Trends in the Irish Labour market –

Special Focus: The impact of the coronavirus (so far)

NERI Report Series, No.9

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Introduction

This report provides a time-series analysis of labour market trends in the Republic of Ireland tracking a selection of indicators related to employment. At the time of writing the government is gradually opening up after 16 months of restrictions related to the global covid pandemic. As such, it may still be six months until the 'dust settles' and a further six months until we can see the full-impact of lockdowns on the labour market.

In last year's NERI labour market report the analysis described the labour market as it existed directly before the first lockdown and provided evidence that in many important respects, conditions were yet to recover from the impact of the financial crisis of 2008, especially for young people. For instance, both the employment rate and participation rate had quite a way to go to return to pre-crisis levels, particularly for younger age groups. The data also showed that almost every indicator of precarious work available showed elevated levels of precarity for younger workers relative to labour market conditions before the financial crisis. This includes part-time work, underemployment, temporary contracts and more. Labour Force Survey (LFS) data also showed over qualification rates to be a persistent issue in Ireland relative to other high-income EU countries, with little improvement in ten years. The data showed little improvement in the occupational profile for the population under 35 since 2012 (the share of employment in occupations requiring tertiary education remained steady, for instance) and particularly strong growth in employment in the *Accommodation and Food* sector (the most precarious NACE sector with the lowest average earnings) in more recent years. The analysis also showed significant inequality in earnings growth since 2010, with the occupations associated with the highest wages and training driving average wage increases for the economy as a whole as wages for much of the bottom half of workers stagnated.

The year 2020 is clearly an outlier in terms of the impact on labour markets. There is no comparable year for analysis. Large parts of the labour market and economy have been shut down entirely by decree and many firms have not been operating at 100 percent. There are a number of complicating factors to be considered when assessing the longer-term implications of the coronavirus on the Irish labour market; the churn between lockdown and opening up; unequal ability to work from home in some sectors and occupations relative to others; earnings supports and subsidies for employees to employers hoping to open up again but not sure at what capacity; and future consumer demand (for example in Hospitality due to restrictions of international travel). This leaves many of the headline indicators difficult to interpret or less relevant in a time-series analysis, given the context. Given these factors, the report will look at the most recent quarterly data rather than annual (which has been the focus in previous NERI labour market reports), where available, with specific reference to the final quarter of 2019 (the last 'normal' quarter) and each quarter of 2020.

The evidence suggests that young people, especially young women, those with lower levels of education, those working in occupations with relatively low skills requirements and those working in sectors shutdown by decree (*Accommodation and Food*, *Wholesale/ Retail* & *Construction*) have been most likely to be negatively impacted by covid. However, there is evidence to suggest that over the medium-term other, more high-paying sectors such as *Information and Communications*, *Professional, Scientific and Technical* and *Financial, Insurance and Real Estate activities* may well be of concern to policymakers with a substantial proportion of those on supports from these sectors not expecting to return to their employment.

Labour market data is drawn from the Labour Force Survey (LFS) provided by the Central Statistics Office. The Central Statistics Office have also produced data and special reports over the past year for a deeper understanding of the impact of the coronavirus on the economy and the report will refer specifically to any labour market relevant material.

Headline indicators

This section examines participation, employment and unemployment with a special focus on the year 2020. It is important to remember at this point, that any individual on the special Pandemic Unemployment Payment (PUP) is assigned as employed in these figures as are any individuals currently on wage subsidy schemes introduced during covid (EWSS/TWSS). I will return to examine the figures on supports in later sections.

The labour force grew by 36.5 per cent in the two decades up to the end of 2019 and fell by 1.1 percent by the end of the following year

Tables 1 and 2 show the absolute number of the Irish labour force and the rate of participation by age group since 2002. This includes those in employment and those seeking employment relative to the working age population. The labour force grew by 36.5 per cent in the two decades up to the end of 2019 and fell by 1.1 percent by the end of the following year. During this time the impact from the financial crisis and subsequent recovery in employment impacted some groups over others. The absolute number in the labour force fell significantly between 2008 and 2012 but by 2019 participation numbers for 15-19 and 20-24 year old groups had still a distance to go to recover while older groups had even increased participation relative to the Celtic Tiger era. The impact of the coronavirus in 2020 on the labour force impacted younger groups more with a decrease of 21.1 percent for 15-19 year olds and 5.9 percent for 20-24 year olds. The numbers of some of the older cohorts in the labour force actually increase in 2020 (3.2 percent for the 55-59 year old group and 4.1 percent for the over 65's).

Similar trends were reflected in participation rates. The national participation rate grew moderately on an annual basis in 2019 for the first time since 2012 (62.2 to 62.7 per cent) and was 1.4 percentage points lower at the end of 2020. At 61.3 percent this was almost identical to the figure at the end of 2012 and approximately 5 points lower than in 2007 (66.2 percent). The impact of forced shutdown is evident in the trends over the year with the ebb in the second quarter of 2020 at 58.9 percent. The participation rate for 15-19 year olds increased by less than half a point in 7 years of strong growth (23.8 to 24.2 percent) while the rate fell for the 20-24 year old cohort (73.3 percent to 70.5 percent). Rates for both groups fell again in 2020 by about 5 points each (24.2 to 19.1 and 70.5 to 65.5 percent respectively, though the participation rates in the quarters which were relatively 'opened up' show a slightly more positive picture. Still, participation rates for these two groups are much lower than their peaks in 2007 (43.1 and 86.8 percent respectively). Third level students with part-time jobs are included as participating in the labour market.

Table 1 Labour Force (000)

	2002Q4	2007Q4	2012Q4	2016Q4	2019Q4	2020Q1	2020Q2	2020Q3	2020Q4	2019Q4-20Q4 Δ
15+	1947.6	2347.6	2213	2331.1	2471.7	2467.9	2341.2	2469.8	2445.1	-1.1%
Male	1132.4	1333.3	1211.9	1266.7	1335.3	1334.4	1270.9	1335.4	1322.3	-1.0%
Female	815.2	1014.3	1001.1	1064.4	1136.4	1133.5	1070.3	1134.4	1122.7	-1.2%
Age group										
15 - 19	127.9	126.7	67.4	77.1	78.1	78.1	59.4	80.3	61.6	-21.1%
20 - 24	271.9	323.8	206.7	210.1	213.9	210.9	187.5	222.4	201.2	-5.9%
25 - 34	527.4	657	601	542.9	522.5	523.9	491.2	506.9	510.9	-2.2%
35 - 44	453.9	531.2	569.3	627.3	659.3	653.2	630.7	656.4	653.4	-0.9%
45 - 54	352.4	425.9	455.2	495.3	549.3	554.4	536.9	553.3	558.5	1.7%
55 - 59	117.5	144.2	163.9	189	210.8	209.5	207.8	215	217.6	3.2%
60 - 64	62	91.9	98	121.8	144.6	146.2	141.2	143.2	144.8	0.1%
65 +	34.6	46.9	51.5	67.6	93.2	91.6	86.5	92.4	97	4.1%
Source: CSO (2020a) Labour Force Survey -Table QLF 18										

Table 2 ILO Participation Rate (15 years and over) (%)

	2002Q4	2007Q4	2012Q4	2016Q4	2019Q4	2020Q1	2020Q2	2020Q3	2020Q4
15+	62.3	66.2	61.2	61.9	62.7	62.3	58.9	62	61.3
Male	73.5	75.8	68.3	68.6	69	68.7	65.1	68.2	67.5
Female	51.4	56.8	54.4	55.5	56.6	56.2	52.9	56	55.3
Age group									
15 - 19	41.6	43.1	23.8	25.2	24.2	24.1	18.3	24.8	19.1
20 - 24	81.8	86.8	73.3	76.2	70.5	69	61	72.3	65.5
25 - 34	83.9	85.1	83	83.6	84.8	85.2	79.7	82.4	83.4
35 - 44	79.4	81	80.9	83.4	84.9	84	80.8	84.1	83.9
45 - 54	72.5	78.5	77.2	78.7	82.2	82.5	79.6	81.6	82
55 - 59	57.7	62.4	65.6	69.7	72.9	71.9	71	73.2	73.8
60 - 64	39.1	46.8	44.3	50.9	56.4	56.8	54.5	54.9	55.2
65+	7.9	9.8	9.2	10.6	13.1	12.8	12	12.7	13.3
Source: CSO (2020a) Labour Force Survey -Table QLF 18									

Both participation numbers and participation rates remained relatively steady for the 25-34 year old group all the way through the great recession and the recovery with a drop in the second quarter of 2020 to 79.7 percent, almost recovered by the end of the year (83.4 percent). Participation rates were relatively unaffected for older groups though the 55-59 year old group saw a slight increase in 2020 (72.9 to 73.8 percent).

Ireland does not compare favourably to top European performers in this indicator, driven by low levels of female participation (McDonnell & Nugent 2018).

Tables 3 and 4 show the absolute numbers in employment in the Irish economy as well as the employment rate (the share of the working age population in employment). The number in employment at the end of 2019 (2.3 million) was 37.0 per cent higher than at the turn of the century (1.7 million). Employment was 2.3 percent lower at the end of 2020 compared to a year earlier though this actually represented a strong recovery from the initial shock to employment with shutdown in the second quarter. The employment rate was close to full recovery from the effects of the crash in 2008 by 2019 (70.2 compared to 71.3 in 2007), falling to 65.7 percent in the second quarter and rebounding to 67.8 percent by years end (2.4 points down on the final quarter of 2019).

However, the headline figure again conceals trends for different groups. The number and share of 15-19 year olds in employment at the end of 2019 was about half what it was in 1999. Absolute numbers in employment fell by 25.6 percent in 2020 for this group with some recovery in the relatively open months in quarter 3. The employment rate fell by over 5 percentage points (20.7 to 15.4, having dropped to 13.7 percent in Q3).

Table 3 Employment (000)

	2002 Q4	2007 Q4	2012 Q4	2016 Q4	2019 Q4	2020 Q1	2020 Q2	2020 Q3	2020 Q4	2019Q4-20Q4 (Δ)
15+	1850.3	2232.9	1893.6	2163.5	2361.2	2353.5	2222.5	2295.2	2306.2	-2.3%
Male	1075.2	1264.4	1011.6	1171.1	1273.1	1270.6	1206.1	1246.3	1245.2	-2.2%
Female	775.1	968.5	881.9	992.4	1088	1082.8	1016.3	1048.8	1061	-2.5%
Age group										
15 - 19	112.1	111.7	44.4	62.2	66.8	64.7	44.4	58.7	49.7	-25.6%
20 - 24	252.5	299.9	153.1	182.4	197.3	193.9	161.4	183.5	176.9	-10.3%
25 - 34	501.7	622.8	511.9	503.2	498.2	500.1	462.4	464.8	473.7	-4.9%
35 - 44	436.9	510.4	497.5	589.4	634.2	624.7	612.8	628.4	627.2	-1.1%
45 - 54	338.3	410.8	401.7	468.4	528.1	536.9	518.7	528.1	537.2	1.7%
55 - 59	113.5	140.5	145.2	176.7	204.9	202.3	199.7	205.3	209	2.0%
60 - 64	60.7	90	89	114.3	139.5	141.1	137.5	135.9	136.8	-1.9%
65+	34.5	46.8	50.8	66.9	92.2	89.7	85.6	90.5	95.7	3.8%
Source: CSO (2020a) Labour Force Survey -Table QLF 18										

Table 4 ILO Employment Rate (15- 64) (%)

	2002Q4	2007Q4	2012Q4	2016Q4	2019Q4	2020Q1	2020Q2	2020Q3	2020Q4
15 - 64	67.6	71.3	60.3	67.1	70.2	69.8	65.7	67.7	67.8
Male	77.7	79.6	64.2	72.7	75.6	75.4	71.1	73.3	72.9
Female	57.3	62.9	56.5	61.7	64.8	64.4	60.4	62.1	62.8
Age group									
15 - 19	36.5	38	15.7	20.3	20.7	20	13.7	18.2	15.4
20 - 24	76	80.4	54.3	66.2	65	63.4	52.5	59.7	57.6
25 - 34	79.8	80.7	70.7	77.5	80.8	81.3	75	75.6	77.3
35 - 44	76.4	77.9	70.7	78.4	81.6	80.4	78.5	80.5	80.5
45 - 54	69.6	75.8	68.2	74.4	79	79.9	76.9	77.9	78.8
55 - 59	55.8	60.8	58.2	65.2	70.8	69.4	68.2	69.9	70.9
60 - 64	38.4	45.8	40.2	47.8	54.4	54.8	53.1	52.1	52.1
Source: CSO (2020a) Labour Force Survey -Table QLF 18									

Although the number employed fell by less for the next group (20-24) over 2020 (10.3 percent), the employment rate fell by more and from a higher base (from 65.0 to 57.6 percent). This compares to 80.4 per cent in 2007. Approximately two in five 15-19 year olds were employed in the decade preceding the financial crisis compared to just 1 in 5 in 2019 and less than 1 in 6 at the end of 2020. Although the share of these groups in full-time education has risen in that time, this shows a much lower share of students with part-time jobs than during the Celtic Tiger. In 2007, 32.3 percent of students (15-25) were in employment compared to 18.6 in 2018.

Dropping by over ten points during the recession, the employment rate for 25-34 year olds gradually caught back up to 2007 levels between 2012 and 2019, though still slightly behind 2005. Numbers employed in this age group fell by 4.9 percent over 2020. This figure only recovered slightly from the initial shock in the second quarter in 2020 by the end of the year however (about a quarter of the number lost). The employment rate was down by just over 3 points over the year to the final quarter of 2020 from 80.8 to 77.3 percent. Other than the group approaching retirement (60-64 percent), numbers employed in the older age groups (45+) increased slightly in 2020 while employment rates remained relatively steady.

Tables 5 through 7 show details on unemployment in Ireland over an 18-year timeframe. The number of unemployed was 25.6 percent higher at the end of 2020 than a year previous (27.5 percent for females and 24.1 for males). There was a significant improvement in the last quarter however. Over two-thirds of the increase in unemployment occurred for groups under 35. The 25-34 year old group saw an increase of 53.1 percent for instance (not including *PUP* recipients). Just under a quarter of all new unemployment cases in 2020 were women under 35.

Dropping by over ten points during the recession, the employment rate for 25-34 year olds gradually caught back up to 2007 levels between 2012 and 2019, though still slightly behind 2005

Table 5 Unemployment (000)

	2002 Q4	2007 Q4	2012 Q4	2016 Q4	2019 Q4	2020 Q1	2020 Q2	2020 Q3	2020 Q4	2019Q4-20Q4 (Δ)
15+	97.2	114.7	319.5	167.6	110.6	114.4	118.7	174.7	138.9	25.6%
Male	57.2	69	200.3	95.6	62.2	63.7	64.8	89.1	77.2	24.1%
Female	40.1	45.7	119.2	72	48.4	50.7	54	85.6	61.7	27.5%
Age group										
15 - 19	15.9	15.1	23	14.8	11.4	13.3	14.9	21.6	11.9	4.4%
20 - 24	19.4	23.9	53.6	27.7	16.7	17	26.1	38.8	24.3	45.5%
25 - 34	25.7	34.1	89.2	39.8	24.3	23.8	28.8	42.1	37.2	53.1%
35 - 44	17	20.8	71.8	37.9	25.1	28.5	17.9	28	26.2	4.4%
45 - 54	14	15.1	53.5	26.8	21.1	17.5	18.2	25.2	21.3	0.9%
55 - 59	4	3.7	18.7	12.3	5.9	7.3	8.1	9.7	8.6	45.8%
60 - 64	1.3	1.9	9	7.5	5.1	5.1		7.3	7.9	54.9%

Source: CSO (2020a) Labour Force Survey -Table QLF 18

Table 5a Unemployment (000's)

	2007Q4	2012Q4	2016Q4	2019Q4	2020Q1	2020Q2	2020Q3	2020Q4
15 - 24 years								
Male	23.9	49.2	25.9	16	18.5	18.3	32	17.7
Female	15	27.4	16.6	12	11.8	22.8	28.5	18.5

The difference in the official unemployment rate (again, not including those on *PUP*) was just 1.2 percentage points lower at the end of 2020 compared to a year earlier with a clear improvement in the final quarter in line with opening up sectors which had been closed by decree. Once more the headline rate masks bigger differences among age groups, with unemployment rates up increasing more for the under 35's.

The official estimate for long-term unemployment actually came down in 2020, though this is likely to increase sharply in the coming months once it becomes clear how many *PUP* recipients' jobs are permanently gone and as they enter the official live register.

Table 6 ILO Unemployment Rate (15- 74) (%)

	2002Q4	2007Q4	2012Q4	2016Q4	2019Q4	2020Q1	2020Q2	2020Q3	2020Q4
(15 - 74 years)	5	4.9	14.5	7.2	4.5	4.7	5.1	7.1	5.7
Male	5.1	5.2	16.6	7.6	4.7	4.8	5.1	6.7	5.9
Female	4.9	4.5	11.9	6.8	4.3	4.5	5.1	7.6	5.5
Age group									
15 - 19	12.4	11.9	34.2	19.3	14.5	17.1	25.2	26.9	19.4
20 - 24	7.1	7.4	25.9	13.2	7.8	8.1	13.9	17.5	12.1
25 - 34	4.9	5.2	14.8	7.3	4.7	4.5	5.9	8.3	7.3
35 - 44	3.7	3.9	12.6	6	3.8	4.4	2.8	4.3	4
45 - 54	4	3.5	11.8	5.4	3.8	3.2	3.4	4.6	3.8
55 - 59	3.4	2.5	11.4	6.5	2.8	3.5	3.9	4.5	4
60 - 64	2	2.1	9.1	6.1	3.5	3.5	2.6	5.1	5.5
65 +	0.3	0.3	1.6	1.3	1.2	2.4	1.4	2.4	1.7
Source: CSO (2020a) Labour Force Survey -Table QLF 18									

Table 7 Long term unemployment (15+) (%)

	2002Q4	2007Q4	2012Q4	2016Q4	2019Q4	2020Q1	2020Q2	2020Q3	2020Q4
000's	30.8	33.2	184.7	85.4	38.7	31.9	25.7	34.6	36.8
Rate (%)	1.6	1.4	8.4	3.7	1.6	1.3	1.1	1.4	1.5
Source: CSO (2020a) Labour Force Survey -Table QLF 31									

Table 8 presents more detail on the Irish adult population by economic status and the impact of covid on these different groups. There were almost 60,000 fewer part-time staff in employment at the end of 2020, down 11.8 percent. Within the part-time group, the underemployed (part-time workers who would prefer a full-time job) were less affected than those who worked part-time voluntarily. The number of unemployed seeking full-time work increased by over 20,000 or 28.7 percent and the potential additional labour force increased by approximately 63,000 or 64.6 percent.

Table 8 Economic Status (15+) (000's)

	2002 Q4	2007 Q4	2012 Q4	2016 Q4	2019 Q4	2020 Q1	2020 Q2	2020 Q3	2020 Q4	2019Q4-20Q4 (Δ)
All ILO economic status	3127.7	3543.7	3613.7	3764	3942.8	3958.4	3973.8	3984.1	3991.6	1.2%
In labour force	1947.6	2347.6	2213	2331.1	2471.7	2467.9	2341.2	2469.8	2445.1	-1.1%
In employment	1850.3	2232.9	1893.6	2163.5	2361.2	2353.5	2222.5	2295.2	2306.2	-2.3%
In employment full-time	1528.3	1817.6	1428.7	1694.7	1868.3	1871.7	1818.3	1853.6	1871.2	0.2%
In employment part-time	322	415.3	464.9	468.9	492.9	481.8	404.2	441.6	434.9	-11.8%
In employment part-time - not underemployed			316.2	372.6	384.5	370	296.8	323.9	333.5	-13.3%
In employment part-time - underemployed			148.6	96.3	108.4	111.8	107.4	117.7	101.4	-6.5%
Unemployed	97.2	114.7	319.5	167.6	110.6	114.4	118.7	174.7	138.9	25.6%
Unemployed seeking full-time work/future job-starter	76.5	92.9	271.8	139.7	84.1	87.1	92.8	135.4	108.2	28.7%
Unemployed seeking part-time work	17.7	19.2	36.7	22.8	24.2	24.3	23.1	32.9	26.4	9.1%
Not in labour force	1180.1	1196.1	1400.7	1432.9	1471	1490.5	1632.6	1514.3	1546.6	5.1%
Potential additional labour force	19.9	18.2	56.8	32.5	98.7	108.1	273.5	161.3	162.5	64.6%

Table 9 shows estimates for four indicators of the potential additional labour force. The PLS1 indicator includes unemployed persons plus discouraged workers as a percentage of the Labour Force. PLS2 includes all individuals in Potential Additional Labour Force (PALF) (persons seeking work but not immediately available and persons available to work but not seeking). PLS3 includes those in PLS1 and PLS2 as well as those outside the labour force but not in education or training, while PLS4 includes all three previous categories plus part-time underemployed workers. The rates for PLS3 and PLS4 had already been increasing in the years approaching the pandemic. The estimates for each category all increased over the year and again, do not include PUP or EWSS recipients.

Table 9 Potential Additional Labour Force

	2002Q4	2007Q4	2012Q4	2016Q4	2019Q4	2020Q1	2020Q2	2020Q3	2020Q4
PLS1 (15 - 74)	5.2	5	15.5	7.6	5	5.2	6.7	8.3	6.8
PLS2 (15 - 74)	6	5.6	16.6	8.5	8.2	8.7	15.1	12.8	11.6
PLS3 (15 - 74)	8.4	7.4	18.6	9.7	12	12.6	19.1	16.5	14.9
PLS4 (15 - 74)			25	13.7	16	16.7	23	20.8	18.6

As mentioned, young women seem to have been impacted particularly disproportionately by the employment crisis having already experienced a large increase in material deprivation in 2019. The CSO have provided further detail specifically in relation to married women and by broad age cohort. NERI research has consistently highlighted the low rates of participation of women in the Irish labour market relative to high-income EU countries and have argued that the cost of childcare is one of the main barriers to the participation of women. With many sectors, such as education experiencing forced lockdown over the year, childcare came in to focus as some sectors reopened while schools remained closed.

The data suggests that married females between 25 and 34 have been particularly affected by the pandemic. The absolute number of married women aged 25-34 participating in the Irish labour market (employed or seeking employment) fell by over 10,000 or 16.2 percent (Table 10), representing a 4.2 percentage point drop in the participation rate to 69.5 percent (Table 11). This compares to a 1.4-point drop across the board. The participation rate (again, not including PUP recipients) for young married women has not been as low since before the financial crisis. Employment numbers for the same group fell by 19.2 percent (Table 12).

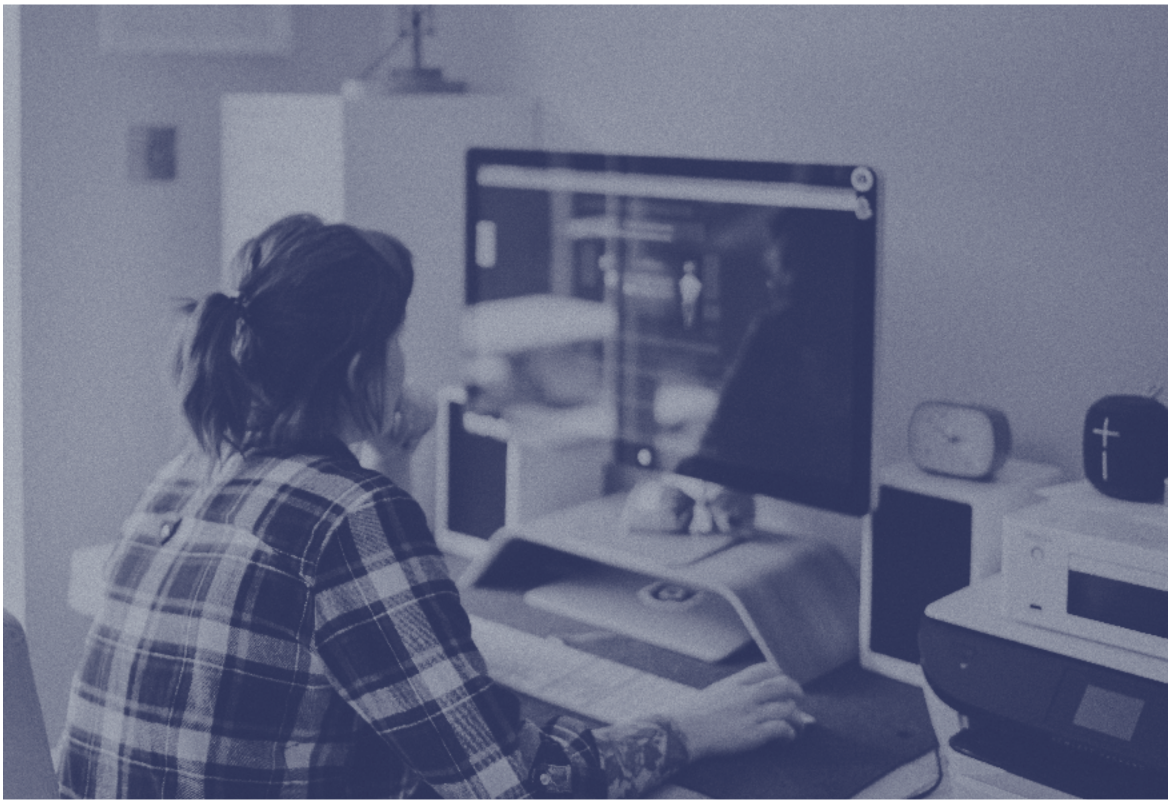


Table 10 Married females in Labour Force

	2002 Q4	2007 Q4	2012 Q4	2016 Q4	2019 Q4	2020 Q1	2020 Q2	2020 Q3	2020 Q4	2019Q4-20Q4 (Δ)
15 +	367.6	466.8	499.1	522.3	575.1	564.9	541.4	556.3	566.6	-1.5%
25 - 34	83.9	103.3	102.7	82.9	72.9	68.1	64.8	57.5	61.1	-16.2%
35 - 44	133.5	154.9	168.2	188.6	203.4	199.1	194.7	203.3	204.5	0.5%
45 - 54	102.6	133.2	140	147.1	170.3	175.4	162.9	171.3	174.1	2.2%
55 - 59	29.1	40.2	51.9	56.4	64.9	61.6	60.8	64.6	68.3	5.2%
60 - 64	11.8	23.3	26.7	32.7	41	40.8	40.9	39	42.2	2.9%
65 +	3.3	6.4	7.2	12.3	18.9	17	15.8	17.4	15.9	-15.9%

Table 11 Married females, Participation rates

	2002 Q4	2007 Q4	2012 Q4	2016 Q4	2019 Q4	2020 Q1	2020 Q2	2020 Q3	2020 Q4	2019Q4-20Q4 (Δ)
15 +	48.5	54.7	55.2	56.2	58.6	57.6	55.5	57	57.3	-1.3
25 - 34	64.9	71.7	76.1	75.4	73.7	72.2	68.8	65.8	69.5	-4.2
35 - 44	62.8	67	70.9	75.3	77.5	75.7	74.5	76.4	76.4	-1.1
45 - 54	55.1	66.4	66.5	67.6	74.8	76.1	71.7	74.8	74.7	-0.1
55 - 59	38	46.8	57.1	59.7	64.2	63	62.8	65.4	66.4	2.2
60 - 64	21.3	32.7	34.7	39.8	45.6	45.8	46.1	44	46.2	0.6
65+	3.6	5.7	4.8	7.2	9.6	8.4	7.8	8.6	7.8	-1.8

Table 12 Married females in Employment

	2002 Q4	2007 Q4	2012 Q4	2016 Q4	2019 Q4	2020 Q1	2020 Q2	2020 Q3	2020 Q4	2019Q4-20Q4 (Δ)
15 +	354.8	454.3	456.2	497.8	558.8	546.2	528.1	530.8	549.5	-1.7%
25 - 34	81	100.5	91.2	77.1	69.9	65.7	62.1	51.9	56.5	-19.2%
35 - 44	129.4	150.2	153.8	179.4	197.3	192	190.8	195.8	199.1	0.9%
45 - 54	98.4	129.6	129.3	141.9	165.7	169.1	158.4	164.2	170.2	2.7%
55 - 59	28.3	39.6	47.8	53.8	63.8	60.3	59.7	62.4	66.8	4.7%
60 - 64	11.4	22.7	25.3	31.8	40	39.6	40.1	36.9	40.7	1.8%
65 +	3.3	6.4	7.2	12.2	18.7	16.7	15.5	17	15.6	-16.6%

Employment and socio-economic groups

Occupations

The CSO also provides details on the breakdown of employment by broad occupational group. The Standard Occupational Classification (SOCCODE 2010) classifies jobs according to the concept of 'skill level' and 'skill specialisation'. Skill level is defined with respect to the duration of training and/or work experience recognised in the field of employment as being generally required to perform the tasks related to do the job competently and efficiently. Skill specialisation is defined as the field of knowledge required for competent, thorough and efficient conduct of the tasks.

Elementary occupations are the sole category for skill level 1 (broadly requiring no more than junior cert level of education and typically involving the performance of simple and routine physical or manual tasks).[1] The fourth skill level relates to what are termed 'professional' occupations and high-level managerial positions in corporate enterprises or national/local government. Occupations at this level normally require at least a degree or equivalent period of relevant work experience.

The data show that employment numbers for different occupational groups have been impacted by the covid pandemic to different degrees. The numbers in some of the top tier jobs associated with the highest pay actually increased quite strongly over the year. *Managers, directors and senior officials* jobs increased by 5.7 percent and *Associate Professionals and Technicians* jobs by 5.6 percent, representing approximately 26,000 jobs between them. The share of *Professionals* also increased modestly by 0.5 percent (approximately 2,000 jobs). *Skilled trades* jobs which are most associated with the *Construction* sector and subject to covid related shutdown were down by 6.9 percent (22,000) as were *Process, Plant and machine operatives* by 7.7 percent or 14,000 jobs. Approximately seventy five percent of the net job loss over the year in 2020 are accounted for in the *Elementary occupations*. These are on average the lowest paid, most precarious jobs in the labour market, with approximately 40,000 fewer in employment in the final quarter of 2020 than a year before. The numbers did bounce back during the relatively 'open' quarter 3 (approximately 55 percent of the initial loss in Q2), however.

1 That is not to say that workers in these occupations are 'low-skilled'. Indeed, NERI research has highlighted high rates of overqualification among workers in the Irish labour market

Table 13 Employment by Occupation (SOCCODE)

	2007 Q4	2012 Q4	2016 Q4	2019 Q4	2020 Q1	2020 Q2	2020 Q3	2020 Q4	2019Q4-20Q4 (Δ)
Managers, directors and senior officials	156.8	160.4	191.5	189.3	189.1	181.5	189.3	200	5.7%
Professional occupations	376.8	390.4	426.6	495.7	509.4	517.1	487.6	498.2	0.5%
Associate professional and technical	228.3	230.3	271.2	274.8	272.6	282.5	289.3	290.2	5.6%
Administrative and secretarial	244	193.3	206.4	242.3	239.3	247.6	245.5	255.7	5.5%
Skilled trades occupations	410.2	257.6	299.8	317.5	315.1	286.8	302.9	295.7	-6.9%
Caring, leisure and other services	147.4	143.1	176.4	200.3	197	176.3	196.8	190.7	-4.8%
Sales and customer service occupations	179	157	171.8	193	186	164.3	179.5	186.4	-3.4%
Process, plant and machine operatives	179.6	145.7	164	185.4	186.2	167.9	171.9	171.1	-7.7%
Elementary occupations	307.2	213.4	246.2	253.9	252	192.8	227.3	212.3	-16.4%
All occupational groups	2232.9	1893.6	2163.5	2361.2	2353.5	2222.5	2295.2	2306.2	-2.3%
Source: CSO (2020a) Labour Force Survey -Table QLF 29									

Education

The LFS includes data on educational attainment using the International Standard Classification of Education (ISCED). It is well established that having a higher education was of benefit to individuals during the financial crisis and great recession in that the drop in employment numbers fell disproportionately on those with lower skills levels. In this section, we briefly examine the effect of the coronavirus on groups by education level.

Table 14 shows the share of the working age population at different levels of educational attainment. The share of Irish adults in the first four categories (primary, lower secondary, higher secondary and post-secondary) all fell by between half a point and a point (2.4 points between them) in the year up to Q4 2020. Though the number of working age adults increased by approximately 30,000 over the year, the number of adults with a highest education level of primary or below also fell by about 30,000, while the numbers in the next two categories (lower and higher secondary) also fell by about 20,000 each.

The share of the top two groups with the highest levels of educational attainment grew by the same amount over the year. This represents significant growth and likely represents an acceleration of recent trends due to lockdown. There were 57,000 more adults at the top education level at the end of 2020 over the year and 33,000 more with third level non-honours degrees. Fewer younger adults are leaving school before leaving cert and more are choosing university. In 2020, what few employment opportunities that would have been available for teenagers were likely even fewer and strong growth in the top category (already the largest cohort) not only reflects growth of numbers going to university straight out of school but also constrained options for many in an uncertain labour market due to covid. Many adults for instance who may be uncertain about their current employment or had plans for entering the labour market with a lower level of education or plans for travelling etc. may have decided that the best use of lockdown was to increase their education/skills level. Depending on the pace of recovery and future demand for skills this is potentially a positive development, though the NERI have highlighted the pre-existing issue of a high rate of over-qualification in the Irish labour market.

Table 14 Education All Persons aged 15 to 64 years

	2016Q4	2019Q4	share	2020Q1	2020Q2	2020Q3	2020Q4	Share
All levels of education	3123.3	3233.4		3242.2	3253.6	3258.6	3260.5	
Primary or below	187.6	204.7	6.3%	214.4	189.3	193.7	174.2	5.3%
Lower secondary	489.3	441.2	13.6%	421.8	441.8	427.3	422.4	13.0%
Higher secondary	744.4	795.6	24.6%	803.4	748.7	771.7	773.3	23.7%
Post-secondary non-tertiary	390.9	423.5	13.1%	424.3	425.2	416.6	412.3	12.6%
Third level non-honours degree	318.1	297.2	9.2%	305.3	329.7	346.1	330.3	10.1%
Third level honours degree or higher	888.1	985.6	30.5%	986.7	1054.3	1030.1	1043.7	32.0%
Source: CSO (2020a) Labour Force Survey -Table QLF 24								

Though we are still not sure as to what the short to medium term will bring in terms of employment for *PUP* and *EWSS* recipients (for now they are defined as employed) there does seem to be similar patterns emerging for groups impacted by lockdown and those impacted by the great recession. Employment numbers (as counted for now) for those in the top two most educated groups actually increased by 47,000 over the pandemic or 6.8 percent for *third level non-honours degree* and 3.6 percent for the category with the highest level of attainment, *third level honours degree or higher* while employment dropped overall by 2.6 percent (58,000). The biggest reduction in employment was for workers at the lowest level of educational attainment (*primary or below*) at 30 percent or 17,000 jobs, coinciding with the reduction in *Elementary professions*. Employment numbers for individuals with lower secondary and higher secondary fell by 9.8 and 11 percent over the year (76,000 approx).

Table 15 Employment by Education (000's)

	2016Q4	2019Q4	2020Q1	2020Q2	2020Q3	2020Q4	2019Q4-20Q4 (Δ)
Persons aged 15+in Employment							
All levels of education	2096.7	2268.9	2263.7	2136.9	2204.6	2210.5	-2.6%
Primary or below	51.1	57.4	55.4	41.9	47	40.2	-30.0%
Lower secondary	201.9	188.9	183.3	167.8	172.4	170.4	-9.8%
Higher secondary	480.6	532	526.2	439.1	485.7	473.4	-11.0%
Post-secondary non-tertiary	286.8	327.2	323.6	300.8	309.5	310.1	-5.2%
Third level non-honours degree	250.9	242.8	247.4	255.3	273.6	259.3	6.8%
Third level honours degree or higher	753.3	858.5	866.9	889.3	866.7	889.6	3.6%
Source: CSO (2020a) Labour Force Survey -Table QLF 24							

The labour force is composed of the employed and unemployed (seeking work) and fell over the year of 2020 by 1.3 percent (approximately 30,000). Again, the figures are suggestive of an uneven impact with participation numbers of those with low education falling at the same time as increasing for those in the top two education categories. At the end of 2020 there were 45,000 more *third level honours degree or higher* graduates (4.9 percent) participating in the Irish labour market than a year before and 22,000 more with *third level non-honours degree.* At the same time, participation for those with less education/training fell; there were 20,000 fewer people with *primary or lower* (down 31.7 percent), 22,000 fewer with *lower secondary education* (-11.0 percent) and 47,000 fewer with *higher secondary* (8.4 percent) qualifications participating in the Irish labour market.

Table 16 Persons aged 15 to 64 years in Labour Force by Education

	2016Q4	2019Q4	2020Q1	2020Q2	2020Q3	2020Q4	2019Q4-20Q4 (Δ)
All levels of education	2263.5	2378.6	2376.3	2254.6	2377.4	2348	-1.3%
Primary or below	61.7	66.5	60.5	46.6	52.5	45.4	-31.7%
Lower secondary	232.4	205.8	198.9	184.9	194.4	183.1	-11.0%
Higher secondary	531.1	558.1	561.2	476.5	535.4	511	-8.4%
Post-secondary non-tertiary	311.7	346.7	342.7	319.4	333.4	330	-4.8%
Third level non-honours degree	266.1	252.1	257.2	266.7	291.5	274.2	8.8%
Third level honours degree/higher	783	885.7	892.2	917.3	917.2	929.5	4.9%
Source: CSO (2020a) Labour Force Survey -Table QLF 24							

Table 17 ILO Participation Rates by Education (%)

	2016Q4	2019Q4	2020Q1	2020Q2	2020Q3	2020Q4
All levels of education	72.5	73.6	73.3	69.3	73	72
Primary or below	32.9	32.5	28.2	24.6	27.1	26
Lower secondary	47.5	46.6	47.2	41.9	45.5	43.4
Higher secondary	71.4	70.1	69.8	63.6	69.4	66.1
Post-secondary non-tertiary	79.8	81.9	80.8	75.1	80	80
Third level non-honours degree	83.6	84.8	84.2	80.9	84.2	83
Third level honours degree or higher	88.2	89.9	90.4	87	89	89.1
Source: CSO (2020a) Labour Force Survey -Table QLF 24						

Translating these figures into participation rates among the different groups, we see that every group has experienced a decline in labour market participation share. Again, it's important to keep in mind that *PUP* and *TWSS* are counted as employed in their entirety and that it is likely that many will not be in employment when the economy fully reopens and emergency supports are withdrawn. While the national participation rate fell by 1.6 percentage points (73.6 to 72.0 percent), participation among the most highly educated group (*third level honours degree or higher*) fell least (from 89.9 to 89.1 percent) while the rate fell furthest for the least educated group (who were already significantly behind) from 32.5 to 26.0 percent. This held up as a trend from lower to higher educated groups.

Table 18 Unemployed Persons by Education15 to 64 years

	2016Q4	2019Q4	2020Q1	2020Q2	2020Q3	2020Q4	2019Q4-20Q4 (Δ)
All levels of education	166.8	109.6	112.5	117.7	172.8	137.5	25.5%
Primary or below	10.6	9.1	5.1				-
Lower secondary	30.5	16.9	15.6	17.2	22	12.7	-24.9%
Higher secondary	50.5	26.1	35	37.4	49.6	37.6	44.1%
Post-secondary non-tertiary	25	19.5	19.1	18.6	23.9	19.9	2.1%
Third level non-honours degree	15.1	9.4	9.8	11.4	17.9	14.8	57.4%
Third level honours degree or higher	29.7	27.2	25.3	28	50.5	39.9	46.7%
Source: CSO (2020a) Labour Force Survey -Table QLF 24							

The number of officially unemployed (not including *PUP* recipients) grew by 25.5 percent or 18,000 in 2020 from 109,600 to 137,500, translating to an unemployment rate of 5.9 percent, up from 4.6 percent at the end of 2019. The impact of 2020 on unemployment for different groups by education is less clear cut. The unemployment rate for working age adults with primary education actually fell from 13.6 to 11.4 percent in 2020, as it did for the lower secondary group (8.2 to 6.9 percent). For those with higher secondary education (the second largest group), the unemployment rate increased from 4.7 to 7.4 percent, up 11,500. Similarly, at the top of the skills distribution (those with *third level honours degree or higher* are the largest group), numbers unemployed increased by 12,700 or 46.7 percent (representing a 1.2 percentage point increase in the unemployment rate from 3.1 to 4.3 percent). For those with a third level honours degree, unemployment also increased by approximately 5,000 with the rate up to 7.4 percent from 4.7 at the end of 2019.

Table 19 ILO Unemployment rates by Education (%)

	2016Q4	2019Q4	2020Q1	2020Q2	2020Q3	2020Q4
All levels of education	7.4	4.6	4.7	5.2	7.3	5.9
Primary or below	17.1	13.6	8.5	10.1	10.5	11.4
Lower secondary	13.1	8.2	7.8	9.3	11.3	6.9
Higher secondary	9.5	4.7	6.2	7.8	9.3	7.4
Post-secondary non-tertiary	8	5.6	5.6	5.8	7.2	6
Third level non-honours degree	5.7	3.7	3.8	4.3	6.1	5.4
Third level honours degree or higher	3.8	3.1	2.8	3.1	5.5	4.3

Source: CSO (2020a) Labour Force Survey -Table QLF 24

Employment by Sector

Table 20 shows trends in employment figures by 14 broad NACE sectors. The data show clearly the impact of covid related restrictions on different sectors.

There were 46,000 fewer workers officially employed in the *Accommodation and Food* sector (the lowest paid sector) in the final quarter of 2020 as a year previous (down 25.7 percent). There is a clear trend related to lockdown restrictions in this sector in particular evident in the data, with an increase of approximately 20,000 in Q3 2020 after the initial lockdown in Q2. Employment figures were also down in *Administrative and Support Services* by 26.8 percent or 30,000. There was less of a bounce back during the periods of reopening in this sector however, with employment numbers falling further in Q4, perhaps a sign that the return to 'normality' may be more difficult in the sector. Many of these jobs are in office related services and therefore the reduction in employment could become permanent if trends in flexible working continue. Other NACE activities (R to U), which includes the arts and entertainment also saw a reduction of 15.3 percent or 18,000 in employment numbers (this sector is also relatively low paid and precarious). Similarly, there was less recovery in the periods of opening up. *Construction* was also down 7.3 percent or 10,500 jobs but bounced back more strongly in the second half of the year.

Elsewhere, the official employment estimates for some of the more high-paying sectors have actually improved over covid. There were almost 12,000 or 9.2 percent more in employment in *Information and Communications* (the most highly paid sector) at the end of 2020, compared to 2019 and 9,000 or 8.2 percent more in *Financial, Insurance and Real Estate Activities*. Employment in *Professional, Scientific and Technical Activities* and *Education*, two more of the more highly paid sectors grew by 4,500 (3.3 percent) and 5,000 (2.5 percent), though employment was down slightly in the former relative to early 2020.

There were 46,000 fewer workers officially employed in the *Accommodation and Food* sector (the lowest paid sector) in the final quarter of 2020 as a year previous (down 25.7 percent)

Table 20 Employment by NACE Sector

	2012Q4	2016Q4	2019Q4	2020Q1	2020Q2	2020Q3	2020Q4	2019Q4-20Q4
Agriculture, forestry & fishing (A)	107.5	109.9	106.9 (4.5%)	107.3	98.3	98.7	106.4 (4.6%)	-0.5%
Industry (B to E)	240.6	277.4	286.3 (12.2%)	286.5	289.5	301.2	298.2 (12.9%)	4.2%
Construction (F)	85.1	121.1	147.1 (6.2%)	147.7	128.5	136.7	136.4 (5.9%)	-7.3%
Wholesale & retail trade.... (G)	278.1	303.2	310.2 (13.2%)	309.8	282.3	307.5	316.1 (13.7%)	1.9%
Transportation & storage (H)	82.7	93.7	108 (4.6%)	103.7	94	102.9	107.8 (4.7%)	-0.2%
Accommodation & food ... (I)	122.8	155.3	179.2 (7.6%)	170.6	127.5	148.4	133.1 (5.7%)	-25.7%
Information & communication (J)	97.5	113	127.6 (5.4%)	127.8	135.2	128.9	139.4 (6.0%)	9.2%
Financial, insurance & real estate...(K,L)	104.5	108.2	115.1 (4.9%)	119.6	132.2	123.7	124.5 (5.4%)	8.2%
Professional, scientific & technical ...(M)	109.2	141	141.1 (6.0%)	149.5	141	142.1	145.7 (6.3%)	3.3%
Administrative & support service .... (N)	76.2	85	112.1 (4.8%)	111.8	90.8	94.6	82.1 (3.6%)	-26.8%
Public administration & defence.... (O)	86.2	93.9	117 (5.0%)	115.6	118.9	118.8	122.4 (5.3%)	4.6%
Education (P)	139	156.2	191.6 (8.1%)	192.5	194.7	188.1	196.4 (8.5%)	2.5%
Human health & social work activities (Q)	258.5	279	294.3 (12.5%)	290	288	293.4	293 (12.7%)	-0.4%
Other NACE activities (R to U)	102.2	119.4	118.7 (5.0%)	116.7	97	106.6	100.5 (4.4%)	-15.3%

Bearing in mind that the official employment numbers also includes hundreds of thousands of workers on the *PUP* and *TWSS* with significant uncertainty about how many will return to work as it existed before lockdown, the figures on the number of hours actually worked by sector gives further indication of the areas in which economic activity have slowed. Hours worked per week in the Irish economy were down 8.5 percent over the year to the end of 2020 from over 77 million to approximately 71 million. Again, the impact of lockdown on different sectors is evident in the data with hours per week in *Accommodation and Food* down 52.5 percent over the year, in *Other activities* down 37.5 percent, in *Administrative and Support services* down by 33.6 percent and in *Construction* down by 12.9 percent. The actual hours worked per week in some of the high paying sectors which experienced employment growth mentioned earlier grew by much less than employment (3.0 percent in *Information and Communications*, 1.1 percent in *Financial, Insurance and Real Estate Activities* and an actual decrease in *Professional, Scientific and technical* of 1.4 percent). Hours worked in *Industry* grew strongly over the year (4.2 percent) with hours worked also up in *Agriculture* (1.3 percent) and *Public Administration* (1.4 percent). Nine out of fourteen sectors experienced negative growth, including surprisingly, *Human Health and Social work.*

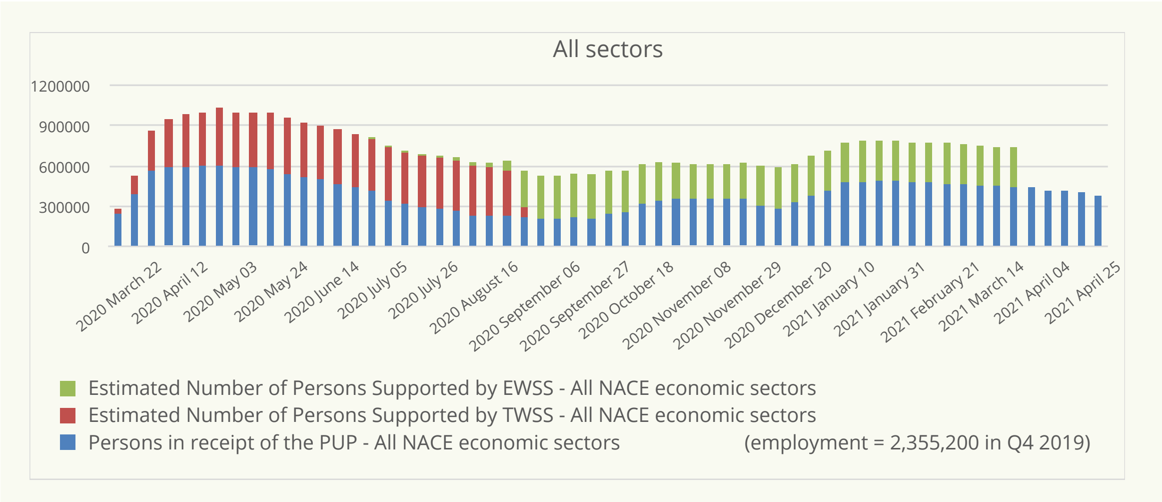
Table 21 Actual hours worked per week by NACE Sector

	2007Q4	2012Q4	2019Q4	2020Q1	2020Q2	2020Q3	2020Q4	2019Q4-20Q4 (Δ)
All sectors	77173000	60150000	77362000	76212000	60961000	72688000	70750000	-8.5%
Agri, forestry & fishing (A)	5408000	4784000	4594000	4652000	4365000	4505000	4655000	1.3%
Industry (B to E)	1129700	8361000	10302000	10543000	9508000	10965000	10738000	4.2%
Construction (F)	9168000	2680000	5491000	5373000	2658000	5010000	4782000	-12.9%
Wholesale & retail trade....(G)	10807000	8412000	9462000	9391000	7121000	9679000	9016000	-4.7%
Transportation & storage (H)	3634000	2923000	3715000	3517000	2520000	3176000	3217000	-13.4%
Accommodation & food ...(I)	4325000	3505000	5079000	4317000	1212000	3636000	2410000	-52.5%
Information & communi... (J)	3106000	3421000	4664000	4735000	4867000	4770000	4802000	3.0%
Financial, insurance & real estate...(K,L)	3887000	3455000	4074000	4221000	4598000	4388000	4120000	1.1%
Professional, scientific & technical...(M)	4703000	3707000	4925000	5389000	4517000	4768000	4855000	-1.4%
Administrative & support service.... (N)	3349000	2271000	3536000	3169000	2286000	2936000	2348000	-33.6%
Public admin & defence... (O)	3347000	2953000	4042000	4071000	4155000	4091000	4098000	1.4%
Education (P)	3558000	3423000	5105000	4877000	3928000	3527000	5046000	-1.2%
Human health & social work (Q)	7096000	7367000	8916000	8745000	7836000	8390000	8509000	-4.6%
Other activities (R to U)	3216000	2808000	3309000	3094000	1308000	2715000	2069000	-37.5%

Covid and employment supports

Sectors

Chart 1 Covid Unemployment and Income supports.



In the last week of March 2020, the Irish government introduced two payments to support the incomes of workers laid off due to Covid related restrictions (the *Pandemic Unemployment Payment*) and to support employers in paying wages in a time of uncertainty (the *Temporary Wage Subsidy Scheme* and later the *Employment Wage Subsidy Scheme*). Those workers in receipt of the wage subsidies are still officially tied to their employers in a way that PUP recipients are not and assumedly are more likely to return to normal once restrictions are lifted. Those in receipt of wage subsidies are likely performing at least a number of hours work per week. Relatively higher PUP numbers are likely indicative of more disruption and might signal more long-term issues for certain sectors of the Irish labour market. The number of workers on both payments peaked in May 2020 at over a million workers or approximately 43 percent of employment (Table 22 shows the share of workers from each sector on supports relative to employment in those sectors in Q4 2019). This included approximately 600,000 on the *PUP* (25.7 percent of employment) and wage subsidies for 422,000 employees (17.9 percent of employment). These figures do not include those on the live register (which we've seen was approximately 30,000 more in Q4 2020 than a year previous at 139,000). In mid-September 2020 the numbers dropped to 530,000, most of which was the result of a two thirds reduction in the numbers on *PUP* to 212,826 (9.4 percent of employment). The numbers on wage subsidies also fell by 100,000 to 317,000. The numbers on wage subsidies have remained relatively steady after that up until the end of March 2021, with a decrease to approximately 260,000 (11.1 percent of employment) in November (the trough for numbers on wage subsidies since their introduction) increasing again to 294,000 (12.5 percent of employment). The numbers on *PUP* have been more erratic and can be clearly seen in the time-series charts as rising and falling in-line with lockdown restrictions. The numbers on the *Pandemic Unemployment Payment* increased again to 352,000 in November, fell to 282,000 in early December during partial reopening and increased by 200,000 in January to 485,000. At the end of April, this had come down again to 385,000 (16.4 percent of employment), significantly lower than the peak in May 2020 but also almost twice as high as the lowest point in September. The available *PUP* numbers are about a month ahead of the data available for the employment wage subsidy scheme.

Though the sectors in which approximately 29 percent of PUP recipients worked in before the global pandemic are unknown a significant share have been identified as having worked in *Accommodation and Food* and *Wholesale/Retail* (approximately 34 percent between them). With such a large share of recipient's previous sectors of work unidentified, the figures for all sectors are almost certainly underestimates. Both sectors have been forced to different degrees into lockdown and the time-series data shows the impact of restrictions quite clearly.

Latest figures show that 83,000 of 385,0000 (approximately 1 in 5) of *PUP* recipients have been identified as coming from *Accommodation and Food* (Chart 6). This compares to a much smaller number of hospitality workers still directly tied to their employers through the employment wage subsidy scheme at around 45,000 or a quarter of the entire sector.[2] There were approximately 180,000 workers in this sector at the end of 2019 and average earnings are the lowest of any sector, by a significant margin. The figure for *PUP* recipients identified as having worked in this sector at the beginning of 2020 shows that at least 46.5 percent are still on the payment (Table 22). There has been little change in the total number of workers supported on the two schemes since March 2020, which is unsurprising given the nature of restrictions in the sector. The numbers decreasing on *PUP* correspond almost exactly to the increases in workers in the sector on wage subsidies during both periods when restrictions were eased (summer 2020 and December 2020).

This is in contrast to *Wholesale/retail* where a relatively large share of workers is also being supported by the two schemes (the highest of any sector at the peak in May 2020 at 180,000), but numbers have improved significantly and a larger share of employees affected are still officially tied to their employers through wage subsidies. For the first five months or so the numbers on supports skewed heavily towards wage subsidies with fewer layoffs. Since September, the numbers on *PUP* and wage subsidies are more equally weighted[3] (in the region of 50,000 each according to the most recent estimates) but have followed a similar pattern as in *Accommodation and Food*; rising in November, falling for a few weeks in December and rising sharply again in January.

Behind the two sectors most affected, the employment wage subsidy scheme was supporting approximately 30,000 workers in each of *Industry* and *Construction* at the end

2 The wage subsidy figures by sector are more accurate than for the PUP as very few recipients' sectors are unidentified in the data.
3 Though, again, the unidentified workers on PUP likely mean that the PUP estimate is low

of March. Approximately 14,000 *Industry* and 21,000 *Construction* workers were the *PUP* at the end of April, respectively. *Construction* is also one of the worst affected sectors with 14.6 percent of workers on *PUP* and 21.1 percent on *EWSS* according to the latest figures. The share of *Industry* workers affected is much lower (5.0 and 9.9 percent on *PUP* and *EWSS* respectively), it being one of the bigger sectors.

The latest available figures show approximately 28,000 *Arts, Entertainment, Recreation and other services workers* on *PUP* (at least 24.3 percent of the sector) with 15,000 (13.1 percent) supported by the *Employment Wage Subsidy*. The share of workers in the sector on *PUP* is a worry when considered against the peak in May 2020 (30.2 percent) and the fact that there has been such little change in the numbers on wage subsidies since 2020. This sector includes the arts, theatre and television production, which have been subject to various restrictions. At least 20.6 percent of *Administration and Support Services* workers are on *PUP* (23,000) and 16.9 percent (18,000) on furlough according to the latest estimates. *Transportation & Storage* workers affected are more likely to be supported by a wage subsidy scheme (23,000) than the PUP (8,000). This equates to 21.7 percent compared to the national average of 12.5 percent on furlough and at least 6.4 percent compared to 16.4 percent of all workers on the *Pandemic Unemployment Payment*.

A relatively small number of workers from four of the sectors associated with the highest average earnings have been affected by Covid. Employment in these sectors also tend to have high skill/education requirements. The latest figures show approximately 27,000 *Professional Scientific and Technical activities* workers were in receipt of government support in March/April 2021, less than half the figure in May 2020 and likely reflecting relative sectoral adaptability to working from home. Supports for workers in this sector are skewed towards wage subsidies, with only 10,000 in receipt of PUP. *Financial, Insurance and Real estate activities* and *Education* both peaked at just over 20,000 workers each in receipt of government supports and have hovered slightly below that figure (17/18,000) throughout the pandemic. The share of supports for workers in *Finance, Insurance and Real Estate* is about 50/50 and skewing toward wage subsidies in *Education*. Around 20,000 *Information and Communications* workers were also being supported at the peak in May 2020 but the figure has been closer to 10,000 since September and is heavily skewed towards employment subsidies likely showing again a greater adaptability to working at home. The share for all of these sectors on both subsidies are well below average, the only exception being the *Professional, scientific and Technical* sector, where the share of workers on furlough is about average.

Table 22 Persons Supported by TWSS/EWSS (share by sector and share of sector)

	Pandemic Unemployment Payment			Wage Subsidy schemes (TWSS, EWSS)		
	The Peak 03/05/20	The Trough 06/09/20	Latest 02/05/21	The Peak 03/05/20	The Trough 22/11/20	Latest 28/03/21
All NACE sectors	**605539**	**222116**	**385211**	**422224**	**262184**	**294007**
Share of recipients	100%	100%	100%	100%	100%	100%
Share of Sector (2019Q4)	25.7%	9.4%	16.4%	17.9%	11.1%	12.5%
Agriculture, forestry & fi.. (A)	**4477**	**1917**	**2874**	**3829**	**1770**	**1845**
Share of recipients	0.7%	0.9%	0.7%	0.9%	0.7%	0.6%
Share of Sector (2019Q4)	4.2%	1.8%	2.7%	3.6%	1.7%	1.7%
Industry (B to E)	**33429**	**10163**	**14328**	**60462**	**21122**	**28480**
Share of recipients	5.5%	4.6%	3.7%	14.3%	8.1%	9.7%
Share of Sector (2019Q4)	11.7%	3.5%	5.0%	21.1%	7.4%	9.9%
Construction (F)	**56404**	**11130**	**21496**	**43698**	**19805**	**31076**
Share of recipients	9.3%	5.0%	5.6%	10.3%	7.6%	10.6%
Share of Sector (2019Q4)	38.3%	7.6%	14.6%	29.7%	13.5%	21.1%
Wholesale/retail...(G)	**76572**	**25686**	**48239**	**102793**	**38747**	**54669**
Share of recipients	12.6%	11.6%	12.5%	24.3%	14.8%	18.6%
Share of Sector (2019Q4)	24.7%	8.3%	15.6%	33.1%	12.5%	17.6%
Transportation & Storage (H)	**13578**	**6907**	**6875**	**28482**	**27453**	**23425**
Share of recipients	2.2%	3.1%	1.8%	6.7%	10.5%	8.0%
Share of Sector (2019Q4)	12.6%	6.4%	6.4%	26.4%	25.4%	21.7%
Accommodation & Food (I)	**121756**	**41950**	**83243**	**32699**	**45398**	**45246**
Share of recipients	20.1%	18.9%	21.6%	7.7%	17.3%	15.4%
Share of Sector (2019Q4)	67.9%	23.4%	46.5%	18.2%	25.3%	25.2%
Information & Commun.....(J)	**7058**	**4029**	**4454**	**14797**	**6255**	**6305**
Share of recipients	1.2%	1.8%	1.2%	3.5%	2.4%	2.1%
Share of Sector (2019Q4)	5.5%	3.2%	3.5%	11.6%	4.9%	4.9%
Financial, insurance &...(K,L)	**12872**	**6333**	**9128**	**12301**	**8905**	**8871**
Share of recipients	2.1%	2.9%	2.4%	2.9%	3.4%	3.0%
Share of Sector (2019Q4)	11.2%	5.5%	7.9%	10.7%	7.7%	7.7%
Professional, scientific.... (M)	**18016**	**8705**	**9888**	**37019**	**16028**	**17027**
Share of recipients	3.0%	3.9%	2.6%	8.8%	6.1%	5.8%
Share of Sector (2019Q4)	12.8%	6.2%	7.0%	26.2%	11.4%	12.1%
Administrative & secre ... (N)	**33962**	**18403**	**23072**	**26688**	**18547**	**18962**
Share of recipients	5.6%	8.3%	6.0%	6.3%	7.1%	6.4%
Share of Sector (2019Q4)	30.3%	16.4%	20.6%	23.8%	16.5%	16.9%
Public administration... (O)	**9114**	**4129**	**4290**	**1014**	**366**	**337**
Share of recipients	1.5%	1.9%	1.1%	0.2%	0.1%	0.1%
Share of Sector (2019Q4)	7.8%	3.5%	3.7%	0.9%	0.3%	0.3%
Education (P)	**14763**	**9271**	**6203**	**10158**	**11646**	**11502**
Share of recipients	2.4%	4.2%	1.6%	2.4%	4.4%	3.9%
Share of Sector (2019Q4)	7.7%	4.8%	3.2%	5.3%	6.1%	6.0%
Human health & social ...(Q)	17099	6804	7507	24434	20999	20726
Share of recipients	2.8%	3.1%	1.9%	5.8%	8.0%	7.0%
Share of Sector (2019Q4)	5.8%	2.3%	2.6%	8.3%	7.1%	7.0%
Unknown	**150371**	**56268**	**114613**	**4846**	**9242**	**9955**
Share of recipients	24.8%	25.3%	29.8%	1.1%	3.5%	3.4%
Share of Sector (2019Q4)						
Arts, entertaintainm.....(R,S)	**35812**	**10270**	**28845**	**18937**	**15863**	**15543**
Share of recipients	5.9%	4.6%	7.5%	4.5%	6.1%	5.3%
Share of Sector (2019Q4)	30.2%	8.7%	24.3%	16.0%	13.4%	13.1%

Chart 2 Unemployment & wage supports by sector, *Industry*

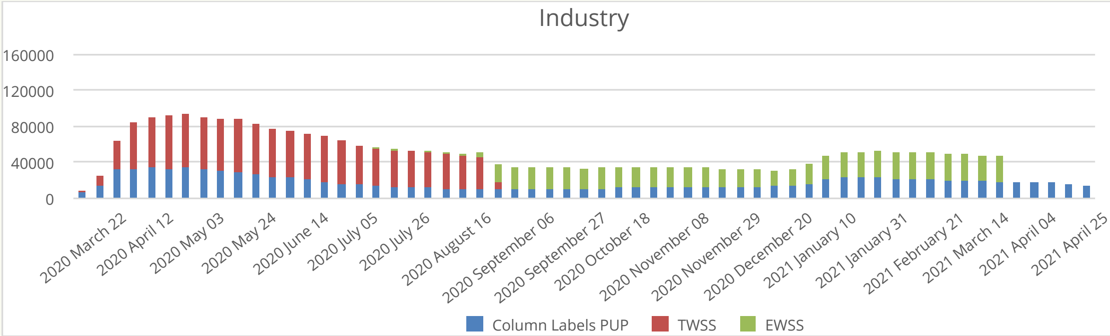


Chart 3 Unemployment & wage supports by sector, *Construction*

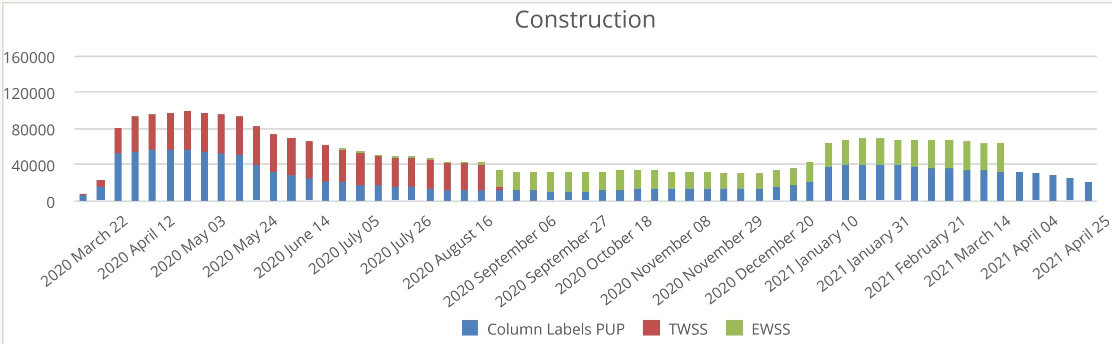


Chart 4 Unemployment & wage supports by sector, *Wholesale/Retail*

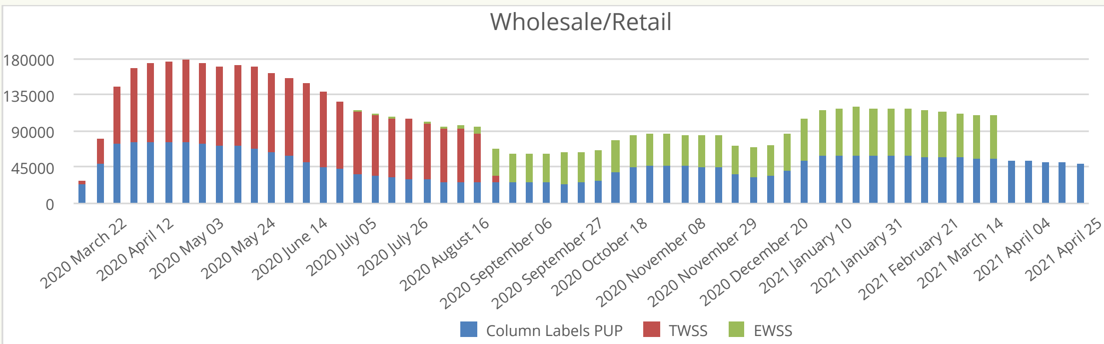


Chart 5 Unemployment & wage supports by sector, *Transport & Storage*

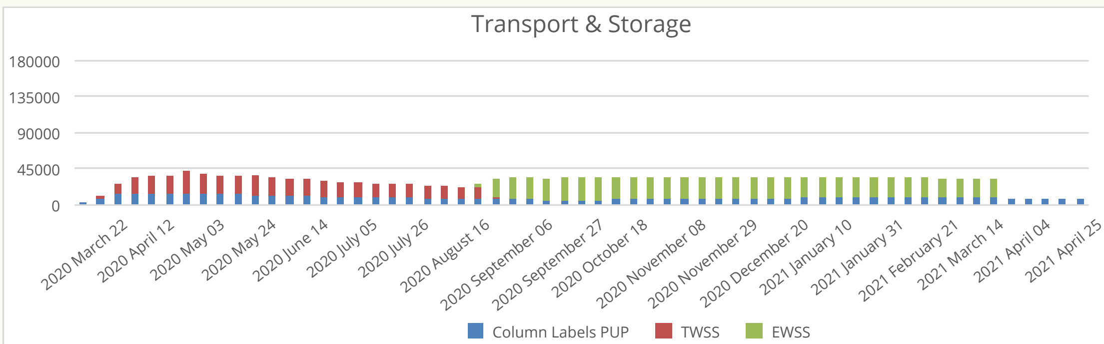


Chart 6 Unemployment & wage supports by sector, *Accommodation & Food*

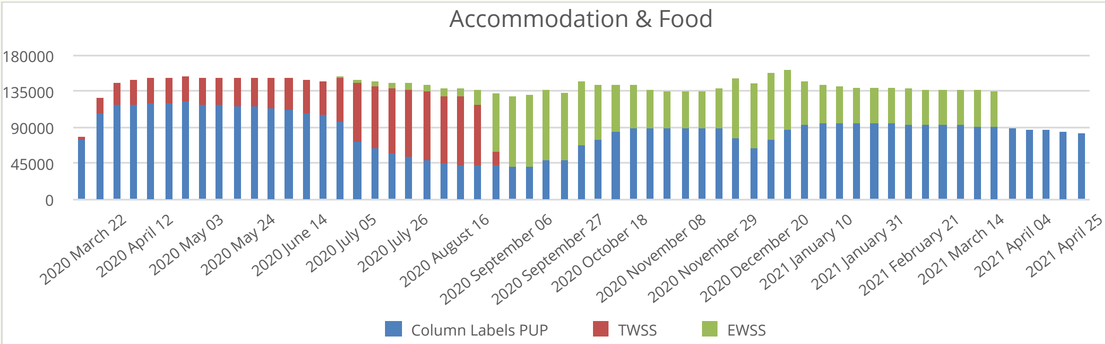


Chart 7 Unemployment & wage supports by sector, *Information & Communication*

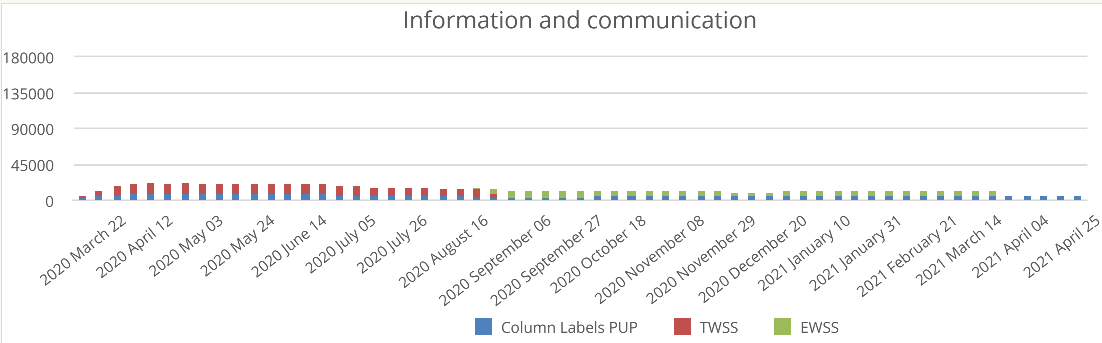


Chart 8 Unemployment & wage supports by sector, *Financial, Insurance & Real Estate*

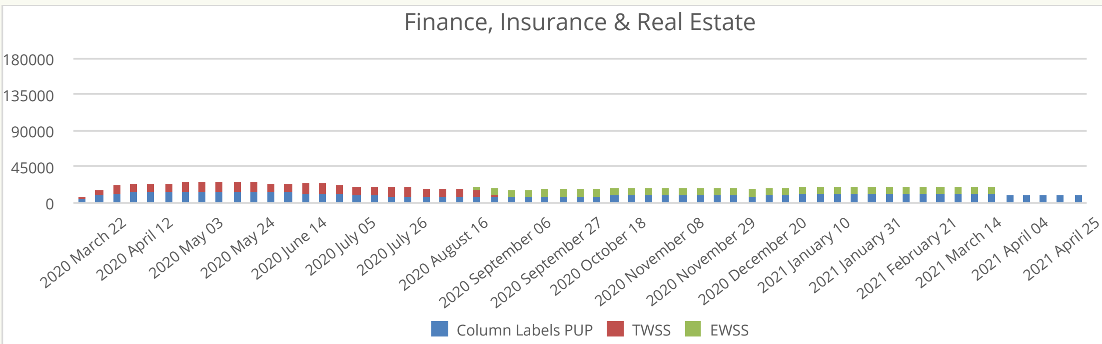


Chart 9 Unemployment & wage supports by sector, *Professional, Scientific & technical*

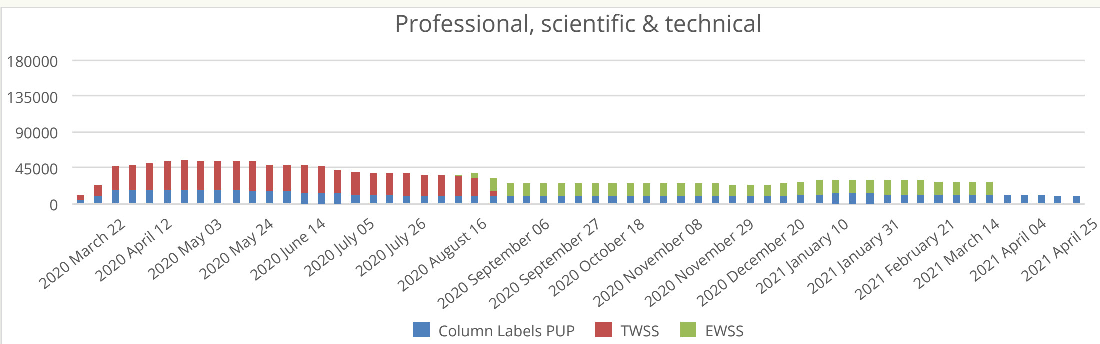


Chart 10 Unemployment & wage supports by sector, *Administrative & Support Service*

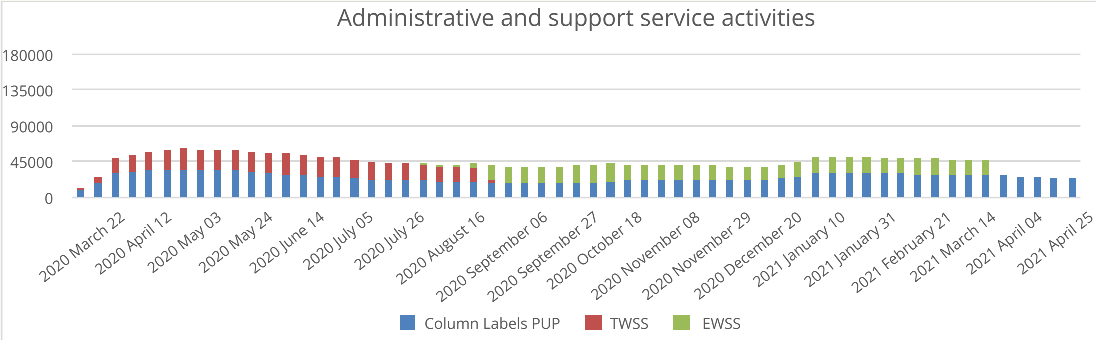


Chart 11 Unemployment & wage supports by sector, *Public Administration and Defence*

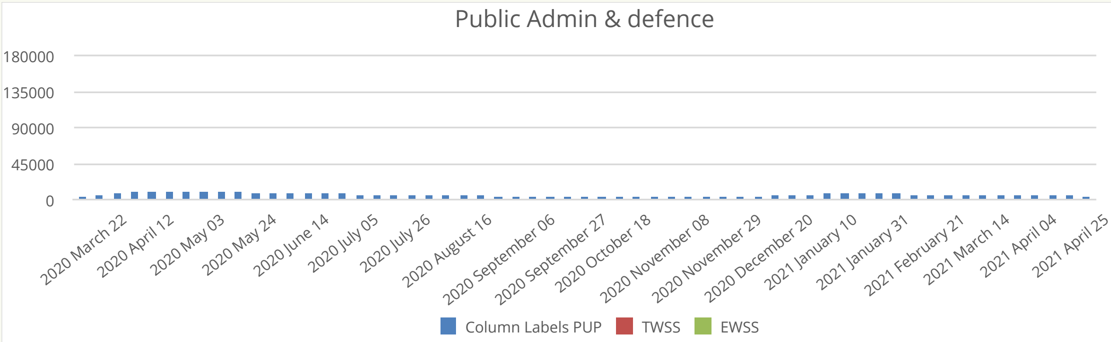


Chart 12 Unemployment & wage supports by sector, *Education*

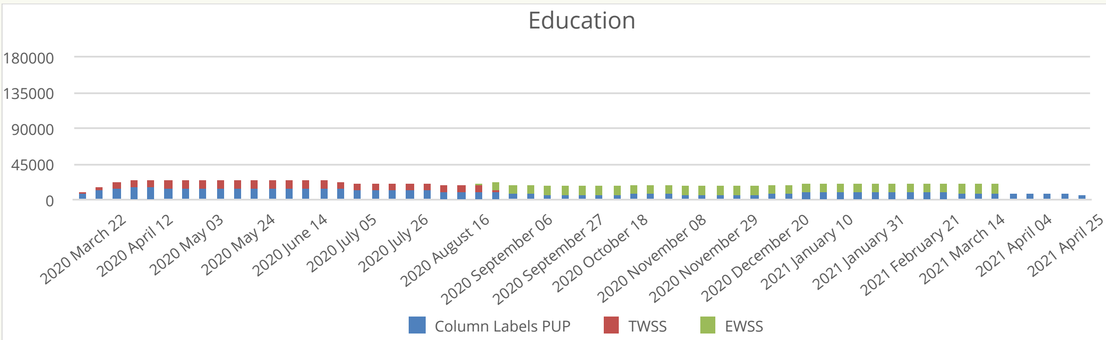


Chart 13 Unemployment & wage supports by sector, *Human Health and Social work*

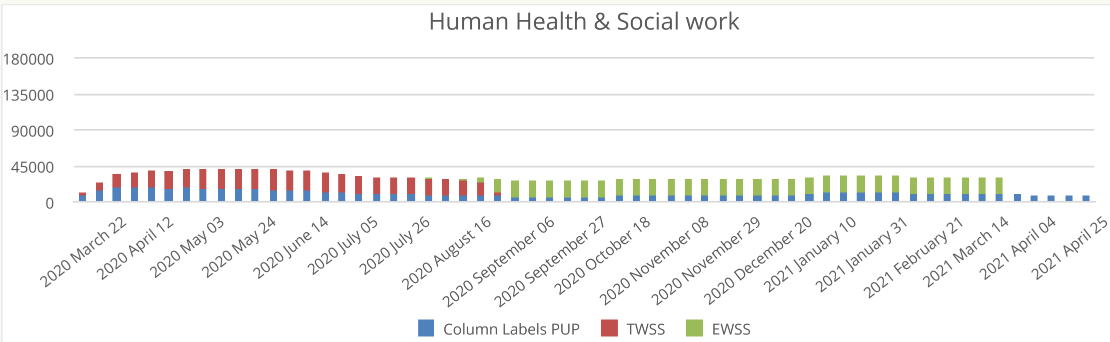
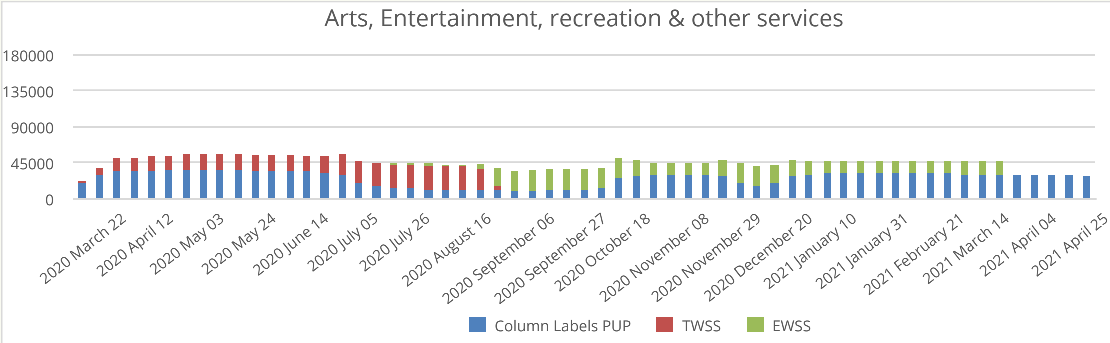


Chart 14 Unemployment & wage supports by sector, *Arts, Entertainment, recreation, other*



Given the nature of the pandemic and the emergency employment and income supports introduced it is hard to gauge the eventual fallout as we continue lockdown. The *Employment Monitor* released by Social Justice Ireland in May examined a question added specifically to the Labour Force Survey in Q4 2020 by the CSO on whether or not recipients of special covid supports expected to return to work post-covid. Though they are all currently considered 'employed' in the official statistics, approximately 1 in 5 said they didn't expect to return to the same job (almost 1 in 4 women). That would amount to 255,000 Irish workers. Over half of these (an estimated 155,000) were in the top half of sectors by average pay; *Information and Communications* (44,000), *Financial, Insurance and Real Estate Activities* (35,000), *Professional, Scientific and Technical Activities* (25,000), *Education* (20,000) and *Human Health and Social Activities* (31,000). Similarly, 23,000 *Industry* workers don't expect to return to their jobs though hours worked in the sector increased in 2020. In this context, the figure for *Accommodation and Food* is relatively insignificant at 18,700.

In terms of lockdown and examining hours worked as an indicator, these sectors for the most part were relatively less affected (with the exception of *Human Health*) by lockdown restrictions and some are likely to be able to be more flexible in accommodating working from home (hours worked in *Information and Communications* actually grew and the decrease in hours in *Professional, Scientific and Technical* was small relative to the average).

This points to a potentially wider issue for Irish labour market beyond the failure of individual firms, which has been the focus of much of the current commentary particularly with regard Hospitality and Tourism). This may actually reflect (at least in part) new opportunities for remote working in these sectors (from both a firm and worker perspective), the implications of which may be far reaching in an Irish context with the decent work that is (was) currently available becoming more mobile.

Age group

This report has already pointed out high levels of unemployment among the under 35's pre-pandemic. The rate was over three times the national average for under 20's and over twice the average for 20-24 year olds. Participation rates were also still significantly lower than in the Celtic Tiger years for the youngest two groups. The share of overall employment for these younger age groups at the end of 2019 were 2.8 percent (15-19), 8.4% (20-24) and 21.1% (25-34) coming to 32.3 percent in total. Tables 23, 24 and 25 show the disproportionate number of younger workers now on unemployment payments and wage subsidies. Though the 25-34 year old group represents a higher share of affected workers, the numbers currently being supported by covid supports for under 25's are exceptionally high, even compared to their already low share of employment pre-pandemic.

Table 23 Persons in receipt of the PUP by Age

	2020 May 03		2020 September 13		2021 March 28	
Under 20 years	27331	4.5%	8612	4.0%	24473	5.5%
20 - 24 years	95589	15.8%	35874	16.9%	82393	18.6%
25 - 34 years	139756	23.1%	48777	22.9%	97873	22.1%
under 35		43.4%		43.8%		46.2%
All ages	605539		212826		443247	

Table 24 Estimated Number of Persons Supported by TWSS and EWSS by Age

	2020 May 03		2020 September 13		2021 March 28	
Under 20 years	9349	2.2%	15203	4.8%	8391	2.9%
20 - 24 years	39771	9.4%	42384	13.3%	29669	10.1%
25 - 34 years	100264	23.7%	76540	24.1%	69467	23.6%
under 35		35.4%		42.2%		36.6%
All ages	422224		317612		294007	

Table 25 Estimated Number of Persons benefitting from PUP, TWSS or EWSS by Age

	2020 May 03		2020 September 13		2021 March 28	
Under 20 years	36065	3.6%	23479	4.5%	32383	4.5%
20 - 24 years	132795	13.1%	76934	14.7%	109959	15.1%
25 - 34 years	235438	23.3%	123334	23.6%	164202	22.6%
under 35		40.0%		42.7%		42.2%
All ages	1011080		523541		726891	

The Employment Monitor by SJI also presents the breakdown of those on supports not expecting to return to the same job by broad age group. The picture looks bleaker again for younger workers displaced by covid; 31.7 percent of 15-24 year olds and 24.1 percent of 24-35 year olds expected not to return to the same job.

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Photo by Majestic Lukas on Unsplash

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