

Regional Labour Markets Bulletin 2015

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Objective



Aim:

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

Audience/main users:

- ETBs
- Career guidance services
- Government departments and agencies
 - (e.g. DJEI - Regional Action Plan for Jobs; DES - Regional Skills Fora)

Regional classification: CSO NUTS 3



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

Selected key points: LMI/indicators, Q4 2014

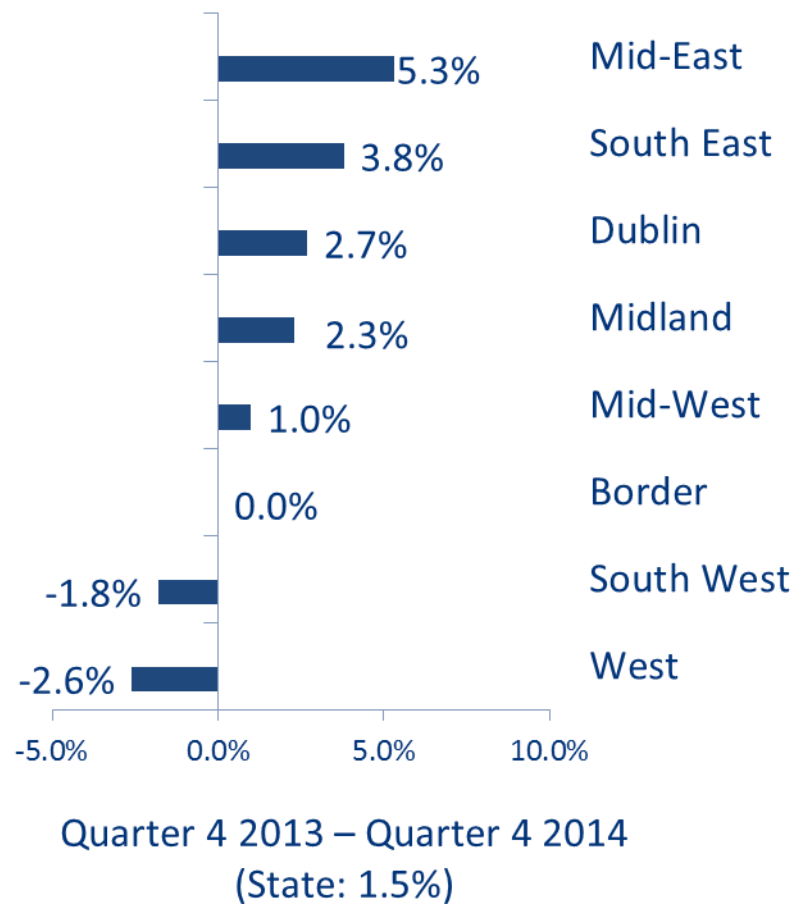


	Area km2	POP 000s	WAP (15-64) 000s	LF 000s	E 000s	UE 000s	E rate %	UE rate %	P rate %
Border	12,200	498.4	310.3	206	186	21	57.4%	10.0%	54%
Dublin	900	1,289	868.7	643	572	55.5	66.4%	8.6%	62.8%
Mid-East	6,100	552.9	357.5	260	238	22	65.1%	8.5%	62.6%
Midland	6,500	290.8	186.1	131	114	17	58.7%	13.1%	59.1%
Mid-West	8,200	378.4	242.1	170	153	17	61.4%	10.2%	57.7%
South-East	9,400	508.1	326.3	232	204.5	28	60.8%	11.9%	58.7%
South-West	12,200	671.6	438.1	308	276	33	60.5%	10.6%	58.2%
West	13,800	434.9	275.8	202	181	21	62.4%	10.2%	59.5%
Ireland	69,400	4,624	3,004.7	2,152	1,939	213.6	62.6%	9.9%	59.8%



- Labour Force and Participation Q4 2014
 - Dublin region had the highest participation rate, at 62.8%, while the Border region, at 54%, had the lowest
 - y-o-y increase in LF only in 3 regions
 - y-o-y increase in participation rates only in 2 regions
- Employment in Q4 2014
 - y-o-y increase in employment rates in 6 regions
 - y-o-y increase in [numbers in] employment in 5 regions
 - Some disparities: Dublin (at 66.4%) and Mid-East (at 65.1%) had the highest employment rates, the Border region (at 57.4%) had the lowest

Regional employment and employment growth



Selected key points: Sector of employment



- Industry was the largest sector of employment in most regions, the exceptions being the Mid-East and Dublin regions, where wholesale & retail was the largest sector
- High value added activities – share of employment
 - Dublin had the highest share : $\frac{1}{4}$ of employment was in knowledge intensive services - market, high-tech, and financial services (broadly coinciding with information & communication (ICT), financial, and professional services activities)
 - Dublin accounted for just over a half of all employed in the ICT sector in the State
 - one-in-ten of all persons in employment in the Dublin region were working in financial services, and the region accounted for 55% of all employed in this sector in the State
 - Apart from Dublin, the Mid-East region was the only other region where the share of employment in knowledge intensive services exceeded the national average
- The share of employment in construction was highest in the Midland, lowest in Dublin

Selected key points – Economic output



Gross Value Added (GVA), 2012

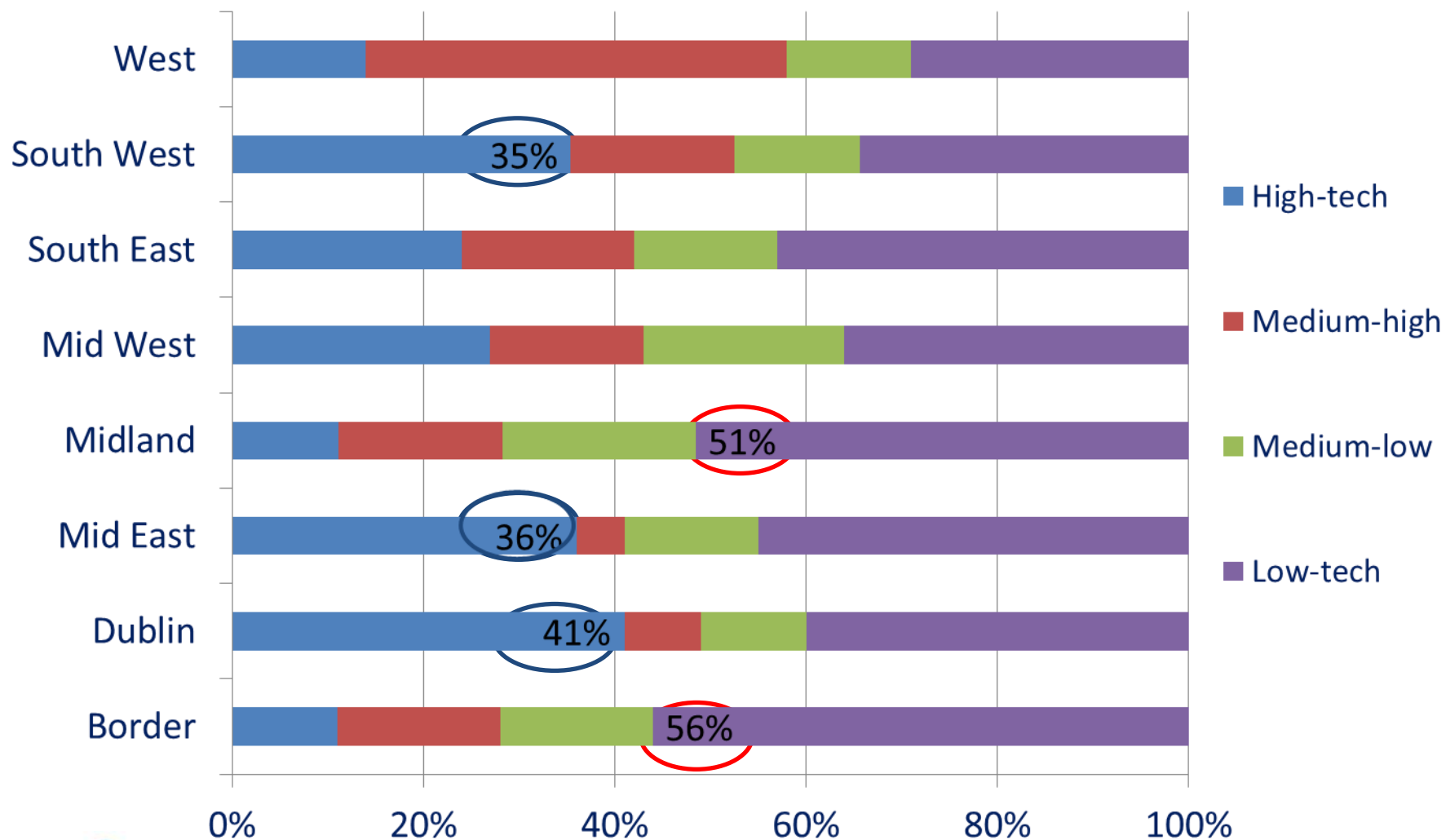
	Border	Dublin	Mid East	Midland	Mid West	South East	South West	West	Ireland
GVA at Basic Prices (Euro Million, 2012)	9,795	65,987	12,147	5,261	10,447	11,742	29,512	12,589	157,481
GVA per person at Basic Prices (Euro), 2012	19,016	51,839	22,863	18,638	27,464	23,588	44,391	28,256	34,308
Indices of GVA per person at Basic Prices (State=100)	55.4	151.1	66.6	54.3	80.1	68.8	129.4	82.4	100
Gross Value Added (GVA) at Basic Prices (%), 2012	6.2	41.9	7.7	3.3	6.6	7.5	18.7	8	100

- GVA – a proxy for prevalence of high value activities in a region
- Dublin had the highest GVA/output per person; the Border and Midland regions the lowest
- Dublin was the only region to report an increase in the output in relative terms (measured by indices of GVA per person) and in relation to 2011
- Dublin accounted for 42% of the State's total output in 2012, the South West for 19%; the only regions to exceed the State average

Selected key points: Employment in manufacturing by technology intensity/type, Q4 2014



- Composition within regions (%)



Selected key points: enterprise landscape



- Medium to large enterprises (50 persons and above; 2014, DataIreland)
 - most numerous in industry (namely in manufacturing), wholesale & retail, and accommodation & food activities
 - the highest number of medium to large enterprises in each sector, with the exception of agriculture, was located in the **Dublin** region;
 - particularly discernible in the financial sector (Dublin accounted for four fifths of all medium to large **financial & insurance** enterprises operating in the State)
 - also, Dublin accounted for over two thirds of enterprises in telecommunications, **computing & related** activities

Inter-regional employment & residence



Region of employment / commuting to work, Q4 2014

	Border	Dublin	Mid-East	Mid-land	Mid-West	South-East	South-West	West	Total
Employed in same region	82%	94%	54%	74%	86%	84%	95%	86%	84%
Employed elsewhere	10%	3.5%	40%	19%	10%	9%	2%	10%	11%
No Answer	8%	2.5%	6%	7%	4%	7%	3%	4%	5%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%

Selected key points: Unemployment (Q4 2014)



- Relative size - the highest **unemployment rates**: Midland (13.1%) and South East (11.9%); the lowest rates were in the Mid-East (8.5%) and Dublin (8.6%)
- Scope: even though it had the lowest unemployment rate of all regions, Dublin (with 55,500 unemployed persons) accounted for a quarter of all unemployed within the State
- Labour market experience:
 - 4-in-5 had some previous experience of employment
 - in terms of previous sector, construction was the largest and accounted for more than a fifth;
 - 2-in-3 had [stated] previous occupation; those previously employed in skilled trades were the largest group across all regions, followed by those in elementary occupations; however regional variation in relative size
- Education: the largest share of the unemployed within each region had attained at most lower secondary education (with the exception of the Midland region)
- Age: relatively higher rates of unemployment for those younger than 25 years of age; these rates were particularly elevated in the Midland and South-East regions, at 29.6% and 29% respectively; in contrast, the Mid-East and Dublin regions had the lowest rates, at 14.7% and 15.9% respectively



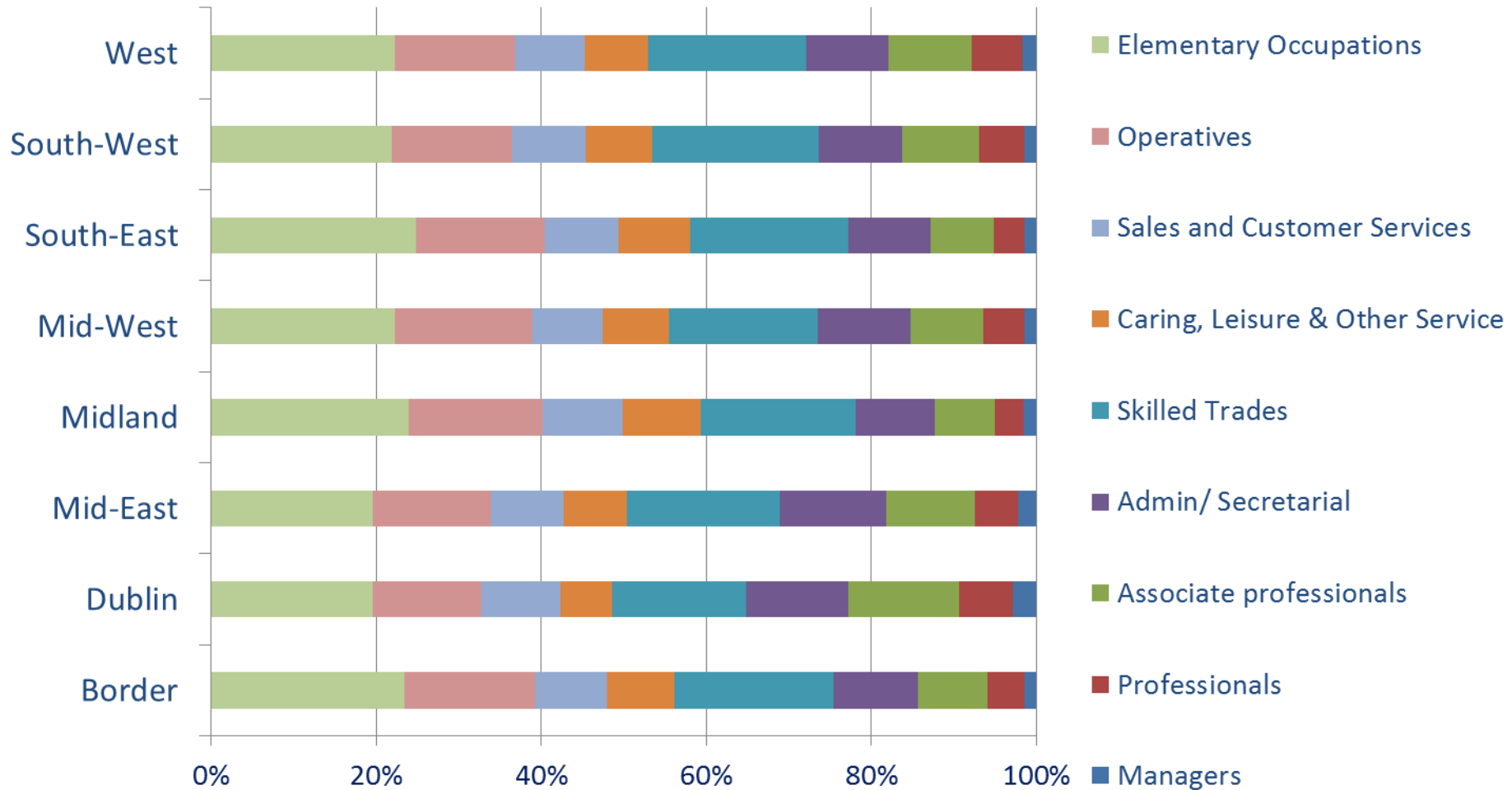
- Movements in and out of employment/unemployment

	Border	Dublin	Mid-East	Mid-land	Mid-West	South-East	South-West	West	Total
Became unemployed during 2014	6,900	21,900	9,000	5,700	7,300	10,500	11,600	9,100	82,000
<i>as share of unemployment</i>	34%	39%	41%	33%	42%	38%	36%	44%	38%
Entered [new] employment during 2014	23,200	98,700	29,300	14,500	19,900	25,100	32,000	21,900	264,700
<i>as share of employment</i>	12%	17%	12%	13%	13%	12%	12%	12%	14%

Selected key points: PES Job Seekers



There were approximately 151,500 job seekers in May 2015

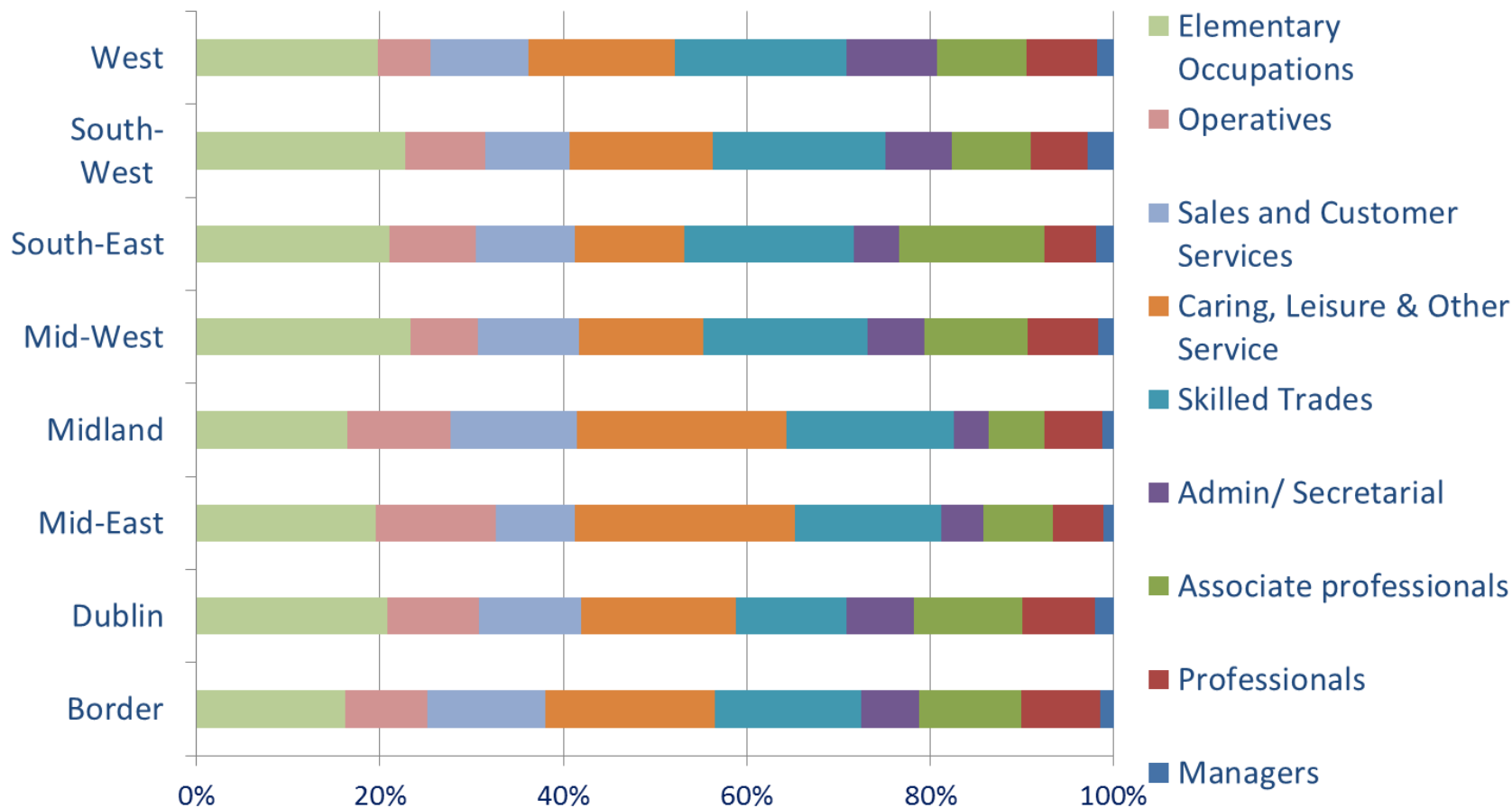


Source: DSP Jobs Ireland

Selected key points: PES Vacancies



Almost 70,000 vacancies advertised on DSP Jobs Ireland for the period Jan-Dec 2014



Further and higher education and training awards by field of learning by region (2014)



Field of learning / Region	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Total
Agriculture/vet	404	727	116	257	400	712	429	248	3,293
Arts/humanities	671	4,520	1,114	247	1,328	749	1,940	2,008	12,577
Business & law	2,049	8,038	794	990	1,928	1,853	3,434	1,772	20,858
Education	181	1,832	622	-	1,352	130	467	696	5,280
Eng. & construction	883	3,082	68	396	1,132	885	1,457	931	8,834
General learning	479	1,311	155	422	302	368	291	200	3,528
Health	1,831	7,540	881	1,117	1,666	2,120	3,083	1,530	19,768
ICT	339	1,488	139	188	440	290	795	417	4,096
Science/maths	463	2,268	366	123	428	164	1,119	739	5,670
Services	693	1,311	92	318	350	890	1,055	501	5,210
Social sciences/journalism	140	2,615	628	37	466	160	898	815	5,759
Total	8,133	34,732	4,975	4,095	9,792	8,321	14,968	9,857	94,873

Selected key points- using indicators



Example: Young people and their situation – indicators regarding:
[non] participation in education & training and in the labour market



Early school leaving

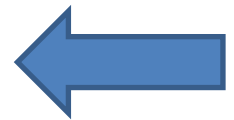


[Youth] Unemployment rate



[Youth] Unemployment ratio

Policy
targets

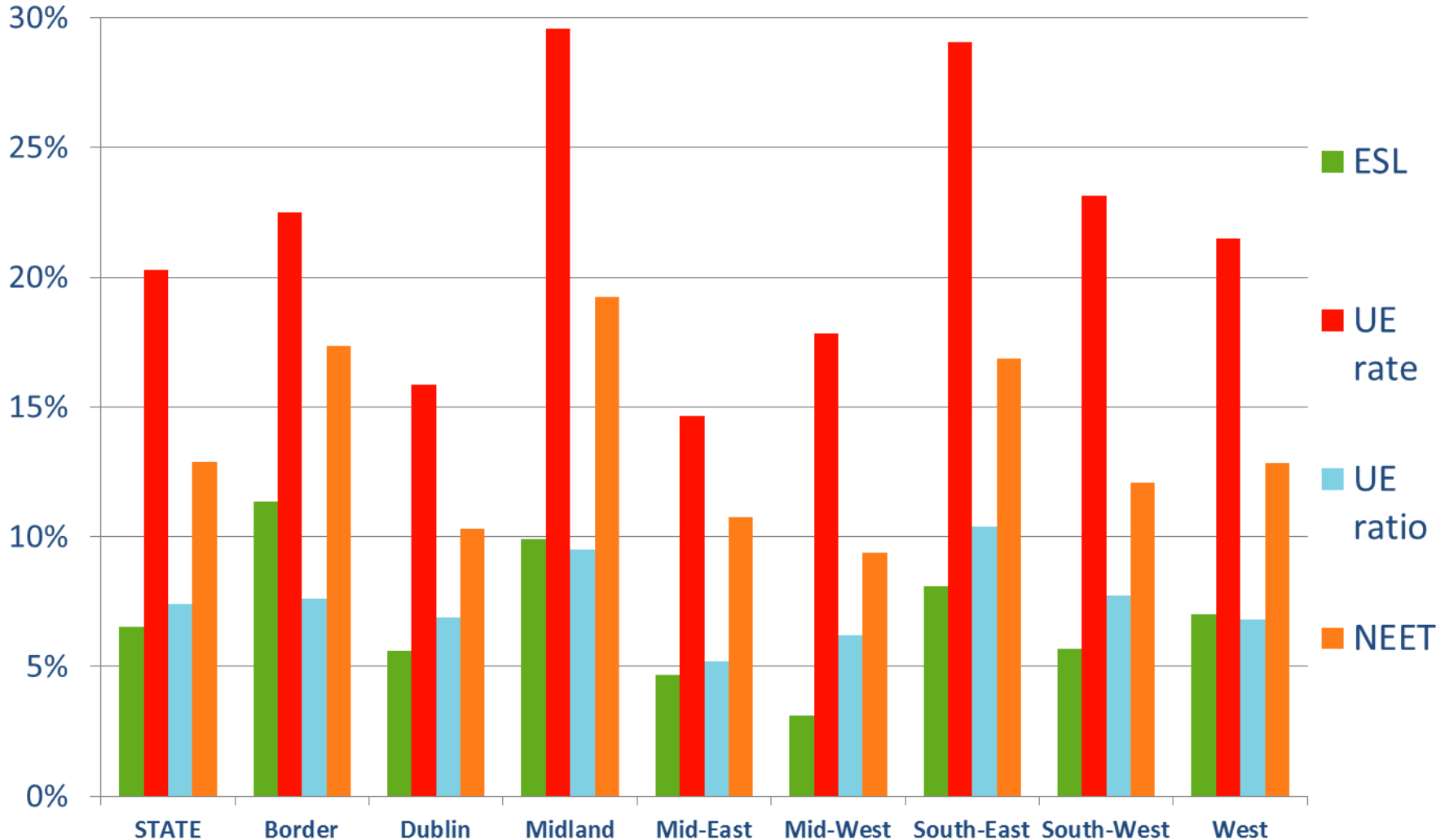


NEET
[Youth] Disengagement from both labour market and education & training

Selected key points- using indicators



Young people: [non] participation in education & training and/or in the labour market



Conclusion



- Regional comparison

- Benchmarking regions
- Similarities across regions
- Differences across regions

- Assisting policy making

- Relevant indicators and statistics (e.g. skill supply & demand, business landscape, etc.)
- Regional monitor

Conclusion – regional comparison



- Similarities across regions
 - profile of the Live Register
 - profile of unemployed regarding their previous sector of employment and educational attainment
 - profile of Public Employment Service job seekers
 - profile of Public Employment Service vacancies
- Differences across regions:
 - business landscape and sectoral composition of employment (e.g. share of knowledge intensive services)
 - business landscape (GVA/economic output / GVA index per region/per person; composition of manufacturing employment in terms of technology intensity; share of large enterprises)
 - share of relatively higher skilled occupations in regional employment
 - unemployment rate & youth unemployment rate, labour force participation rate, employment rate
 - Prevalence of commuting to [work] across regions
 - Extent of non-engagement with the labour market/education & training



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