

Regional Labour Markets Bulletin 2014

Skills and Labour Market Research Unit, SOLAS

2014

Objective



To support decision making process at regional and national level, in the areas of education and training provision, labour market policies and career guidance by providing data on demand for, and supply of skills for the 8 NUTS 3 regions in Ireland

Regional classification: CSO NUTS 3



Border (1)	Dublin (5)	Mid-East (4)	Midland (3)	Mid-West (8)	West (2)	South-East (6)	South-West (7)
Cavan	Dublin City	Kildare	Laois	Clare	Galway City	Carlow	Cork City
Donegal	Dun-Laoghaire-Rathdown,	Meath	Longford	Limerick City	Galway County	Kilkenny	Cork County
Leitrim	Fingal	Wicklow	Offaly	Limerick County	Mayo	South Tipperary	Kerry

Selected key points: LM indicators, Q4 2013



	Area km2	POP 000s	P/km ²	WAP (15-64) 000s	LF 000s	E 000s	UE 000s	E rate %	UE rate %	P rate %
Border	12,200	510	42	319	215	185.8	29.0	56%	13.5%	55.2%
Dublin	900	1,279	1,408	870	635	572.1	63.2	65%	10.0%	62.2%
Mid-East	6,100	544	89	353	258	225.9	32.2	62%	12.5%	63.3%
Midland	6,500	288	44	184	129	111.1	17.6	58%	13.7%	59.0%
Mid-West	8,200	378	46	245	170	151.3	18.2	60%	10.7%	57.2%
South-East	9,400	506	54	327	233	197.1	36.2	58%	15.5%	59.1%
South-West	12,200	675	55	442	312	280.6	31.8	61%	10.2%	58.7%
West	13,800	435	32	278	211	185.9	25.0	64%	11.9%	62.2%
Ireland	69,400	4,610	66	3,019	2,163	1,910	253	61%	11.7%	60.1%

Selected key points: LM indicators



- Employment in quarter 4 2013
 - Dublin (at 64.6%) and the West region (at 63.6%) had the highest employment rates, the Border region (at 56.1%) had the lowest
- Participation (LF) in quarter 4 2013
 - The Mid East region had the highest participation rate, at 63.3%, while the Border region, at 55.2%, had the lowest

Regional employment and employment growth



Selected key points: Unemployment



- **Unemployment (Q4 2013):**

- the highest unemployment rates were in the South East (15.5%), Midland (13.7%), and Border (13.5%) regions; the lowest rates were in the South West (10.2%) and Dublin (10.0%)
- Reflecting the size of its labour market, Dublin accounted for one quarter of all unemployed within the State (63,000 persons), even though it had the lowest unemployment rate of all regions
- Unemployed persons had been mostly previously employed in skilled trades and elementary occupations across all regions; however sizeable numbers, the majority of whom were younger than 25, had no previous occupation
- Youth UE rate (<25): the highest in Midland (36%) and South East (33%); the lowest in Dublin (18%) and South West (20%)

Selected key points



- Economic output - Gross Value Added (GVA); 2011

	Border	Dublin	Mid East	Midland	Mid West	South East	South West	West	Ireland
Gross Value Added (GVA) per person at Basic Prices (Euro)	18,571	47,539	21,714	17,777	25,982	22,610	42,311	26,933	32,224
Indices of GVA per person, (State=100)	58	148	67	55	81	70	131	84	100
(GVA, share) (%)	6.5	40.9	7.8	3.4	6.7	7.6	19	8.1	100

- Dublin had the highest output per person; the Border and Midland regions had the lowest
- Dublin accounted for 41% of the State's total output in 2011; Dublin and the South West region combined accounted for 60% of the total output of the State in 2011
- both of these regions increased their share since 2010; the Mid West and Mid East regions decreased their share

Inter-regional employment & residence



	Border	Dublin	Mid-East	Mid-land	Mid-West	South-East	South-West	West	Total
Employed in same region	81%	93%	52%	72%	88%	84%	94%	86%	84%
Employed elsewhere	9%	4%	41%	22%	6%	9%	2%	8%	11%
No Answer	10%	3%	7%	6%	6%	7%	4%	6%	5%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%

Selected key points: Sector of employment



- Industry was the largest broad economic sector in South West, Mid-West, and West
- Wholesale & retail was the largest in Border and Mid-East
- Agriculture accounted for at least 10% of regional employment in the Midland, South East and West regions
- Dublin had the highest share of high value added activities; thus ¼ of employment was in knowledge intensive services - market, high-tech and financial services, broadly coinciding with information & communication, financial, and professional services activities; it also had the highest share of employment in food & accommodation, as well as in transportation services
- The South West region had the largest industrial employment, and consistent with this, the largest manufacturing employment; however, in terms of high-tech manufacturing, Dublin was the largest and had the highest share of its employment in this particular segment of all regions

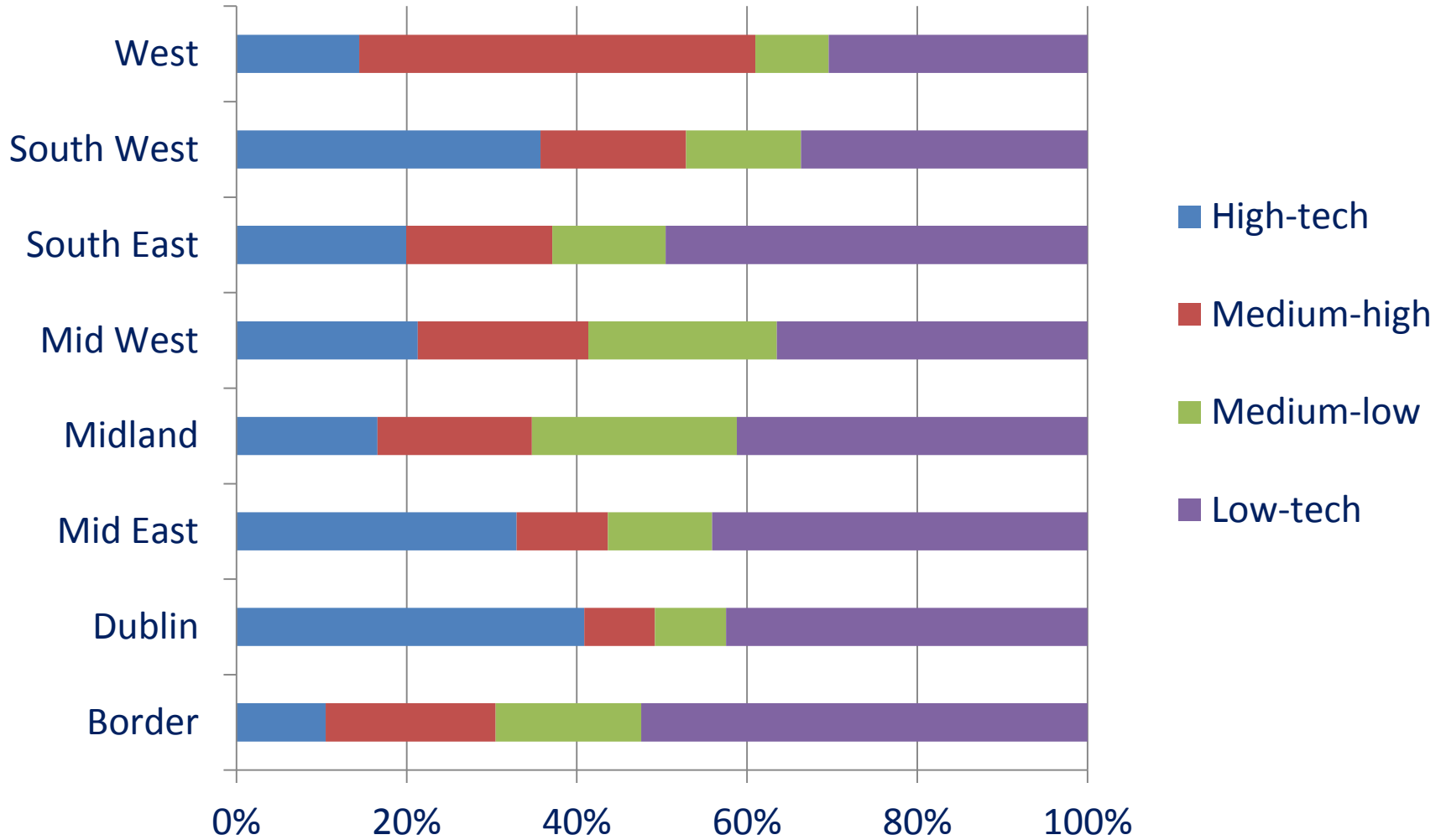
Selected key points: Employment by Occupation



- **Employment by broad occupational group**

- Relatively higher skilled occupations, professionals and associate professionals combined, accounted for at least $\frac{1}{4}$ of employment across the regions
- Dublin had the highest share, with almost 2-in-5 of employed in these two categories
- Of all those employed in professional occupations, Dublin accounted for 37%; similarly, it accounted for 38% of associate professional employment within the State
- Skilled trades: the lowest share in Dublin, the highest in Midland & West
- Skilled trades expanded particularly strongly over the period Q4 2012- Q4 2013, with a y-o-y increase of approx. 33,500 persons, consistent with the sectoral increase in agricultural employment, as well as with the increase in self-employment over the same period
- Also discernible was an increase in elementary occupations over the same period (approx. 13,000)

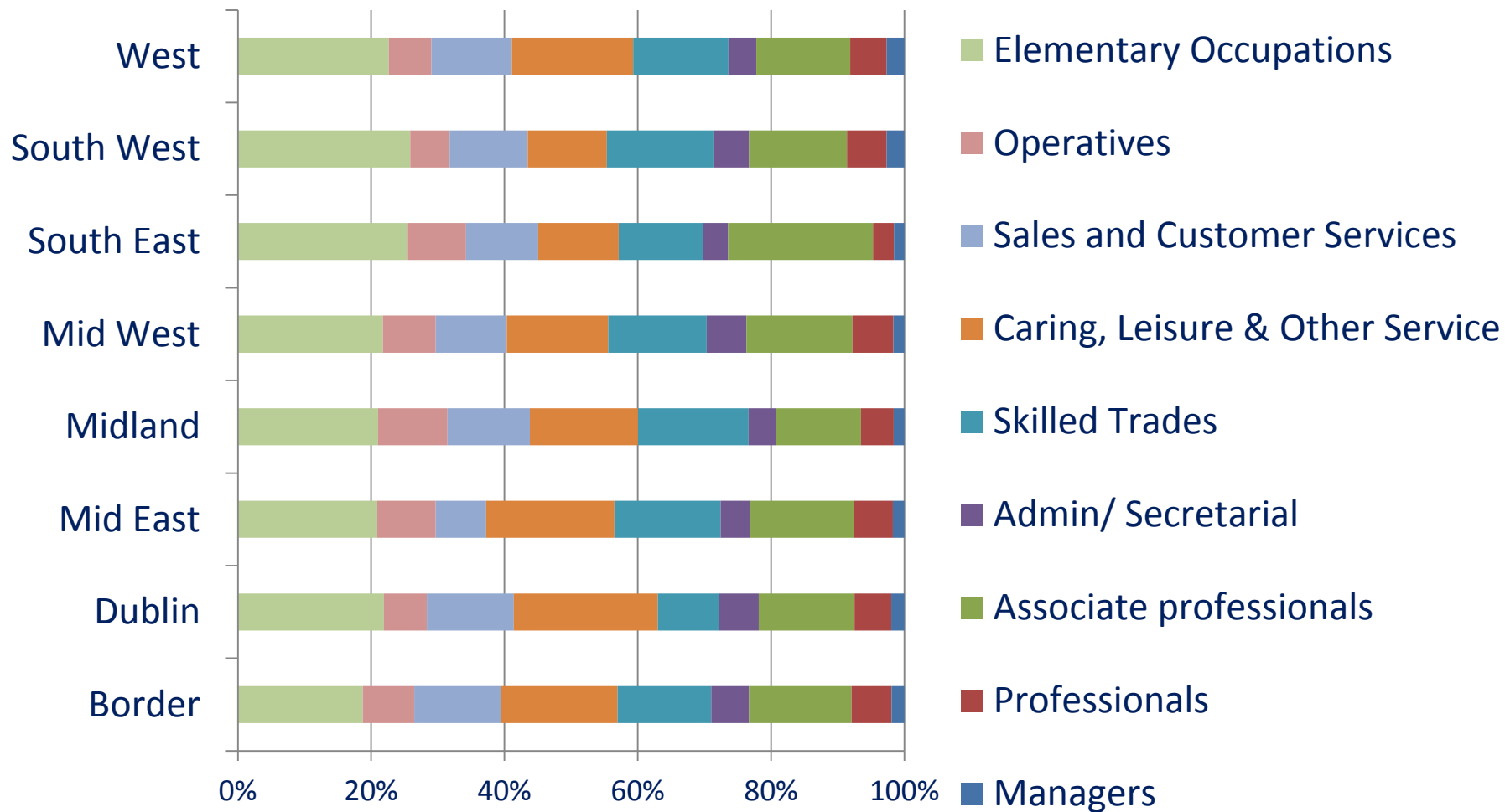
Selected key points: Employment in manufacturing by technology type, Q4 2013



Selected key points: PES Vacancies



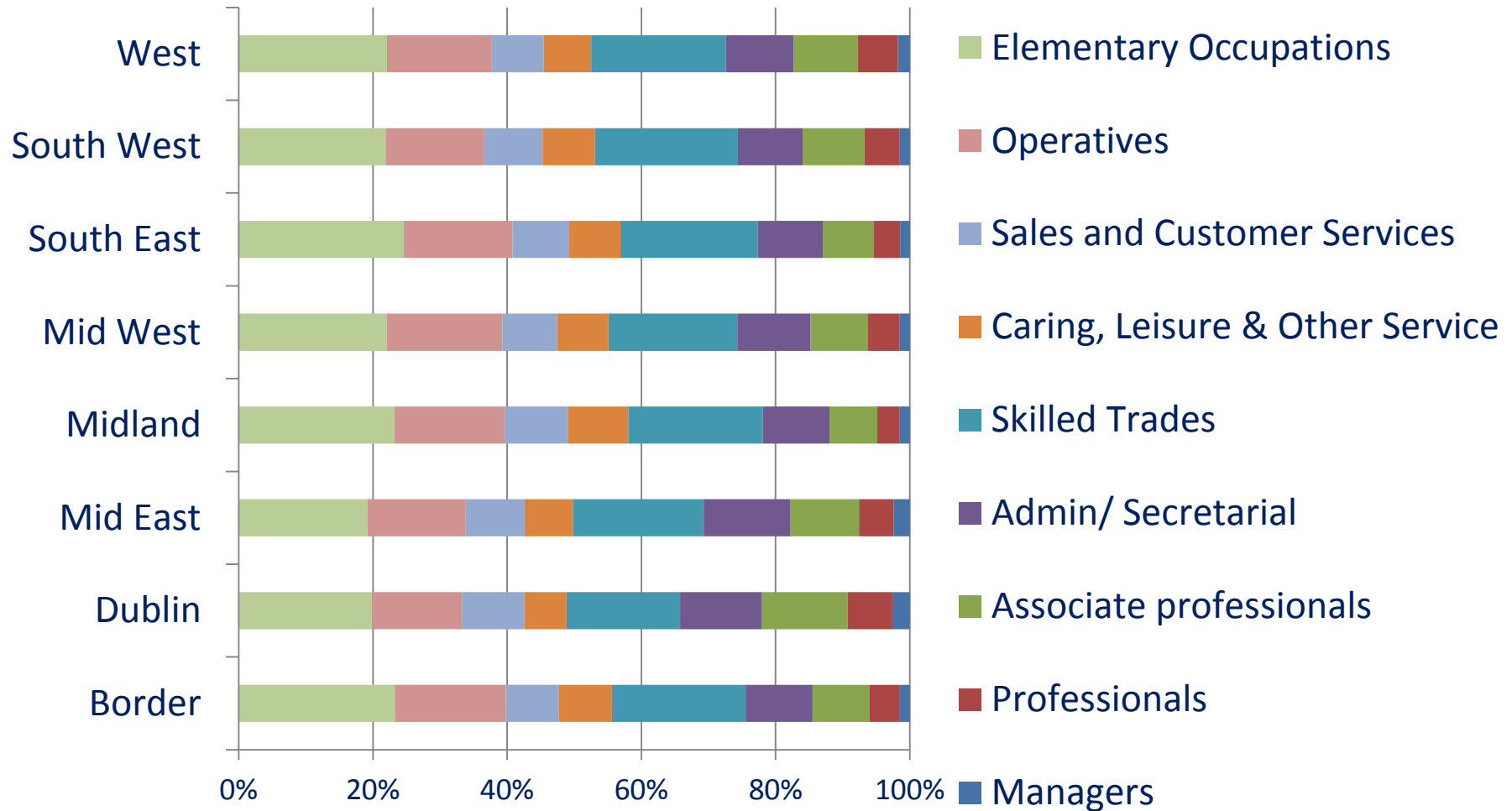
In excess of 64,000 vacancies advertised on DSP Jobs Ireland Jan-Dec 2013



Selected key points: PES Job Seekers



There were 164,500 job seekers in May 2014



Selected key points: Active enterprises



- Active enterprises:
 - the **wholesale and retail sector** accounted for the largest share of active enterprises in most regions; **professional activities** accounted for the greatest share in Dublin and **construction** in the Midland and West regions
 - in each region, the vast majority of enterprises employ **fewer than 10 persons** accounting for over 90% of enterprises in all but the Dublin region (88.9%)
- Medium to large enterprises:
 - the highest number of medium to large enterprises in each sector, with the exception of agriculture, was located in the **Dublin** region
 - Dublin accounted for four fifths of all medium to large **financial & insurance** enterprises operating in the State, and for two thirds of all operating in telecommunications, **computing & related** activities

Conclusion



- Some similarities across regions (e.g. profile of the Live Register, sectoral picture - construction decline since the peak, profile of Public Employment Service vacancies, previous sector of employment, sourcing of IT & health care skills from non-EEA countries etc.)
- However, many differences across regions (e.g. contribution of agriculture to the regional employment, unemployment rate & youth unemployment rate, labour force participation rate, share of relatively higher skilled occupations in regional employment, share of high-tech manufacturing, regional economic output & output per persons - GVA / GVA index - relative to the State, etc.)



Questions, enquiries, comments to:

Ivica Milicevic

Skills and Labour Market Research Unit (SLMRU), SOLAS

Tel: ++ 353 1 5332460

e-mail: ivica.milicevic@solas.ie