

Regional Labour Markets Bulletin 2016

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SOLAS



Introduction

- Changes in relation to the 2015 report
- Selected statistics
 - Output (GVA)
 - Enterprise landscape
 - LMI - demand
 - Employment, vacancies, employment projections – (expansion, replacement demand and recruitment requirement)
 - LMI - supply
 - Unemployment
 - Job ready job seekers
 - Education & training
 - Sample of charts for illustration – regional profile (Dublin)

Objective



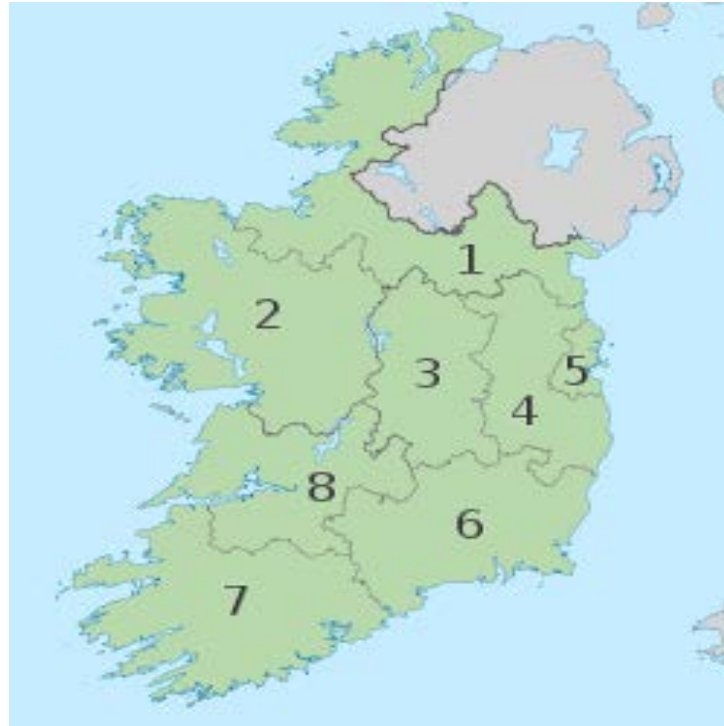
Aim:

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

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		

Selected key points – Economic output



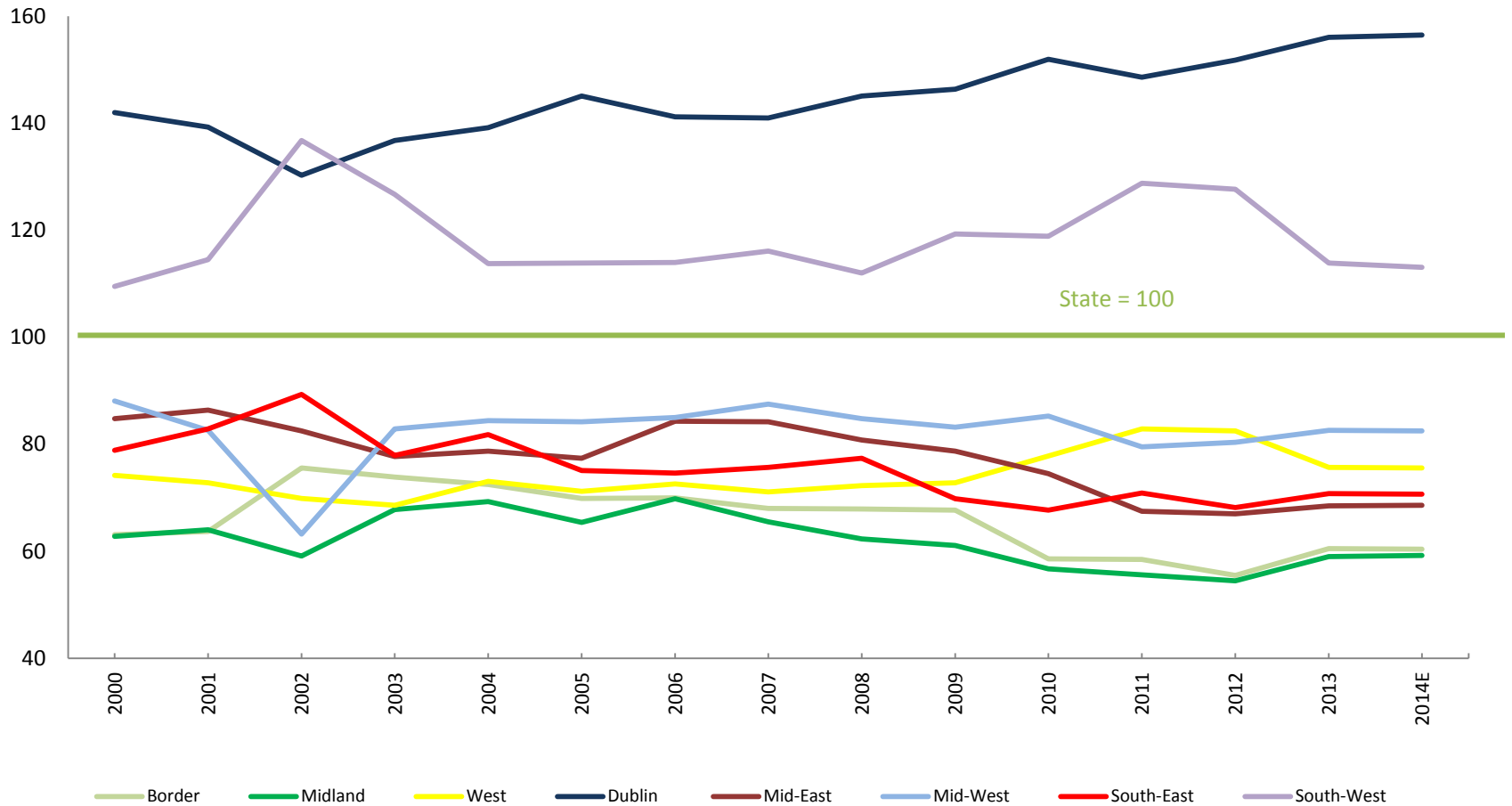
Gross Value Added (GVA), 2013

	Border	Dublin	Mid East	Midland	Mid West	South East	South West	West	Ireland
GVA at Basic Prices (Euro Million)	11,093	70,811	12,952	5,936	11,168	12,543	26,961	12,008	163,474
GVA per person at Basic Prices (Euro)	21,445	55,365	24,276	20,923	29,305	25,092	40,384	26,839	35,464
Indices of GVA per person at Basic Prices (State=100)	60.5	156.1	68.5	59.0	82.6	70.8	113.9	75.7	100
GVA at Basic Prices (%)	6.8	43.3	7.9	3.6	6.8	7.7	16.5	7.3	100

- GVA – equivalent to GDP; relatively high 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 had the lowest
- Y-o-y increase in GVA in 6 regions; in terms of relative GVA (indices), almost all regions improved their relative position y-o-y (exceptions being the West region and South-West region; however, the S-W remains above the State's average, the only region apart from Dublin to exceed it)
- Dublin accounted for 43% of the State's total output in 2013



Regional economic output over time - Indices of Gross Value Added (GVA) per person, by region, 2000-2014* (State = 100)



*2014 figures are estimates

Regional enterprise landscape



Business Demography (refers to 2014)

- active enterprises, by size, in the **private business economy (sectors B-N)**
- in each region, the vast majority of enterprises were micro enterprises (<10 persons engaged); Midland had the highest share of micro enterprises; in all regions above 90% were micro enterprises
- Considering the **No. of persons engaged**, SMEs (<250) accounted for over two thirds (69%) of the total, at the State level; regional variations – Dublin SME share 53% vs. Midland 97%
- Dublin had the biggest share of persons in large enterprises (250 and above engaged)
- While accounting for 1/3 of active enterprises in the State, Dublin accounted for over a 1/2 in ICT; almost 3/5 in financial; and 2/5 in professional activities
- Not comparable with figures presented in the last year Report (e.g. change in methodology / sampling resulting in better coverage re. micro enterprises)

Selected key points: LM indicators, Q4 2015



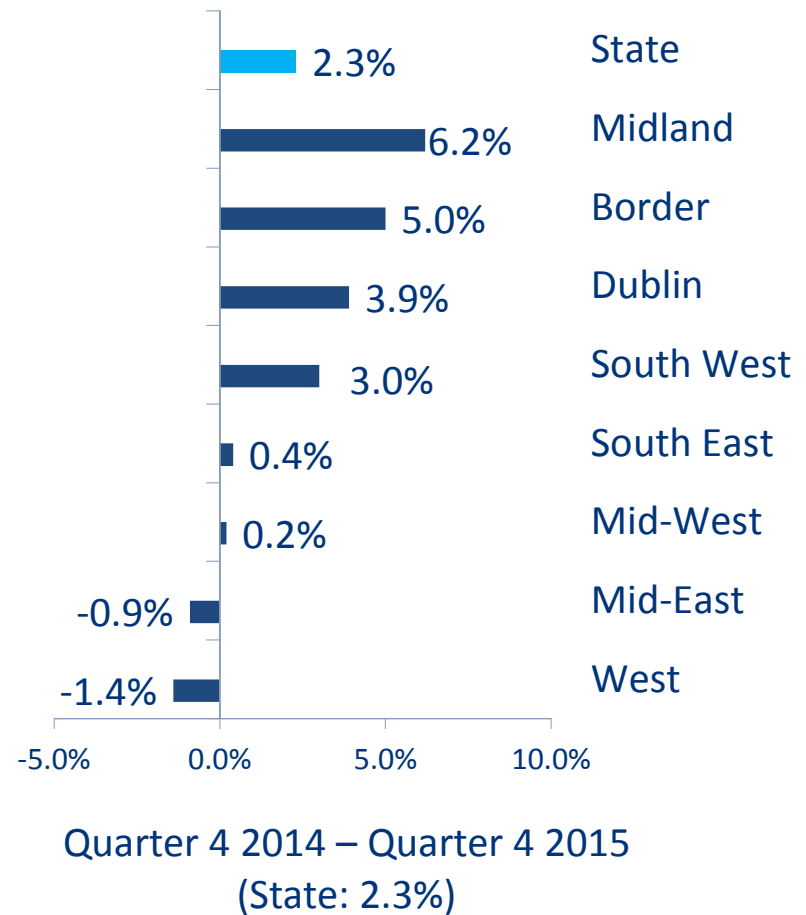
	POP 000s	WAP (15-64) 000s	LF 000s	E 000s	UE 000s	E rate (20-64)	UE rate (15-75)	P rate
Border	494.5	304.2	213.6	195	18.6	67.8%	8.7%	56.5%
Dublin	1,319.5	883.8	660.4	610.4	50.0	72.2%	7.6%	63.2%
Mid-East	552.6	354.3	255.1	235.8	19.3	71.2%	7.6%	61.5%
Midland	293.6	187.9	135.4	120.8	14.7	68.2%	10.9%	60.3%
Mid-West	376.4	238.5	167.1	153.1	14.1	67.8%	8.5%	57.1%
South-East	510.4	325.7	233.1	205.4	27.7	66.7%	11.9%	58.6%
South-West	670.7	433.4	306.3	283.9	22.4	68.8%	7.4%	58.1%
West	433.9	273.9	199.5	178.6	20.8	67.9%	10.6%	58.8%
Ireland	4,653.6	3,001.8	2,170.5	1,983.0	187.5	69.6%	8.7%	60.0%

Selected key points: LMI (Q4 2015)



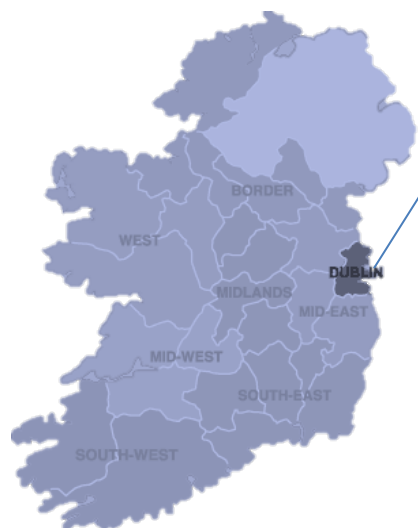
- Labour Force and Participation
 - Dublin region had the highest participation rate, at 63.2%, while despite y-o-y improvement, the Border region, at 56.5%, had the lowest; the Mid-West had a rate of 57.1%, the second lowest
 - y-o-y increase in LF in 3 regions; contraction in 4 regions
 - y-o-y increase in participation rates in 3 regions, decline in 3 regions
- Employment
 - y-o-y increase in numbers employed in 4 regions; static in 2; decline in 2 regions
 - three regions (Dublin, Mid-East, and South-West) reached the national employment target rate (c.f. APJ; 69%-71%)
- Unemployment
 - Numbers UE declined in 6 regions, no change in 2 regions
 - UE rate reduced in 6 regions
 - In 3 regions, the rate of UE remained > 1 p.pt. above the average rate for the State

Regional employment and employment growth, year on year (y-o-y)





Region at a glance: Dublin



Population	1,319,500
Working age (15-64 years)	883,800
Labour force	660,400
Participation rate	63.2%
Employment	610,400
Employment rate (20-64 years)	72.2%
Unemployment	50,000
Unemployment rate	7.6%
GVA per person (€)	55,365
GVA p.p. index (State = 100)	156.1



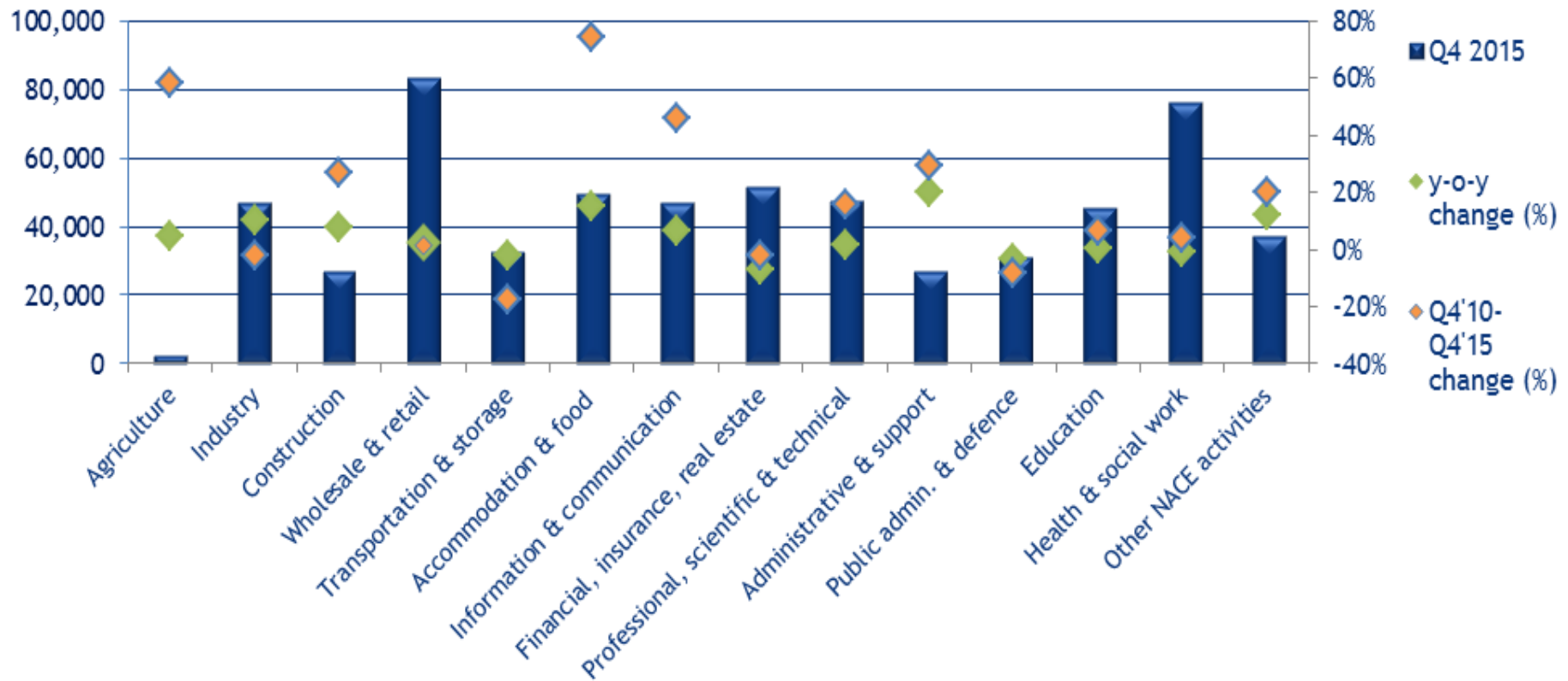
- High value added activities – share of employment in *KIS*
 - Dublin had the highest share: 25% of employment was in *knowledge intensive services* – namely, market, high-tech, and financial services (broadly coinciding with ICT, financial, and professional activities); the share also high in the Mid-East (17%)
 - Dublin accounted for over a 1/2 of all employed in the *ICT* and in financial services, and for 40% of all in professional services in the State
- Public sector (Public admin. & defence, Health, Education) *relatively similar* in size across regions (approx. ¼ of employment)

Selected key points: Employment

Sample: Dublin



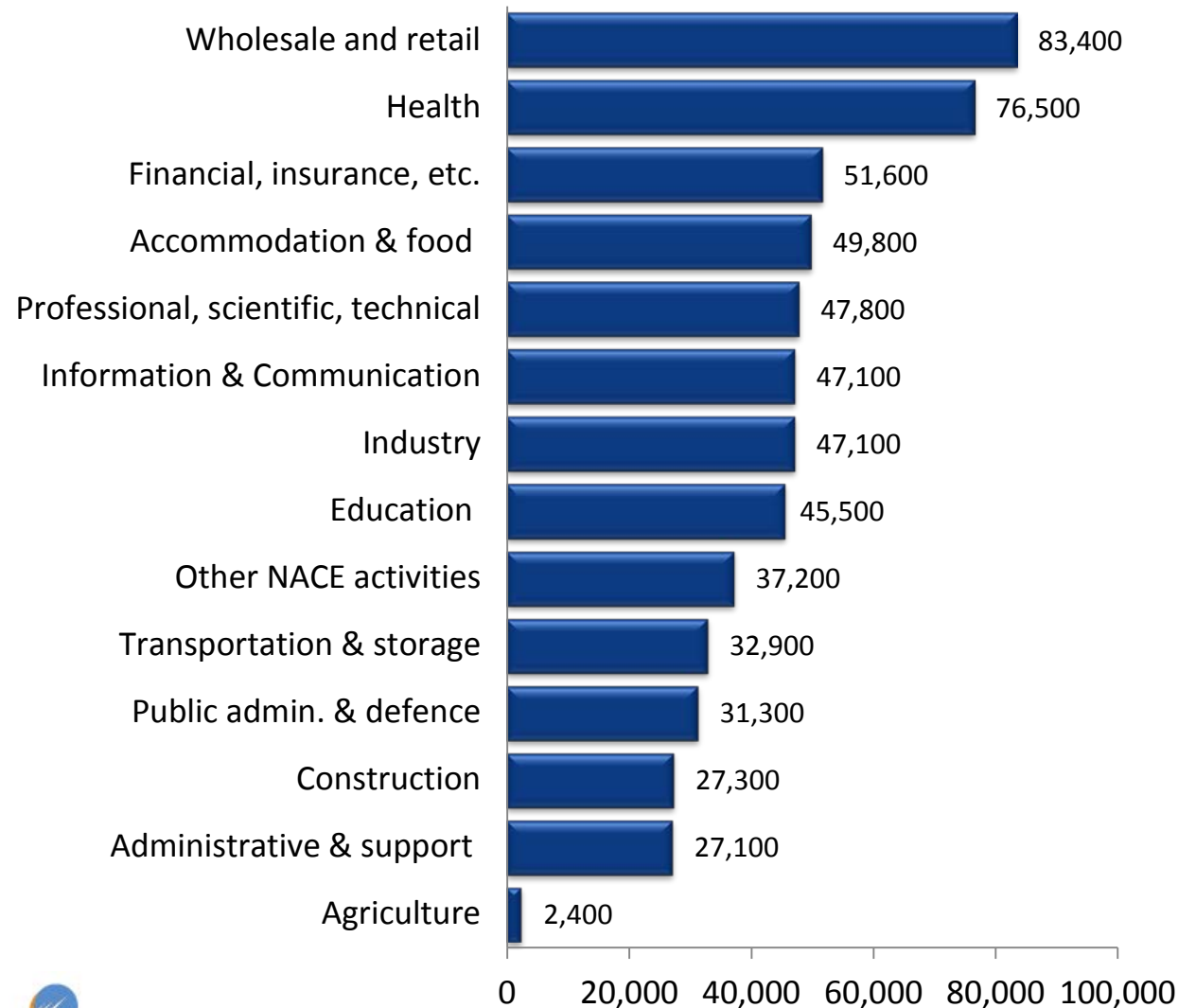
Employment by economic sector* (Q4 2015), y-o-y change (%), and Q4 2010 – Q4 2015 change (%) (Dublin)



Selected key points: Employment Sample: Dublin



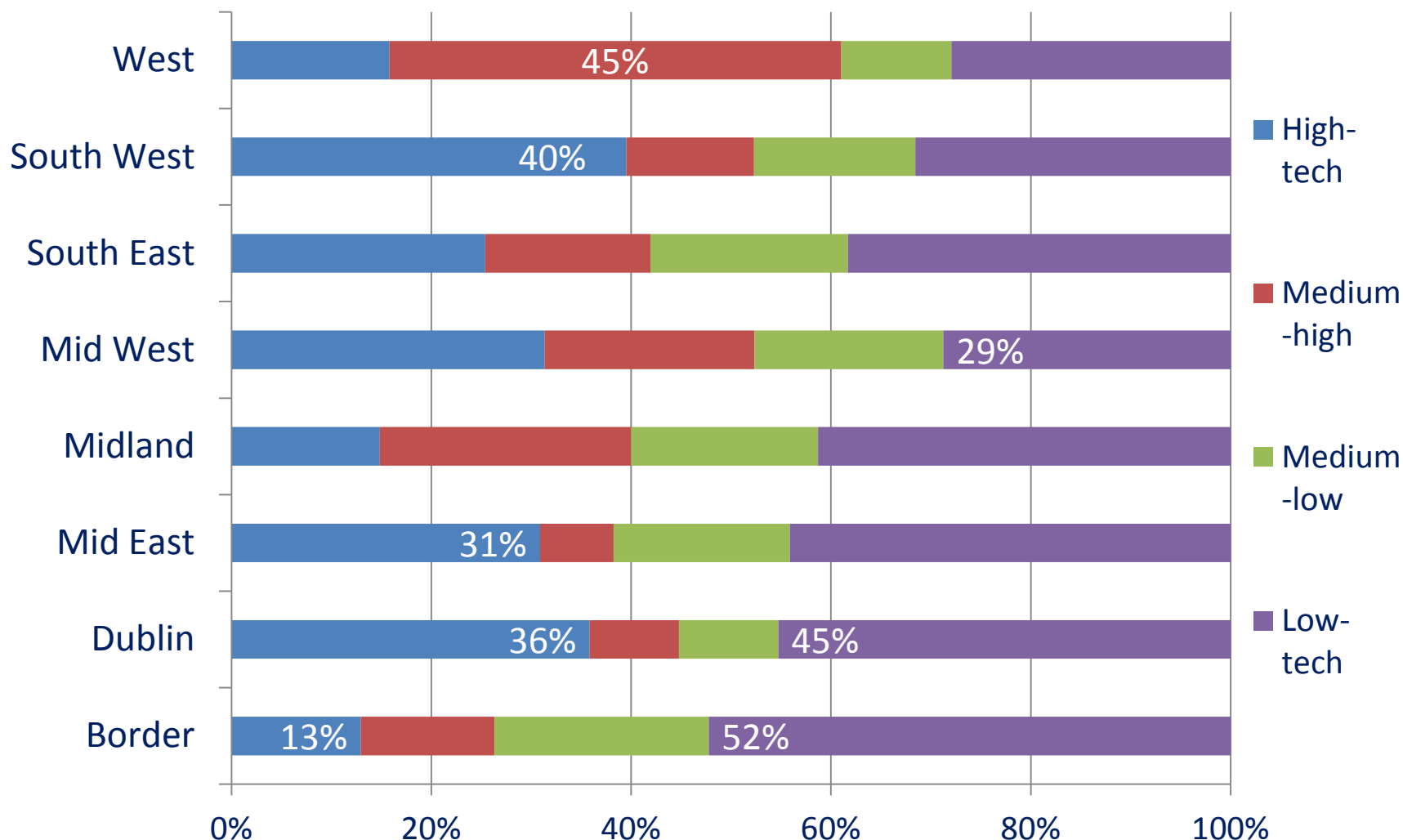
Employment by economic sector* (Dublin), Q4 2015



Selected key points: Employment in manufacturing by technology intensity/type, (% shares) Q4 2015



- Composition within regions (%)

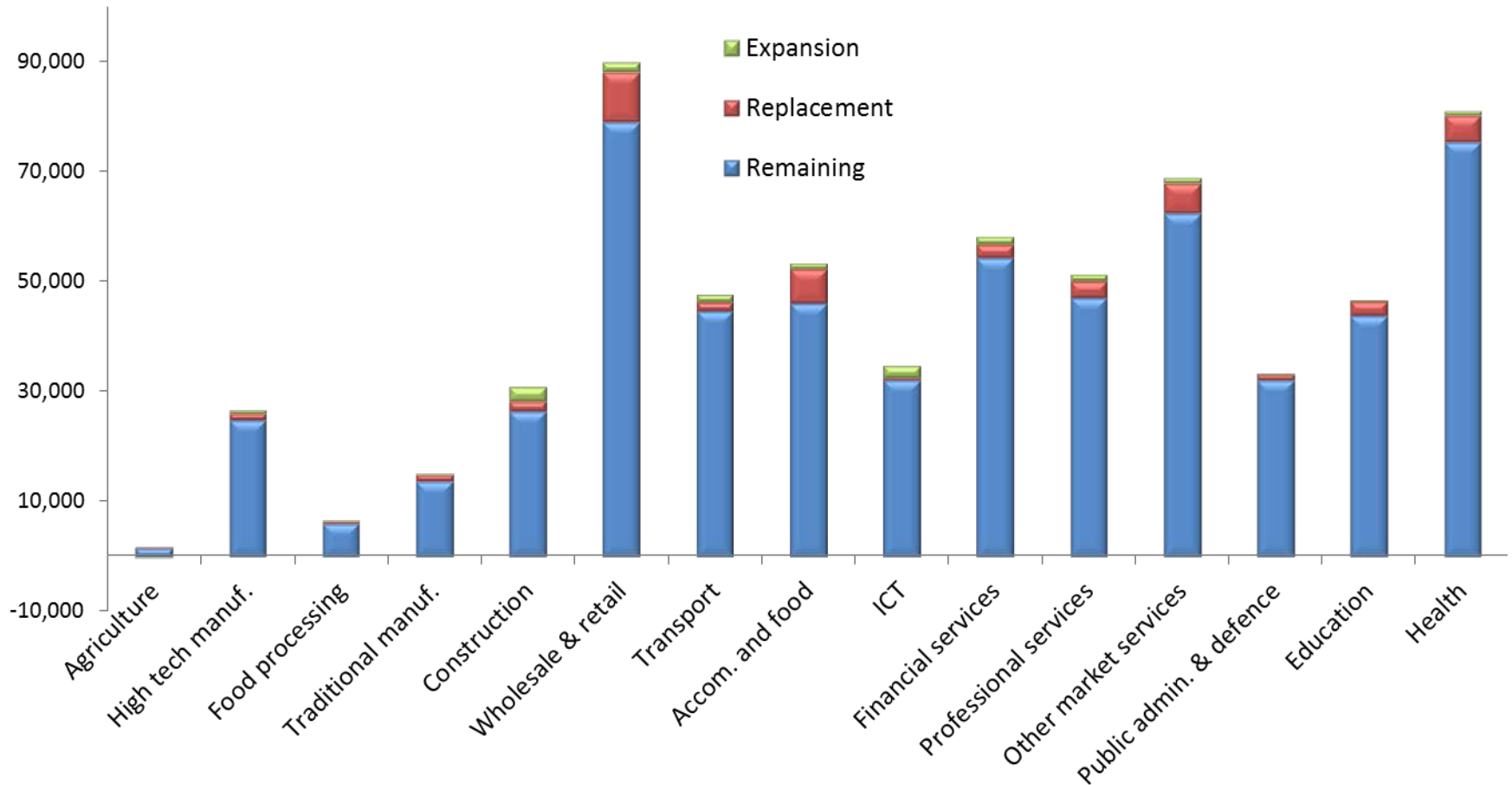


Selected key points: Employment projections/demand

Sample: Dublin



Employment projections by sector – annual projected recruitment requirement*, Dublin



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	81.7%	93.8%	53.5%	71.0%	87.6%	81.9%	93.9%	85.2%	84.0%
Employed elsewhere	9.4%	3.5%	40.1%	24.4%	5.8%	9.9%	2.3%	9.2%	10.9%
No Answer	8.9%	2.7%	6.4%	4.6%	6.6%	8.3%	3.8%	5.7%	5.2%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%

Selected key points: Unemployment (Q4 2015)

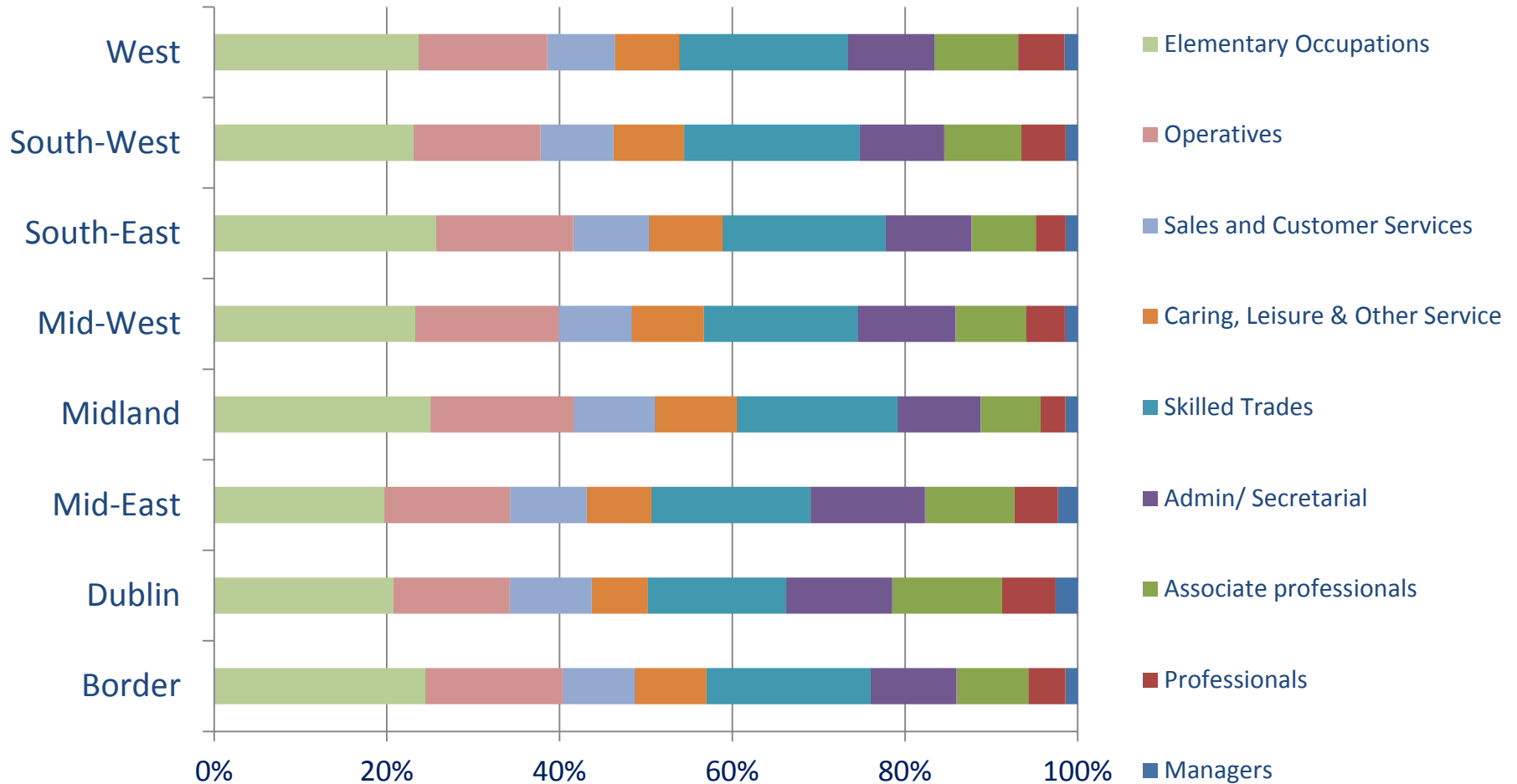


- Relative size - the highest **unemployment rates**: South East (11.9%) Midland (10.9%) and West (10.6%); each of these regions had a rate of unemployment that was more than one percentage point above the State's average; the lowest UE rates were in the South-West (7.4%), Mid-East and Dublin (7.6%)
- Labour market experience:
 - Sizeable share with no previous experience of employment
 - in terms of previous sector, construction was the largest (about a fifth; the highest in all but two regions)
 - those previously employed in skilled trades and in elementary occupations were the largest group (s) across all regions; however some regional variation in relative size
- Education: large shares of unemployed within each region had attained at most lower secondary education; some regional variation
- Age: relatively higher rates of unemployment for those younger than 25 years of age; these rates were particularly high in the West, Midland, and South-East

Selected key points: PES Job Seekers



There were approximately 125,000 job ready job seekers in April 2016

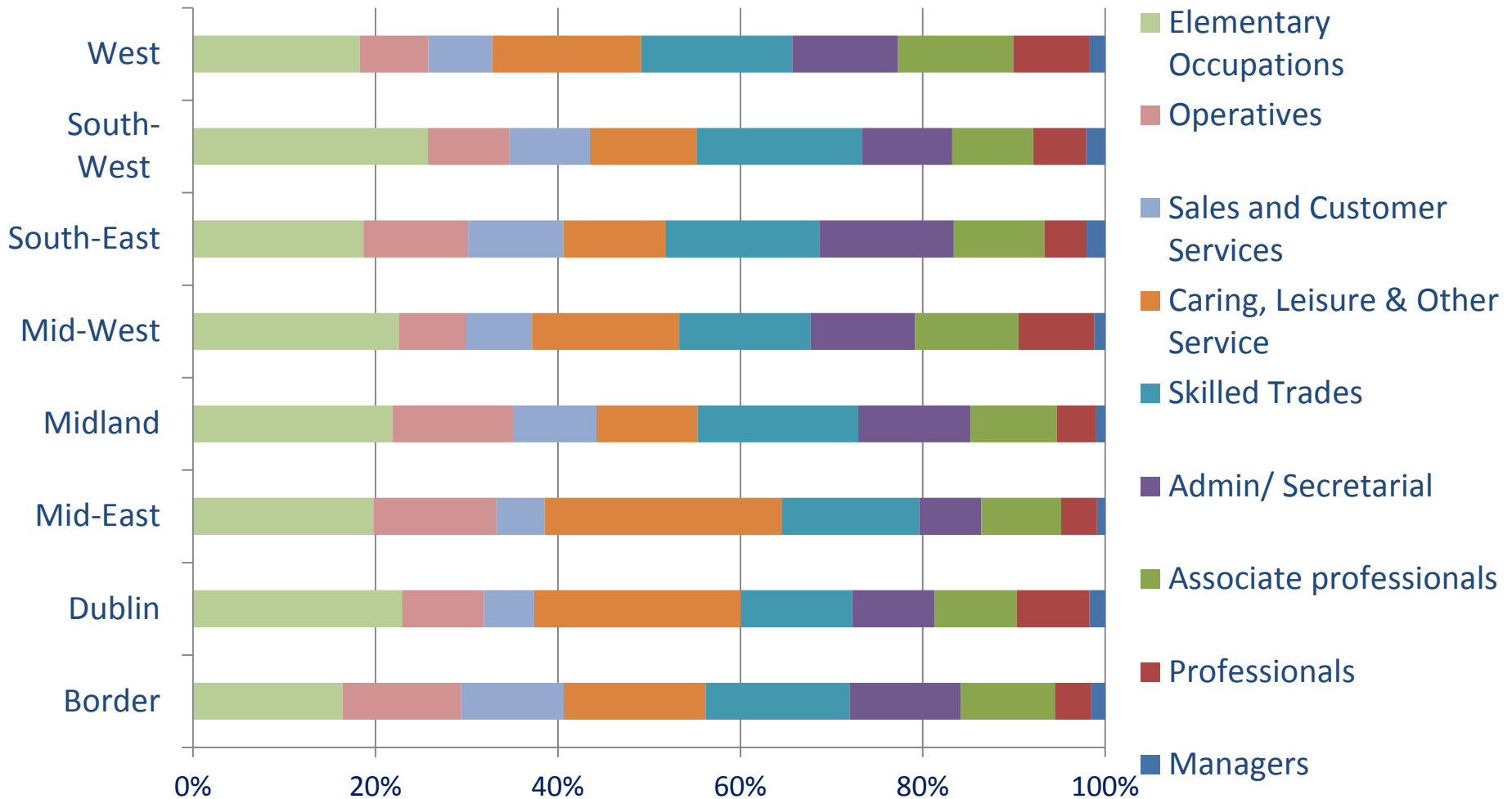


Source: Central Records System of the Department of Social Protection (DSP Client Database)

Selected key points: PES Vacancies

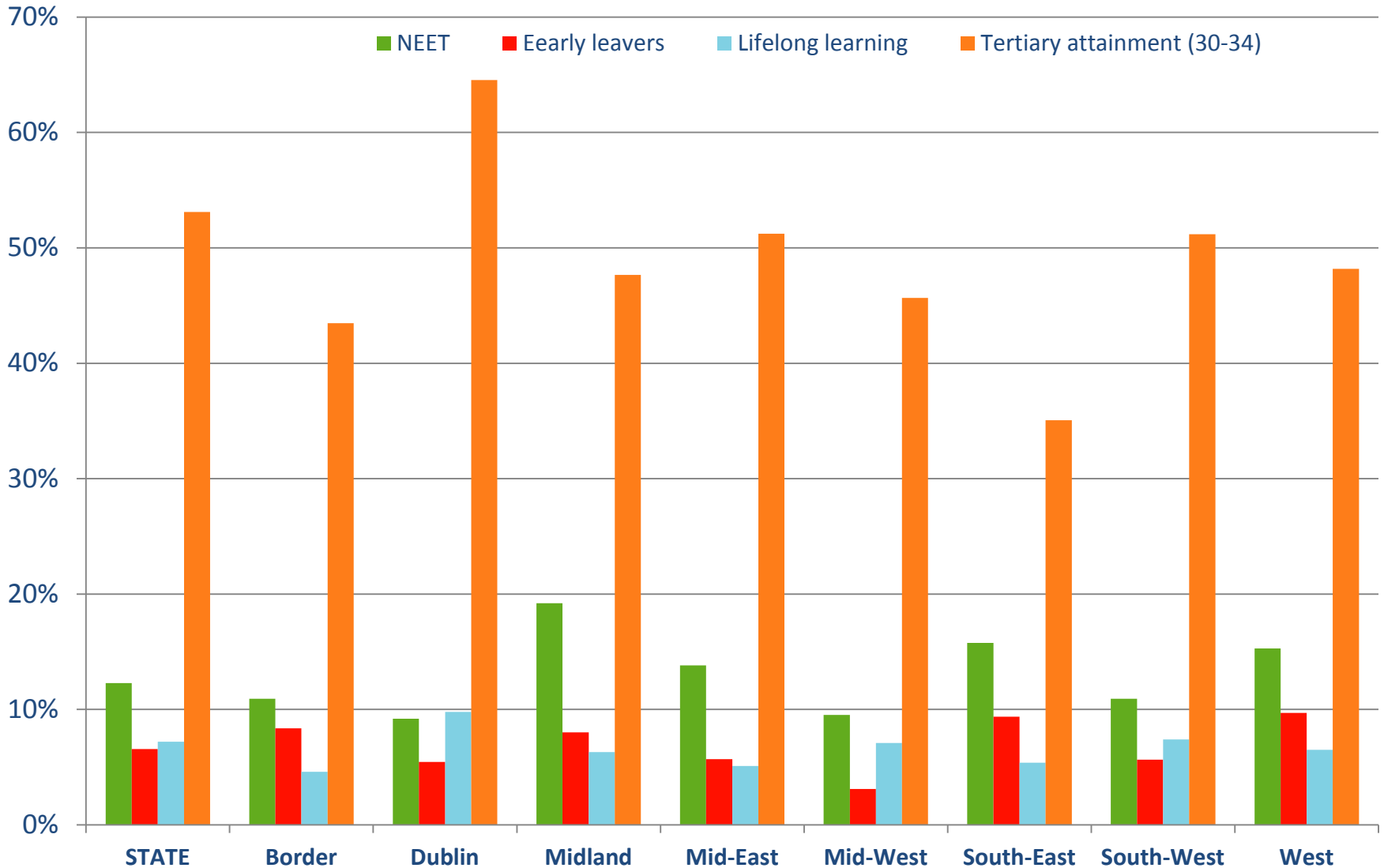


Almost 95,000 vacancies advertised on DSP Jobs Ireland for the period Jan-Dec 2015



Source: DSP Jobs Ireland

Selected key points- education indicators





□ Assisting policy making

- Relevant indicators and statistics (e.g. skill supply & demand, business landscape, etc.)
- Regional monitor? (targets from APJ, Ireland's National Skills Strategy 2025)
- Assistance to new part of skill identification infrastructure – RSF

• Regional comparison

- Similarities across regions
- Differences across regions
- Benchmarking regions

Conclusion – regional comparison



- Similarities across regions
 - Profile of the Live Register (e.g. age, gender)
 - 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:
 - Economic profile - GVA/economic output / GVA index per region/per person; high value added activities
 - Knowledge intensive services (KIS) – share of employment
 - Composition of manufacturing employment in terms of technology intensity
 - Share of relatively higher skilled occupations in regional employment
 - LMI - unemployment rate & youth unemployment rate, labour force participation rate, employment rate
 - Prevalence of commuting to [work] across regions
 - Extent of non-engagement (NEET) with the labour market/education & training
 - Tertiary attainment (30-34)
 - LLL



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