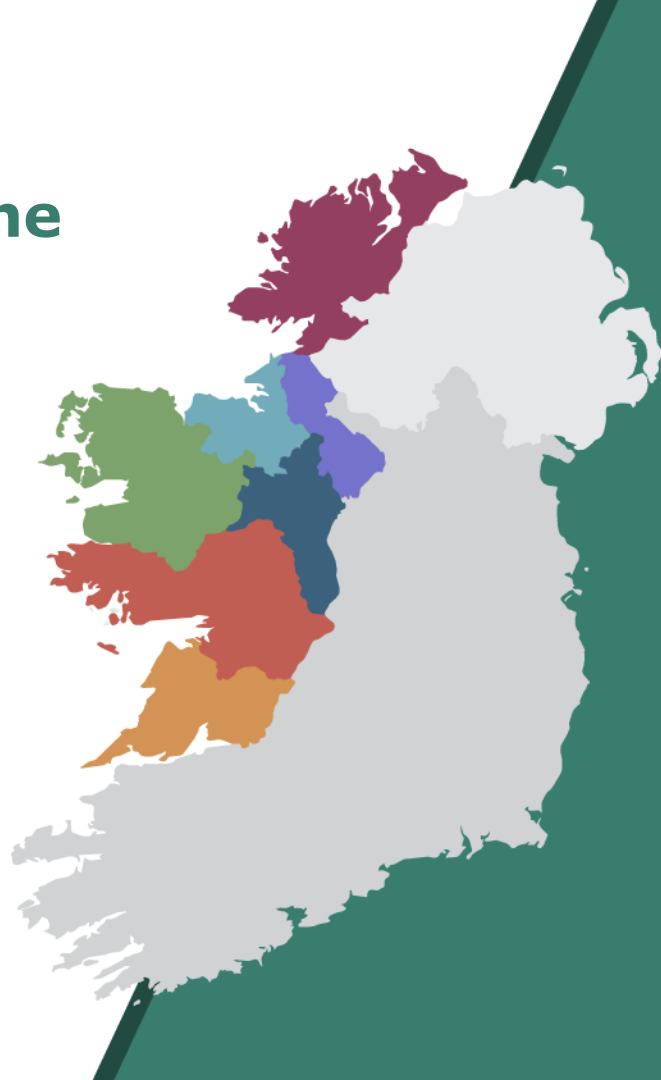


Sectoral Employment Profile of the Western Region of Ireland: Policy Implications

Pauline White, Policy Analyst,
Western Development Commission

7th Annual NERI Labour Market Conference,
1 May 2019



Western Development Commission (WDC)

- 7 county Western Region
- State body – Department of Rural & Community Development
- WDC Act 1998

'....foster and promote the economic and social development of the Western Region'

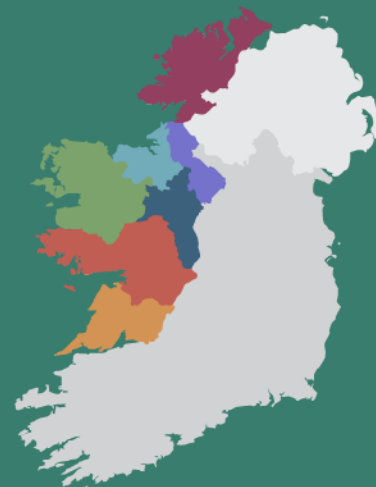


1. Broad Sectoral Employment Trends in Western Region & State (1996-2016)
2. Current Detailed Sectoral Employment Profile of Western Region & State
3. Counties of the North West: Donegal, Sligo & Leitrim
4. Policy Implications

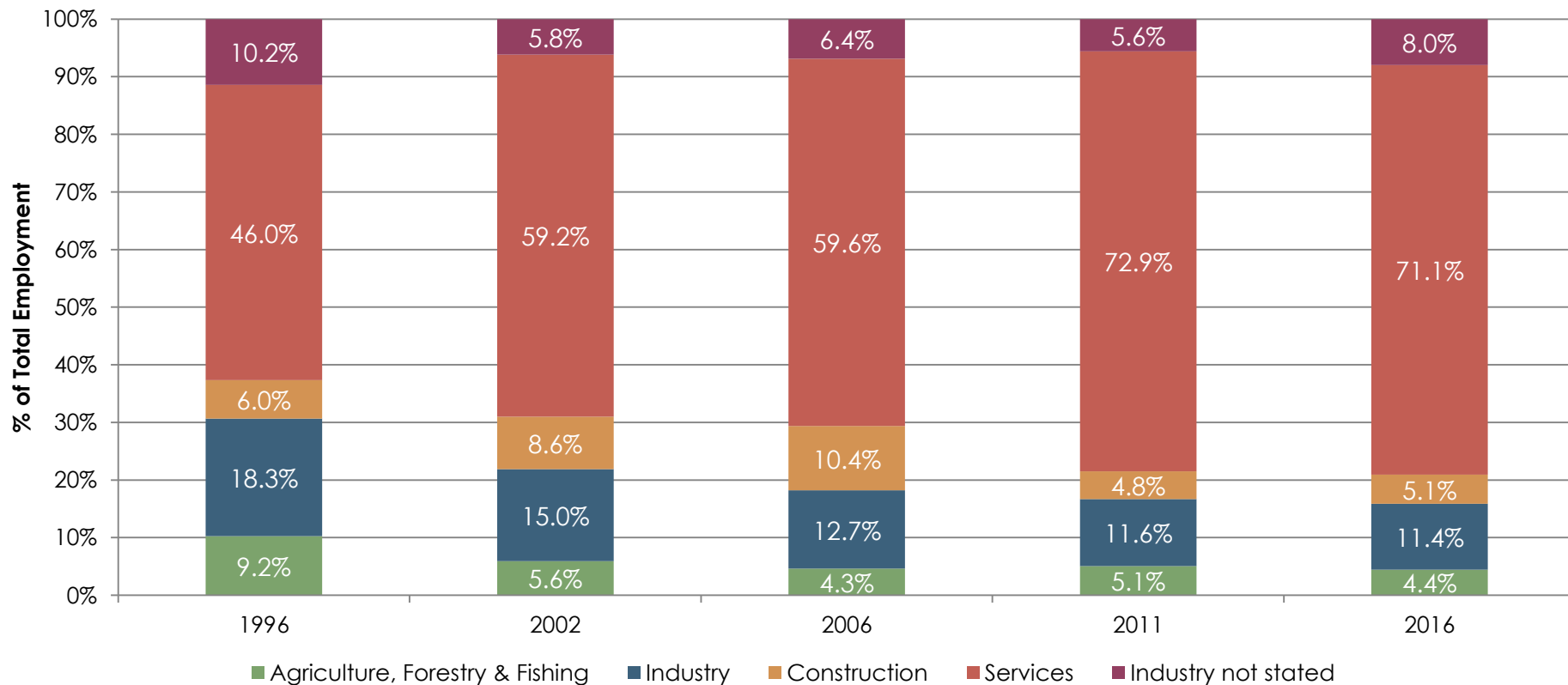
Broad Sectoral Employment Trends

Western Region & State

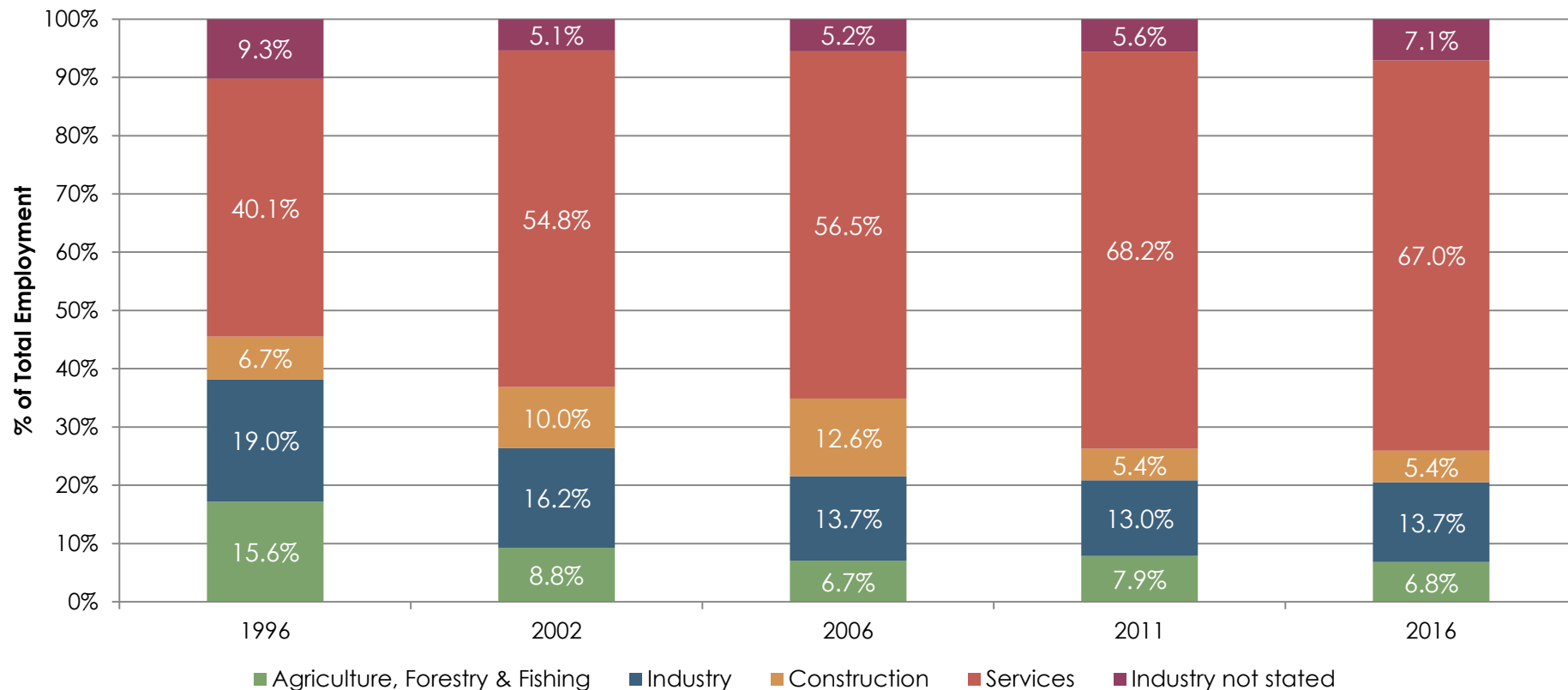
1996-2016



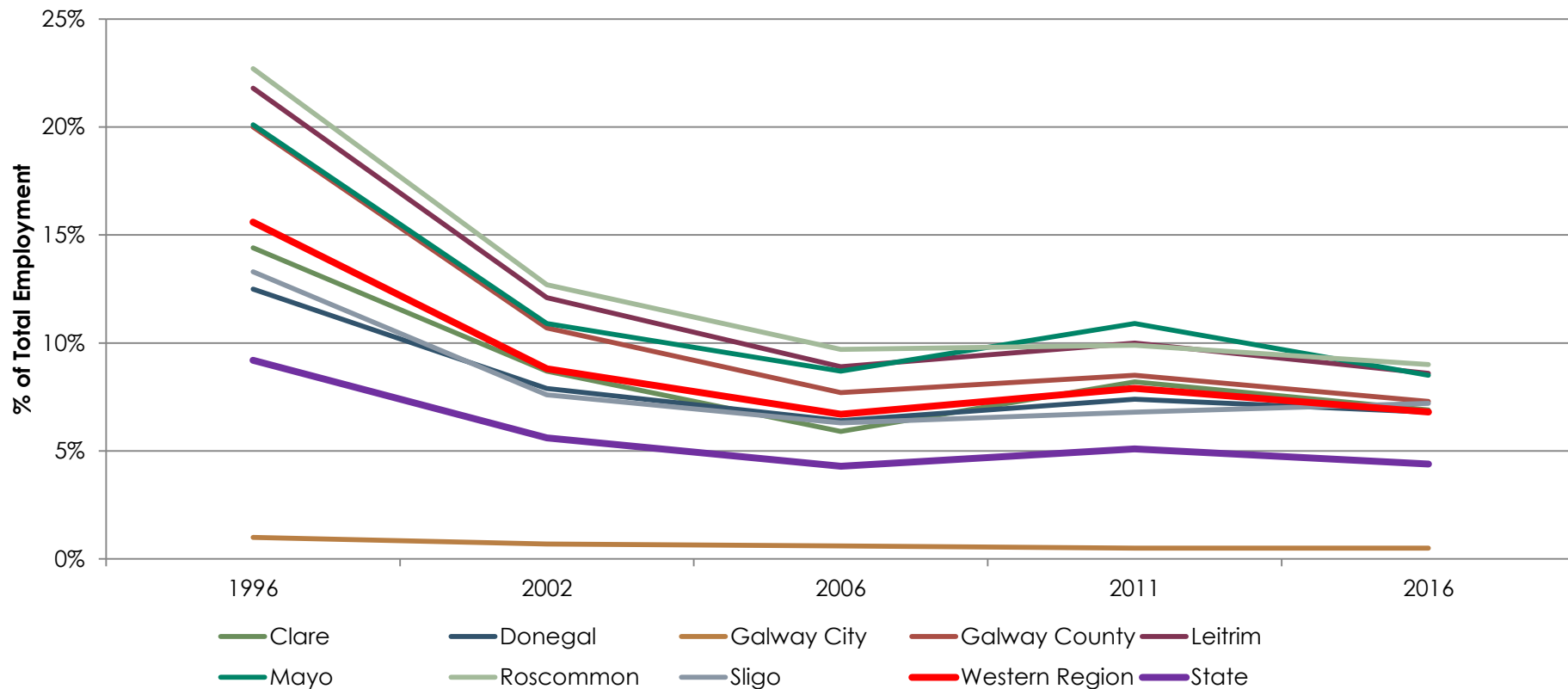
Sectoral composition of employment in State 1996-2016



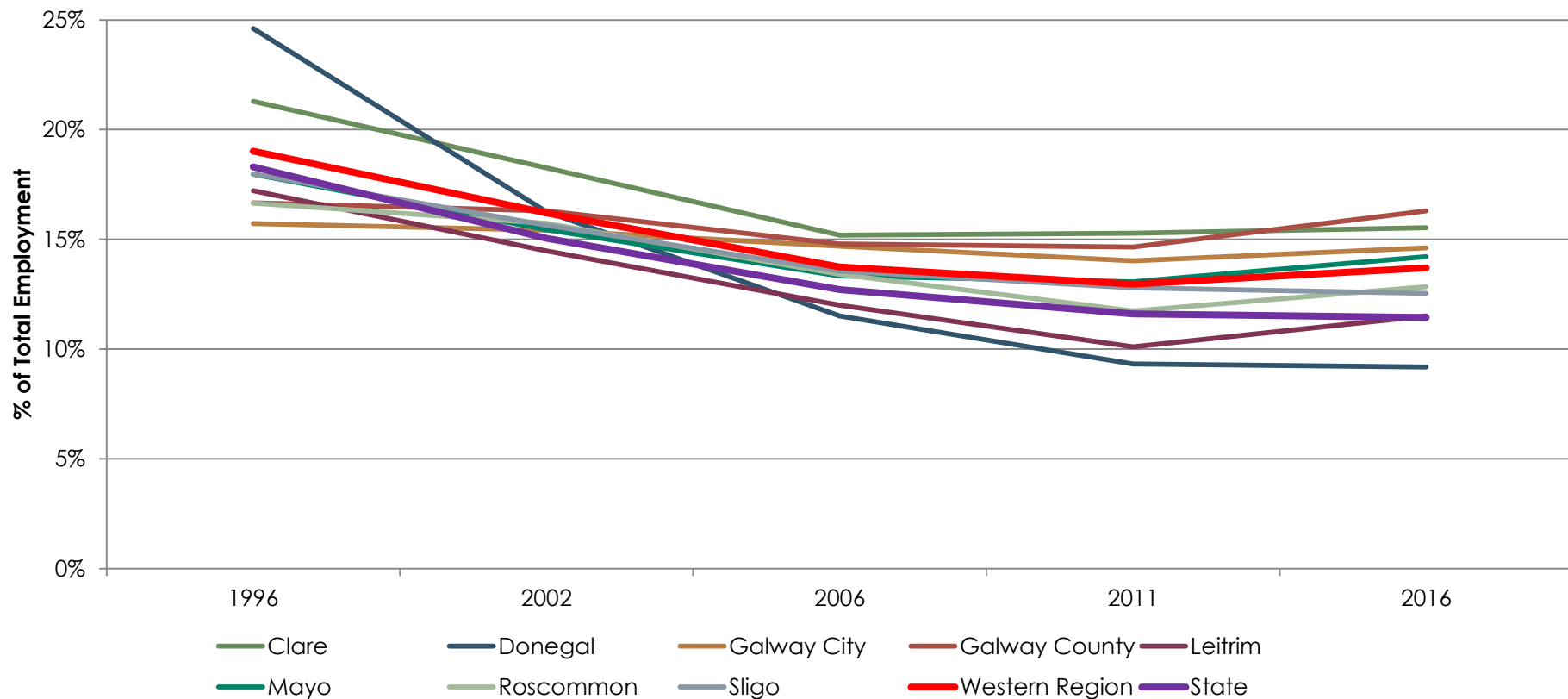
Sectoral composition of employment in Western Region, 1996-2016



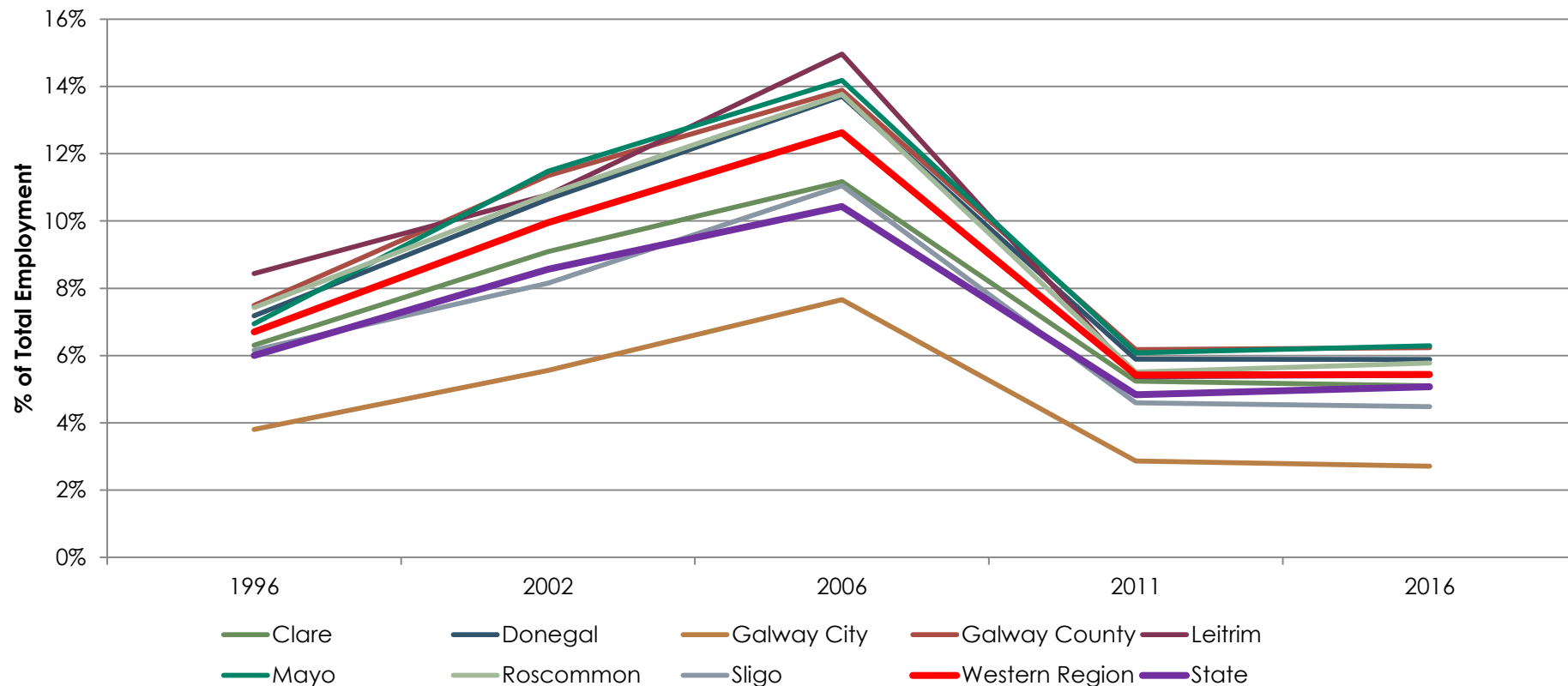
Agriculture, Forestry & Fishing as % of total employment in western counties, 1996-2016



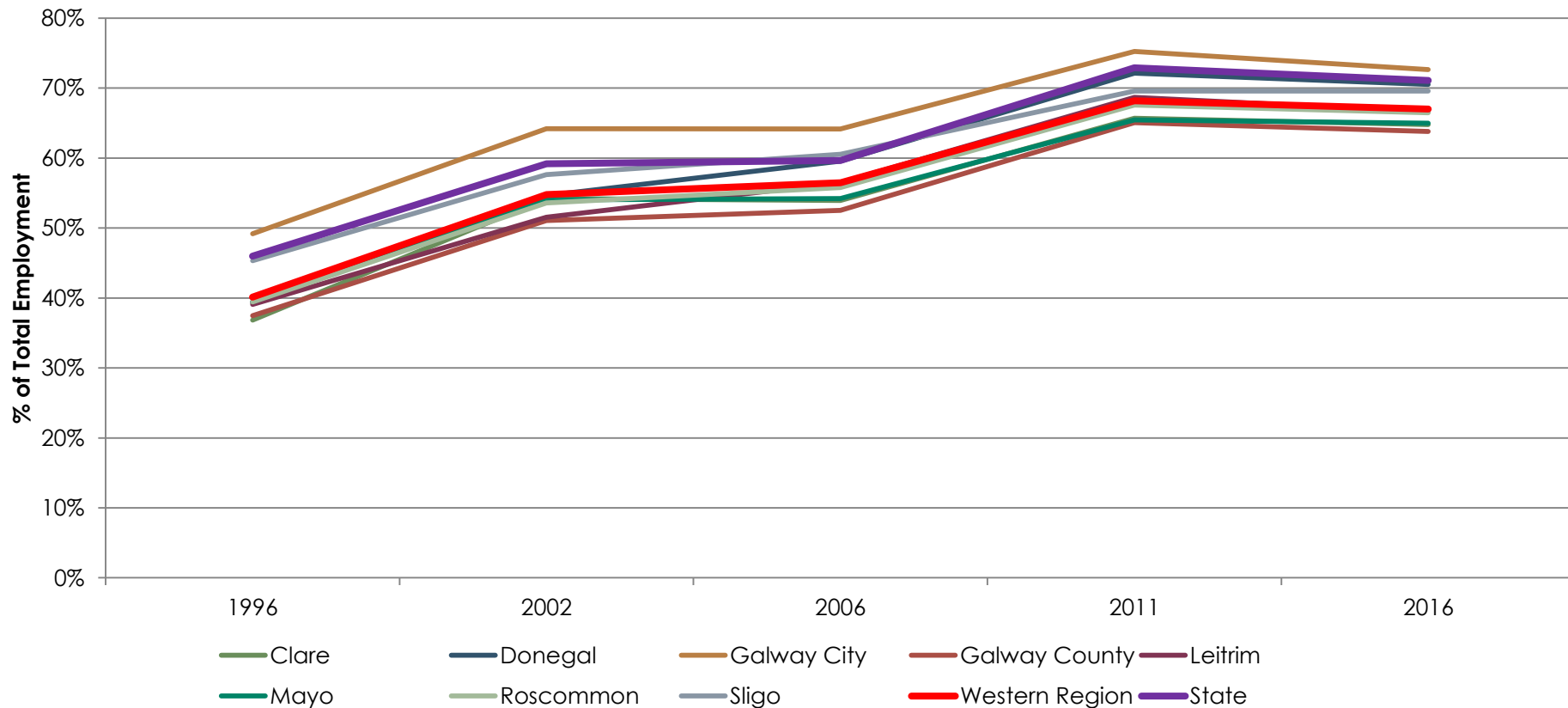
Industry as % of total employment in western counties, 1996-2016



Construction as % of total employment in western counties, 1996-2016

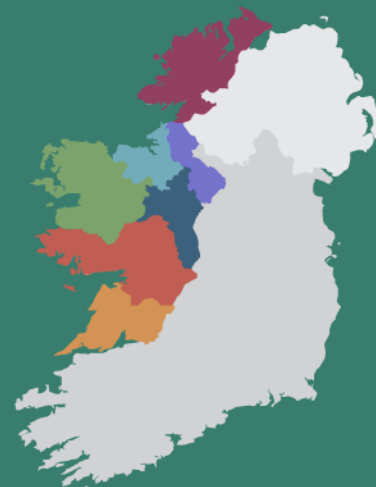


Services as % of total employment in western counties, 1996-2016

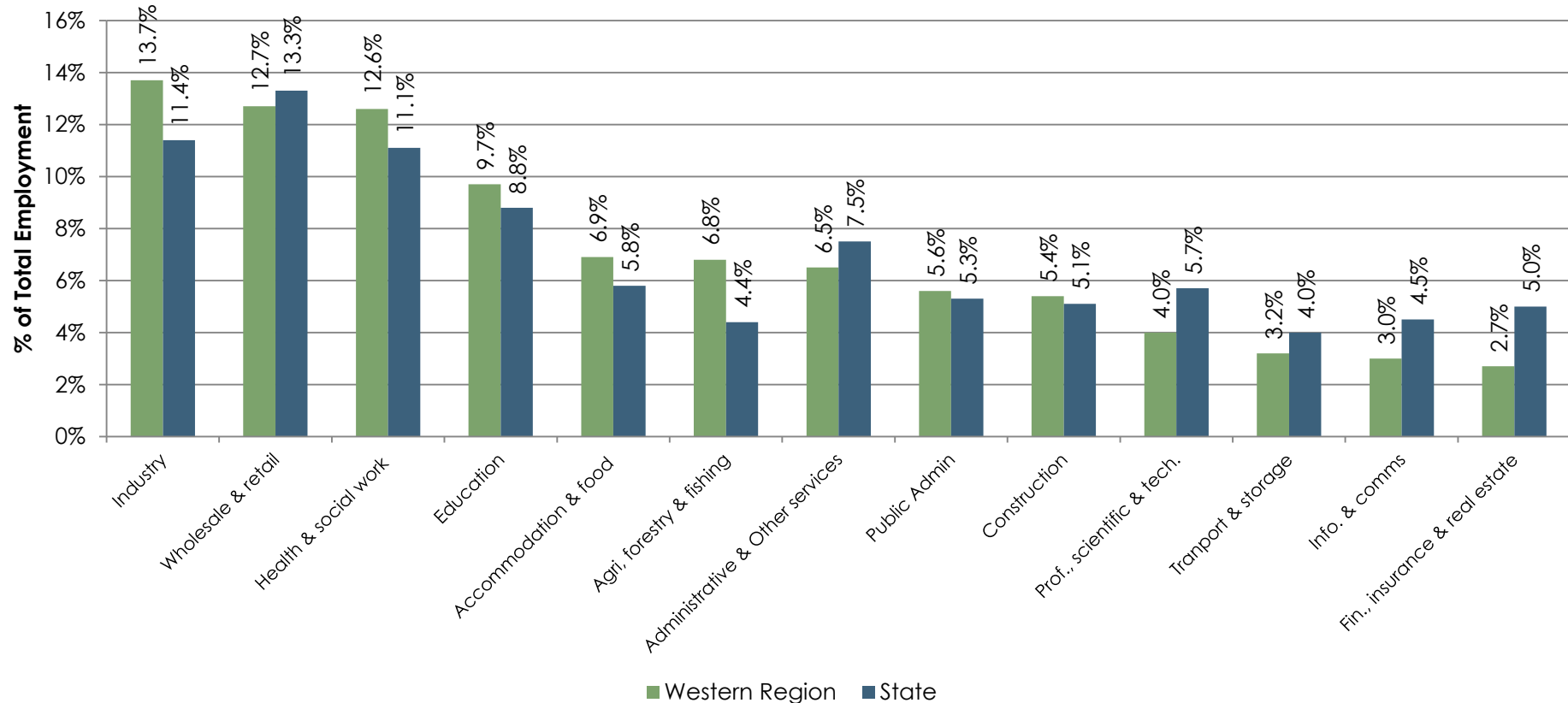


Current Detailed Sectoral Employment Profile

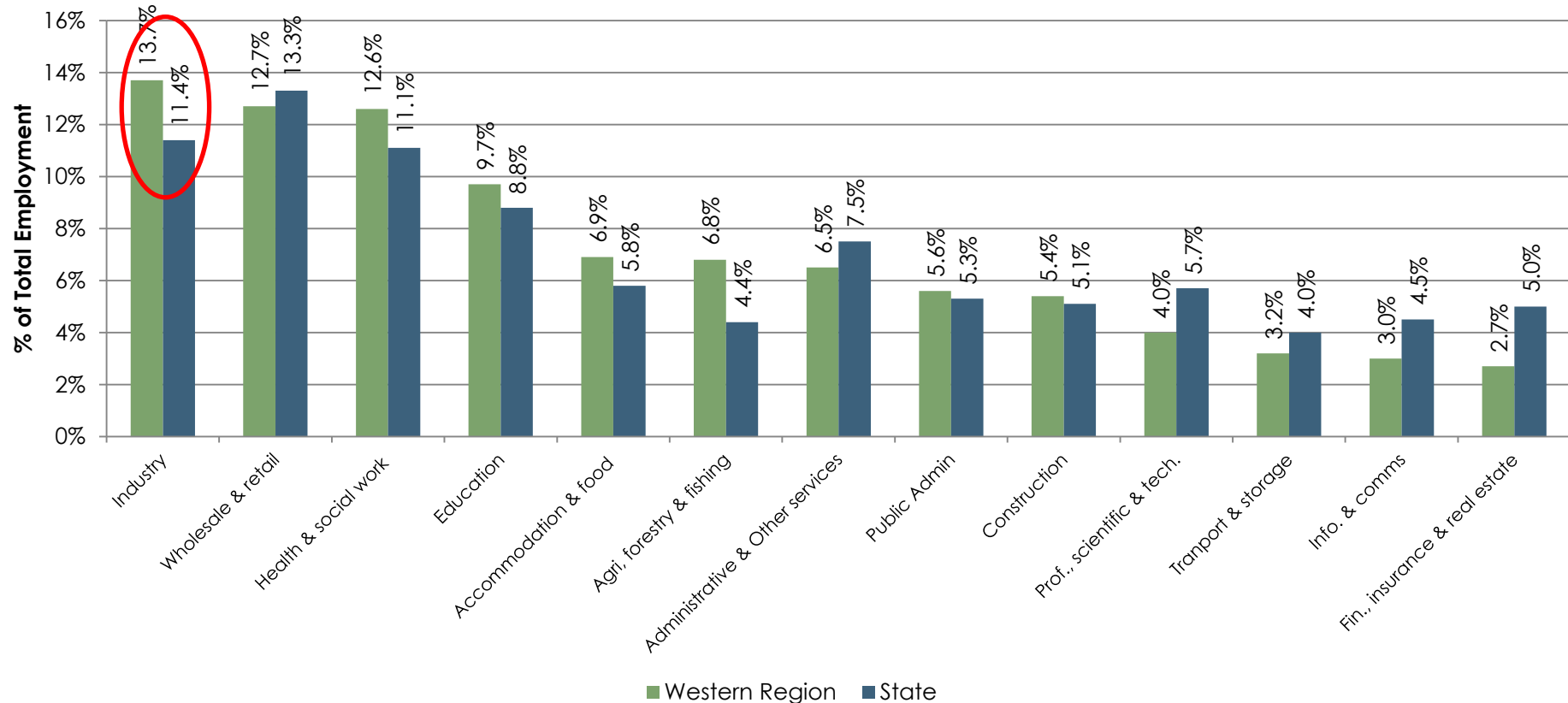
Western Region & State



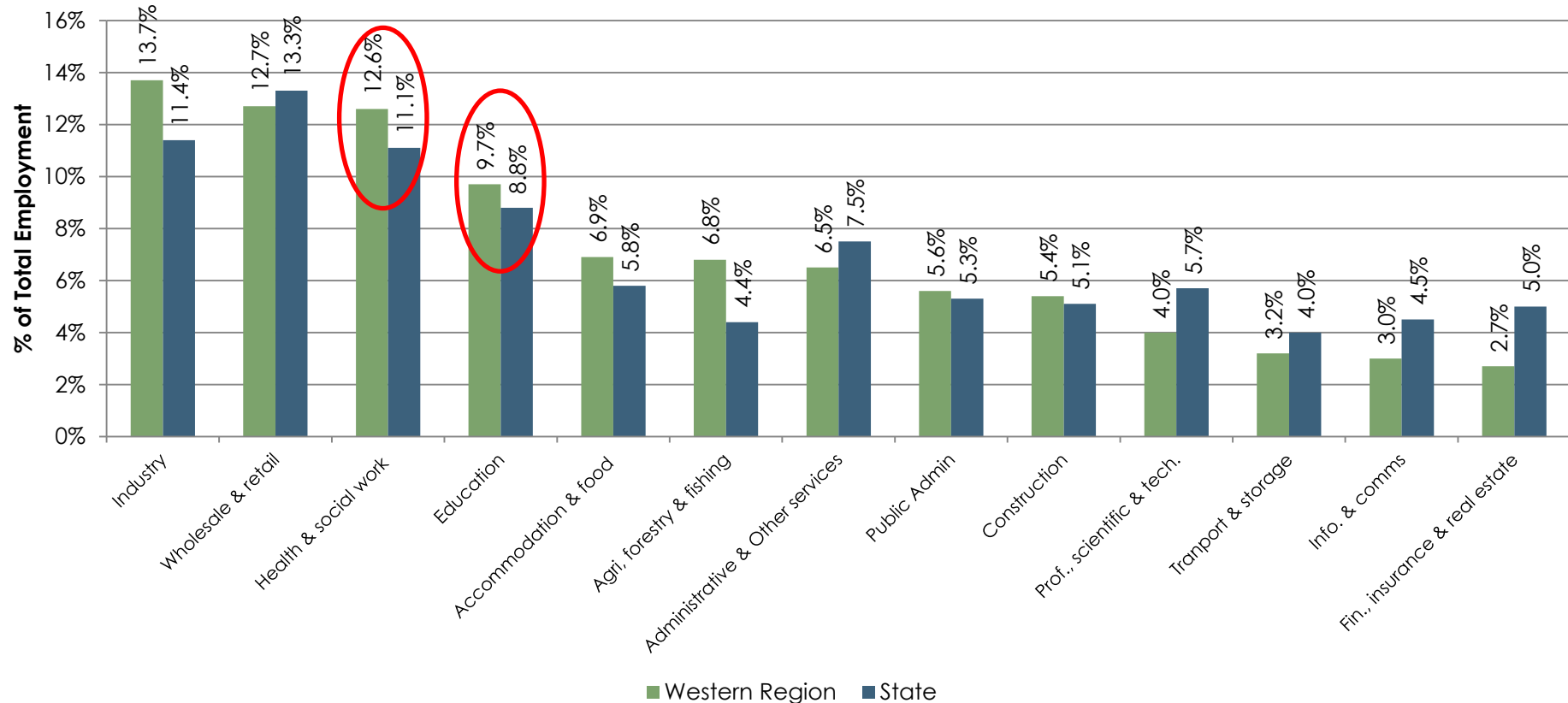
Percentage of total employment by NACE Rev 2 sector in Western Region & State, 2016



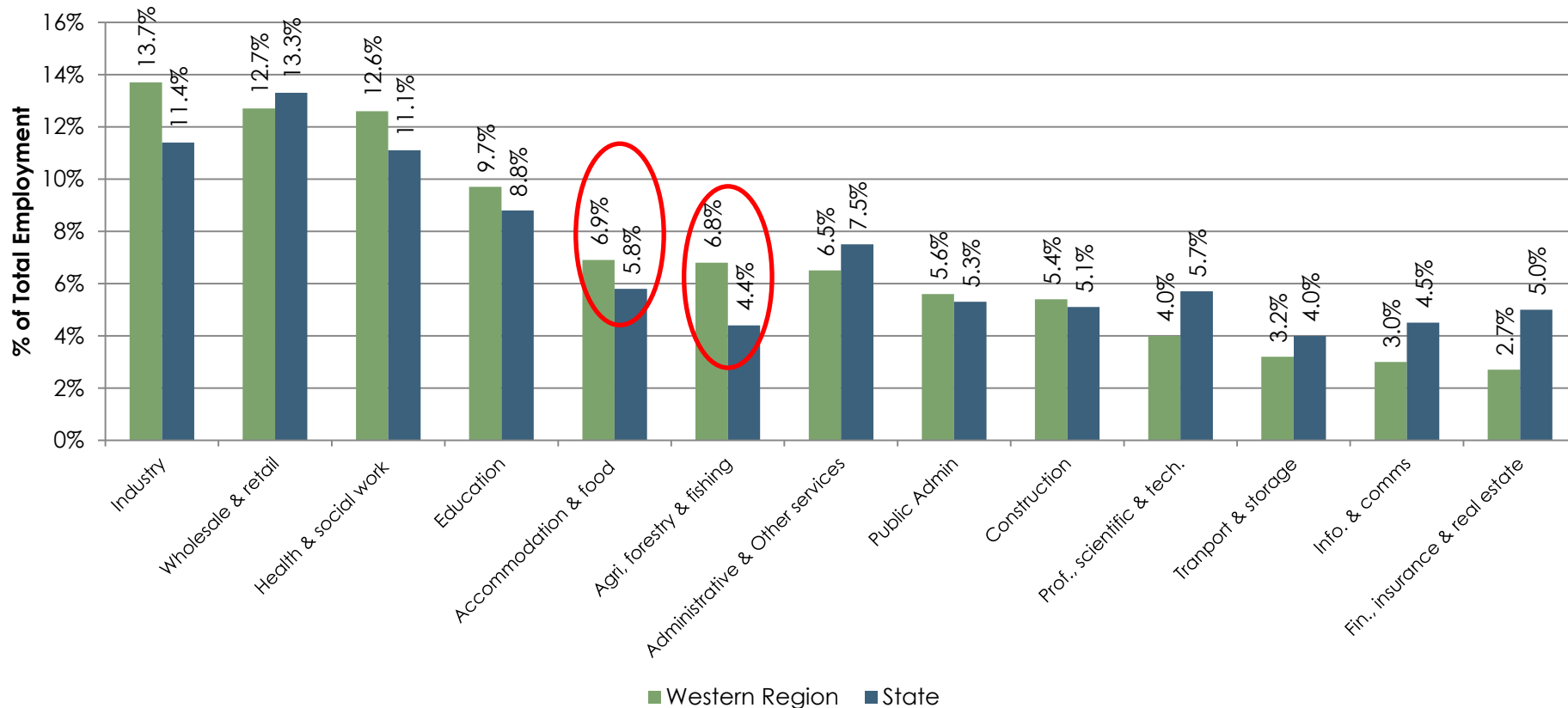
Percentage of total employment by NACE Rev 2 sector in Western Region & State, 2016



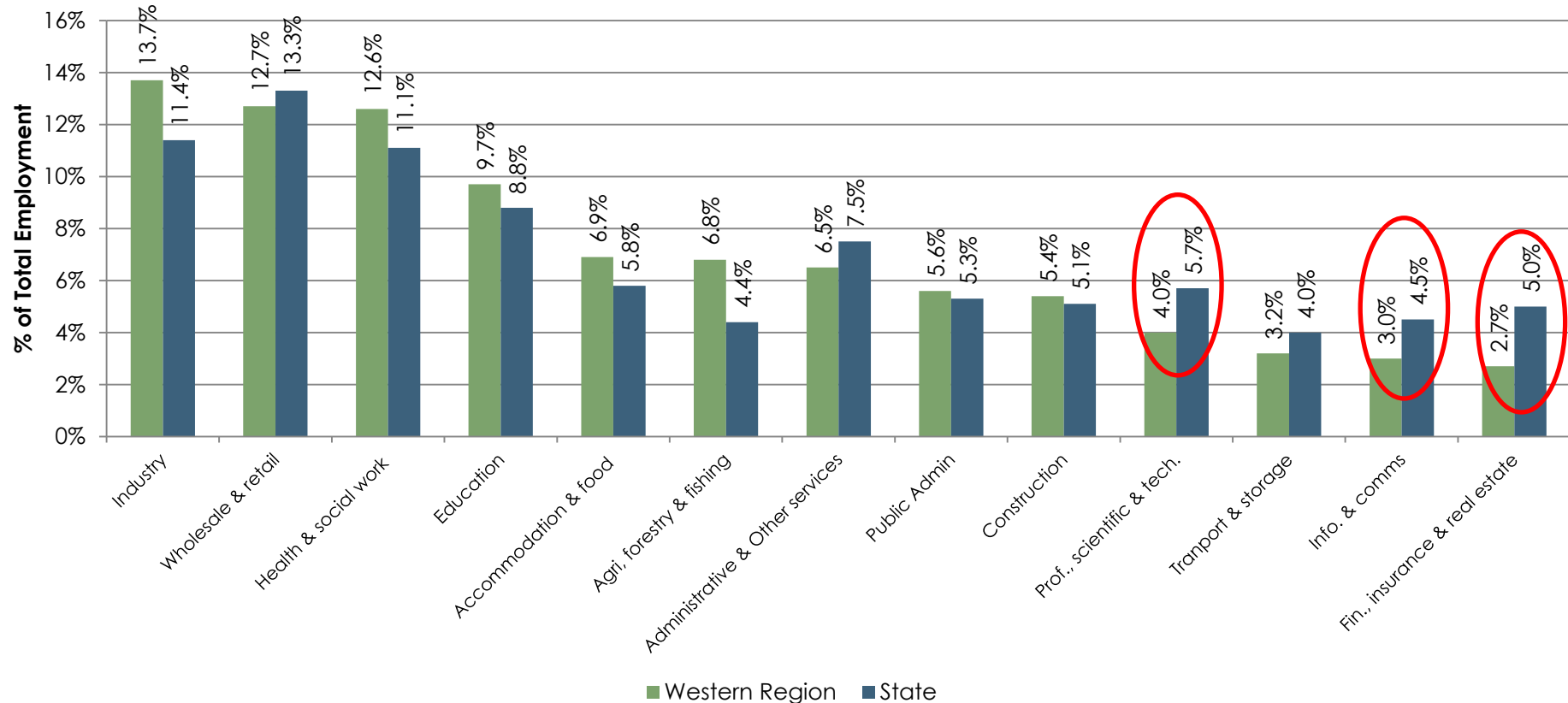
Percentage of total employment by NACE Rev 2 sector in Western Region & State, 2016



Percentage of total employment by NACE Rev 2 sector in Western Region & State, 2016

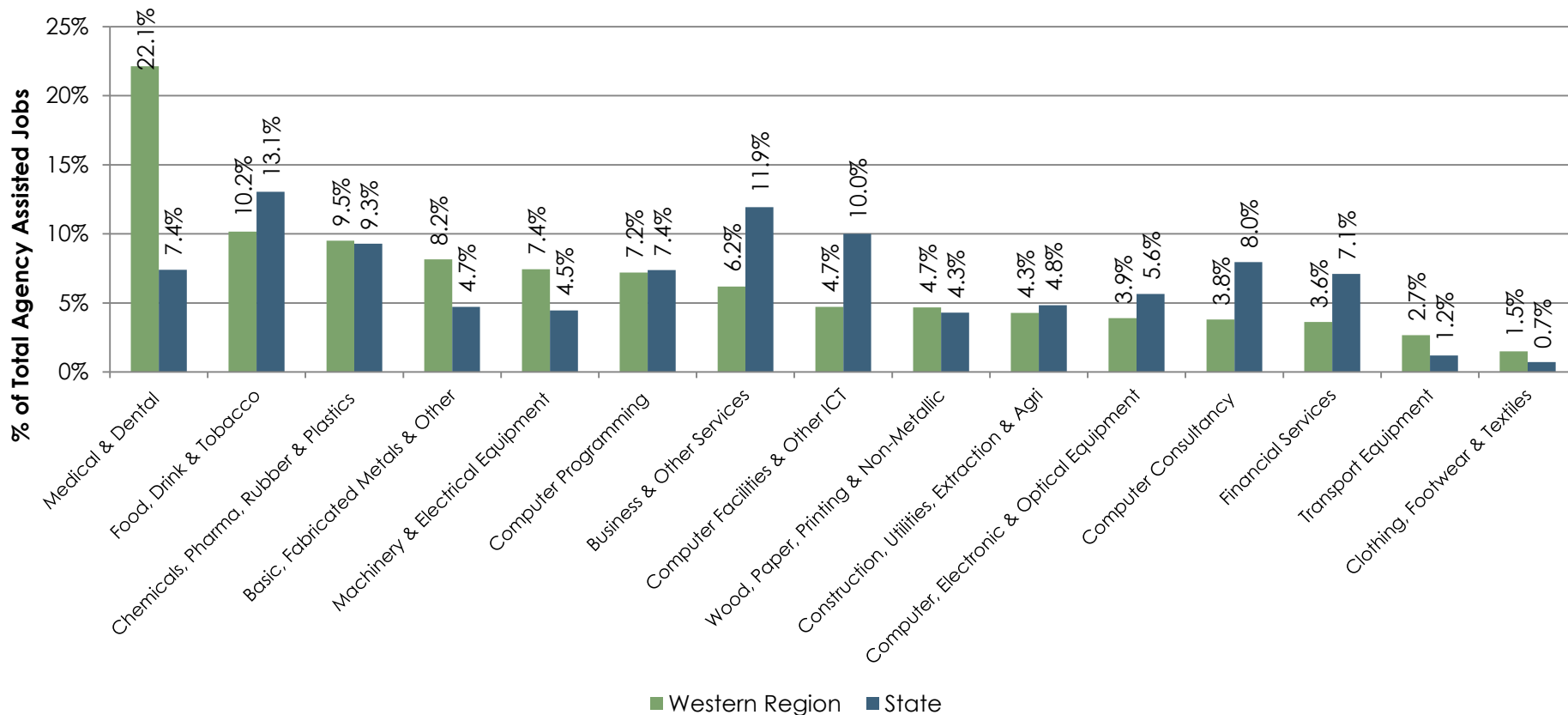


Percentage of total employment by NACE Rev 2 sector in Western Region & State, 2016

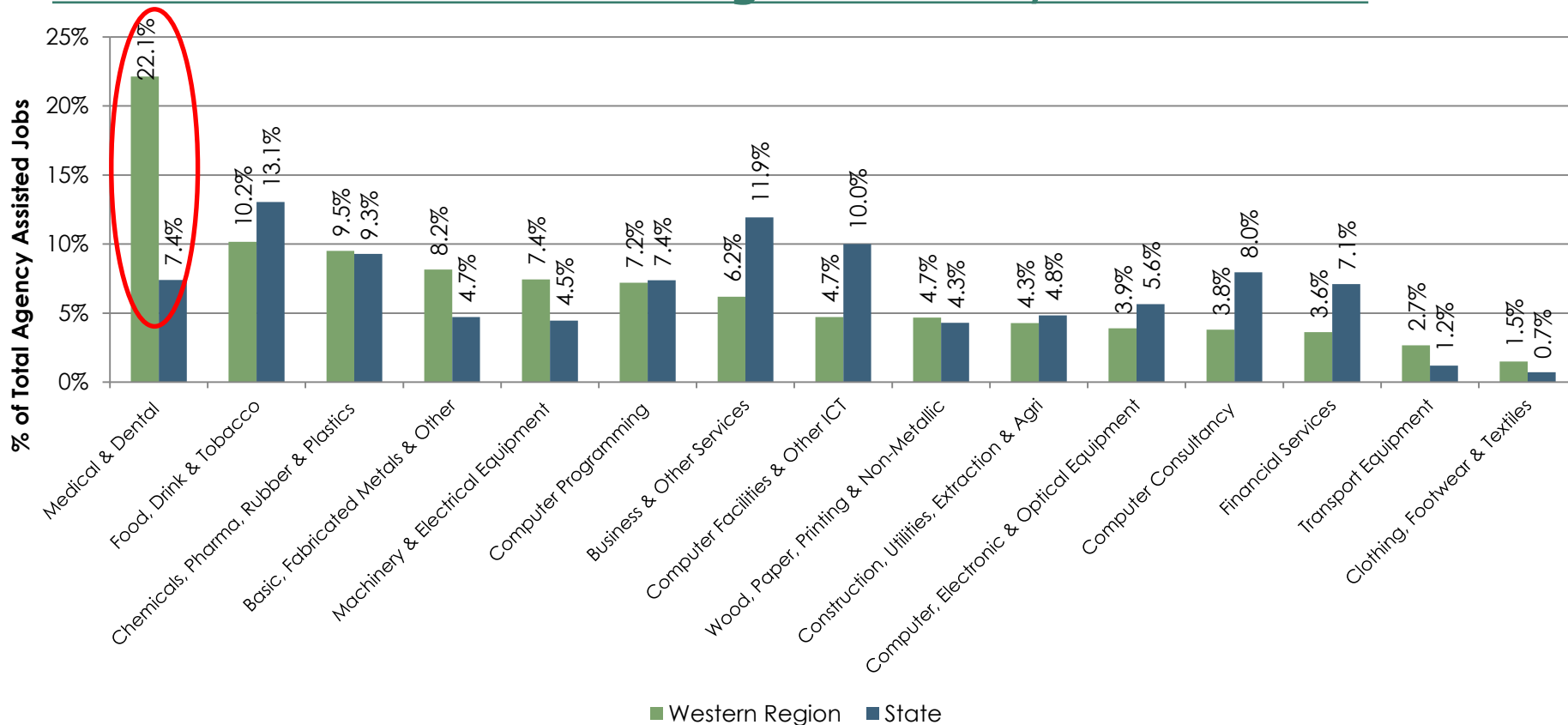


- Greater reliance on **traditional & public service** sectors in WR
 - **Industry considerably more important**, largest in WR (in State Wholesale & Retail)
 - **Health & Education** significant employers in WR, particularly for North West
 - **Hospitality** and **Agriculture** employ higher share, esp. for rural areas
- Knowledge Intensive Services considerably less important
 - **Combined KIS employ 9.7% of workers in WR v 15.2% in State**

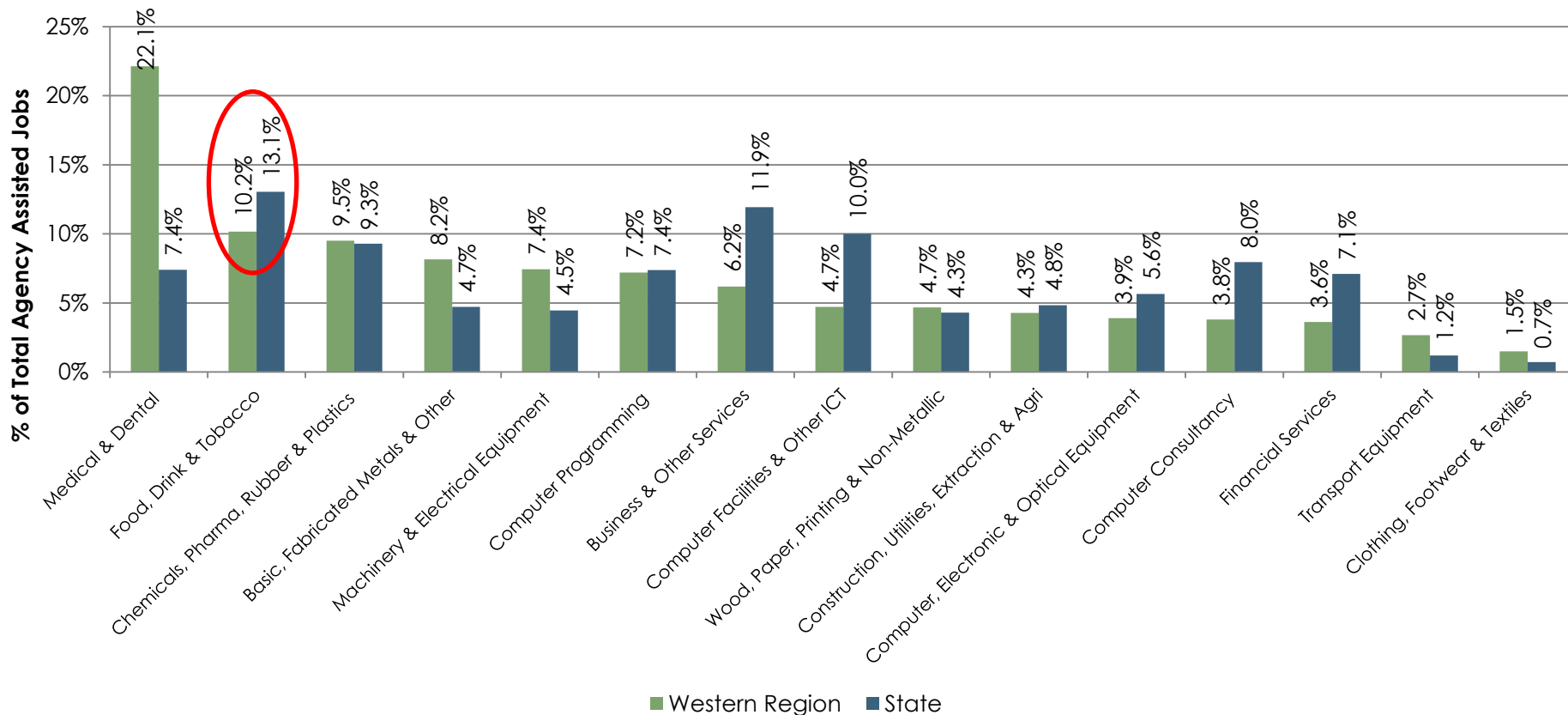
Percentage of total agency assisted jobs by NACE Rev 2 sector in Western Region & State, 2017



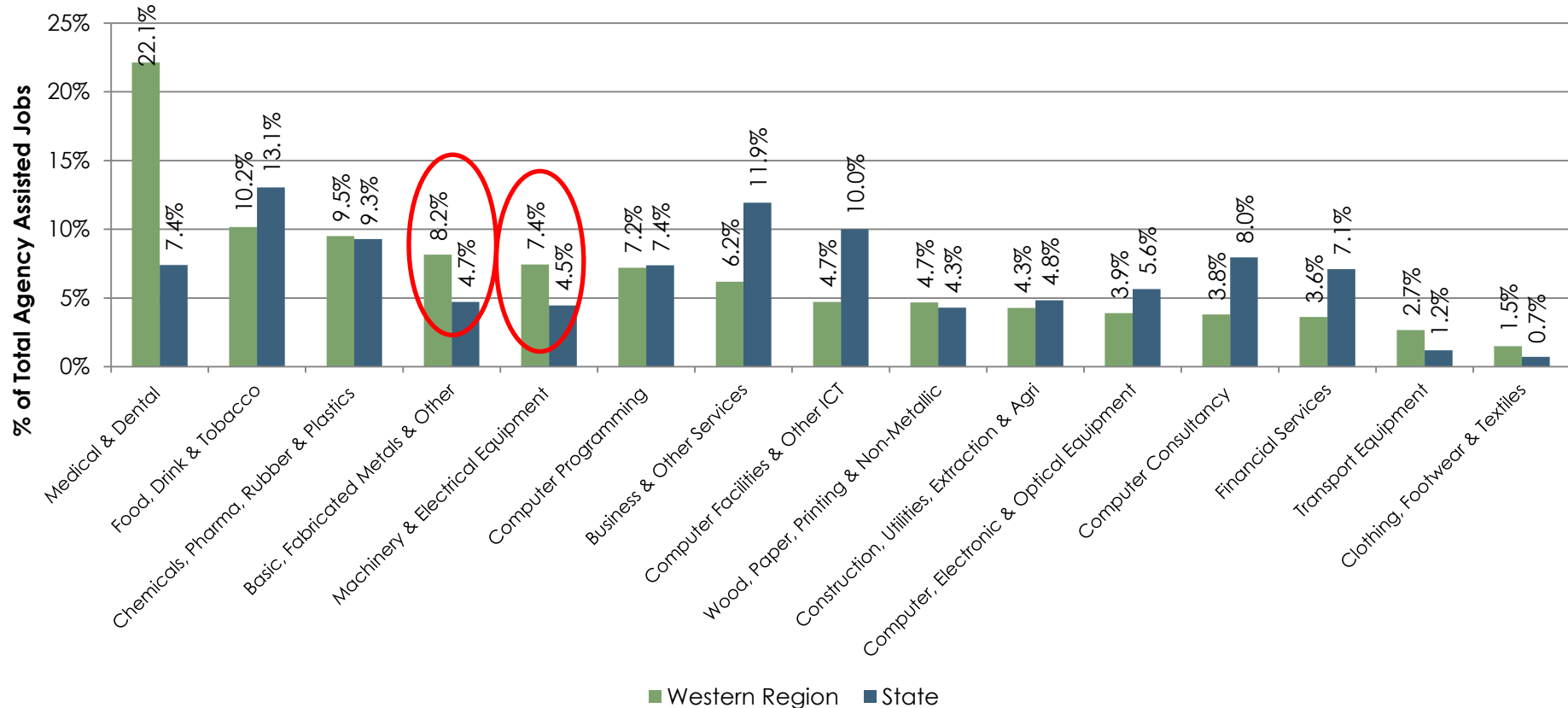
Percentage of total agency assisted jobs by NACE Rev 2 sector in Western Region & State, 2017



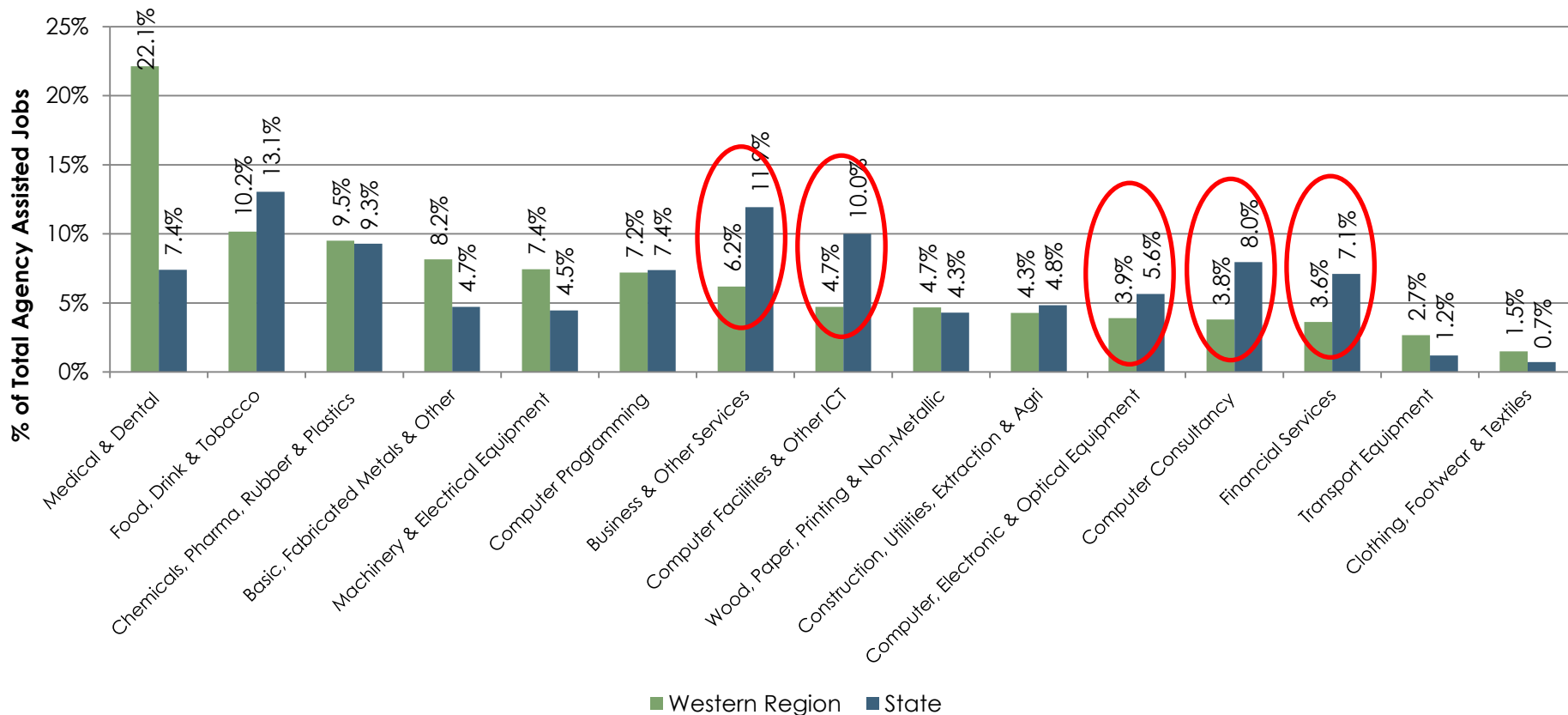
Percentage of total agency assisted jobs by NACE Rev 2 sector in Western Region & State, 2017



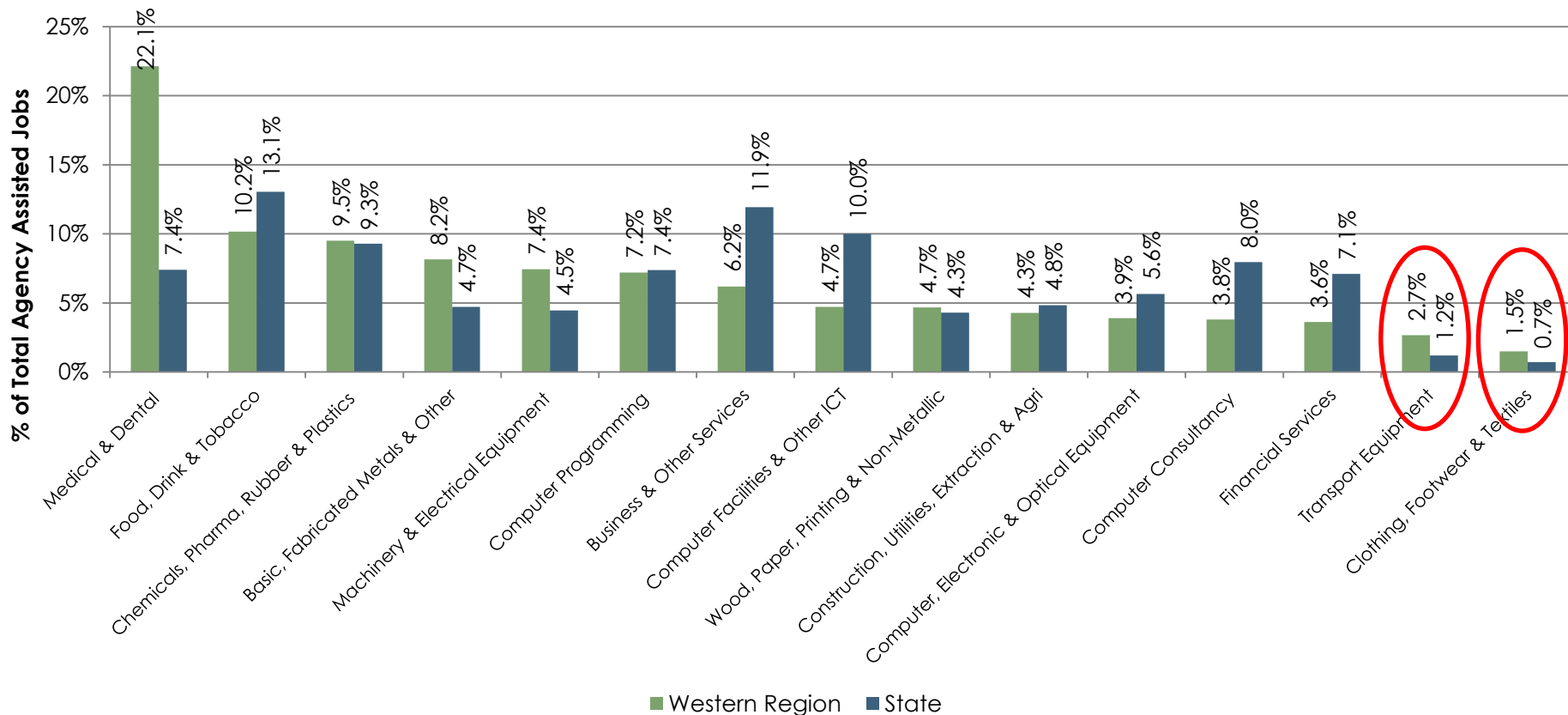
Percentage of total agency assisted jobs by NACE Rev 2 sector in Western Region & State, 2017



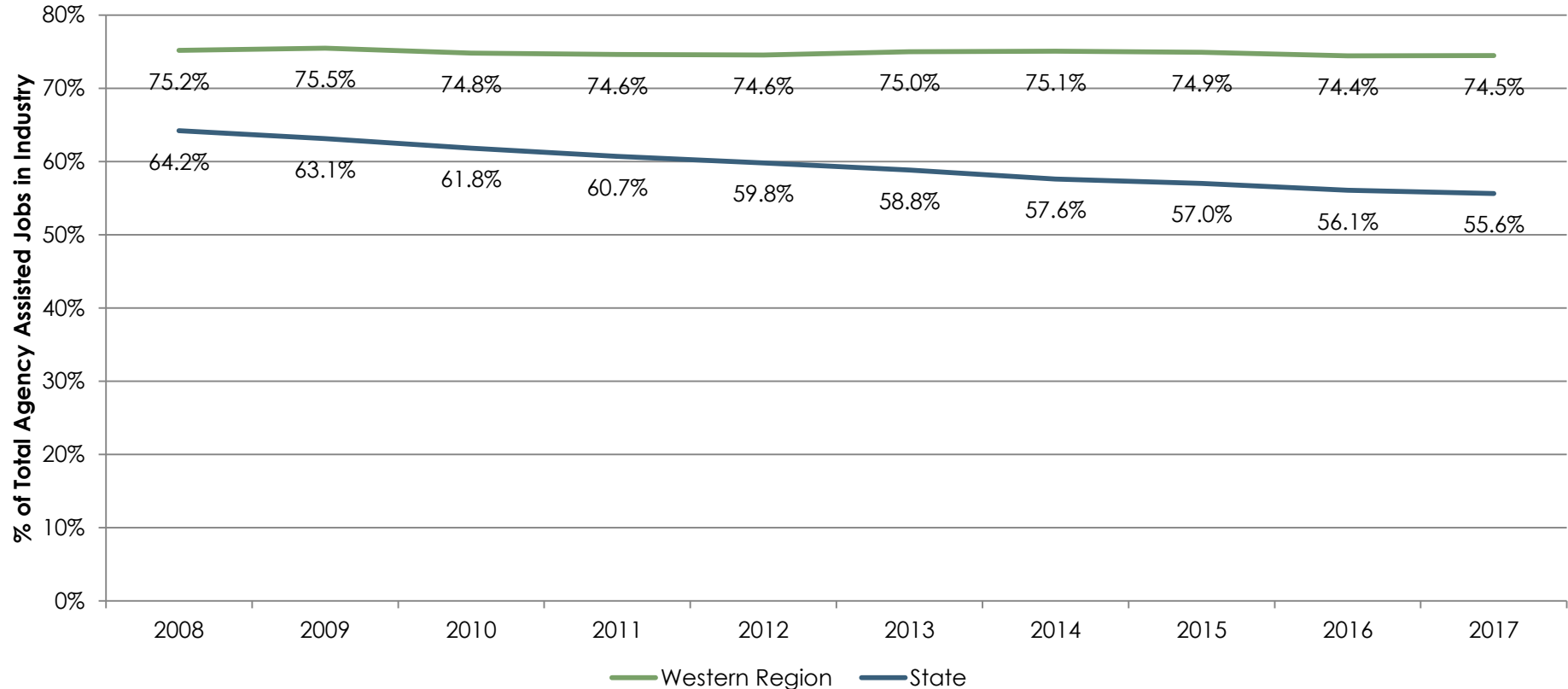
Percentage of total agency assisted jobs by NACE Rev 2 sector in Western Region & State, 2017



Percentage of total agency assisted jobs by NACE Rev 2 sector in Western Region & State, 2017



Percentage of total agency assisted jobs in Industry in Western Region & State, 2008-2017



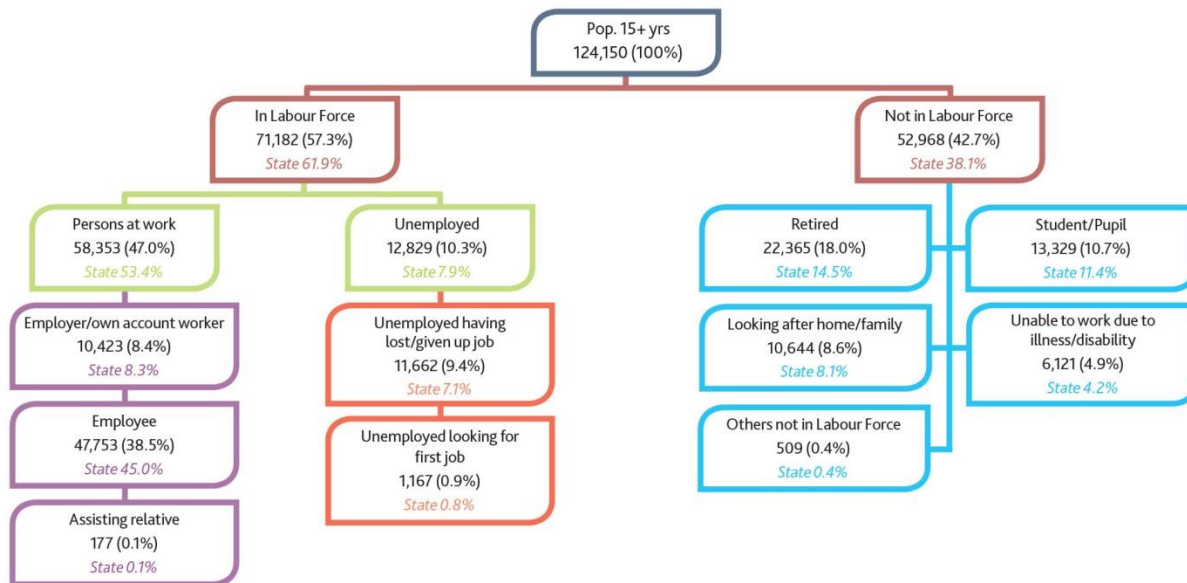
- **66,392 agency assisted jobs** in Western Region (2017)
 - MedTech accounts for 22.1% in WR v 7.4% in State. **WR home to 46.4% of assisted MedTech jobs in Ireland**
 - **Agri-food less significant**, largest assisted sector nationally
 - **Engineering** considerably more important in region
 - Substantially **smaller share** in **internationally traded** (except Computer Programming) & **financial services**
 - Higher share in strongly growing **Transport Equipment** & in **Clothing & Textiles**
- **Industry accounted for ¾ of assisted jobs in WR for past 10 yrs.**
Nationally Industry's share fell steadily

Counties of the North West

Donegal, Sligo & Leitrim

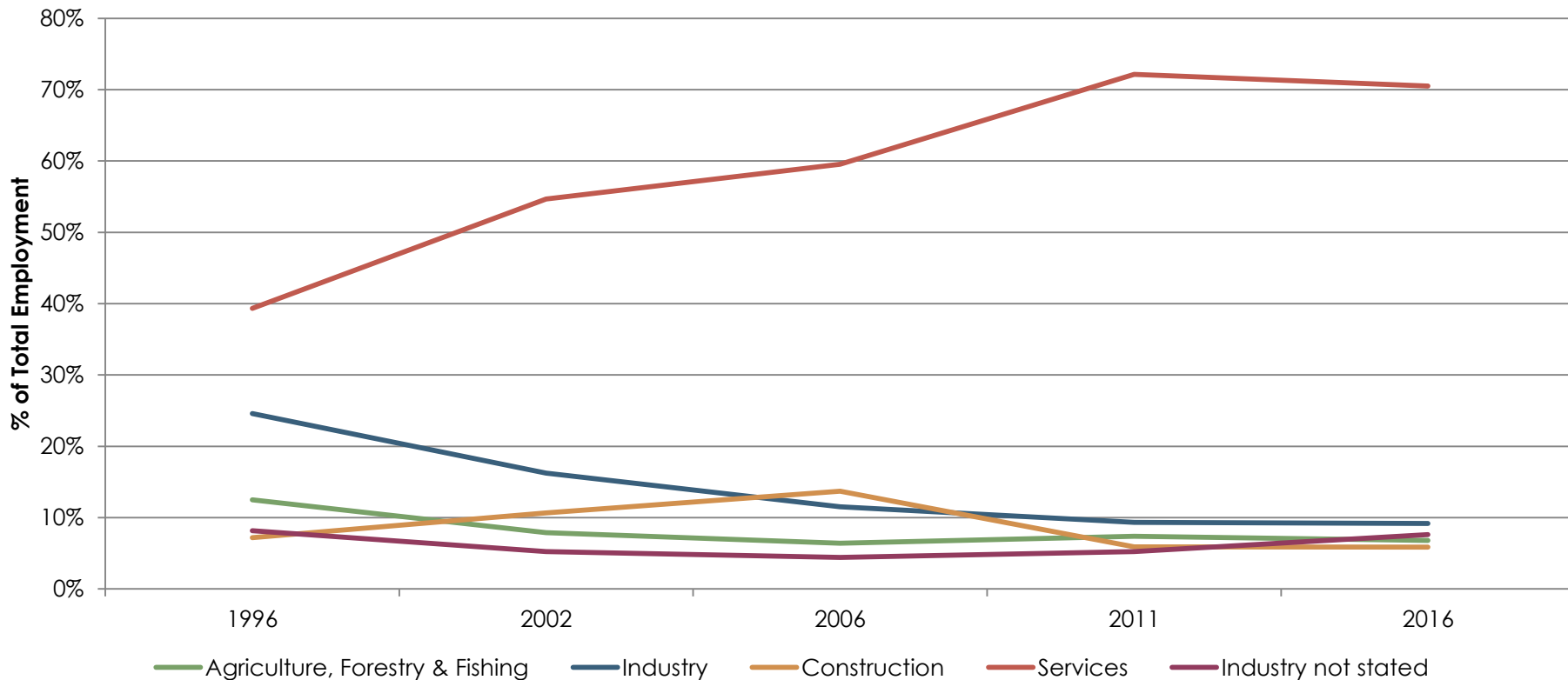


Population of county Donegal aged 15 years and over by principal and labour force status, 2016

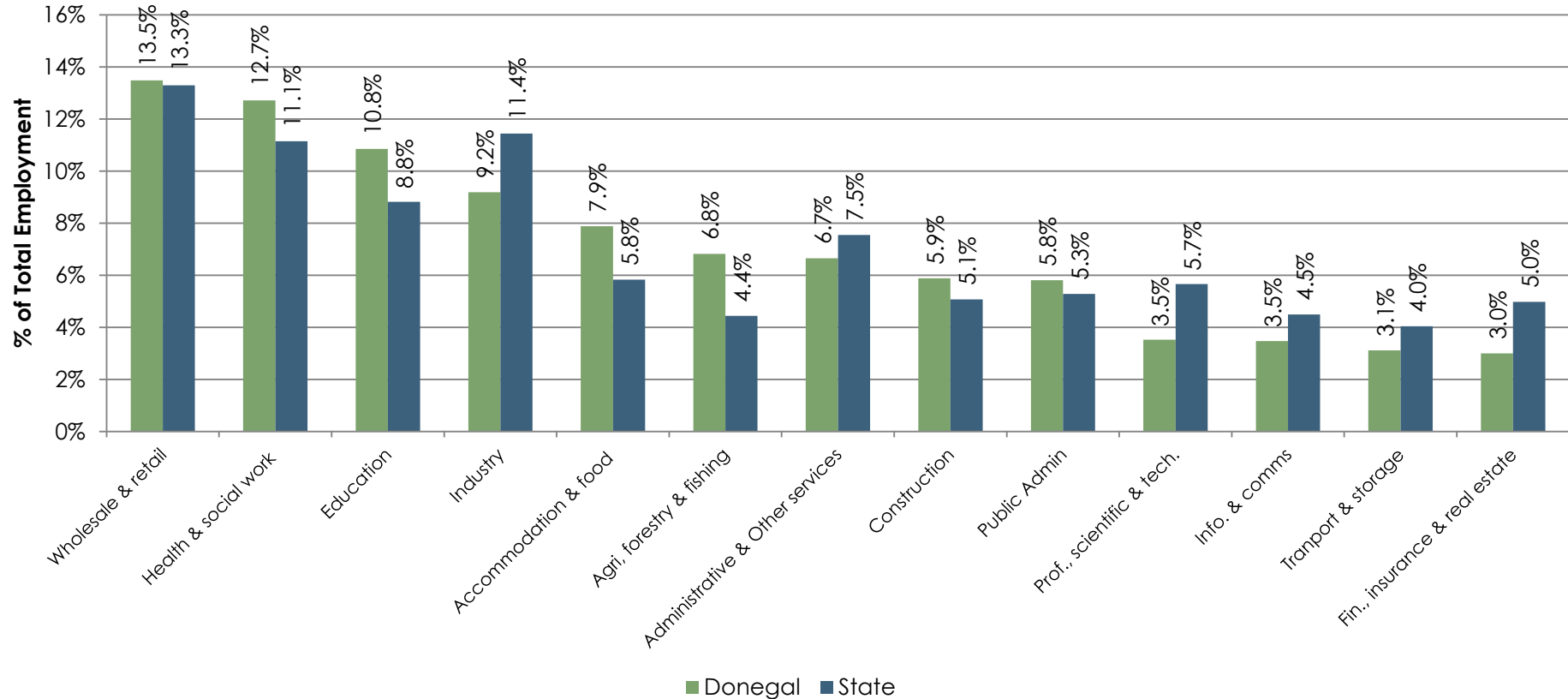


Source: CSO, Census 2016 Summary Results – Part 2, Table EZ011. Analysis by Western Development Commission (WDC)

Percentage of employment in county Donegal by broad economic category, 1996-2016



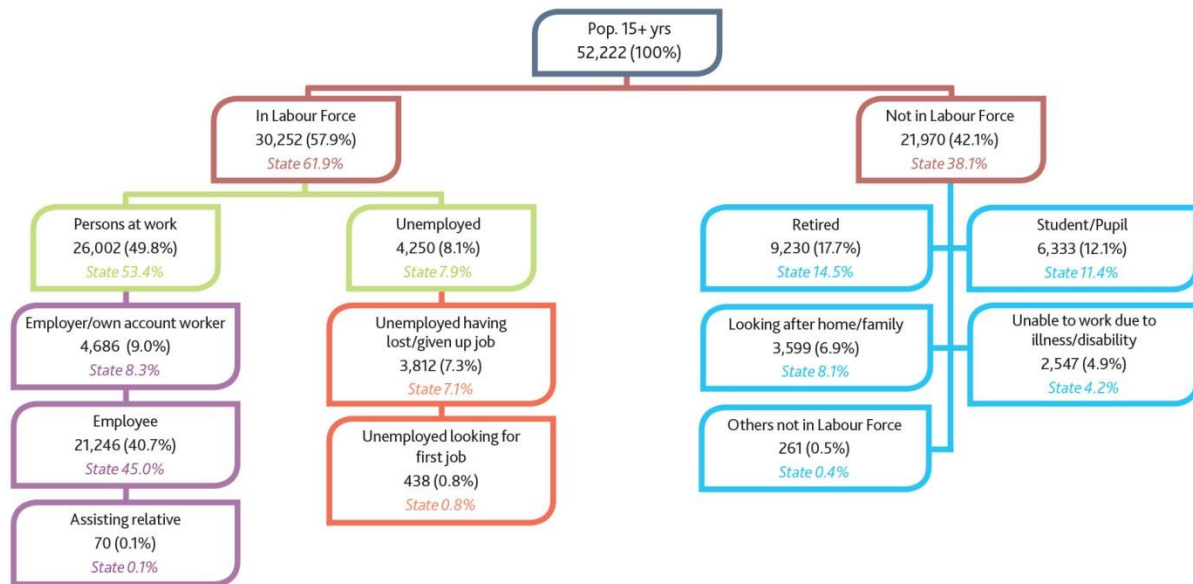
Percentage of total employment by NACE Rev 2 sector in Donegal & State, 2016



Donegal's sectoral employment profile

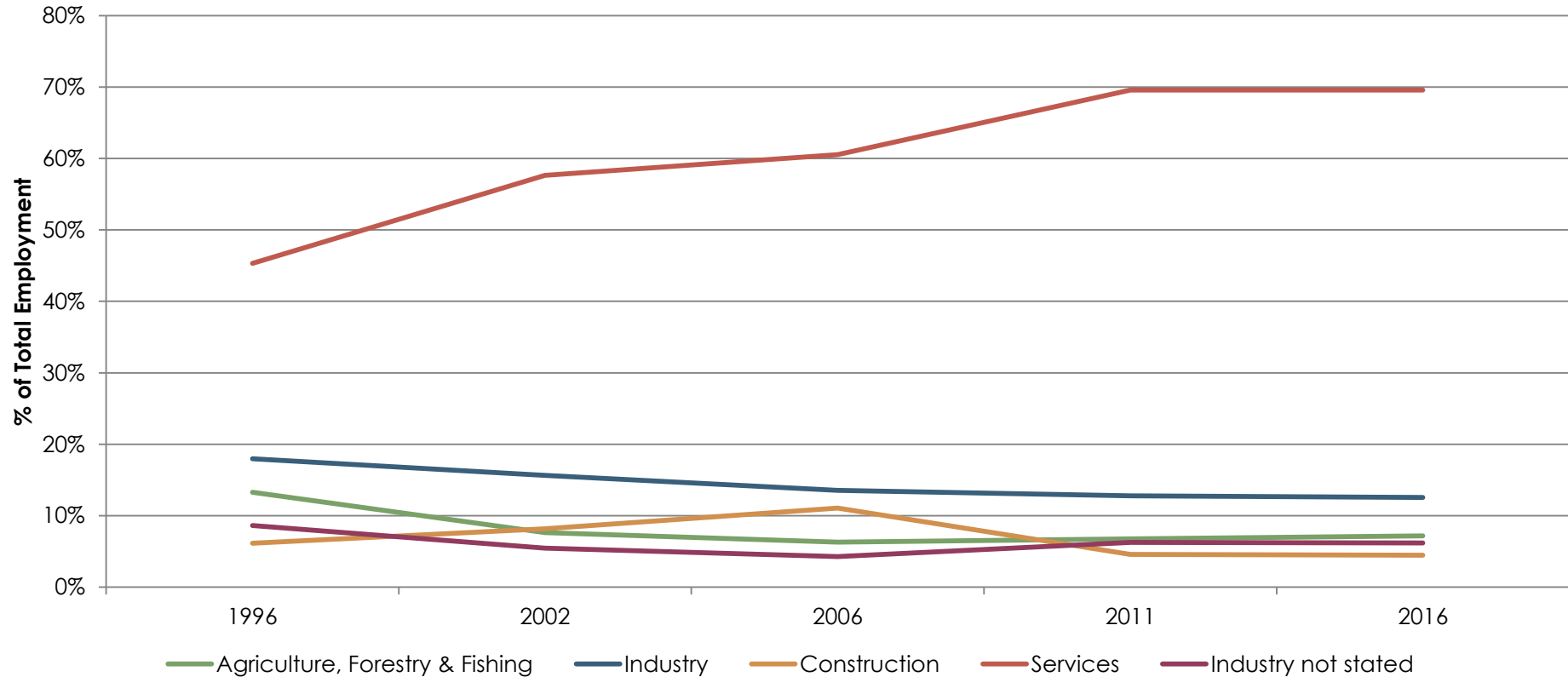
- Donegal's economy dramatically restructured
- 2nd highest share (after Galway City) in WR working in Services
 - Highest share in Education in State
 - 3rd highest share in Accommodation & Food service in State
 - Information & Communications had strongest jobs growth +39% (2011-2016)
 - Financial services had 9% decline, closure of bank & insurance branches
- Industry's share of jobs fell from 1 in 4 (1996) to less than 1 in 10 (2016)
 - 4th lowest share in Industry in Ireland
 - Agri-food (inc. seafood processing) largest industrial activity
 - Highest share in Clothing & Textiles in Ireland
- Smallest decline in WR in share working in Agriculture, Forestry & Fishing, partly due to Fishing & Aquaculture

Population of county Sligo aged 15 years and over by principal and labour force status, 2016

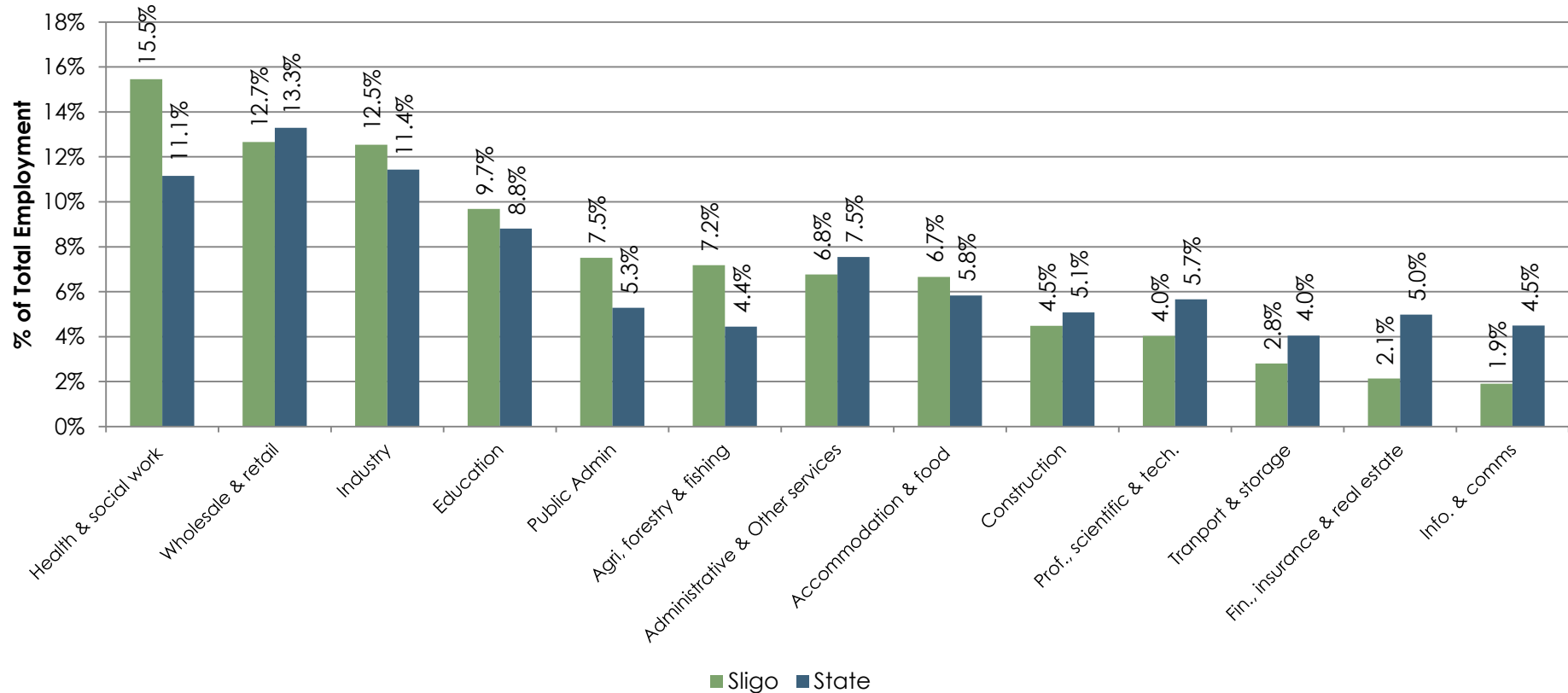


Source: CSO, Census 2016 Summary Results – Part 2. Table EZ011. Analysis by Western Development Commission (WDC)

Percentage of employment in county Sligo by broad economic category, 1996-2016



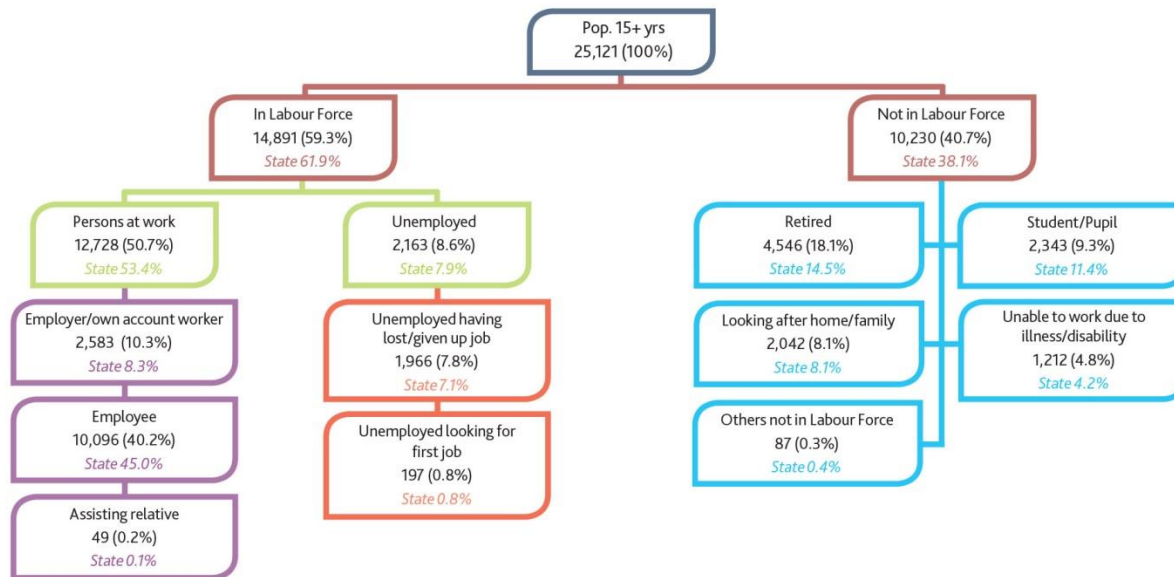
Percentage of total employment by NACE Rev 2 sector in Sligo & State, 2016



Sligo's sectoral employment profile

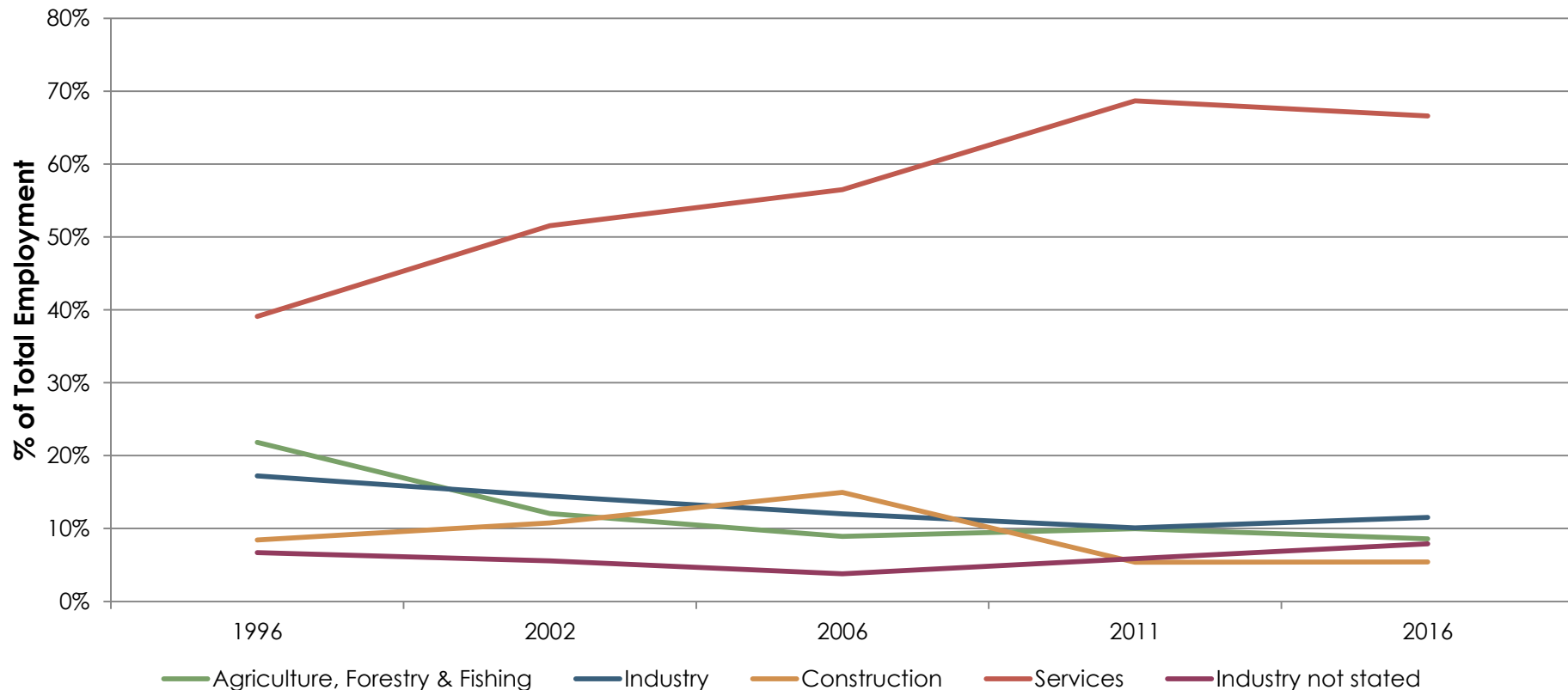
- Total employment grew 2.2% (2011-2016), lowest in Ireland
- 3rd highest share (after Galway City & Donegal) in WR in Services
 - Highest share in Health & Care in State
 - Information & Communications and Professional services both grew, but well below State average
 - Financial services experienced largest jobs decline -14.1% (-1.3% nationally)
- Industry's share declined steadily
 - 2nd highest share (% of Industry jobs) in Chemicals & Pharma & 3rd highest share in MedTech in State
 - Only western county (with Clare) where Industry's share declined 2011-2016
- Construction declined 0.3% (2011-2016) compared with 16.6% national growth

Population of county Leitrim aged 15 years and over by principal and labour force status, 2016

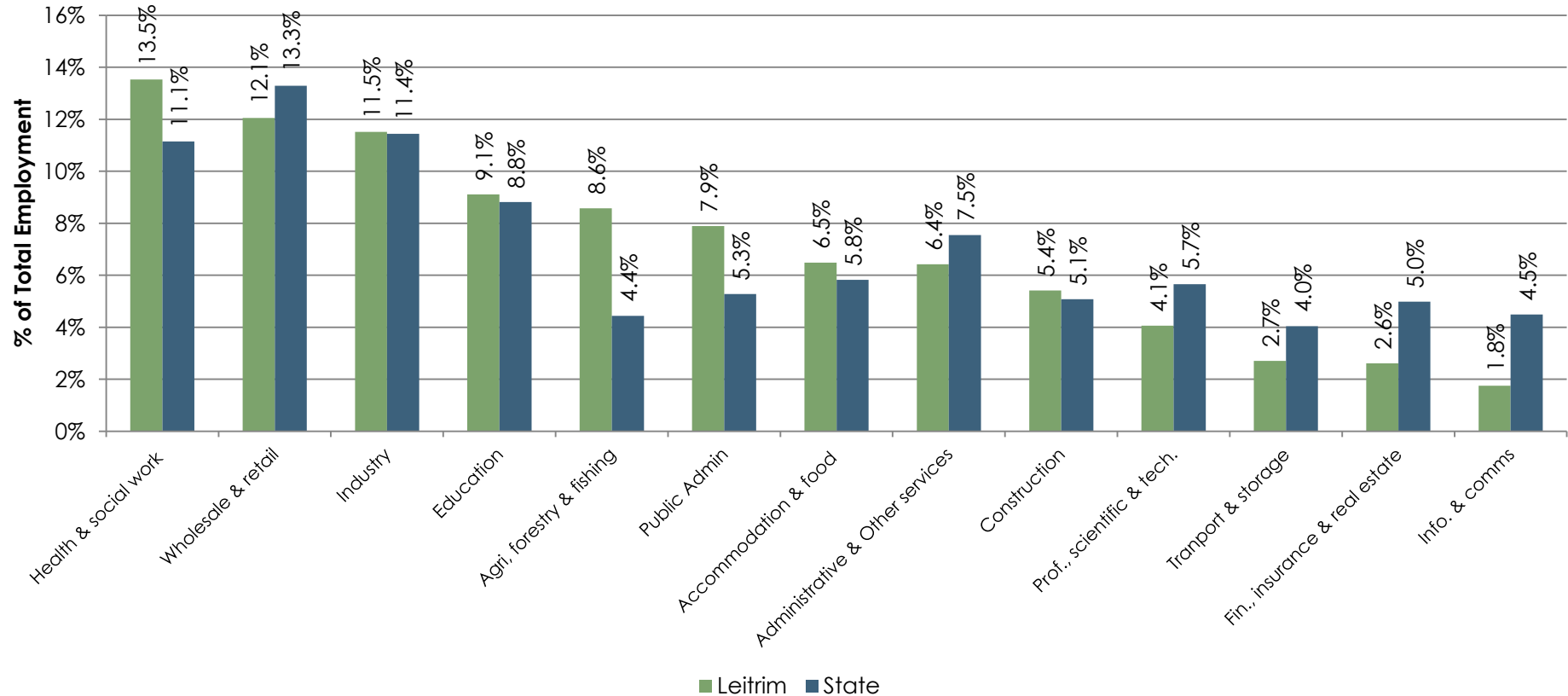


Source: CSO, Census 2016 Summary Results – Part 2. Table EZ011. Analysis by Western Development Commission (WDC)

Percentage of employment in county Leitrim by broad economic category, 1996-2016



Percentage of total employment by NACE Rev 2 sector in Leitrim & State, 2016



Leitrim's sectoral employment profile

- Services' share grew steadily but dropped 2011-2016
 - 2nd highest share in Health & Care in State
 - 2nd highest share in Public Administration & Defence in State
 - Administrative & Other Services (inc. call centres) had largest jobs decline (-12.1%)
 - Information & Communications and Professional services grew (2011-2016) but well below State average
- Industry had strongest jobs growth (2011-2016) +21.1%, over double the national avg. (9.4%)
 - MedTech and Chemicals & Pharma account for 1/3 of Industry jobs
- Agriculture's share of employment in Leitrim double national average, contributing to higher self-employment

- **Public sector** more significant for employment in WR esp. in North West & for women: main focus must be provision of quality services, but public sector's role as a source of jobs must also be considered in policy decisions
- National policy more focused on international services but needs of the **manufacturing** sector e.g. freight, energy, access, skills, continue to be very important for WR
 - Strong LifeSciences cluster in region – convergence with other sectors, dissemination of skills
 - Diversification & resilience – advanced engineering, emerging areas e.g. energy, transport
- **Tourism / Hospitality** more important, esp. for women & in areas with fewer options
 - Smaller scale operations & falling self-employment – risk losing 'uniqueness', important role in town centre renewal (esp. small towns) as their retail role declines
 - Exposure to Brexit – Britain largest source of overseas tourism revenue for Roscommon, Leitrim, Donegal & Mayo
- Opportunity to grow **Knowledge Intensive Services**
 - Remote work/ Quality of life – need for high quality broadband, digital hubs
 - Self-employment – contract employment, digital services with flexible location
 - International services MNCs – lower costs than Dublin (for company & staff), staff loyalty

- CSO, Census 2016: *Summary Results Part 2, Table EZ011*
- CSO, Census 2006: *Volume 7 - Principal Economic Status and Industries, Table Co713*
- CSO, Census 2002: *Volume 5 - Principal Economic Status and Industries, Table Bo513*
- CSO, Census 1996: *Volume 5 - Principal Economic Status and Industries, Table Ao513*
- Department of Business, Enterprise & Innovation: *Annual Employment Survey 2017, special run*

Thank You

All publications at www.wdc.ie/publications/

paulinewhite@wdc.ie

 @WDCInsights

 <https://wdcinsights.wordpress.com/>

 www.wdc.ie

