number of jobs located within the town boundary and this accounted for 25.2% of all jobs located within County Roscommon (17,154). Relative to the six other main towns/city in this report, Roscommon town has the second lowest number of jobs with higher numbers in Galway City (51,211), Sligo town (13,562) Letterkenny (13,109), Ennis (10,628) and Castlebar (9,911) and lower numbers in Carrick-on-Shannon (3,145). The ratio of local jobs in Roscommon town (4,315) to resident workers (2,531) in the town is 1.7 indicating that the town is a key economic attraction 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 town of Roscommon.

8. Roscommon town Labour Catchment

Between 2016 and 2022, there was an increase of +10.2% (+398) jobs located in Roscommon town. This was the third highest increase of the seven main towns/city within this report with the highest rate of jobs growth in Galway City (+15.4%) and Letterkenny (+15%) and lower increases in 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 has increased by +15.6% (+2,314) in County Roscommon and by +12.4% (+30,148) from 242,712 to 272,860 in the Western Region as a whole. Roscommon town accounted for 17.2% of the growth in jobs in County Roscommon since 2016.

8.4 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 County Roscommon a total of 2,566 (8.8%) resident workers were recorded as mainly working from home in Census 2022. This represents a +21.4% (+452) increase from the number in 2016 (2,114 or 8.3% of resident workers). This is a lower increase than other counties, suggesting that the type of employment in the county is less amenable to remote working opportunities (ICT, professional services etc.).

Nonetheless, due to the increased incidence in working from home, the employment base in Roscommon 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.

8. Roscommon town Labour Catchment

8.5 Employment based commuting patterns to Roscommon town

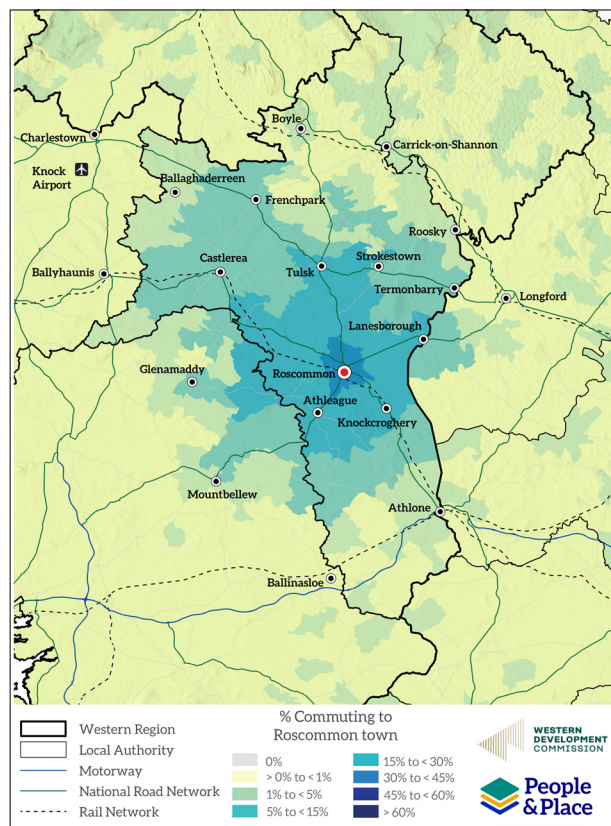
Map 8.2 shows the extent of commuting flows to Roscommon town for work opportunities. The colours represent the proportions of people at work who live in each ED and travel to work in Roscommon town.

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. Roscommon town, 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 8.2: Commuting Flows into Roscommon town, 2022



Source: CSO POWSCCAR

As expected, the EDs closest to Roscommon town 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 >45%). Beyond these areas, the proportion travelling to the town gradually declines and is illustrated on the map; graduating from the darker green areas (Tulsk, Lanesborough, Knockcroghery and Athleague) where between 15% and 30% of resident workers in those EDs work in Roscommon town, through to medium green (Castlerea, Frenchpark, Strokestown, Termonbarry and Glenamaddy) where between 5% and 15% of resident workers in those EDs commute to work in Roscommon town. The remainder of Roscommon County (north and south) and bordering counties have relatively low rates of commuting to Roscommon town with rates in Ballaghaderreen, Boyle, Carrick-on-Shannon, Roosky, Athlone and Mountbellew all below 5%. Indeed, these areas to the north and south of the county are under a much higher level of urban influence from employment opportunities in settlements such as Sligo town, Carrick-on-Shannon, Athlone and Galway City.

8. Roscommon town Labour Catchment

8.6 Identifying the Roscommon town labour catchment

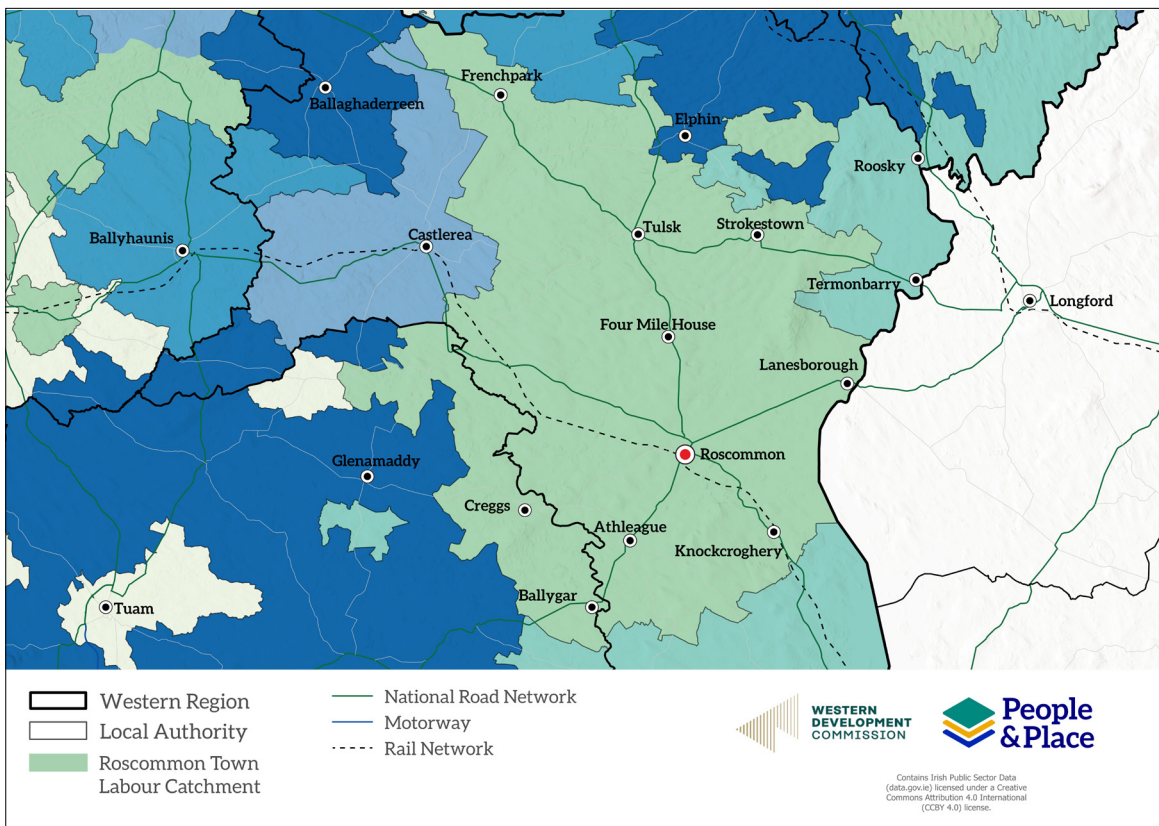
While Map 8.2 shows EDs from where even one person commuted to Roscommon town, all of these EDs are not included in the Roscommon town labour catchment. The Roscommon town labour catchment is based on only those EDs for which Roscommon town is the most popular work destination for resident workers. Other 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 8.3 shows the Roscommon town labour catchment as depicted by the green colour. The labour catchment extends to large parts of the centre of the county, with northeast areas of Roscommon County forming part of the Carrick-on-Shannon labour catchment and areas in south Roscommon County largely part of the Athlone labour catchment. The strong influence of Athlone, Carrick-on-Shannon, Castlerea and Longford town (external to the Western Region) all have an impact on the overall size of Roscommon town labour catchment. Since 2016, the Roscommon town labour catchment has expanded in areas towards Castlerea and Frenchpark (see Section 8.9).

Map 8.3: Roscommon town labour catchment, 2022



7 | For a more detailed explanation of the methodology, see [Appendix](#).

8. Roscommon town Labour Catchment

In summary, Roscommon town is still the dominant labour catchment for some parts of central County Roscommon and extends up to Frenchpark. However, the remainder of northern Roscommon County is part of the Carrick-on-Shannon labour catchment and southern Roscommon County is largely connected to Athlone. In particular, Roscommon town is the key economic driver for the immediate areas surrounding the town, central and east Roscommon County (Four Mile House, Lanesborough etc.) and then the northern area stretching from Frenchpark down to Strokestown.

In 2022, there were 9,168 people classified as at work and living within the Roscommon town labour catchment (3.1% of all Western Region resident workers). The Roscommon town labour catchment has a population at work 3.6 times larger than the town of Roscommon (9,168 to 2,531 respectively).

The Roscommon town labour catchment is the eighth largest labour catchment in the Western Region with the labour catchments of Limerick City (10,630) and Ballina in Mayo (9,875) with larger labour catchments. Of the seven main towns in this report, only the Carrick-on-Shannon labour catchment is smaller (6,600).

Since 2016, the geographical size of the Roscommon town labour catchment has expanded slightly including parts of what was previously the Castlerea labour catchment. The total resident workers residing in the labour catchment in 2022 was 9,168, an increase of +26.7% since 2016 (from 7,235) and by +25.5% since 2006 (from 7,306).

8.7 Profile of the Roscommon town labour catchment

Map 8.3 above identified the Roscommon town labour catchment (in green). 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 Roscommon town 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 Roscommon town.

The Roscommon town labour catchment is therefore composed of those who live in and are employed within the town (**Working in Roscommon town**) and those who live in the labour catchment but work outside the town e.g. other towns such as Athlone, rural areas and locations outside the Western Region such as Dublin 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 8.8 and Section 8.9), both in terms of geography and socio-economic characteristics, a comparison profile of the Roscommon town labour catchment relative to the State (Section 8.10), a comparison profile of those 'Working in Roscommon town' and 'Working elsewhere in Ireland' (Section 8.11) and a comparison profile of the Roscommon town labour catchment and the six other main towns/city within the Western Region (Section 8.12).

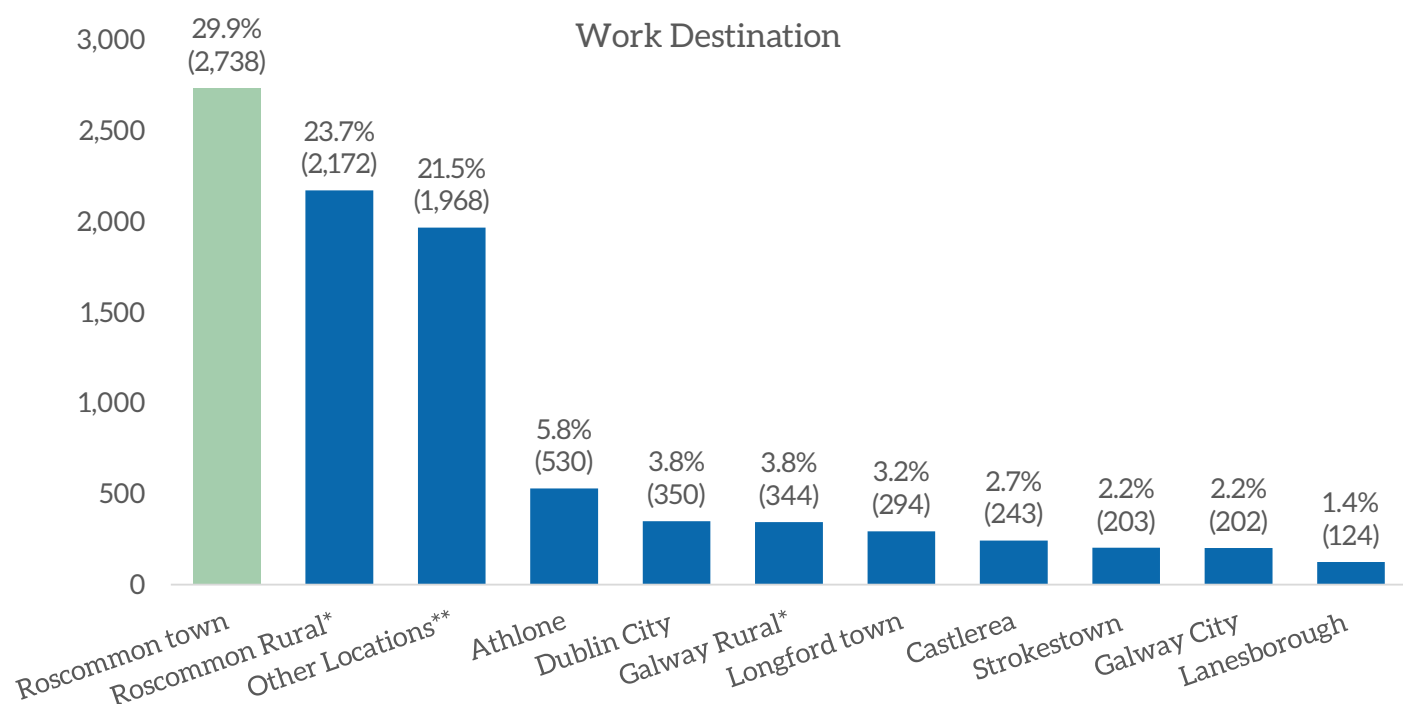
⁸ | Note: 'Working elsewhere in Ireland' refers to working anywhere beyond the town boundary, which could include suburbs outside the town boundary to more distant locations such as Dublin City.

8.7.1 Place of Work

The Roscommon town labour catchment can be seen to include most of County Roscommon, but is mainly contained within central areas and the midwest. In Figures 8.1 and 8.2 the main work locations for those who live in the Roscommon town labour catchment are set out. Those who work mainly from home in the Roscommon town labour catchment (n=986)⁹ are coded with their home location as their place of work i.e., a resident worker from Roscommon town who works mainly from home is coded with their place of work as Roscommon town.

As expected, Roscommon town is the principal place of employment for those living in the labour catchment, accounting for 2,738 (29.9%) of all employment - although this share has declined since 2016 (34.7%). Of the seven labour catchments reviewed here, the Roscommon town labour catchment has the second lowest proportion of resident workers commuting to the principal town/city, with only Carrick-on-Shannon lower at 29.5%. 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., Roscommon town). Employment in rural parts of County Roscommon (destination outside any defined CSO settlement) is the next most popular destination and this accounted for just under a quarter of all resident workers (23.7% or 2,172). Since 2016, flows to 'Rural' areas have increased by +2.9% (see Figure 8.2).

Figure 8.1: Key Destinations of resident workers in the Roscommon town labour catchment, 2022



*Roscommon/Galway Rural' - destination outside any defined CSO settlement
 **'Other Locations' - Less than 124 commuters

The other large employment destinations for residents within the Roscommon town labour catchment are important towns in close proximity to Roscommon town; Athlone, Longford town, Castlerea, Strokestown and Lanesborough.

⁹ Of the 986 coded as working from home in the Roscommon town labour catchment, 150 are coded as both living in and working in the Roscommon town settlement.

8. Roscommon town Labour Catchment

Dublin City (350 or 3.8%) is highlighted as a key destination for Roscommon town labour catchment residents. Since 2016, Dublin City has increased significantly as an employment destination (+75.9%) - rail and road improvements, reduced travel times and more flexible working from home arrangements are contributory factors to this.

In summary, the Roscommon town labour catchment comprises nearly a third (29.9% or 2,738) of resident workers who are employed in Roscommon town with the remaining over two-thirds (70.1%) employed in locations outside of the town.

Figure 8.2: Key Destinations in 2022 and change since 2016

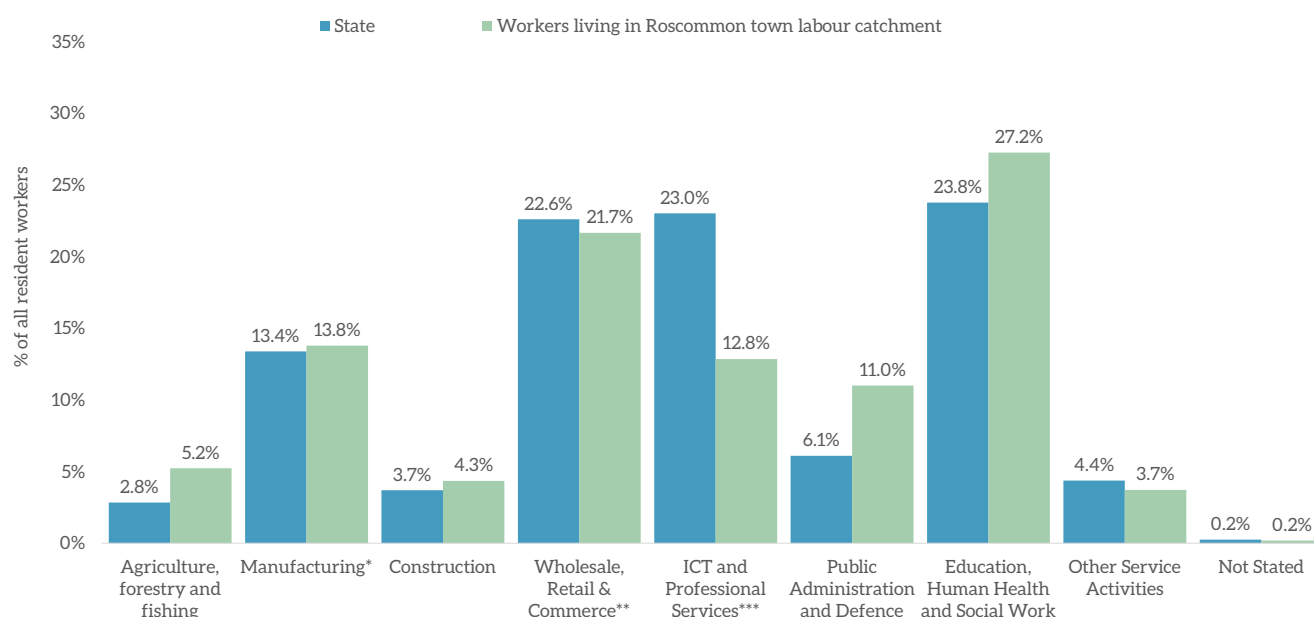
Work Destination	Resident Workers	Change 2016-2022	% Change 2016-2022	Proportional Share 2022	Proportional Share Change 2016-2022
Roscommon town	2,738	227	9.0%	29.9%	-4.8%
Roscommon Rural*	2,172	669	44.5%	23.7%	2.9%
Other Locations**	1,968	655	N/A	21.5%	N/A
Athlone	530	2	0.4%	5.8%	-1.5%
Dublin City	350	151	75.9%	3.8%	1.1%
Galway Rural*	344	37	12.1%	3.8%	-0.5%
Longford town	294	66	28.9%	3.2%	0.1%
Castlerea	243	64	35.8%	2.7%	0.2%
Strokestown	203	1	0.5%	2.2%	-0.6%
Galway City	202	71	54.2%	2.2%	0.4%
Lanesborough	124	-4	-3.1%	1.4%	-0.4%
Total	9,168	1,933	26.7%		

8.7.2 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 Roscommon town labour catchment is shown in Figure 8.3. The 'Education, Human Health and Social Work' sector is the most important employer and this accounted for just under a third of all resident workers (27.2%) - considerably higher than the State average of 23.8%. The 'Wholesale, Retail Trade, Transportation and Storage, Accommodation and Food Service Activities' (21.7%) is the next biggest sectors for the labour catchment. The 'Manufacturing' sector accounted for 13.8% of all resident workers in the Roscommon town labour catchment, with all other sectors accounting for 13% or less.

Figure 8.3: Industrial Profile of the Roscommon town labour catchment and the State, 2022



Relative to the national picture, the ‘Education, Human Health and Social Work’ sector stands out and plays a far more important role in the overall employment base and is 3.4 percentage points higher than the State average. The ‘Public Administration and Defence’ sector’s share of employment (11%) is 4.9 percentage points higher than the State average (6.1%) and the ‘Agriculture, Forestry and Fishing’ sector (5.2%) is 2.4 percentage points higher than the State average (2.8%).

Across the seven labour force catchments, Roscommon town does not appear to have any particular industrial specialisation and recorded the second lowest proportion employed in the ‘Manufacturing’ sector, the second lowest in ‘ICT and Professional Services’ sector and the third lowest proportion in the ‘Education, Human Health and Social Work’ sector¹⁰.

As seen in Figure 8.4 below, the industrial groups which saw the largest proportional increases between 2016 and 2022 were the ‘Manufacturing’ sector (+0.1 percentage points), the ‘Education, Human Health and Social Work’ sector (+0.8 percentage points) and the ‘ICT and Professional Services’ sector (+3.3 percentage points). In contrast, the largest proportionate declines have been in the ‘Agriculture, forestry and fishing’ sector (-3.6 percentage points) and the ‘Wholesale, Retail & Commerce’ sector (-1.8 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 8.4: Industrial Profile of the Roscommon town labour catchment in 2016 and 2022

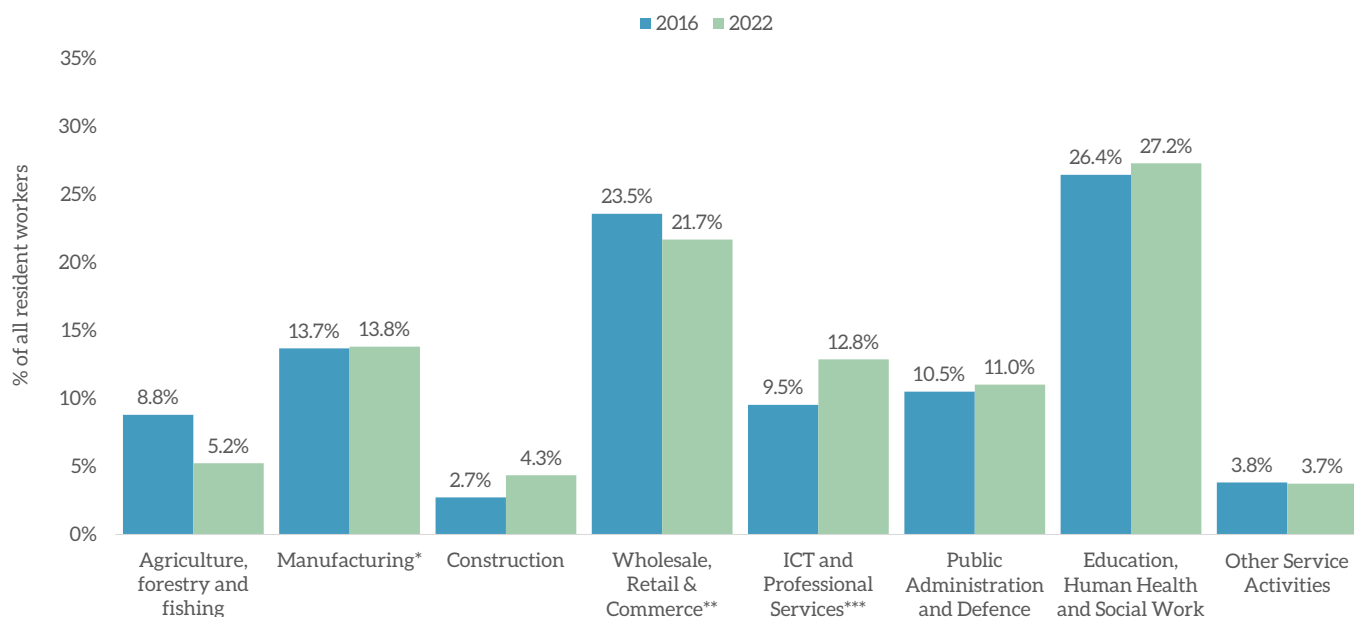


Figure 8.5 below details the industry of employment of the Roscommon town labour catchment by the location of employment – working within Roscommon town or working elsewhere. Employment in the ‘Education, Human Health and Social Work’ (32.8%), ‘Wholesale, Retail and Commerce’ (25.6%) and ‘Public Administration and Defence’ (13.1%) sectors are more dominant among those employed within Roscommon town. The ‘ICT and Professional Services’ (13.3%), ‘Manufacturing’ (16.6%) and ‘Agriculture, forestry and fishing’ (7.5%) sectors have a higher share of employment outside the town than within.

Figure 8.5: Industrial Profile of the Roscommon town labour catchment, 2022

Industry	Workers living in the Roscommon town labour catchment							
	Total		Working in Roscommon town		Working elsewhere in Ireland			
Agriculture, forestry and fishing	479	5.2%	31	1.0%	448	7.5%		
Manufacturing*	1,264	13.8%	271	8.5%	993	16.6%		
Construction	398	4.3%	77	2.4%	321	5.4%		
Wholesale, Retail & Commerce**	1,985	21.7%	813	25.6%	1,172	19.5%		
ICT and Professional Services***	1,178	12.8%	383	12.1%	795	13.3%		
Public Administration and Defence	1,008	11.0%	416	13.1%	592	9.9%		
Education, Human Health & Social Work	2,498	27.2%	1,042	32.8%	1,456	24.3%		
Other Service Activities	341	3.7%	134	4.2%	207	3.5%		
Not Stated	17	0.2%	6	0.2%	11	0.2%		
Total	9,168	100%	3,173	100%	5,995	100%		

8.7.3 Socio-Economic Group

The socio-economic structure of employment in the Roscommon town labour catchment is set out in Figure 8.6. 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 Roscommon town is broadly similar to that of the State with the largest group by far being 'Non-manual'¹² (50.1%) similar to the State average at 49.5%. As with the State, the next largest category in the Roscommon town labour catchment is 'Employers and Managers' at 11.3%. Relative to the other six key labour catchments, the Roscommon town labour catchment recorded the third 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 6-11% of the resident workforce. 'Farmers and Agricultural Workers' account for 5.4% of all resident workers in the labour catchment.

Figure 8.6: Socio-Economic Group (SEG) Profile of the Roscommon town labour catchment and the State, 2022

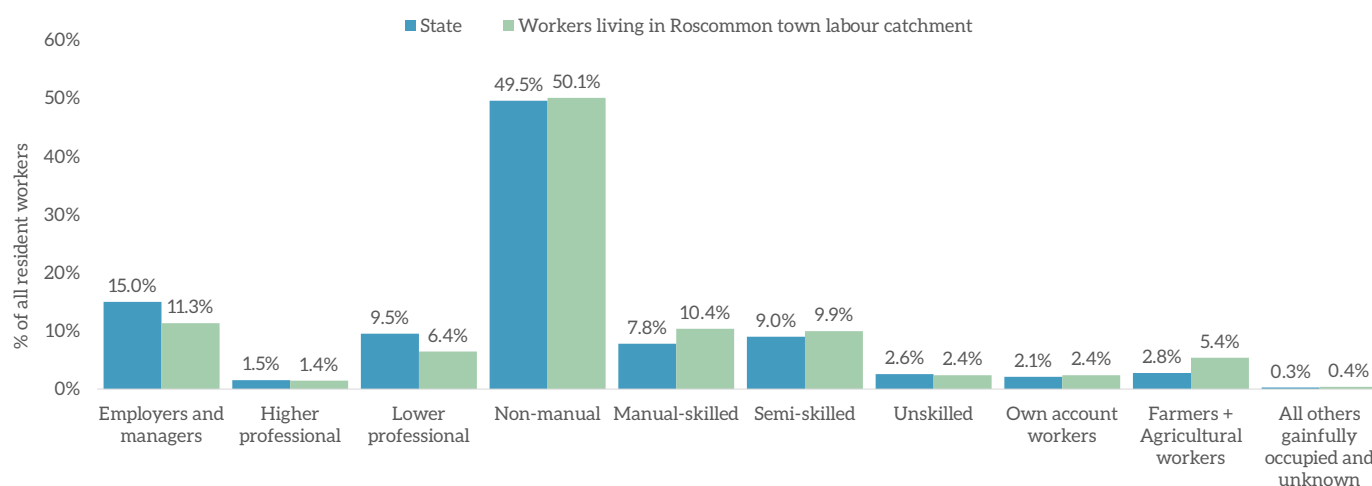


Figure 8.7 below details the socio-economic structure breakdown for those working within Roscommon town and those working outside Roscommon town. The largest difference between the 'town' and 'elsewhere' group is within the 'Non-manual' group (60.6% in Roscommon town vs 44.5% in job locations outside Roscommon town) which relates to persons working in retail, government, banking and other areas fulfilling administrative roles.

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.

8. Roscommon town Labour Catchment

As a follow on to previous indicators on the high level of external commuting to employment opportunities (i.e., beyond the labour catchments to locations such as Athlone and Dublin and Galway cities), there are somewhat notable differences in rates with a higher proportion of those employed outside Roscommon town classed as 'Lower professional' and 'Employers and Managers'. Those working outside Roscommon town, in mostly rural areas, also have a higher proportion of workers as part of the 'Farmers and Agricultural workers' grouping (7.7% working outside the town vs 1.1% working in the town).

Figure 8.7: Socio-Economic Group (SEG) Profile of the Roscommon town labour catchment, 2022

Socio-Economic Group (SEG)	Workers living in the Roscommon town labour catchment							
	Total		Working in Roscommon town		Working elsewhere in Ireland			
Employers and managers	1,037	11.3%	344	10.9%	693	11.6%		
Higher professional	131	1.4%	50	1.6%	81	1.4%		
Lower professional	590	6.4%	155	4.9%	435	7.3%		
Non-manual	4,589	50.1%	1,920	60.6%	2,669	44.5%		
Manual-skilled	949	10.4%	225	7.1%	724	12.1%		
Semi-skilled	912	9.9%	290	9.1%	622	10.4%		
Unskilled	216	2.4%	89	2.8%	127	2.1%		
Own account workers	216	2.4%	51	1.6%	165	2.8%		
Farmers + Agricultural workers	494	5.4%	34	1.1%	460	7.7%		
All others gainfully occupied and unknown	34	0.4%	12	0.4%	22	0.4%		
Total	9,168	100%	3,170	100%	5,998	100%		

8.7.4 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 8.8 details the average education profile among those resident workers in the Roscommon town labour catchment with 57% 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%. Relative to all seven labour catchments, Roscommon town has the lowest educated workforce, just below that of the Letterkenny labour catchment (57.2%)¹³.

¹³ | At the local authority level, Galway City recorded the second highest rate in the State at 72%. The rate for County Roscommon resident workers was recorded at 58.2%. 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).

8. Roscommon town Labour Catchment

Figure 8.8 below details the education attainment levels for all workers, those employed within the town and those employed elsewhere. There is a variance between the education attainment of those who are employed within Roscommon town (55.1% with third level) and those employed elsewhere (58% with third level). This relates to the high level of commuting from within the labour catchment to other areas, including Carrick-on-Shannon.

Figure 8.8: Education Attainment Profile of the Roscommon town labour catchment, 2022

Education Attainment	Workers living in the Roscommon town labour catchment								
	Total			Working in Roscommon town			Working elsewhere in Ireland		
Secondary	3,841	41.9%		1,387	43.8%		2,454	40.9%	
Third	5,226	57.0%		1,748	55.1%		3,478	58.0%	
Not Stated	101	1.1%		35	1.1%		66	1.1%	
Total	9,168	100%		3,170	100%		5,998	100%	

Relative to the other main labour catchments, Roscommon town has the lowest level of third level attainment of those employed within the town. With a recorded rate of 55.1% with third level education employed in Roscommon town, Galway City (71.1%), Sligo town (65.6%), Letterkenny (61.1%), Carrick-on-Shannon (59.6%), Castlebar (58.1%) and Ennis (57.4%) labour catchments have higher rates of third level educated workers. This reflects the type of local employment opportunities in Roscommon town i.e., the lack of third level education institutes and larger companies employing significant numbers of third level graduates.

8.7.5 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%, at 13.7% Roscommon County recorded the second lowest rate in the Western Region with other local authorities as follows: Leitrim (13.9%), Mayo (13.9%), Clare (15%), Sligo County (15.3%) and Donegal (16%).













The age profile of those at work and over 15 years who live in the Roscommon town labour catchment is shown in Figure 8.9. The proportion of young workers (<30 years) residing within the Roscommon town labour catchment (13.5%) is considerably lower than the overall State average of 17.6%. Relative to other towns in this analysis, the age profile of the Roscommon town labour catchment is the second oldest of the labour catchments. Within the Roscommon town labour catchment, 13.5% of resident workers are aged <30 years compared to the higher rates in the Galway City (17.2%), Letterkenny (16.4%), Sligo town (15.5%), Ennis (14.1%) and Carrick-on-Shannon (13.9%) labour catchments with only Castlebar (13.5%) labour catchment older.

8. Roscommon town Labour Catchment

The high levels of out-migration of younger people from rural areas within Roscommon to participate in third level education and to take up employment opportunities elsewhere is certainly a contributory factor to this trend.

The age profile is broadly similar for those employed within Roscommon town than those employed elsewhere and is evident in the data presented in Figure 8.9 below. A total of 13.8% (up from 12.3% in 2016) of all Roscommon town labour catchment workers employed in Roscommon town are aged 'less than 30 years' whereas the rate for workers elsewhere is 13.4% (down from 14.4% in 2016).







Figure 8.9: Age Profile of the Roscommon town labour catchment, 2022

Age	Workers living in the Roscommon town labour catchment								
	Total			Working in Roscommon town			Working elsewhere in Ireland		
<30	1,241	13.5%		439	13.8%		802	13.4%	
30-45	3,518	38.4%		1,154	36.4%		2,364	39.4%	
45-64	4,065	44.3%		1,480	46.7%		2,585	43.1%	
65+	344	3.8%		97	3.1%		247	4.1%	
Total	9,168	100%		3,170	100%		5,998	100%	

8.7.6 Gender

The gender composition of residents in the Roscommon town labour catchment is shown below. Within the Roscommon town labour catchment, female workers and their male counterparts account for an equal proportion of the total workforce: with rates of 50% each. 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 8.10: Gender Profile of the Roscommon town labour catchment, 2022

Gender	Workers living in the Roscommon town labour catchment								
	Total			Working in Roscommon town			Working elsewhere in Ireland		
Female	4,580	50.0%		1,866	58.9%		2,714	45.2%	
Male	4,588	50.0%		1,304	41.1%		3,284	54.8%	
Total	9,168	100%		3,170	100%		5,998	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 Roscommon town labour catchment and employed in Roscommon town are female and account for 58.9% of all resident workers (Figure 8.10).

8. Roscommon town Labour Catchment

In contrast to this, those residing in the Roscommon town labour catchment and employed elsewhere are more likely to be males - accounting for 54.8% 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).

8.7.7 Means of Travel

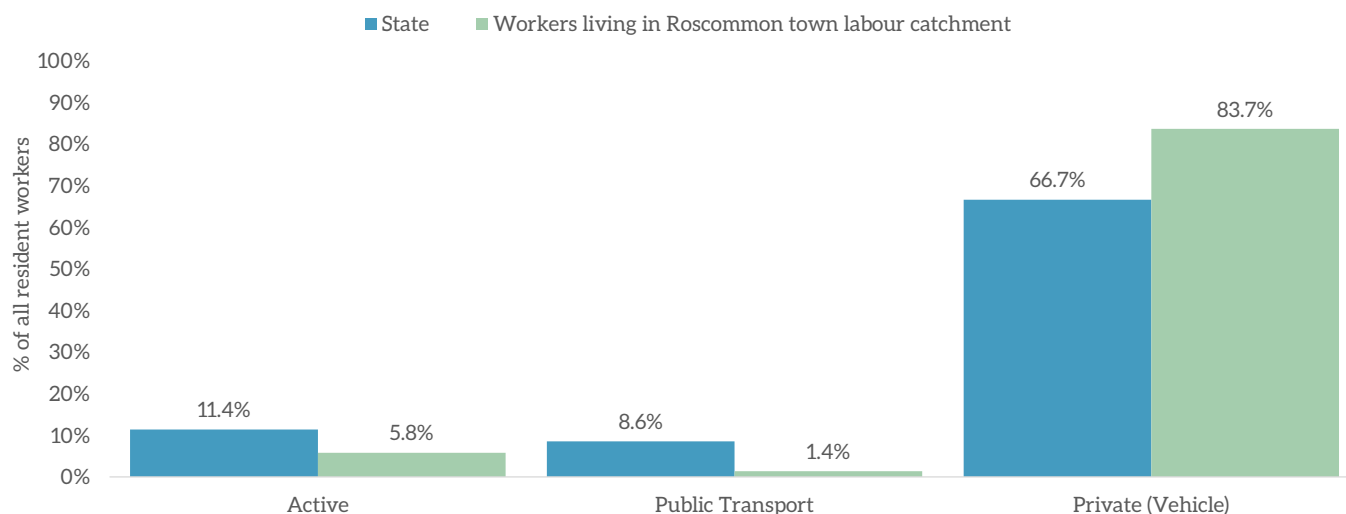
Nationally in 2022, commuting to work by car in Ireland was still the most popular means of travel, with 59% driving and a further 4% travelling as a passenger in a car. The proportion commuting by car did however fall slightly from 66% in 2016 to 63% in 2022. The second most popular way of getting to 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 Roscommon town labour catchment, a total of 5.8% (532) used 'Active' modes, 1.4% (124) used 'Public' modes and 83.7% (7,670) used 'Private' modes of transport to employment destinations. This is the highest rate amongst the seven labour catchments and is unsurprising as it is very rural with more limited availability of public transport, see Figures 8.11 and 8.12 below.

Figure 8.11: Means of Travel for Resident Workers, 2022



As expected, there is a variation in the modes used by resident workers who are employed in Roscommon town and those employed elsewhere. Those employed in Roscommon town have a much higher propensity to use 'Active' modes (9.4%) as opposed to those employed elsewhere (3.9%).

Figure 8.12: Means of Travel for Resident Workers - Working in the town vs elsewhere, 2022

Means of Travel	Workers living in the Roscommon town labour catchment							
	Total		Working in Roscommon town			Working elsewhere in Ireland		
Active	532	5.8%	297	9.4%	235	3.9%		
Public Transport	124	1.4%	30	0.9%	94	1.6%		
Private (Vehicle)	7,670	83.7%	2,700	85.2%	4,970	82.9%		
Total	8,326	90.8%	3,027	95.5%	5,299	88.3%		

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.

8.7.8 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 8.13 below details the overall 'travel time departure' distribution of all Roscommon town labour catchment resident workers.

The most common travel time departures are within the '07:01-08:30' band and this accounted for 50.1% of all resident workers in the labour catchment. The next most popular departure time is 'Before 07:00' - recorded at just over one in five of all workers, 21.8% in the Roscommon town labour catchment and just over one in four of all workers, 25.8%, in the State.

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 8.13: Departure Times for Resident Workers, 2022¹⁵

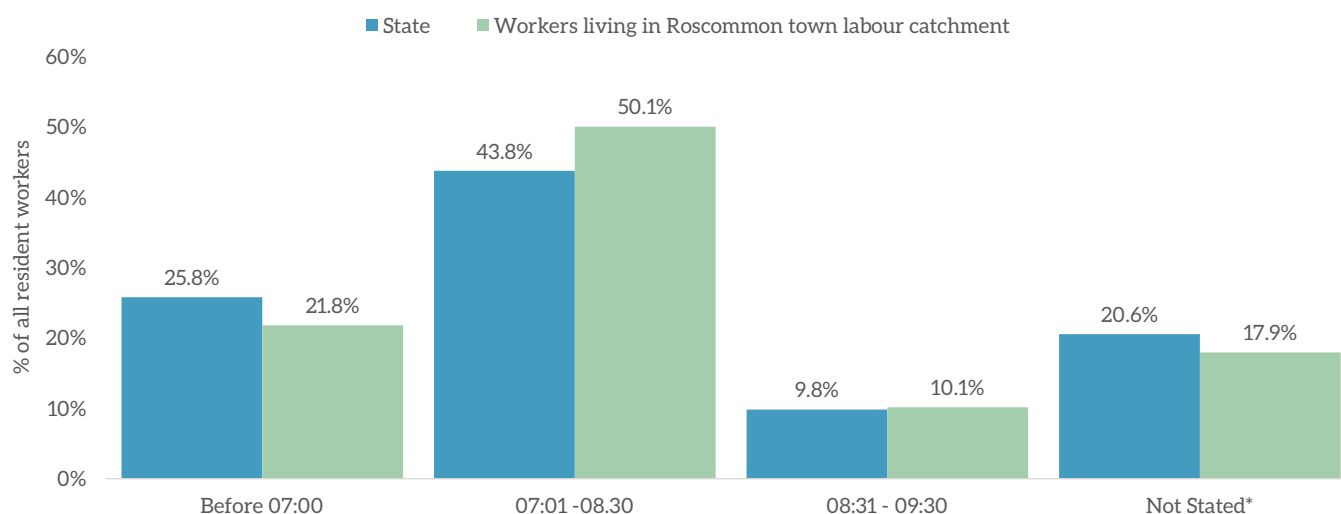


Figure 8.14 below shows a comparison of the ‘travel-time departures’ of those working in Roscommon town and those working elsewhere. Comparing these two groups there are some differences across the departure times. There is a higher share commuting to Roscommon town between ‘08:31-09:30’ than those commuting elsewhere. A total of 20.3% of Roscommon town bound workers residing in the labour catchment depart for work ‘Before 07:00’, lower than the rate for workers travelling to other destinations (22.6%). This is as a result of the multiple commuting destinations within the overall Roscommon town labour catchment where a total of 70.1% commute to destinations other than Roscommon town (Athlone, ‘Roscommon Rural’, Dublin City etc.).

Figure 8.14: Departure Times for Resident Workers - Working in the town vs elsewhere, 2022

Departure Time	Workers living in the Roscommon town labour catchment							
	Total		Working in Roscommon town		Working elsewhere in Ireland			
Before 07:00	2,001	21.8%	645	20.3%	1,356	22.6%		
07:01-08:30	4,592	50.1%	1,770	55.8%	2,822	47.0%		
08:31-09:30	930	10.1%	384	12.1%	546	9.1%		
Not Stated*	1,645	17.9%	371	11.7%	1,274	21.2%		
Total	9,168	100%	3,170	100%	5,998	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 8.14 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.

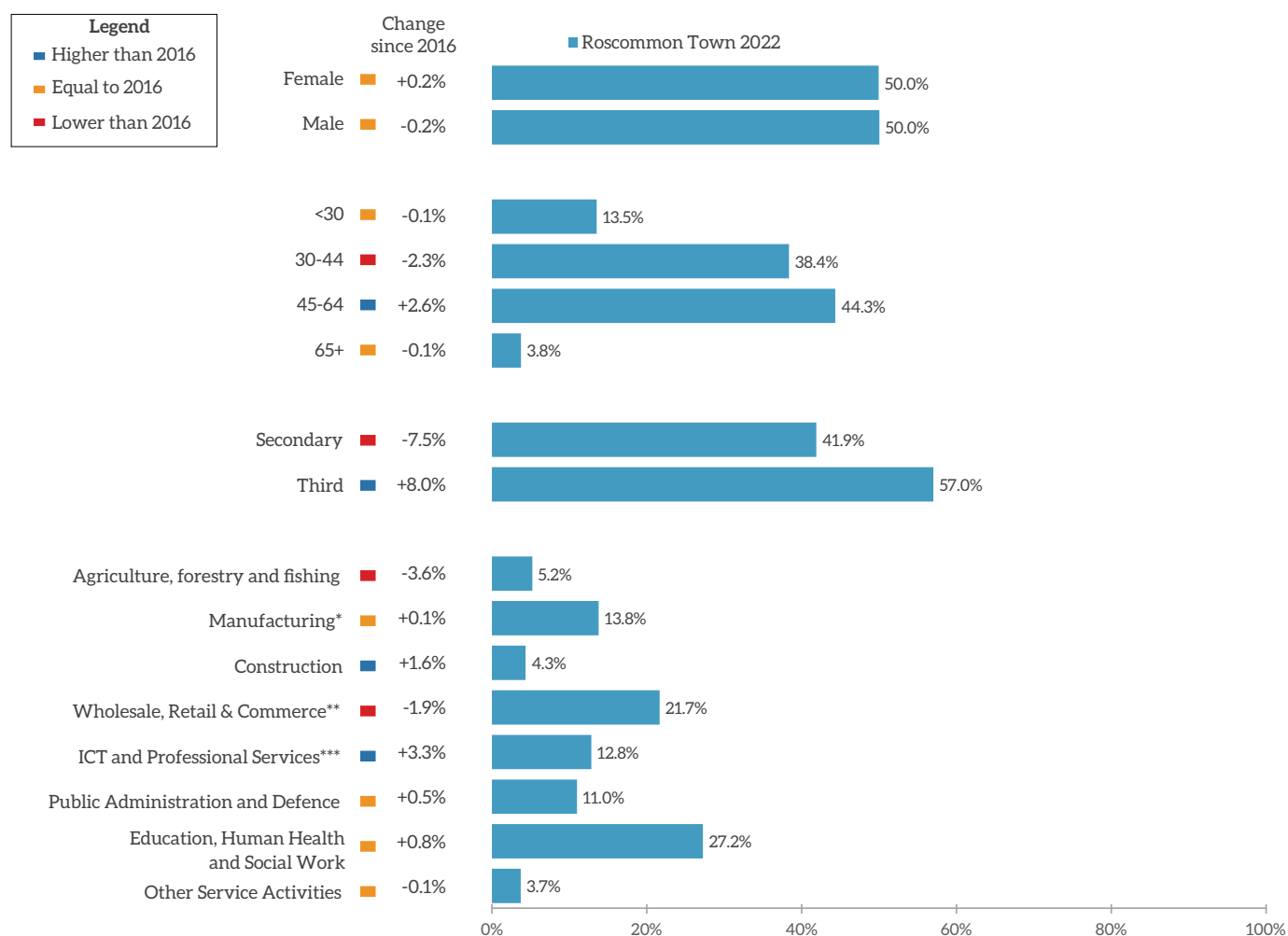
8.8 Analysis of change between 2016 and 2022

The graphic below details the change that has occurred across the Roscommon town 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 Roscommon town labour catchment is still the dominant labour catchment for large parts of central Roscommon.

Since 2016, the geographical size of the Roscommon town labour catchment has expanded slightly (including parts of what was previously the Castlerea labour catchment) see maps in Section 8.9. The total resident workers residing in the labour catchment has increased to 9,168 from 7,235 in 2016 (+26.7% or +1,933) and from 7,306 in 2006 (+25.5% or +2,862).

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) and a higher share engaged in the 'Education, Human Health and Social Work' and in particular 'ICT and Professional Services' and 'Construction' related industries. As with the changing State profile, the Roscommon town labour catchment has also seen a decline in employment in 'Agriculture, forestry and fishing' and 'Wholesale, Retail & Commerce'.

Figure 8.15: 2022 Profile indication of change in key indicators since 2016 (comparison of % rates)

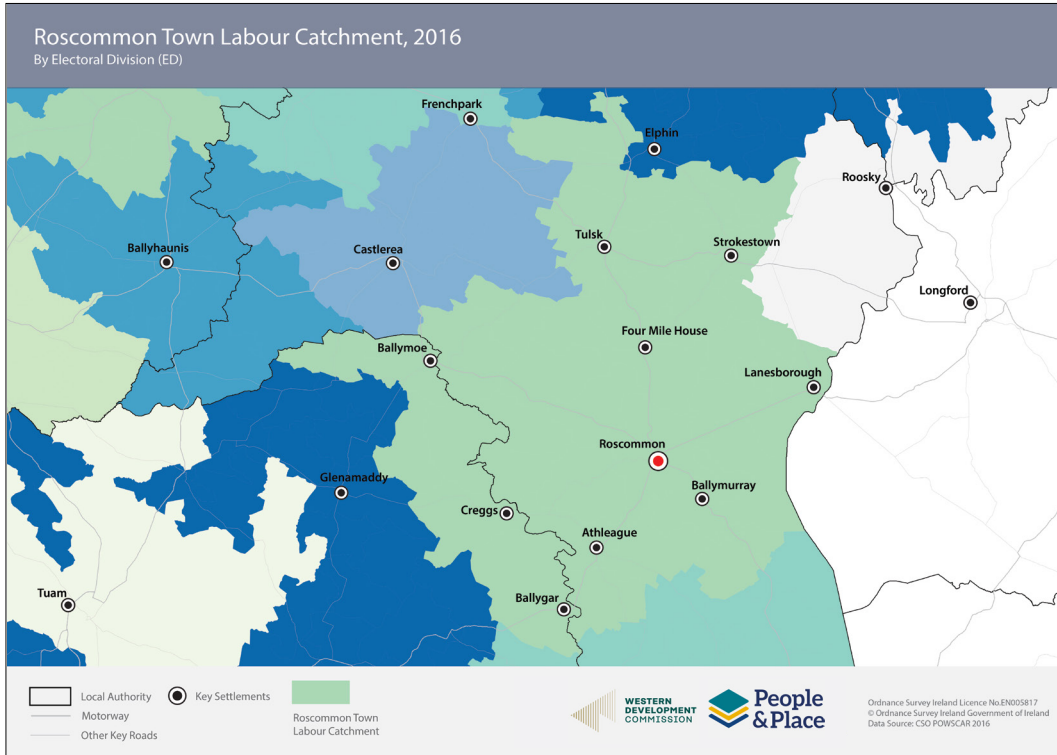


Note: with only nine classifications available, industrial classifications in POWSCCAR are less detailed than normal classifications in other Census outputs.
 Manufacturing = Manufacturing, mining and quarrying, Electricity, Gas, Water supply and Waste Management
 **Wholesale, Retail etc. = Wholesale,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

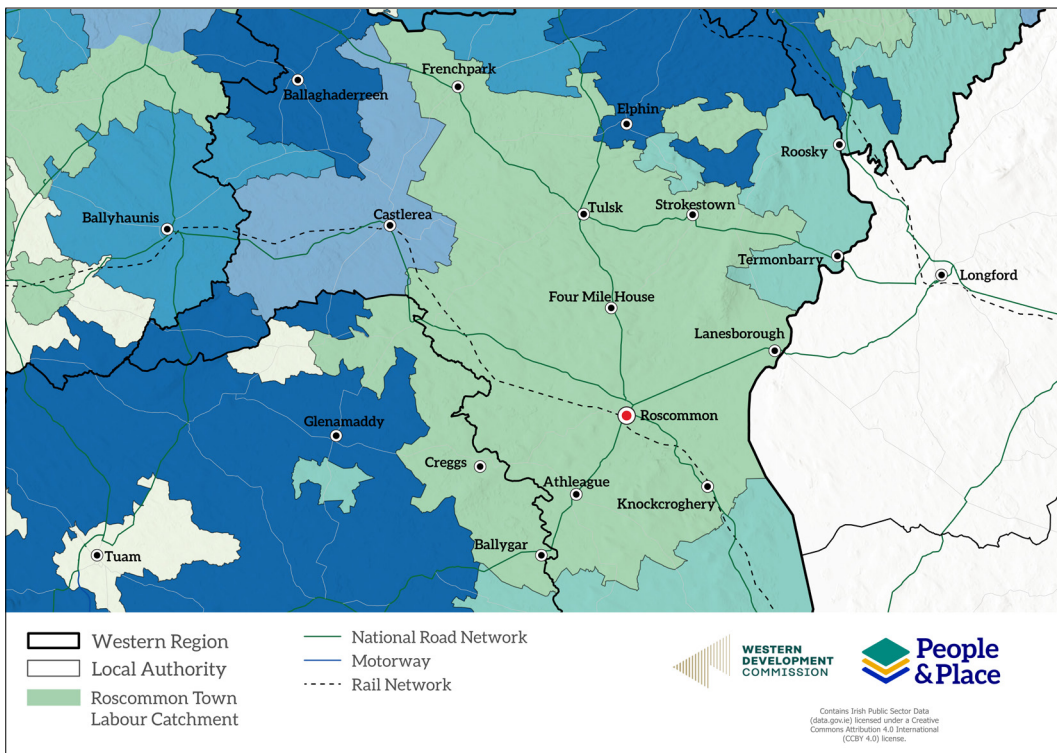
8.9 Analysis of labour catchment change between 2016 and 2022

The maps below detail the geographical changes that have taken place within the Roscommon town labour catchment and neighbouring labour catchments between 2016 and 2022. Since 2016, the Roscommon town labour catchment has expanded in areas towards Castlerea and Frenchpark.

Map 8.4: Roscommon town labour catchment, 2016



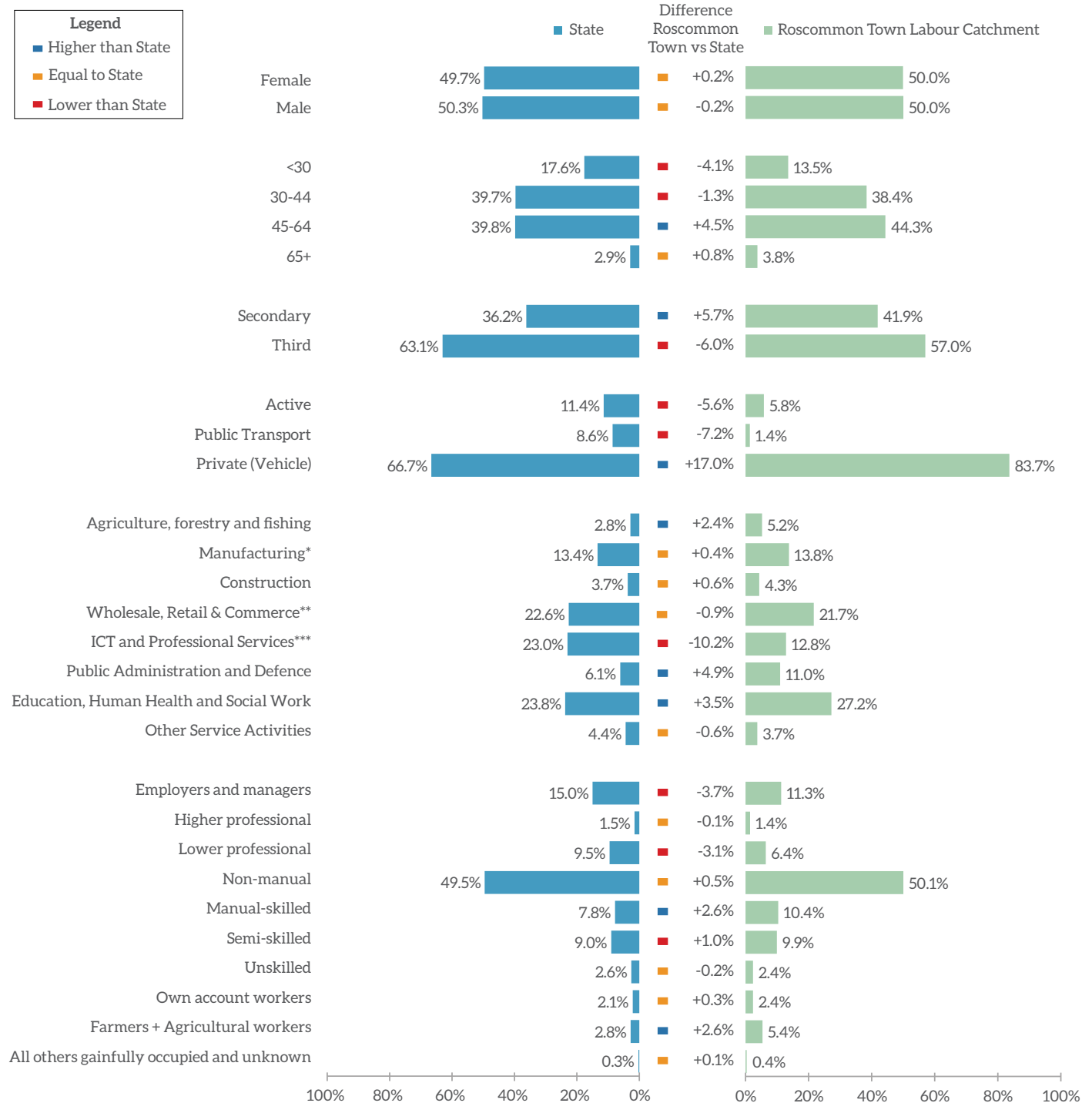
Map 8.5: Roscommon town labour catchment, 2022



8.10 Roscommon town labour catchment comparison with the State, 2022

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

Figure 8.16: Comparison between State and Roscommon town labour catchment data for selected indicators

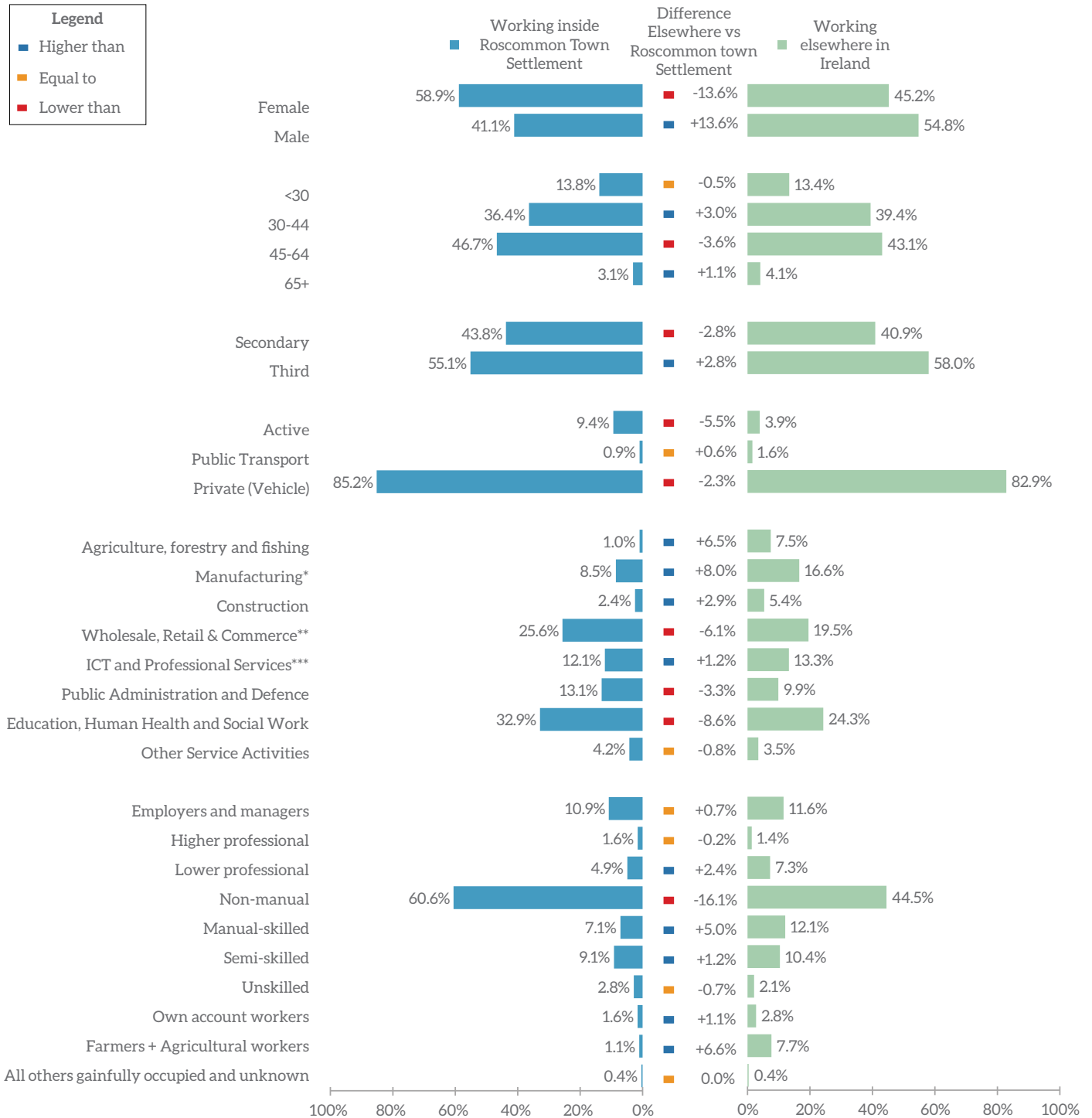


Note: with only nine classifications available, industrial classifications in POWSCCAR are less detailed than normal classifications in other Census outputs.
 *Manufacturing = Manufacturing, mining and quarrying, Electricity, Gas, Water supply and Waste Management
 **Wholesale, Retail etc. = Wholesale,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

8.11 Roscommon town labour catchment - Employed within Roscommon town and elsewhere in Ireland comparison

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

Figure 8.17: Comparison between those working within Roscommon 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.

8. Roscommon town Labour Catchment

8.12 Socio-Economic comparison of all seven labour catchments

The graphic below details the socio-economic characteristics of resident workers within the Roscommon town labour catchment and the other six main labour catchments in the Western Region; Carrick-on-Shannon, Castlebar, Ennis, Galway City, Letterkenny 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 Roscommon town labour catchment is 57%.

8.12.1 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.

*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.

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%

8.12.2 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%

8. Roscommon town Labour Catchment

8.12.3 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%

8.12.4 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%

Labour Catchments in the Western Region
8. Roscommon town Labour Catchment

8.12.5 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%

8.12.6 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%

8.12.7 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

9.0 Carrick-on-Shannon Labour Catchment

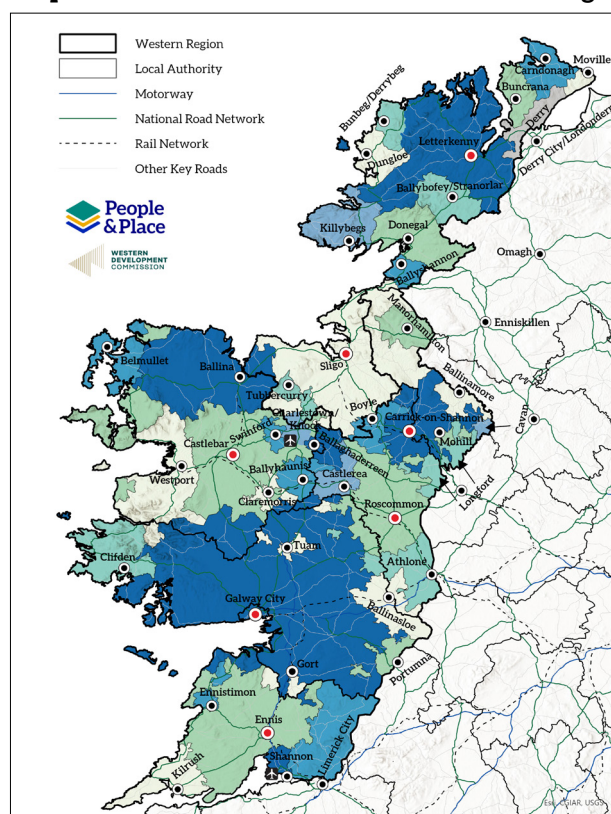
9.1 Introduction

The Western Development Commission (WDC) continues its series of regional labour market analyses with this new publication, *Travel to Work and Labour Catchments in the Western Region: A Profile of Seven Town Labour Catchments*. Based on Census of Population 2022 (POWSCCAR)¹ data, it provides unique insights into the key labour market centres in the Western Region through an analysis of the travel to work patterns of workers living in the Western Region. This is the third time the WDC has undertaken this analysis, previous reports based on 2006 Census data is available [here](#) and 2016 Census data is available [here](#).

This work is particularly timely given developments in government policy such as the National Planning Framework (NPF) and NPF Revision (2024), which sets out regional targets for where population and jobs growth should occur and associated plans and policies such as the Regional Spatial and Economic Strategies (RSES), County and City Development Plans (CDPs), Local Economic and Community Plans (LECPs) and Climate Action Plans for the seven local authorities within the Western Region.

The report and analysis identify the town labour catchments for the Western Region, comprising counties Clare, Donegal, Galway, Leitrim, Mayo, Roscommon and Sligo (see Map 9.1 below). The town labour catchment is the area from which a town draws most of its' workforce. At a regional level, the report also assists with the identification of the key employment centres in the Western Region and identifies changes since 2016. It maps and visualises the size and scale of employment based commuting patterns, highlights the potential labour supply available for future growth and, as such, provides important insights for employers and policymakers - nationally, regionally and locally.

Map 9.1: Labour Catchments in the Western Region, 2022



Source: CSO POWSCCAR

1| Census 2022 Place of Work, School, College or Childcare - Census of Anonymised Records (POWSCCAR).

9.2 About this Profile - Carrick-on-Shannon

As part of its remit in promoting the economic and social development of the Western Region, the WDC is interested in examining the nature and extent of economic and labour market activity at the regional and sub-regional level. The full report presents an overview of all 43 labour catchments in the Western Region with subsequent sections focusing on the main seven towns/city catchments.

This section examines the town of Carrick-on-Shannon as an employment destination for resident workers in the Western Region and provides detailed mapping and descriptive analysis of the Carrick-on-Shannon labour catchment. Following a discussion on Carrick-on-Shannon town data in 2022 (Section 9.3) and the impact of working from home (Section 9.4), the profile presents the following:

1. A graphical illustration of travel to work patterns and commuting flows (Section 9.5) and the overall labour catchment of the town (Section 9.6);
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 9.7); 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 (Castlebar, Ennis, Galway City, Letterkenny, Roscommon town and Sligo town) (Section 9.8-9.12).

9.3 The importance of Carrick-on-Shannon as a place of work

The official CSO settlement of Carrick-on-Shannon had a population of 4,743 persons recorded in the 2022 Census. Carrick-on-Shannon is the 16th largest urban centre within the Western Region (Galway City is the largest) and the 100th largest in the State. Since 2006, the population residing within the town of Carrick-on-Shannon has increased by +50% (+1,580)².

Population

In the most recent intercensal period 2016 to 2022, the population of Carrick-on-Shannon has increased by +16.8% (+681). 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 Leitrim have seen significant population growth since 2016 with the highest rates in Drumshanbo (+37%), Ballinamore (+21%), Mohill (+20%) and Manorhamilton (+14%).

Labour Force

Since Census 2016 there has been an increase in the numbers living in Carrick-on-Shannon 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 Carrick-on-Shannon has increased by +8.5% (from 2,131 to 2,313). The number of residents at work has increased by +17.3% (from 1,754 to 2,057). Conversely, the number classed as unemployed has decreased by -32.1% (from 377 to 256). The +17.3% increase in those at work in Carrick-on-Shannon has been higher than in the State (+15.6%), the Western Region (+14.6%) and County Leitrim (+16.4%).

Daytime Working Population

According to POWSCCAR 2022, the total number of jobs located within the Carrick-on-Shannon boundary was 3,145 and this accounted for 1.2% of all jobs located within the Western Region (272,860)³. Of all cities and towns in Ireland, Carrick-on-Shannon has the 54th highest number of jobs located within the town boundary and this accounted for 35.3% of all jobs located within County Leitrim (8,913). Relative to the six other main towns/city in this report, Carrick-on-Shannon is the smallest employment centre. There are higher numbers of jobs in the other main centres reviewed here; Galway City (51,211), Sligo town (13,562), Letterkenny (13,109), Ennis (10,628), Castlebar (9,911) and Roscommon town (4,315). The ratio of local jobs (3,145) to resident workers (2,061) in the town is 1.53 indicating that the town is a key economic attraction 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 town of Carrick-on-Shannon.

Between 2016 and 2022, there was an increase of +9.7% (+277) jobs located in Carrick-on-Shannon. This was the fourth highest increase of the seven main towns/city within this report with the highest rate of jobs growth in Galway City (+15.4%), Letterkenny (+15%) and Roscommon town (+10.2%) and lower rates in Castlebar (+9.6%), Ennis (+4.5%) and Sligo town (+4.1%)⁴. Over the same period, the number of jobs in County Leitrim increased by +17.6% (+1,332) and the Western Region as a whole by +12.4% (+30,148) from 242,712 to 272,860. Carrick-on-Shannon accounted for 20.8% of the new job growth in Leitrim over the 2016-2022 period.

9.4 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 County Leitrim a total of 1,762 (12%) resident workers were recorded as mainly working from home in Census 2022. This represents a +74.1% (+750) increase from the number in 2016 (1,012 or 8.1% of resident workers).

Resulting from the increased incidence in working from home, the employment base in Leitrim 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.

9. Carrick-on-Shannon Labour Catchment

9.5 Employment based commuting patterns to Carrick-on-Shannon

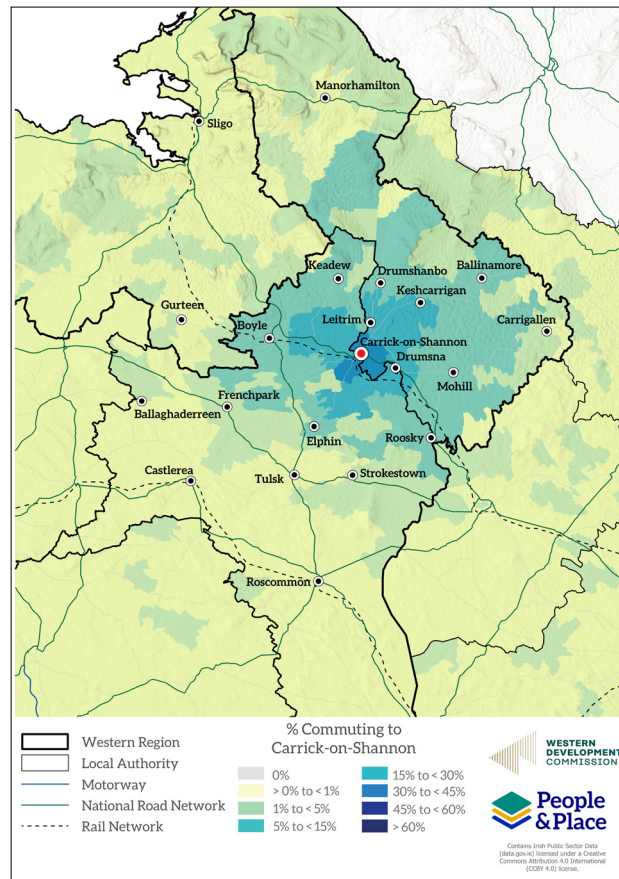
Map 9.2 shows the extent of commuting flows to Carrick-on-Shannon for work opportunities. The colours represent the proportions of people at work who live in each ED and travel to work in Carrick-on-Shannon.

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. Carrick-on-Shannon, 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 9.2: Commuting Flows into Carrick-on-Shannon, 2022



Source: CSO POWSCCAR

As expected, the EDs closest to Carrick-on-Shannon 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 <45%). Beyond these areas, the proportion travelling to the town gradually declines and is illustrated on the map; graduating from the darker green areas (Leitrim village, Keshcarrigan and Drumsna) where between 15% and 30% of resident workers in those EDs work in Carrick-on-Shannon, through to medium green (Keadew, Drumshanbo, Ballinamore, Mohill, Roosky, Elphin and Boyle) where between 5% and 15% of resident workers in those EDs commute to work in Carrick-on-Shannon. The remainder of Leitrim, in particular northern parts of the county, is characterised by commuting of below 5% to Carrick-on-Shannon for work.

9. Carrick-on-Shannon Labour Catchment

9.6 Identifying the Carrick-on-Shannon labour catchment

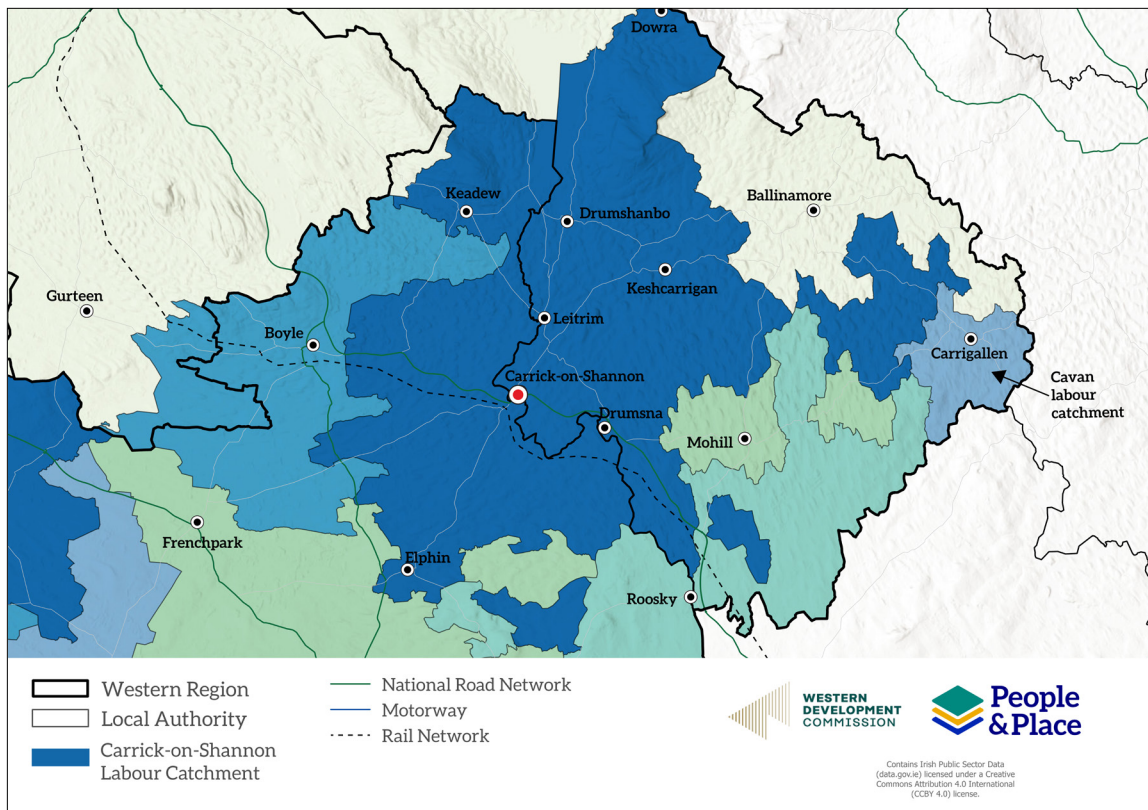
While Map 9.2 shows EDs from where even one person commuted to Carrick-on-Shannon, all of these EDs are not included in the Carrick-on-Shannon labour catchment. The Carrick-on-Shannon labour catchment is based on only those EDs for which Carrick-on-Shannon is the most popular work destination for resident 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 9.3 shows the Carrick-on-Shannon labour catchment as depicted by the dark blue colour. While the labour catchment extends to large parts of County Leitrim it also extends into large parts of northern County Roscommon (from Elphin to Keadew). Large parts of southeast Leitrim are not part of the Carrick-on-Shannon labour catchment and comprise smaller labour catchments of settlements such as Ballinamore and Mohill. Since 2016, the Carrick-on-Shannon labour catchment has contracted due to the expansion of the Boyle labour catchment and the emergence of both the Ballinamore and the Mohill labour catchments (both now with populations over 1,000) (see Section 9.9).

Map 9.3: Carrick-on-Shannon labour catchment, 2022



Source: CSO POWSCAR

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

9. Carrick-on-Shannon Labour Catchment

In summary, Carrick-on-Shannon is still an important employment destination but its influence within County Leitrim and north County Roscommon now covers a smaller geographical area than in 2016. In particular, Carrick-on-Shannon is the key economic attraction for the immediate areas surrounding the town, southwest County Leitrim (Leitrim village, Drumshanbo, Drumsna etc.) and northeast County Roscommon stretching from Elphin to Keadew.

Since 2016, the geographical size of the Carrick-on-Shannon labour catchment has contracted (mainly southeast County Leitrim and parts of southwest County Leitrim) and the total resident workers residing in the labour catchment has decreased from 7,785 in 2016 (-15.2%) and from 6,632 in 2006 (-0.5%) to 6,600 in 2022. This labour catchment is the only one of the seven key labour catchments in this report that has recorded a decline in the number of resident workers (see Section 9.9).

In 2022, there were 6,600 people classified as at work and living within the Carrick-on-Shannon labour catchment (2.2% of all Western Region resident workers). The labour catchment is the 10th largest labour catchment across the region with the two non-county towns of Westport (7,056) and Ballina (9,875) and the Limerick City labour catchment (10,630) all larger. This is a change from 2016 when the Carrick-on-Shannon labour catchment was the eighth largest in the Western Region, larger than the Roscommon town labour catchment. The Carrick-on-Shannon labour catchment has a population at work 3.2 times larger than the town of Carrick-on-Shannon (6,600 to 2,061 respectively).

9.7 Profile of the Carrick-on-Shannon labour catchment

Map 9.3 above identified the Carrick-on-Shannon 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 Carrick-on-Shannon town 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 Carrick-on-Shannon.

The Carrick-on-Shannon labour catchment is therefore composed of those who live in and are employed within the town (**Working in Carrick-on-Shannon**) and those who live in the labour catchment but work outside the town e.g. other towns such as Sligo town, rural areas and locations outside the Western Region such as Longford town 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 9.8 and Section 9.9), both in terms of geography and socio-economic characteristics, a comparison profile of the Carrick-on-Shannon labour catchment relative to the State (Section 9.10), a comparison profile of those 'Working in Carrick-on-Shannon' and 'Working elsewhere in Ireland' (Section 9.11) and a comparison profile of the Carrick-on-Shannon labour catchment and the six other main towns/city within the Western Region (Section 9.12).

⁸ | 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.

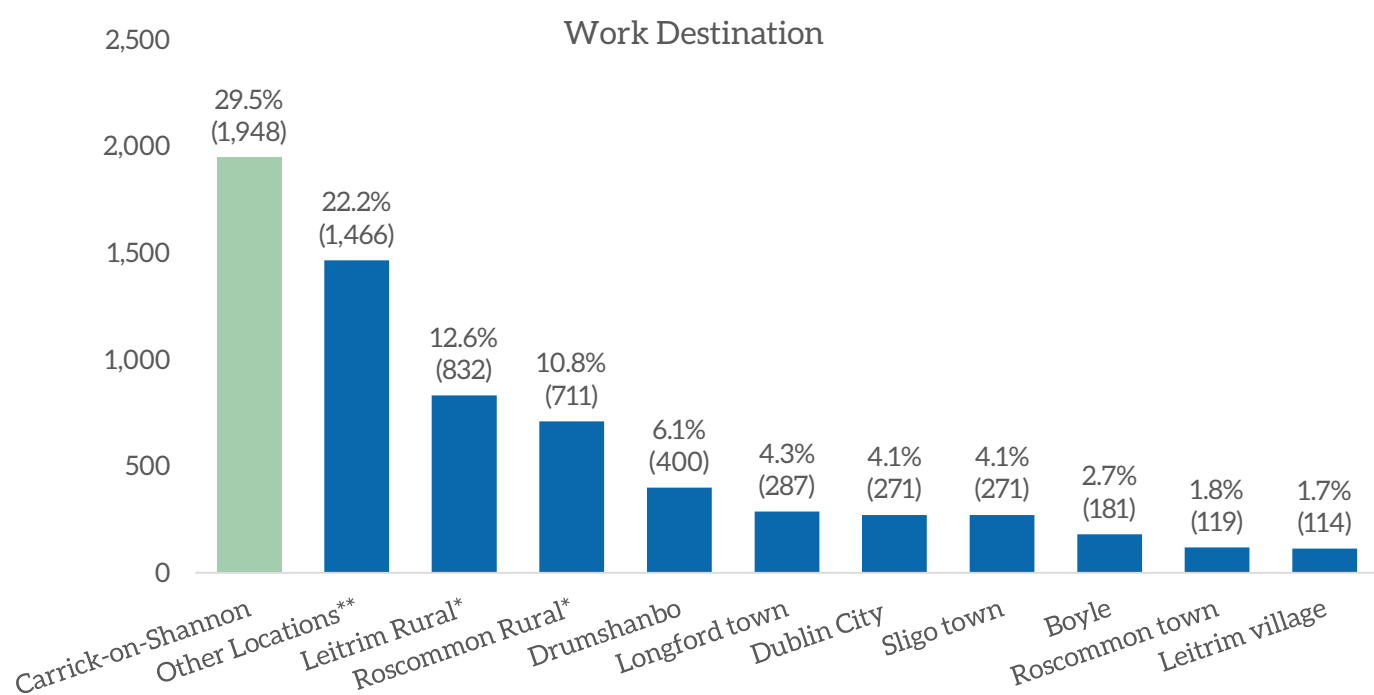
9. Carrick-on-Shannon Labour Catchment

9.7.1 Place of Work

The Carrick-on-Shannon labour catchment can be seen to include most of south County Leitrim, but is mainly contained within central areas and the midwest. In Figures 9.1 and 9.2 the main work locations for those who live in the Carrick-on-Shannon labour catchment are set out. Those who work mainly from home in the Carrick-on-Shannon labour catchment (n=935)⁹ are coded with their home location as their place of work i.e., a resident worker from Carrick-on-Shannon who works mainly from home is coded with their place of work as Carrick-on-Shannon.

As expected, Carrick-on-Shannon town is the principal place of employment for those living in the labour catchment, accounting for 1,948 (29.5%) of all employment - although this share has increased since 2016 (26.9%). Of the seven labour catchments reviewed here, the Carrick-on-Shannon labour catchment has the lowest proportion of resident workers commuting to its' centre. 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., Carrick-on-Shannon). Employment in 'Other Locations' (settlements with <114 commuters) is the next most popular destination and this accounted for just over a fifth of all resident workers (22.2% or 1,466), highlighting the dispersed nature of employment in more rural areas (see Figures 9.1 and 9.2).

Figure 9.1: Key Destinations of resident workers in the Carrick-on-Shannon labour catchment, 2022



*Leitrim/Roscommon Rural' - destination outside any defined CSO settlement
 **'Other Locations' - Less than 114 commuters

The other large employment destinations for residents within the Carrick-on-Shannon labour catchment are important towns in close proximity to Carrick-on-Shannon; Drumshanbo, Longford town, Sligo town, Boyle, Roscommon town and Leitrim village. Interestingly, the same number of people commute to Sligo town and Dublin City for work.

9| Of the 935 coded as working from home in the Carrick-on-Shannon labour catchment, 226 are coded as both living in and working in the Carrick-on-Shannon settlement.

9. Carrick-on-Shannon Labour Catchment

Both 'Leitrim Rural' (destination outside any defined CSO settlement) (832 or 12.6%) and 'Roscommon Rural' (711 or 10.8%) are also highlighted as key destinations for Carrick-on-Shannon labour catchment residents. It is clear from examining the change between 2016 and 2022 in the proportional share of employment in key destinations, that Carrick-on-Shannon and 'Roscommon Rural' have increased by +2.6% and +1.9% respectively and have grown in importance, while 'Leitrim Rural' has declined by -1.7%. The number employed in Sligo has declined (from 343), while the numbers employed in Dublin are similar (as illustrated in Figure 9.2 below).

In summary, the Carrick-on-Shannon labour catchment comprises just under a third (29.5% or 1,948) of resident workers who are employed in Carrick-on-Shannon town with the remaining over two thirds (70.5%) employed in locations outside of the town. As such, the Carrick-on-Shannon labour catchment is a local economic space where resident workers avail of job opportunities both in the town and other nearby economic centres - smaller settlements, rural locations and other large towns such as Drumshanbo, Longford town and Sligo town.

Figure 9.2: Key Destinations in 2022 and change since 2016

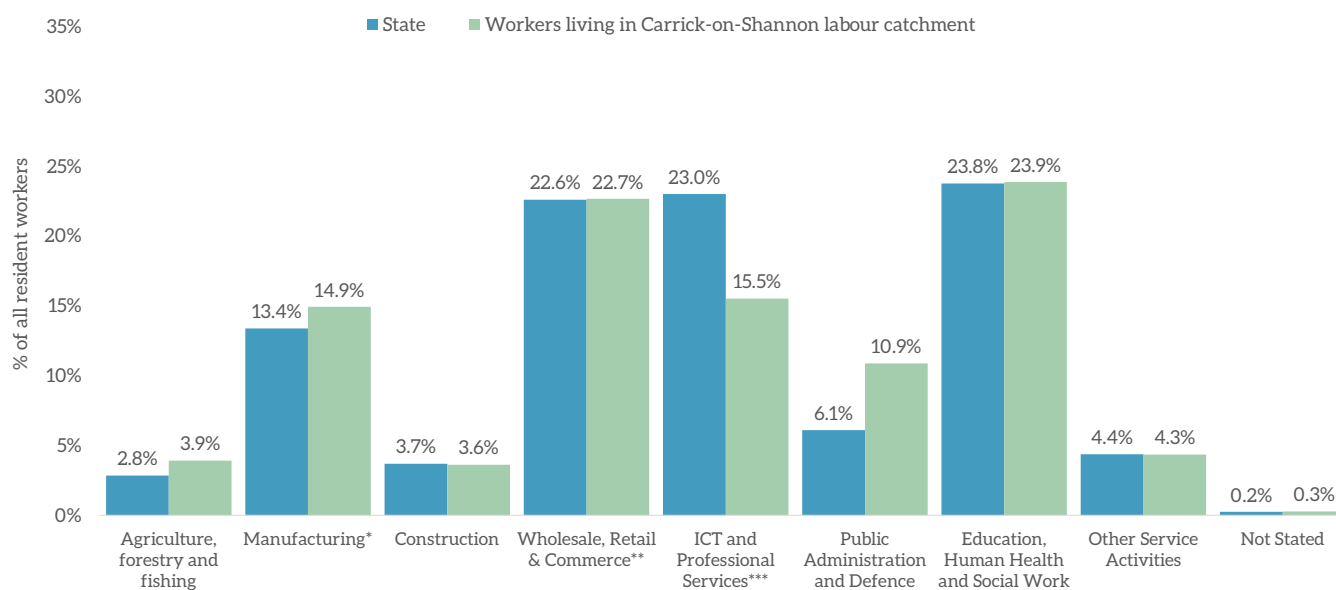
Work Destination	Resident Workers	Change 2016-2022	% Change 2016-2022	Proportional Share 2022	Proportional Share Change 2016-2022
Carrick-on-Shannon	1,948	-149	-7.1%	29.5%	2.6%
Other Locations**	1,466	-552	N/A	22.2%	N/A
Leitrim Rural*	832	-279	-25.1%	12.6%	-1.7%
Roscommon Rural*	711	17	2.4%	10.8%	1.9%
Drumshanbo	400	38	10.5%	6.1%	1.4%
Longford town	287	-19	-6.2%	4.3%	0.4%
Dublin City	271	2	0.7%	4.1%	0.7%
Sligo town	271	-72	-21.0%	4.1%	-0.3%
Boyle	181	-8	-4.2%	2.7%	0.3%
Roscommon town	119	-6	-4.8%	1.8%	0.2%
Leitrim village	114	53	86.9%	1.7%	0.9%
Total	6,600	-1,185	-15.2%		

9.7.2 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 Carrick-on-Shannon labour catchment is shown in Figure 9.3. The 'Education, Human Health and Social Work' sector is the most important employer and this accounted for almost a quarter of all resident workers (23.9%). The 'Wholesale, Retail Trade, Transportation and Storage, Accommodation and Food Service Activities' sector accounted for just over a fifth of resident workers (22.7%) in the Carrick-on-Shannon labour catchment. The Information and Communication, Financial, Real Estate, Professional, administration and support service activities' sector (15.5%) and the 'Manufacturing, mining and quarrying, Electricity, Gas, Water supply and Waste Management' sector (14.9%) 'are the next biggest sectors in the labour catchment with all other sectors accounting for 11% or less.

Figure 9.3: Industrial Profile of the Carrick-on-Shannon labour catchment and the State, 2022



Relative to the national picture, the ‘Public Administration and Defence’ and ‘Manufacturing’ sectors play a more important role in the overall employment base. The ‘Public Administration and Defence’ sector’s share of employment (10.9%) is 4.8 percentage points higher than the State average (6.1%) and the ‘Manufacturing’ sector (14.9%) is 1.5 percentage points higher than the State average (13.4%). The ‘ICT and Professional Services’ sector recorded a rate of 15.5% whereas the State average was 23%.

Across the seven labour force catchments, Carrick-on-Shannon does not appear to have any particular industrial specialisation having recorded the third highest proportion employed in the ‘Agriculture, forestry and fishing’ sector, the third highest in the ‘ICT and Professional Services’ sector, the second highest proportion in the ‘Public Administration and Defence’ sector and the lowest proportion in the ‘Education, Human Health and Social Work’ sector¹⁰.

As seen in Figure 9.4 below, the industrial groups which saw the largest proportional increases between 2016 and 2022 were the ‘ICT and Professional Services’ (+3.3 percentage points), ‘Manufacturing’ (+2.4 percentage points) and ‘Public Administration and Defence’ (+1.4 percentage points) sectors. In contrast, the largest proportionate declines have been in the ‘Agriculture, forestry and fishing’ sector (-3.4 percentage points), the ‘Education, Human Health and Social Work’ sector (-0.7 percentage points) and the ‘Wholesale, Retail & Commerce’ sector (-3.3 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 9.4: Industrial Profile of the Carrick-on-Shannon labour catchment in 2016 and 2022

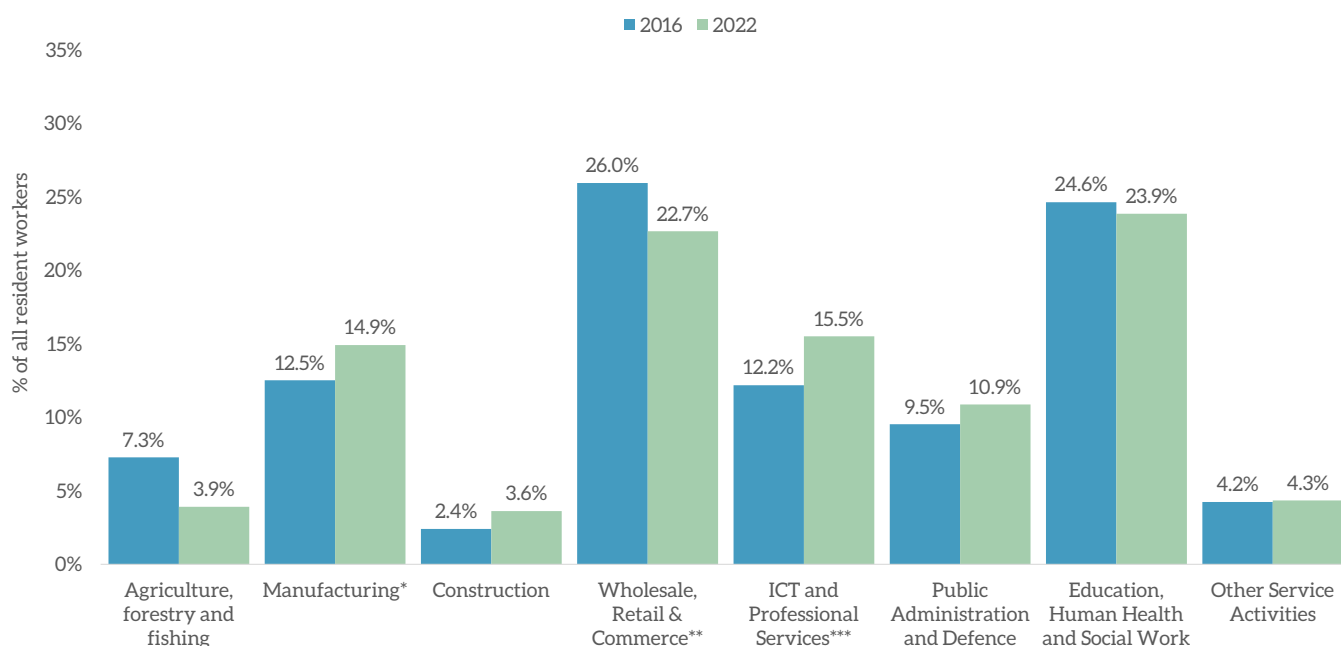


Figure 9.5 below details the industry of employment of the Carrick-on-Shannon labour catchment by the location of employment – working within Carrick-on-Shannon town or working elsewhere. Employment in the ‘Manufacturing’ (16.3%), ‘ICT and Professional Services’ (16%) and ‘Wholesale, Retail and Commerce’ (26.3%) sectors are more dominant among those employed within Carrick-on-Shannon town. The ‘Education, Human Health and Social Work’ (25.9%) and ‘Agriculture, forestry and fishing’ (5.7%) sectors have a higher share of employment outside the town than within.

Figure 9.5: Industrial Profile of the Carrick-on-Shannon labour catchment, 2022

Industry	Workers living in the Carrick-on-Shannon labour catchment							
	Total		Working in Carrick-on-Shannon town		Working elsewhere in Ireland			
Agriculture, forestry and fishing	258	3.9%	18	0.8%	240	5.7%		
Manufacturing*	985	14.9%	390	16.3%	595	14.1%		
Construction	239	3.6%	65	2.7%	174	4.1%		
Wholesale, Retail & Commerce**	1,496	22.7%	628	26.3%	868	20.6%		
ICT and Professional Services***	1,024	15.5%	382	16.0%	642	15.2%		
Public Administration and Defence	718	10.9%	279	11.7%	439	10.4%		
Education, Human Health & Social Work	1,575	23.9%	485	20.3%	1,090	25.9%		
Other Service Activities	287	4.3%	133	5.6%	154	3.7%		
Not Stated	18	0.3%	9	0.4%	9	0.2%		
Total	6,600	100%	2,389	100%	4,211	100%		

9.7.3 Socio-Economic Group

The socio-economic structure of employment in the Carrick-on-Shannon labour catchment is set out in Figure 9.6. 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 Carrick-on-Shannon is broadly similar to that of the State with the largest group by far being 'Non-manual'¹² (51.6%), although this category is marginally higher than the State average at 49.5%. As with the State, the next largest category in the Carrick-on-Shannon labour catchment is 'Employers and Managers' at 12.1%. Relative to the other six key labour catchments, the Carrick-on-Shannon labour catchment recorded the third largest proportion of resident workers classed as 'Employers and Managers' (Galway City labour catchment is the highest at 13.3% followed by Ennis at 13%). Following these, the three categories of 'Semi-skilled', 'Manual-skilled' and 'Lower professional' all account for approximately 7-9% of the resident workforce. 'Farmers and Agricultural Workers' account for 4% of all resident workers in the labour catchment.

Figure 9.6: Socio-Economic Group (SEG) Profile of the Carrick-on-Shannon labour catchment and the State, 2022

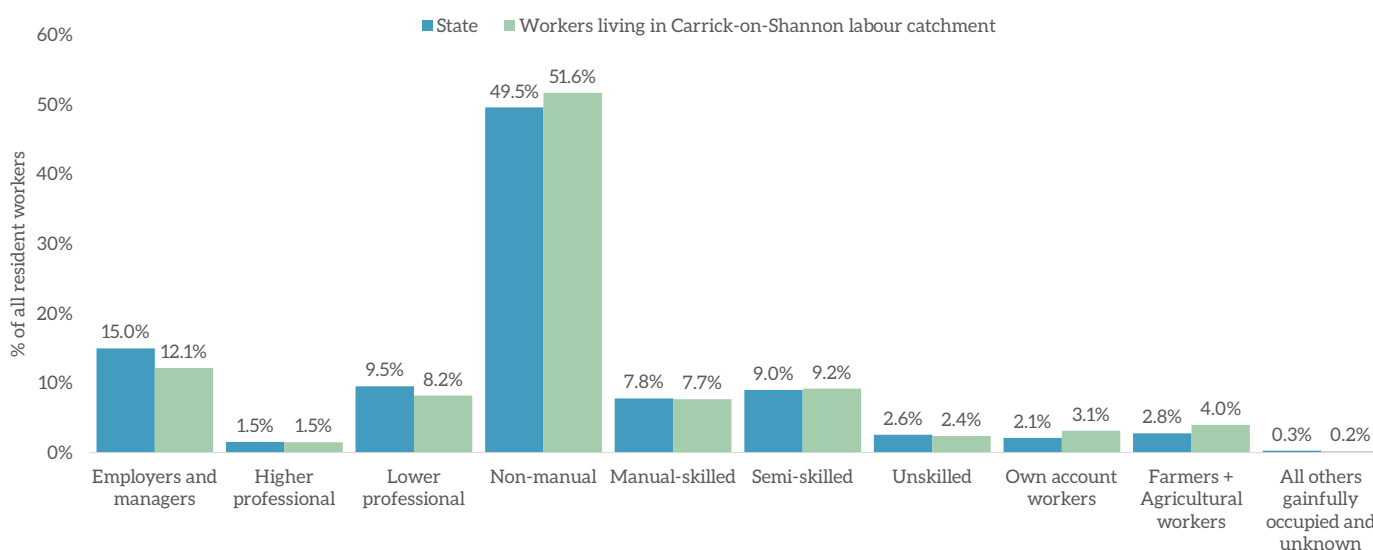


Figure 9.7 below details the socio-economic structure breakdown for those working within Carrick-on-Shannon town and those working outside Carrick-on-Shannon town.

The largest difference between the 'town' and 'elsewhere' group is within the 'Non-manual' group (55.9% in Carrick-on-Shannon town vs 49.2% in job locations outside Carrick-on-Shannon town) which relates to persons working in retail, government, banking and other areas fulfilling administrative roles. Those working outside Carrick-on-Shannon town, in mostly rural areas, also have a higher proportion of workers as part of the 'Farmers and Agricultural workers' grouping (5.9% working outside the town vs 0.6% working in the town).

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.

Figure 9.7: Socio-Economic Group (SEG) Profile of the Carrick-on-Shannon labour catchment, 2022

Socio-Economic Group (SEG)	Workers living in the Carrick-on-Shannon labour catchment							
	Total		Working in Carrick-on-Shannon town		Working elsewhere in Ireland			
Employers and managers	802	12.2%	288	12.1%	514	12.2%		
Higher professional	98	1.5%	35	1.5%	63	1.5%		
Lower professional	541	8.2%	191	8.0%	350	8.3%		
Non-manual	3,409	51.7%	1,338	56.0%	2,071	49.2%		
Manual-skilled	506	7.7%	143	6.0%	363	8.6%		
Semi-skilled	607	9.2%	272	11.4%	335	8.0%		
Unskilled	157	2.4%	57	2.4%	100	2.4%		
Own account workers	206	3.1%	47	2.0%	159	3.8%		
Farmers + Agricultural workers	263	4.0%	15	0.6%	248	5.9%		
All others gainfully occupied and unknown	11	0.2%	3	0.1%	8	0.2%		
Total	6,600	100%	2,389	100%	4,211	100%		

9.7.4 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 9.8 details the average education profile among those resident workers in the Carrick-on-Shannon labour catchment with 62.2% having completed third level education - this is similar to the rate of 63.1% for workers nationally. The rate for the Western Region was recorded at 61%. Relative to all seven labour catchments, Carrick-on-Shannon has the fourth most educated workforce with only Galway City (67.6%), Sligo town (63.2%) and Ennis (62.5%) having higher rates of third level education¹³.

¹³ | At the local authority level, Galway City recorded the second highest rate in the State at 72%. The rate for County Leitrim resident workers was recorded at 61%. 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).

9. Carrick-on-Shannon Labour Catchment

Figure 9.8 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 Carrick-on-Shannon town (59.6% with third level) and those employed elsewhere (63.7% with third level). This relates to the high level of commuting from within the labour catchment to third level qualified employment opportunities working elsewhere though living in the labour catchment.

Figure 9.8: Education Attainment Profile of the Carrick-on-Shannon labour catchment, 2022

Education Attainment	Workers living in the Carrick-on-Shannon labour catchment								
	Total			Working in Carrick-on-Shannon town			Working elsewhere in Ireland		
Secondary	2,445	37.0%		944	39.5%		1,501	35.6%	
Third	4,105	62.2%		1,423	59.6%		2,682	63.7%	
Not Stated	50	0.8%		22	0.9%		28	0.7%	
Total	6,600	100%		2,389	100%		4,211	100%	

Relative to the other main labour catchments, Carrick-on-Shannon has the fourth highest level of third level attainment of those employed within the town. With a recorded rate of 59.6% with third level education employed in Carrick-on-Shannon town, this is higher than the rate in Castlebar (58.1%), Ennis (57.4%) and Roscommon town (55.1%). The Galway City (71.1%), Sligo town (65.6%) and Letterkenny town (61.1%) labour catchments have higher rates of highly educated workers (see Section 9.12). This reflects the type of local employment opportunities in these towns i.e., third level education institutes, major hospitals and significant IDA business parks with higher levels of foreign direct investment companies that tend to employ more third level graduates.

9.7.5 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%, Leitrim recorded a rate of 13.9% with other local authorities as follows: Roscommon County (13.7%), Mayo (13.9%), Clare (15%), Sligo County (15.3%) and Donegal (16%).

The age profile of those at work and over 15 years who live in the Carrick-on-Shannon labour catchment is shown in Figure 9.9. The proportion of young workers (<30 years) residing within the Carrick-on-Shannon labour catchment (13.9%) is lower than the overall State average of 17.6%. Relative to other towns in this analysis, the age profile of the Carrick-on-Shannon labour catchment is older than the other larger labour catchments. Within the Carrick-on-Shannon labour catchment, 13.9% of resident workers are aged <30 years whereas the rate is higher in the Galway City (17.2%), Letterkenny (16.4%), Sligo town (15.5%) and Ennis (14.1%) labour catchments.

9. Carrick-on-Shannon Labour Catchment

The slightly older age profile in Carrick-on-Shannon may be explained by a number of factors, for example many young people migrate to other destinations for third level education and employment opportunities. The age profile is marginally higher for those employed within Carrick-on-Shannon town than those employed elsewhere and is evident in the data presented in Figure 9.9 below. A total of 15.8% (up from 14.5% in 2016) of all Carrick-on-Shannon labour catchment workers employed in Carrick-on-Shannon town are aged 'less than 30 years' whereas the rate for workers elsewhere is 12.8% (up from 12.2% in 2016).

Figure 9.9: Age Profile of the Carrick-on-Shannon labour catchment, 2022

Age	Workers living in the Carrick-on-Shannon labour catchment								
	Total		Working in Carrick-on-Shannon town			Working elsewhere in Ireland			
<30	916	13.9%		377	15.8%		539	12.8%	
30-45	2,582	39.1%		971	40.6%		1,611	38.3%	
45-64	2,864	43.4%		985	41.2%		1,879	44.6%	
65+	238	3.6%		56	2.3%		182	4.3%	
Total	6,600	100%		2,389	100%		4,211	100%	

9.7.6 Gender

The gender composition of residents in the Carrick-on-Shannon labour catchment is shown below. Within the Carrick-on-Shannon labour catchment, female workers account for a larger proportion of the total workforce than their male counterparts with rates of 51.2% and 48.8% 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 9.10: Gender Profile of the Carrick-on-Shannon labour catchment, 2022

Gender	Workers living in the Carrick-on-Shannon labour catchment								
	Total		Working in Carrick-on-Shannon town			Working elsewhere in Ireland			
Female	3,382	51.2%		1,377	57.6%		2,005	47.6%	
Male	3,218	48.8%		1,012	42.4%		2,206	52.4%	
Total	6,600	100%		2,389	100%		4,211	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 Carrick-on-Shannon labour catchment and employed in Carrick-on-Shannon town are female and account for 57.6% of all resident workers (Figure 9.10).

9. Carrick-on-Shannon Labour Catchment

In contrast to this, those residing in the Carrick-on-Shannon labour catchment and employed elsewhere are more likely to be males - accounting for 52.4% 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).

9.7.7 Means of Travel

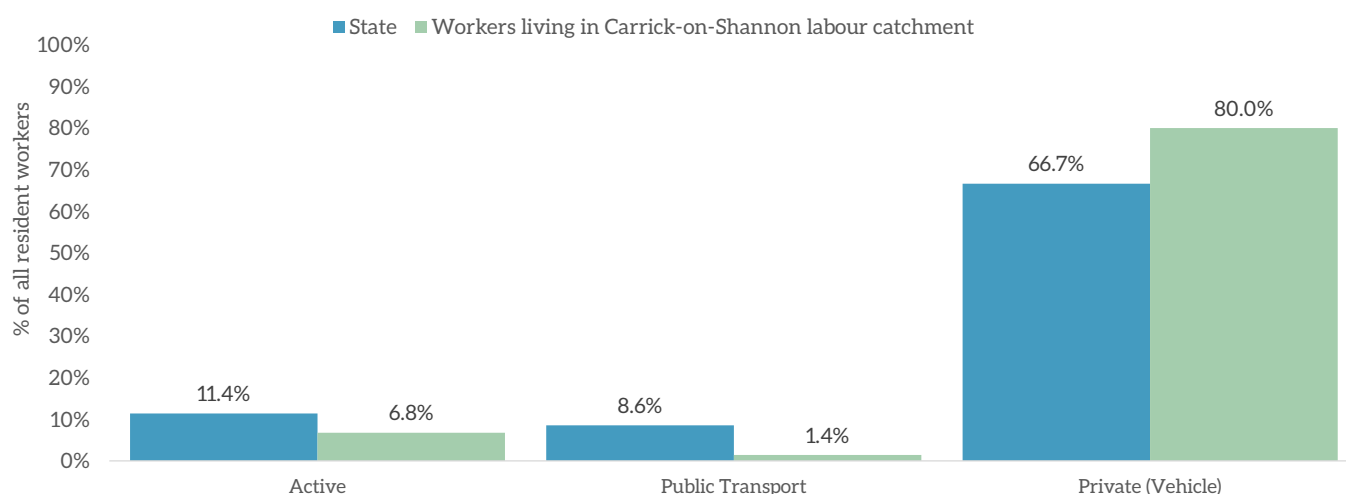
Nationally in 2022, commuting to work by car in Ireland was still the most popular means of travel, with 59% driving and a further 4% travelling as a passenger in a car. The proportion commuting by car did however fall slightly from 66% in 2016 to 63% in 2022. The second most popular way of getting to 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 Carrick-on-Shannon labour catchment, a total of 6.8% (448) used 'Active' modes, 1.4% (93) used 'Public' modes and 80% (5,282) used 'Private' modes of transport to employment destinations. This is the fourth highest rate amongst the seven labour catchments, see Figures 9.11 and 9.12 below.

Figure 9.11: 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 Carrick-on-Shannon town and those employed elsewhere. Those employed in Carrick-on-Shannon town have a much higher propensity to use 'Active' modes (12%) as opposed to those employed elsewhere (3.8%).

Figure 9.12: Means of Travel for Resident Workers - Working in the town vs elsewhere, 2022

Means of Travel	Workers living in the Carrick-on-Shannon labour catchment								
	Total			Working in Carrick-on-Shannon town			Working elsewhere in Ireland		
Active	448	6.8%		286	12.0%		162	3.8%	
Public Transport	93	1.4%		22	0.9%		71	1.7%	
Private (Vehicle)	5,282	80.0%		1,885	78.9%		3,397	80.7%	
Total	5,823	88.2%		2,193	91.8%		3,630	86.2%	

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.

9.7.8 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 9.13 below details the overall 'travel time departure' distribution of all Carrick-on-Shannon labour catchment resident workers.

The most common travel time departures are within the '07:01-08:30' band and this accounted for 48.8% of all resident workers in the labour catchment. The next most popular departure time is 'Before 07:00' - recorded at just over one in five of all workers, 21.7%, in the Carrick-on-Shannon labour catchment and just over one in four of all workers, 25.8%, in the State.

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 9.13: Departure Times for Resident Workers, 2022¹⁵

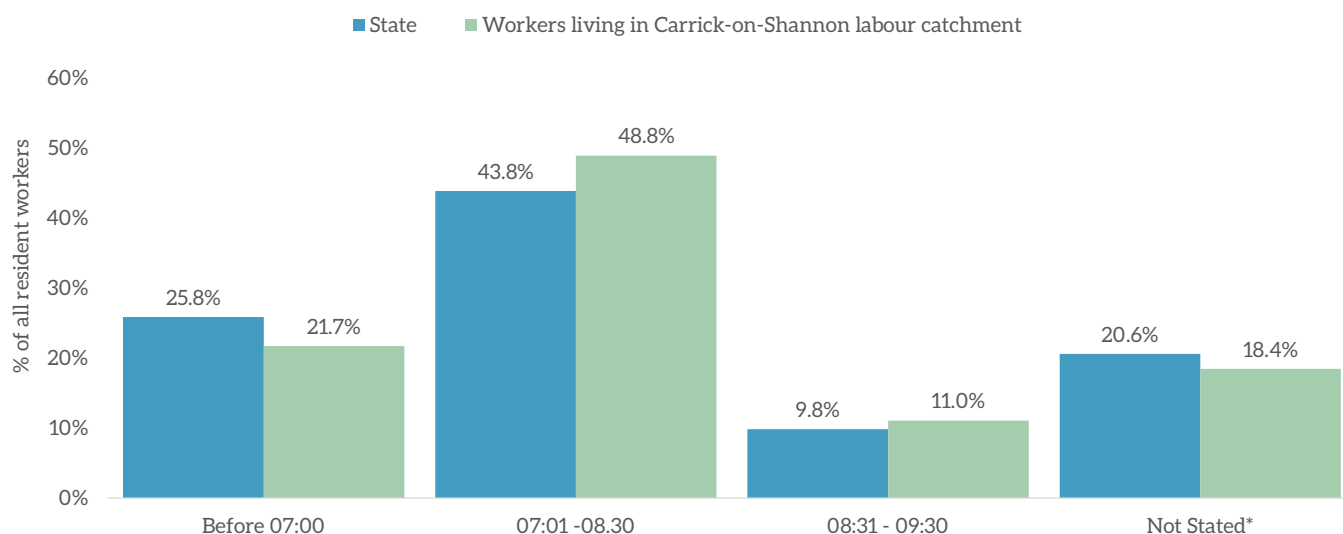


Figure 9.14 below shows a comparison of the ‘travel-time departures’ of those working in Carrick-on-Shannon town and those working elsewhere. Comparing these two groups there are some differences across the departure times. There is a higher share commuting to Carrick-on-Shannon town between ‘08:31-09:30’ than those commuting elsewhere. A total of 20% of Carrick-on-Shannon bound workers residing in the labour catchment depart for work ‘Before 07:00’. This is lower than the rate for workers travelling to other destinations (22.6%). This is as a result of the multiple commuting destinations within the overall Carrick-on-Shannon labour catchment where a total of 70.5% commute to destinations other than Carrick-on-Shannon town (Sligo town, Roscommon town etc., see Figures 9.1 and 9.2).

Figure 9.14: Departure Times for Resident Workers - Working in the town vs elsewhere, 2022

Departure Time	Workers living in the Carrick-on-Shannon labour catchment							
	Total		Working in Carrick-on-Shannon town		Working elsewhere in Ireland			
Before 07:00	1,431	21.7%	478	20.0%	953	22.6%		
07:01-08:30	3,224	48.8%	1,214	50.8%	2,010	47.7%		
08:31-09:30	729	11.0%	337	14.1%	392	9.3%		
Not Stated*	1,216	18.4%	360	15.1%	856	20.3%		
Total	6,600	100%	2,389	100%	4,211	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 9.14 above).

¹⁵ | 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.

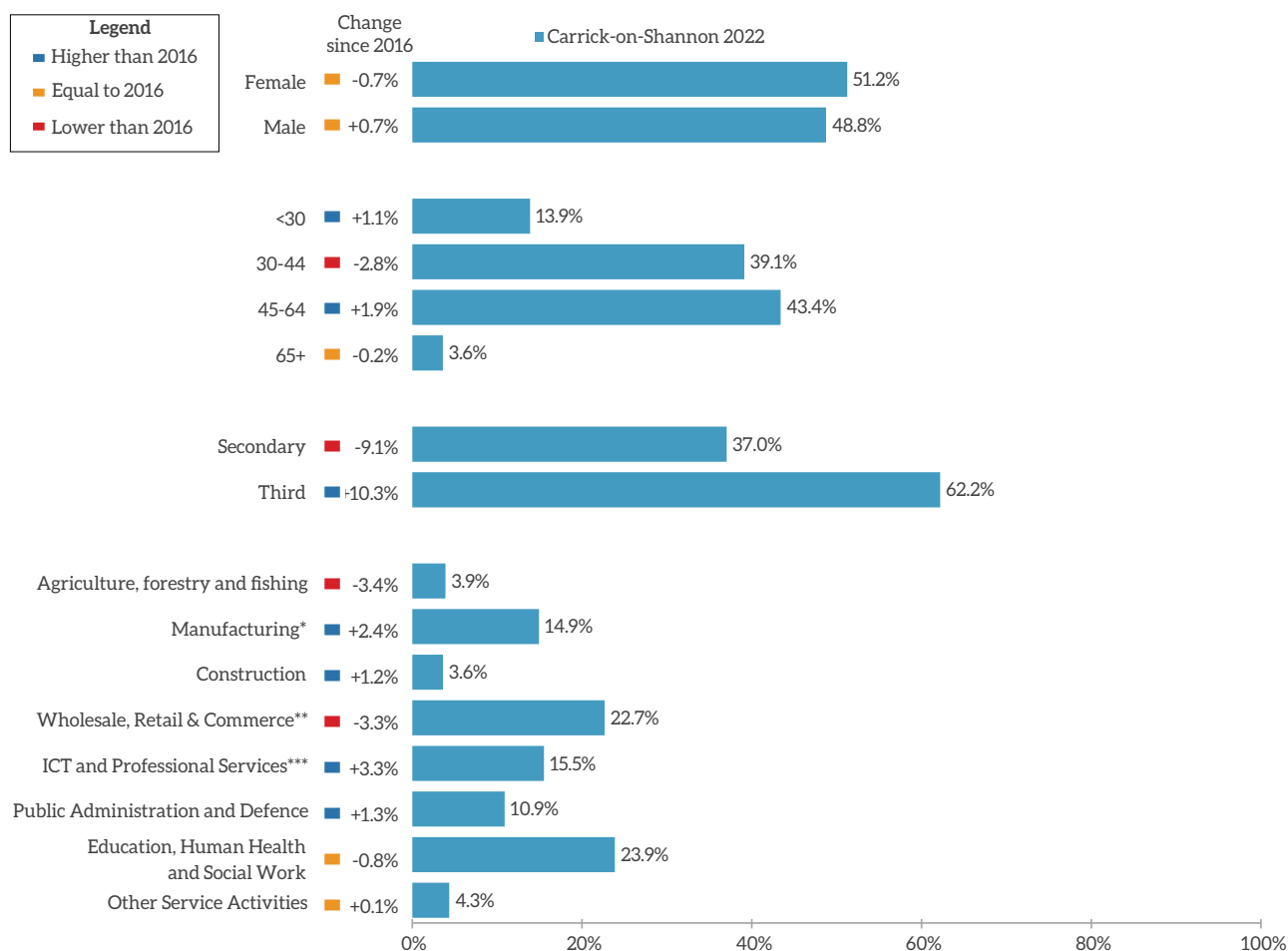
9.8 Analysis of change between 2016 and 2022

The graphic below details the change that has occurred across the Carrick-on-Shannon 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 Carrick-on-Shannon labour catchment is still the dominant labour catchment for large parts of south and midwest County Leitrim, see maps in Section 9.9.

Since 2016, the geographical size of the Carrick-on-Shannon labour catchment has contracted (mainly southeast County Leitrim and parts of southwest County Leitrim) (see maps in Section 9.9). The total resident workers residing in the labour catchment has decreased from 7,785 in 2016 (-15.2% or -1,185) and from 6,632 in 2006 (-0.5% or -32) to 6,600 in 2022. This labour catchment is the only one of the seven key labour catchments in this report that has declined in the number of resident workers.

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', 'Public Administration and Defence' and 'ICT and Professional Services' related industries. As with the changing State profile, the Carrick-on-Shannon labour catchment has also seen a decline in employment in 'Agriculture, forestry and fishing' and 'Wholesale, Retail & Commerce'.

Figure 9.15: 2022 Profile indication of change in key indicators since 2016 (comparison of % rates)

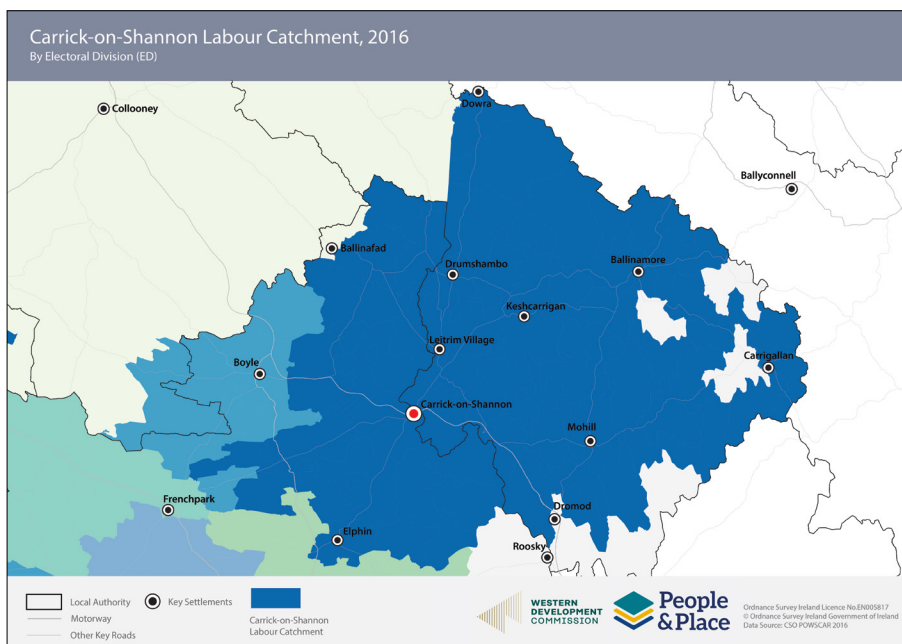


Note: with only nine classifications available, industrial classifications in POWSCCAR are less detailed than normal classifications in other Census outputs.
 Manufacturing = Manufacturing, mining and quarrying, Electricity, Gas, Water supply and Waste Management
 **Wholesale, Retail etc. = Wholesale,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

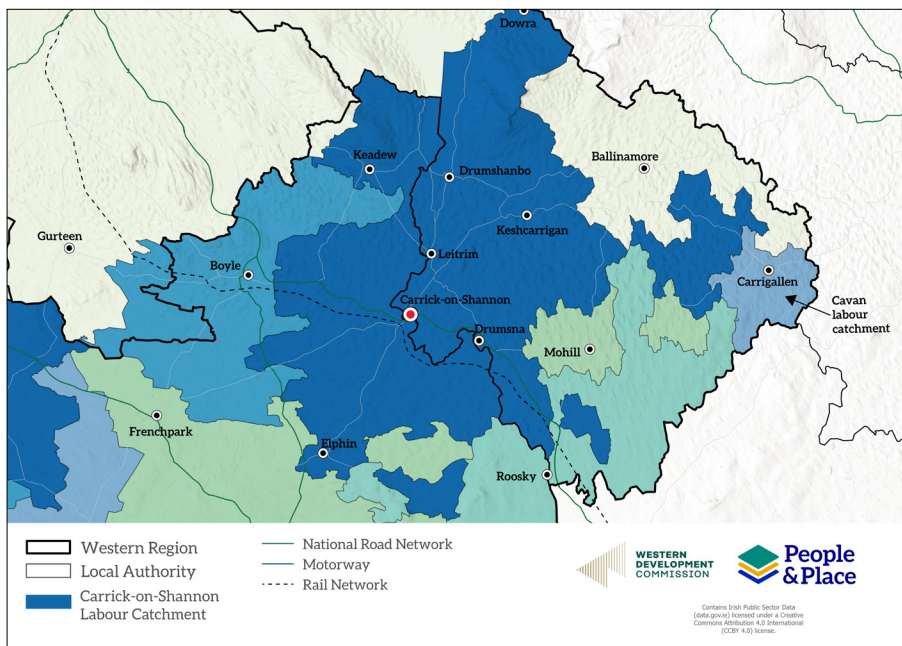
9.9 Analysis of labour catchment change between 2016 and 2022

The maps below detail the geographical changes that have taken place within the Carrick-on-Shannon labour catchment and neighbouring labour catchments between 2016 and 2022. While the Carrick-on-Shannon labour catchment extends to large parts of County Leitrim it also extends into large parts of northern County Roscommon (from Elphin to Keadew). Large parts of southeast Leitrim are not part of the Carrick-on-Shannon labour catchment and comprise smaller labour catchments of settlements such as Ballinamore and Mohill. Since 2016, the Carrick-on-Shannon labour catchment has contracted due to the expansion of the Boyle labour catchment and the emergence of both the Ballinamore and the Mohill labour catchments (both now with populations over 1,000).

Map 9.4: Carrick-on-Shannon labour catchment, 2016



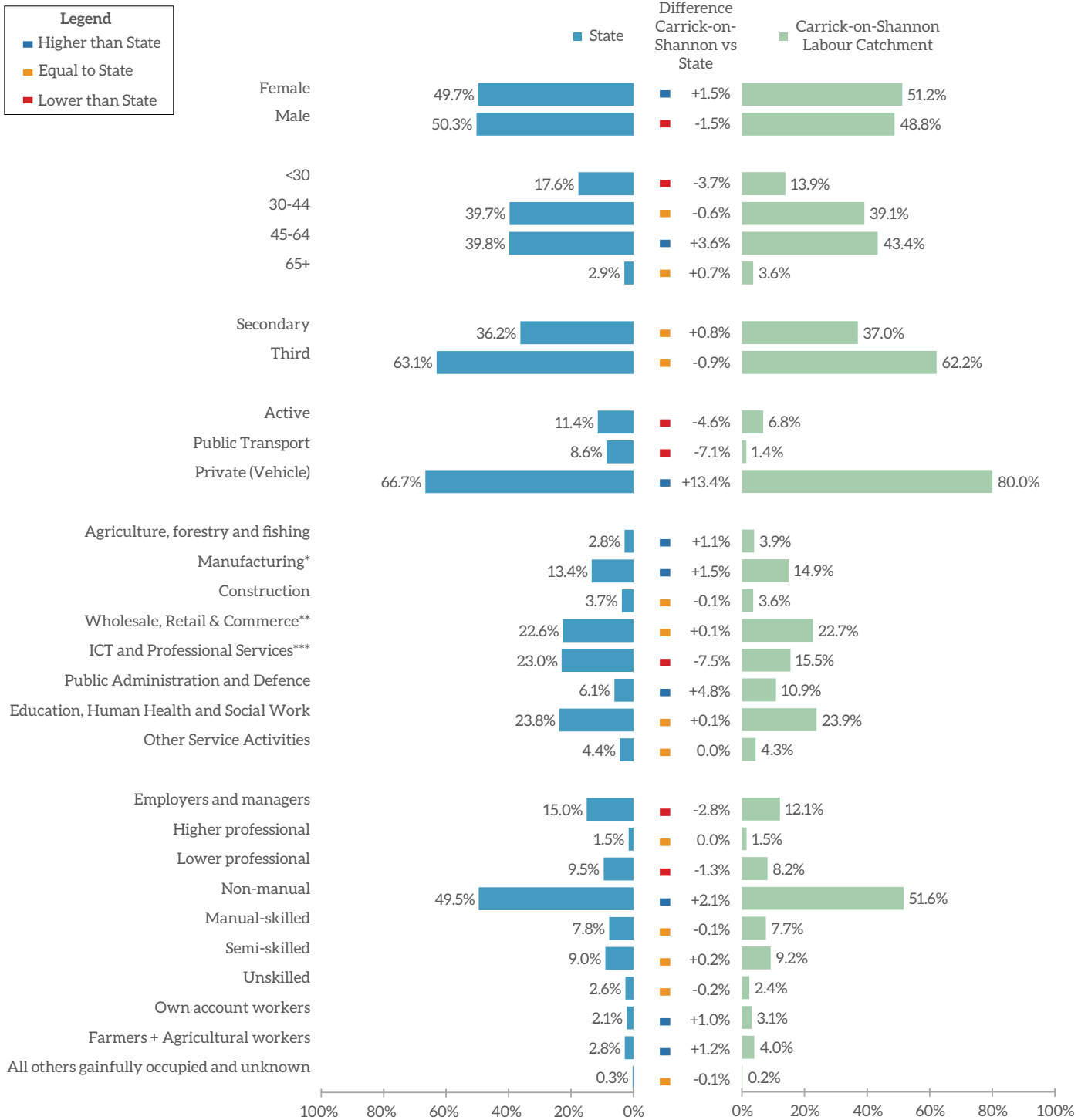
Map 9.5: Carrick-on-Shannon labour catchment, 2022



9.10 Carrick-on-Shannon labour catchment comparison with the State, 2022

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

Figure 9.16: Comparison between State and Carrick-on-Shannon labour catchment data for selected indicators

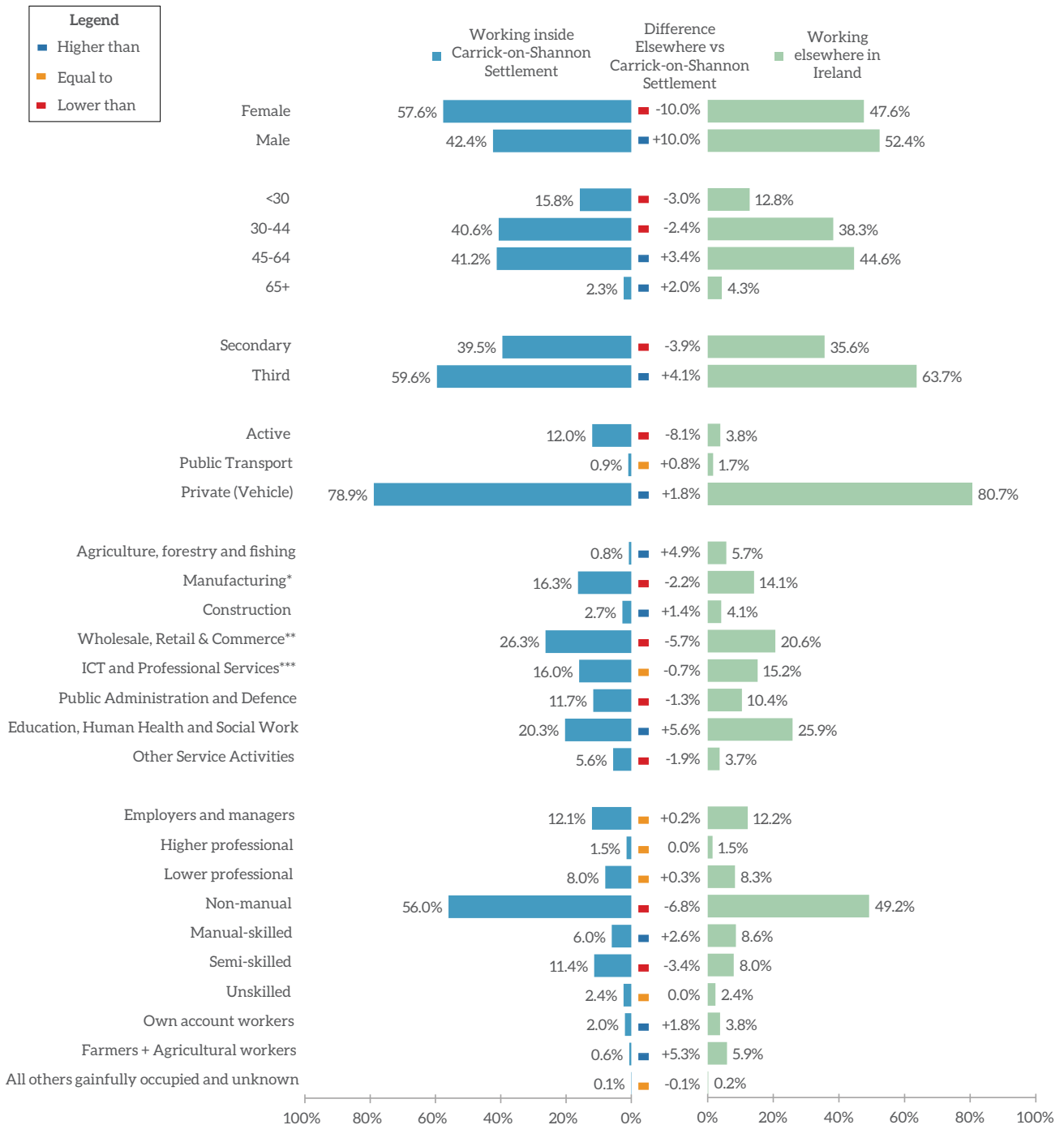


Note: with only nine classifications available, industrial classifications in POWSCCAR are less detailed than normal classifications in other Census outputs.
 *Manufacturing' = Manufacturing, mining and quarrying, Electricity, Gas, Water supply and Waste Management
 **Wholesale, Retail etc. = Wholesale,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

9.11 Carrick-on-Shannon labour catchment - Employed within Carrick-on-Shannon town and elsewhere in Ireland comparison

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

Figure 9.17: Comparison between those working within Carrick-on-Shannon 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.

9. Carrick-on-Shannon Labour Catchment

9.12 Socio-Economic comparison of all seven labour catchments

The graphic below details the socio-economic characteristics of resident workers within the Carrick-on-Shannon labour catchment and the other six main labour catchments in the Western Region; Castlebar, Ennis, Galway City, Letterkenny, 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 Carrick-on-Shannon labour catchment is 62.2%.

9.12.1 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%

9.12.2 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%

9. Carrick-on-Shannon Labour Catchment

9.12.3 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%

9.12.4 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%

9. Carrick-on-Shannon Labour Catchment

9.12.5 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%

9.12.6 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%

9.12.7 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.

10.0 Overall Conclusions & Implications

10.1 Overall Conclusions and Implications

This report is based on the POWSCCAR dataset compiled from the results from Census 2022 and is a follow up on a previous report developed using the same datasets from Census 2016 and 2006. The report outlines the labour catchments of all cities/towns in the Western Region with a population greater than 1,000. In total, the report maps 43 labour catchments and provides a detailed socio-demographic profile of the seven county towns/city within the Western Region.

The report also outlines the main elements of change that have occurred between 2016 and 2022. These data are very useful for researchers and policymakers whose interest is data analysis at the regional or local level. The analysis allows for a greater understanding of travel to work patterns in the Western Region and the various labour catchments to which they give rise. The main conclusions and implications from this analysis are set out below.

1. According to POWSCCAR 2022¹, there were a total of 294,878 people living within the Western Region and at work. This figure has increased by +13.3% (+34,617) from the total of 260,261 outlined within POWSCCAR 2016. As expected and due to the strong economic conditions in employment rates in Ireland in recent years, the growth rate of those living within the Western Region and at work has increased far more significantly between 2016 and 2022 (+13.3%) than the rate of change between 2006 and 2016 (+14,712 or +6%).
2. This is an important point of interest when comparing the labour catchments within the Western Region as of 2022 with those as profiled in previous iterations of this report (2006 and 2016). Since 2006, Ireland and indeed the Western Region, has witnessed a major economic transformation with those in employment in Ireland increasing by +20% (+390k) from 1.93 million in 2006 to 2.32 million in 2022. Much of this growth has occurred in recent years with those in employment increasing by +15.2% between 2016 and 2022 (+313k from just over 2 million in 2016 to 2.32 million in 2022). Similarly, unemployment rates have declined sharply across the State with the census unemployment rate in April 2022 at 8% and down from 13% in Census 2016. As such, while undertaking a like for like comparison of the labour catchments in 2006, 2016 and 2022 may be interesting, the comparison should be treated with caution as the economic baseline across the three census periods is very different.
3. As with the results from the 2006 and 2016 analysis, the Galway City labour catchment is by far the largest with 88,253 people living within the labour catchment and at work (51.5% actually employed within Galway City). This labour catchment accounted for 29.9% of the total population at work and residing within the Western Region, a proportional increase of 3% from 2016 (27%). The labour catchment is larger, in terms of population at work, than the combined labour catchments of Sligo town, Letterkenny, Ennis and Castlebar.
4. The Sligo town labour catchment is the second largest in 2022 with 24,382 resident workers. In a change from the 2016 results, Letterkenny now has the third largest labour catchment in the Western Region with a population at work of 23,503 which is marginally higher than the Ennis labour catchment (22,342) which is now the fourth largest. In general and detailed in Table 2.1 (page 22), the largest labour catchments are all based on the county towns/city within each local authority area. The exceptions to this are the labour catchments of Limerick City (10,630) and Ballina in Mayo (9,875) which are the sixth and seventh largest labour catchments in the region (both rising one place in the ranking from 2016) and marginally larger than the Roscommon town (eighth largest) and Carrick-on-Shannon (tenth largest) labour catchments

¹ This figure relates to those with a known work destination and includes those who work from home. However, it does not include those with a 'blank' destination or those classed as being 'mobile' workers.

10. Overall Conclusions and Implications

Interestingly, the Westport labour catchment is now larger than the Carrick-on-Shannon labour catchment – while the population at work in the Westport labour catchment has increased, the main reason for this is the decline in the Carrick-on-Shannon labour catchment is due to the emergence of the Ballinamore and Mohill labour catchments (east of Carrick-on-Shannon) as they are now settlements with a population in excess of 1,000 and thereby included in the 2022 analysis.

5. A city/town's labour catchment is that area from which a city/town draws most of its' workforce. All the city/town labour catchments reviewed in this report have significantly more people at work than the census population at work and residing in that city/town. The difference can be by up to three and a half times as much, for example the Roscommon town labour catchment has a population at work 3.6 times the census population at work and residing in Roscommon town. This highlights the importance of a city/town's labour catchment as a measure of labour supply. Therefore, in terms of population at work, all of these towns have access to a much greater labour supply than the town population. This information, along with the labour market profiles of those living there, will help inform development agencies, employers and local authorities on employment and enterprise in the region.
6. The population at work residing within the larger labour catchments are quite contained. In most labour catchments, the majority of the population at work, approximately 75% plus, work in just seven to ten different locations. Of all seven labour catchments, Galway City is the most self-contained labour catchment and the city attracts 51.5% of all labour catchment workers. The Carrick-on-Shannon labour catchment recorded the lowest rate with only 36.2% of its wider labour catchment at work population employed in the town.
7. The geographic spread of each of the labour catchments varies enormously. As expected, the Galway City labour catchment is by far the largest and contrasts greatly with the dense distribution of small labour catchments in west Mayo and north Roscommon. The strength of employment opportunities in larger settlements such as Galway City, Limerick City, Sligo town, Ennis, Shannon town and Letterkenny has a major impact on the spatial distribution of labour catchments, both size and scale, within close proximity of these employment centres – such as the labour catchments in counties Galway, Clare, Donegal and Mayo etc. In contrast, areas within the Western Region that are further away from large employment centres tend to have a larger number of labour catchments that are smaller both in geographical size and population size – such as labour catchments in counties Roscommon, Leitrim and eastern Mayo.
8. The relative proximity of some of the selected towns also plays a role in determining the spatial extent of a labour catchment. For example, Castlebar, Westport and Ballina are relatively close to each other and so limit the geographic extent of their respective labour catchments. In contrast to this, Ennis and Kilrush are further apart and as such Ennis has a far more extensive western catchment. Therefore, the closer a town is to another, the less extensive its labour catchment will be, as one town's labour catchment will provide the boundary for the other.
9. While there is strong employment growth in many of the larger population centres (see Table 2.1), there is also evidence of the importance of demographic and employment growth in smaller rural centres. For example, new smaller labour catchments have emerged in Moville (Donegal), Tubbercurry (Sligo), Ballinamore and Mohill (Leitrim) and Ennistimon in Clare.

10. Overall Conclusions and Implications

10. There is a wide variation in the numbers of people at work in each labour catchment. The Galway City labour catchment accounted for 29.9% of all workers within the Western Region – and the next four largest labour catchments (Sligo town, Letterkenny, Ennis and Castlebar) account for a further 29.6% combined (similar levels to 2016). Some other labour catchments cover geographically large areas, but have relatively small working populations, e.g. Kilrush (2,890) and Clifden (1,887).
11. In general, between 2016 and 2022 there has been little change in the relative size of the labour catchments; in terms of number of resident workers, geographic extent and overall ranking. The ten largest labour catchments within the Western Region are still the seven key towns and Limerick City (sixth largest), Ballina (seventh largest) and Westport (ninth largest).
12. The most notable change amongst the largest four catchments has been the growth of the Letterkenny labour catchment which is now third largest and surpassed the Ennis labour catchment which is now the fourth largest labour catchment. Over the period from 2016 to 2022 the Letterkenny labour catchment has increased in population by +19.2% whereas Ennis only increased by +4.4%. Lower growth rates in the Ennis labour catchment can be attributed to the significant increase in the Shannon labour catchment in Clare which increased by +22.8% (due to a change in the CSO boundary definition for Shannon to include the Shannon Free Zone).
13. In 2022, the seven key towns/city labour catchments account for nearly two-thirds (64.9%) of all resident workers in the Western Region. This proportion is +2.6% higher than the overall proportional share in 2016.
14. As with the results from previous iterations of the report, the non-county towns of Limerick City, Ballina and Westport play a significant part in the spatial distribution of labour catchments within their respective regional areas. All three account for 9.3% of the total resident workers in the Western Region.
15. 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 2022².
16. Compared with the State average (63.1%), the Galway City labour catchment has a higher rate of third level education attainment (67.6%) with Sligo town, Ennis and Carrick-on-Shannon with similar attainment levels to the State. The Castlebar, Letterkenny and Roscommon town labour catchments are more than 5 percentage points below the State average.
17. Areas close to or having third level institutes tend to have a much higher proportion of people with a third level degree or higher living there. In the Galway City, Sligo town and Ennis labour catchments, 62% or more of those employed had a third level degree or higher.

² 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).

10. Overall Conclusions and Implications

18. Generally, the labour catchments of larger towns and cities have younger workforces. Within the key city/town catchments, both Galway City (17.2%) and the Letterkenny (16.4%) labour catchments have the highest rates of young workers (<30 years). Both the Castlebar and Roscommon town labour catchments have the lowest rates at 13.5%. The age profile of each labour catchment is also likely to be influenced by the occupational profile of the catchment. It is interesting that the age profile of the Sligo town (13.5%) and Castlebar (13.5%) labour catchments are relatively older despite the presence of Institutes of Technology in these towns which would attract a younger population. There are a number of possible explanations such as:
- The smaller size of these labour catchments will have fewer employment opportunities to attract and retain young workers.
 - Younger workers are retained but choose to live in other areas, for example additional data show that many living in the Westport labour catchment, travel to work in Castlebar.
 - The recent designation of university status at ATU will support its' role in attracting more students to its' campuses across the Western Region and driving industry-education collaboration.
19. An examination of employment by industrial group³ in each of the seven labour catchments shows some similarities and differences compared with the State picture. In each of the seven labour catchments, the most significant employment sector is the 'Education, Human Health and Social Work Activities', ranging from 23.9% of all employment in the Carrick-on-Shannon labour catchment to 29.9% in Letterkenny labour catchment. While this is the most significant employment sector in all seven labour catchments profiled, nationally it is also the largest sector (23.8%).
20. The second most significant employment sector across the seven labour catchments in the Western Region is 'Wholesale, Retail & Commerce' ranging from 21% in the Galway City labour catchment to 24.7% in the Castlebar labour catchment. Nationally this sector was the third most significant in employment share (22.6%). In two of the labour catchments, the third most significant employment sector is 'ICT and Professional services'. This is the case for Carrick-on-Shannon (15.5%) and Letterkenny (17.6%) labour catchments. Nationally this sector is the second most significant, accounting for 23% of all employment. For the five other labour catchments, the third largest employment sector is 'Manufacturing*' where the employment share ranges from 8.7% in Letterkenny to 19.2% in Galway City. Nationally, 'Manufacturing' is the fourth most significant employment sector⁴.
21. In terms of industry of employment, there are some notable differences between the national picture and that in most, if not all, of the seven labour catchments. The most important employment sector in the seven labour catchments; 'Education, Human Health and Social Work Activities', is a sector dominated by public sector employment.
22. The other sector which is largely composed of public sector employment 'Public Administration and Defence' also has relatively high shares of employment in each of the labour catchments (apart from Galway City), ranging from 11% in the Roscommon town labour catchment to 7.9% in the Letterkenny labour catchment.

3 | 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.

4 | 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.

10. Overall Conclusions and Implications

23. While public sector employment can be relatively stable, high concentrations might suggest a relative weakness in other sectors of the economy. The relatively lower shares compared to nationally in the 'high' growth sectors of 'ICT and Professional services' in the labour catchments in the Western Region suggest this. That aside, this sector has shown considerable growth across all labour catchments since 2016.
24. Another notable difference is the employment shares employed in Construction. Nationally the share is 3.7%, across four of the seven labour catchments it is less, ranging from 2.7% in Sligo town to 3.6% in the Carrick-on-Shannon labour catchment (excluding those with a mobile or blank destination). This contrasts with the employment share in 2006 – just before the housing crash, where nationally the rate was 5.8% but it was much higher in each of the seven labour catchments.
25. The analysis has shown that in Donegal, the only labour catchment that has a link to Northern Ireland is the area adjacent to Derry, called the Derry labour catchment. In 2022, this labour catchment is the 18th largest in the Western Region and accounted for 3,160 resident workers or 1.1% of the resident workforce in the Western Region. Between 2006 and 2016, this catchment increased in size by approximately +10% (+476). However, between 2016 and 2022 both the population size and geographical scale of this catchment has decreased due to the emergence of the Moville labour catchment in north-east Inishowen which was not included in previous analysis in 2016 or 2006.
26. Regardless of the contraction of the Northern Ireland (Derry) labour catchment it should be noted that 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, that 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](#)).
27. 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. 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 (based on Q36 in Census 2022 form) increased by +133%, from 111,744 workers in 2016 (5.7%) to 260,821 in 2022 (11.4%). 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. Since Census 2016, it is clear, when examining the maps of commuting flows, that there are more diffuse patterns which are associated with a greater incidence of working from home.

11.0 Appendix

11.1 Methodology

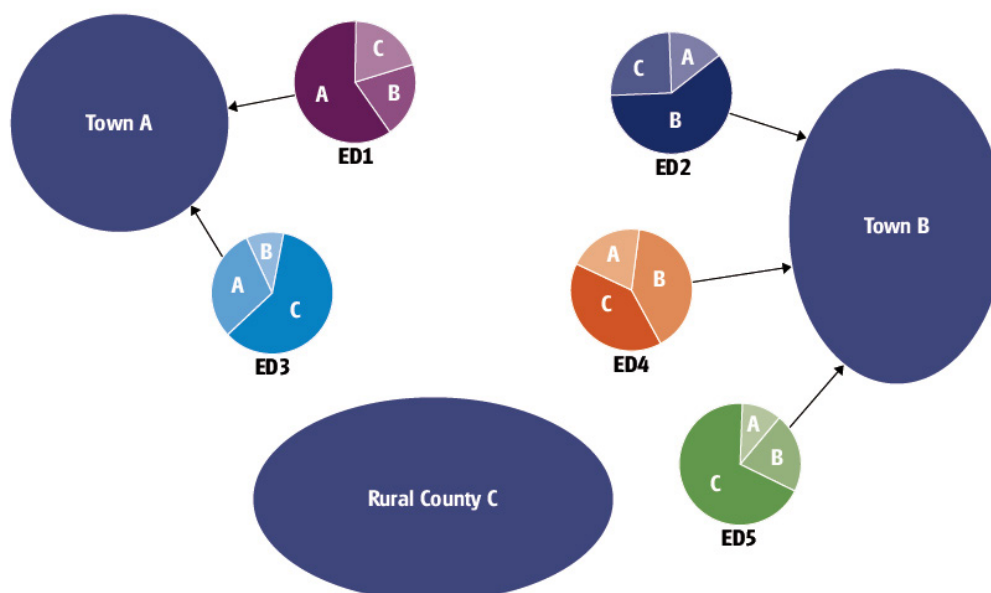
The analysis in this report aims to identify labour catchments which are based on travel to work patterns. Each of the 43 labour catchments identified are not based on town or county administrative boundaries, but on people's travel to work patterns. The method used to define the labour catchments is as follows.

Labour Catchments are created by assigning EDs ($n=3,420$)¹ to a particular city/town's catchment based on the city/town in which the highest number of its residents work. All EDs are assigned to the catchment of a city/town in Ireland with a resident population greater than 1,000 ($n=307$). In total, there were 314 possible city/town destinations that any ED could be assigned to, categorised as follows:

- Towns with a population greater than 1,000 (307)²;
- Northern Ireland county destinations (6); and
- Residual 'rural' catchment (non-town locations i.e., not in a settlement >1,000 population) (1)

The analysis followed the same methodology for assigning EDs to city/towns that was used in the previous research carried out in 2018 based on Census 2016. Each electoral division (ED) is examined and the place of work of all those who live in that ED is identified (either town, Northern Ireland or rural destination). Each ED is then allocated to a specific town's catchment on the basis of the town to which the highest numbers of its residents travel to work. In other words, if we look at all those in a particular ED who work and identify in which town the highest number of those people work, then that ED will be included in the labour catchment of that town. Figure 11.1 illustrates how EDs are allocated to a particular town's catchment.

Figure 11.1: Method of allocation of Electoral Divisions (EDs) to a town's labour catchment (Source: WDC and People and Place, 2024)



1 | In 2006 the CSO published POWCAR results for 4,441 EDs - the complete list of EDs in Ireland. Subsequent publications in 2011 and 2016 were produced for 3,406 EDs as per the aggregated ED results from Census 2011 and 2016. In 2022, the complete list of EDs in Ireland has increased to 3,420. As such, a direct comparison between ED flows in 2016 and 2022 is not possible in all cases.

2 | According to the CSO Census Built-Up Urban Area population results there are 306 with a population >1,000. For the purposes of this report and in line with previous iterations, we have included an amalgamation of both Derrybeg (794) and Bunbeg (749) as the one settlement. As such, the total number of settlements with a population >1,000 is 307.

11. Appendix: Methodology, Scope and National Comparisons

For example, ED1 is allocated to the catchment of town A on the basis that most of its residents travel there to work, rather than to Town B or Rural County C5. ED2 is allocated to Town B on the same basis. In ED3, the majority of its residents travel to Rural County C, but as Rural County C is not a town, ED3 is not allocated to it but is allocated to Town A as Town A is the next most popular destination and is also a town with a resident population greater than 1,000. In ED4, Town B and Rural County C are equally popular destinations but the ED is allocated to Town B as this is a town (>1,000 population), whereas Rural County C is not. ED5 is similar to ED3, it is allocated to the second most popular destination because the first, Rural County C is not a town. In a number of cases, EDs had a similar number of trips to two towns (>1,000 population) and in this case the ED was assigned to the town with the closest proximity. In the Western Region, all 946 EDs (subset of 3,420 Census 2022 EDs) were analysed to determine the number of their commuters travelling to work in each town with a population greater than 1,000 persons.

Each ED was assigned to the labour catchment of one of these towns: namely, the one to which the highest number of its residents were travelling to work. The 946 EDs within the Western Region were finally allocated to 43 town catchments. Following some post-processing of the initial results (such as re-assigning EDs where there was a joint score between two settlements - the one with closest proximity was chosen) there was a total of 58 initial catchments. Of these, 20 were based on ED groups of less than 3 and as such a further re-assignment was required.

This process followed the same methodology as the work carried out in 2009 and 2018 with EDs assigned to the next dominant location. This process then resulted in the production of the final 43 catchments across the region and a number of EDs linked to towns and locations outside the Western Region: Limerick City, Athlone, Derry County, Ballinasloe, Longford, Portumna, Cavan and Tullamore. These are identified in Map 2.1 and Table 2.1 (Chapter 2 Introduction). The labour catchments of seven city/towns, the largest in each of the seven counties which comprise the Western Region, are examined in detail in this report. Map 2.1 details the distribution of the catchments of the 43 labour markets. Most notable changes in this from the 2016 based analysis is the inclusion of additional catchments for Tubbercurry, Moville, Mohill and Ballinamore labour catchments and the loss of the Loughrea labour catchment due to only 2 EDs being assigned to the settlement. This is indicative of greater flows to Galway City from the wider Loughrea area.

11.2 Scope

The labour catchments defined in this report are based on information on the place of work and place of residence for each individual in the census. Workers with 'no fixed place of work' have therefore not been included. As a result the POWSCCAR dataset does not include the entire population at work. This has some implications for the research in terms of comparisons at a regional level and the representation of some occupational groups within the data.

Figure 11.2 shows the response rate for different place of work categories by county in the Western Region. The first two categories (Mobile and Uncodable) are those that are excluded from the POWSCCAR dataset. Construction and transport workers are strongly represented within the 'no fixed place of work' category. Therefore such workers are under-represented in this report. In addition, there are a high number of those categorised as farmers where the location of work was left blank, rather than providing a specific location or stating 'work from home'. As a result the occupational group of farmers is also under-represented. As some sectors are stronger in some areas than others, this will have differing effects across counties and regions.

11. Appendix: Methodology, Scope and National Comparisons

Figure 11.2 shows the response rate for different place of work categories by county in the Western Region.

Boundary	No Fixed Place of Work (Mobile Worker)			Place of Work Blank or Uncodable			Works Mainly from Home (Q36)		
Clare	3,388	6.1%		8,150	14.8%		5,420	9.8%	
Donegal	6,047	9.0%		9,112	13.6%		7,010	10.5%	
Galway County	7,003	8.2%		11,343	13.4%		10,436	12.3%	
Galway City	2,004	5.2%		6,745	17.4%		4,756	12.3%	
Leitrim	1,287	8.8%		2,058	14.0%		1,762	12.0%	
Mayo	3,877	6.8%		7,914	13.9%		4,910	8.6%	
Roscommon	1,891	6.5%		4,268	14.6%		2,566	8.8%	
Sligo	2,509	8.4%		4,065	13.6%		3,601	12.1%	
Western Region	28,006	7.4%		53,655	14.2%		40,461	10.7%	
State	149,480	6.5%		324,913	14.2%		260,821	11.4%	

Boundary	Place of Work Coded			Total POWSCCAR		Total included in Analysis		
Clare	38,196	69.3%		55,154	100.0%	43,616	79.1%	
Donegal	44,675	66.8%		66,844	100.0%	51,685	77.3%	
Galway County	56,130	66.1%		84,912	100.0%	66,566	78.4%	
Galway City	25,281	65.2%		38,786	100.0%	30,037	77.4%	
Leitrim	9,560	65.2%		14,667	100.0%	11,322	77.2%	
Mayo	40,367	70.7%		57,068	100.0%	45,277	79.3%	
Roscommon	20,502	70.1%		29,227	100.0%	23,068	78.9%	
Sligo	19,706	65.9%		29,881	100.0%	23,307	78.0%	
Western Region	254,417	67.6%		376,539	100.0%	294,878	78.3%	
State	1,558,524	67.9%		2,293,738	100.0%	1,819,345	79.3%	

The national figures cited throughout the report are those based on the POWSCCAR dataset as described above (Total included in Analysis). They are not necessarily the same as those reported in the full Census of Population 2022 as at work, because as shown in Figure 11.2, the two categories of 'no fixed place of work' and 'place of work address blank or uncodable', are excluded. The remaining data represent 79.3% of the total relevant census population.



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