



# Profile of the Dublin Region

**Skills and Labour Market Research Unit (SLMRU), SOLAS**



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## Introduction

The engagement between education and training providers and employers through the Regional Skills Forum needs to be based on the shared understanding of the labour market they are operating in. Both sides represent the key players in relation to the local labour markets, one on the side of the demand for skills (employers) and one on the side of the supply of skills (education and training providers). The availability of labour market information is critical in ensuring that the engagement between the education and training providers and employers results in an evidence-based, well-informed dialogue about the issues regarding the supply and demand for skills and a mutual agreement on how best to resolve issues identified.

The labour market information presented here is aimed at providing a starting point in relation to the evidence upon which the engagement should be based. It contains a selection of tables, charts and info-graphics on each region's economy (GVA, income, enterprise base), labour market indicators (employment rate, unemployment rate etc.), demand (employment trends, profile of recent hires, vacancies, immigration statistics, estimates of recruitment requirement by broad skill group) and supply (graduate output and unemployment). It also provides an overview of some issues identified through recent analysis of the labour market, including skill shortages and labour turnover.

The data and analysis presented here has been prepared using the data held in the National Skills Database, which collates a wide range of datasets and models on demand and supply of labour at occupational level. This includes data from the Central Statistics Office, Department of Education and Skills, Department of Social Protection, Department of Jobs, Enterprise and Innovation and a number of models for labour market analysis developed by the SLMRU, including the Labour Market Transitions Model and Occupational Employment Projections Model.

The information will be updated in line with the availability of updates of the underlying data sets.

Skills and Labour Market Research Unit (SLMRU), SOLAS

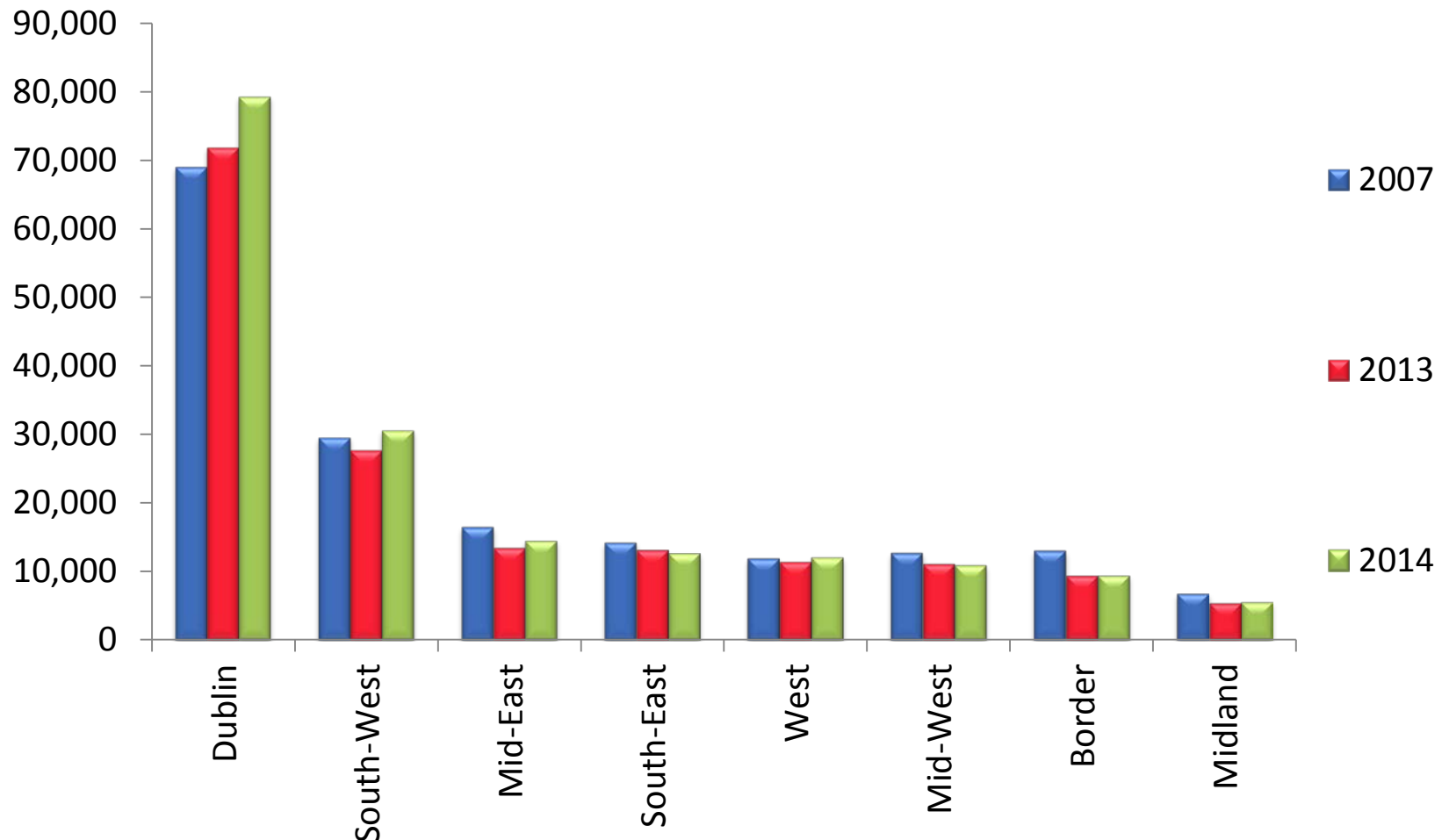
May 2017

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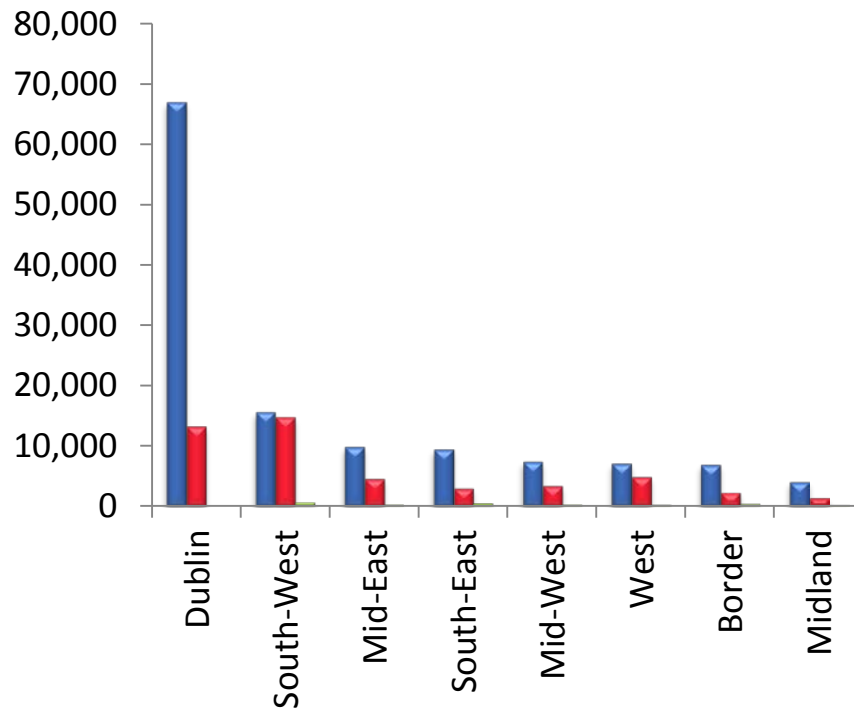
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# Gross Value Added (GVA) by region at basic prices (euro million)

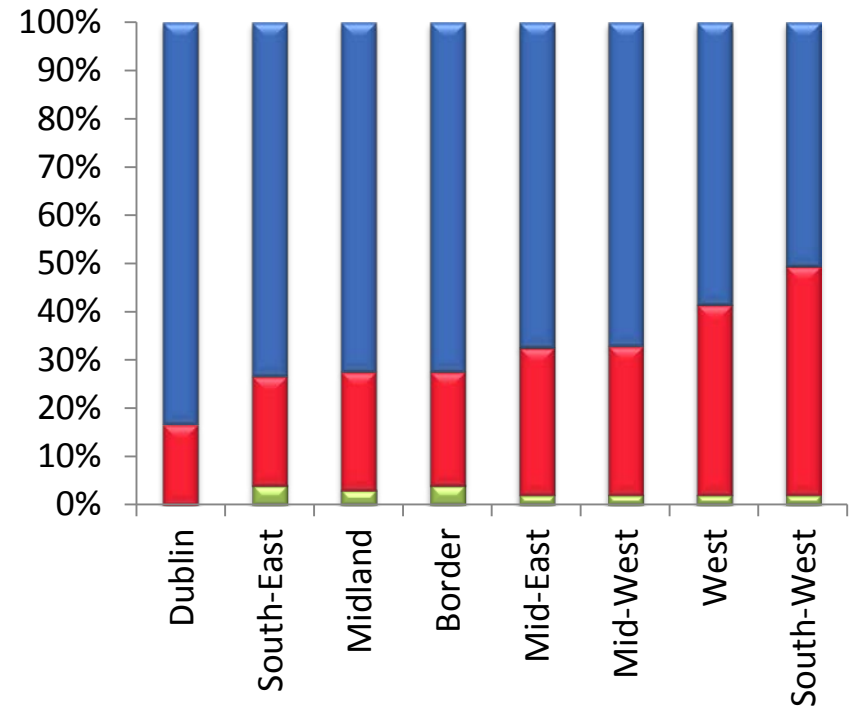


# Gross Value Added (GVA) at basic prices by region and sector

GVA at basic prices by region and sector, 2014 (euro million)



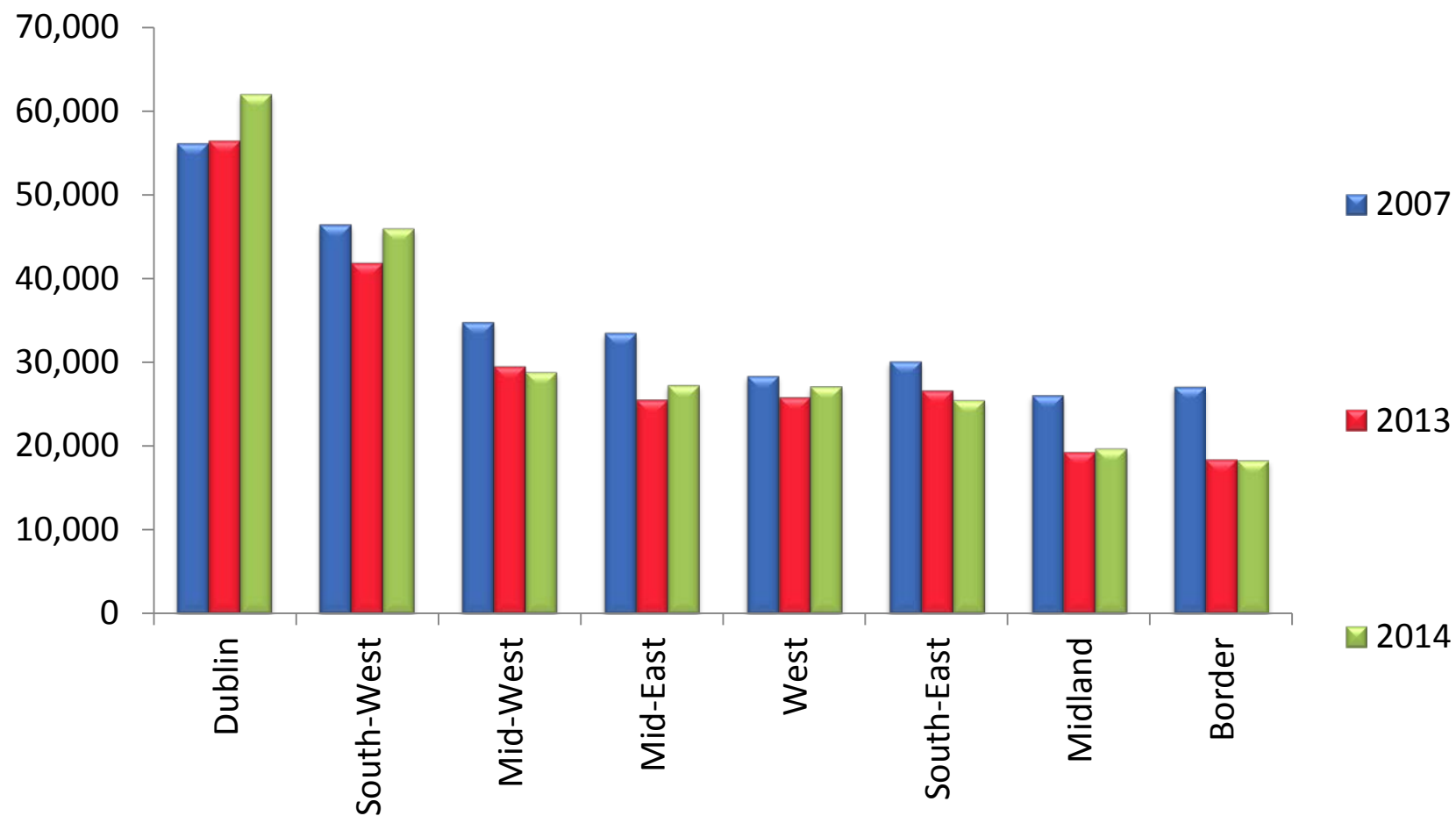
Sectoral distribution of regional GVA at basic prices, 2014



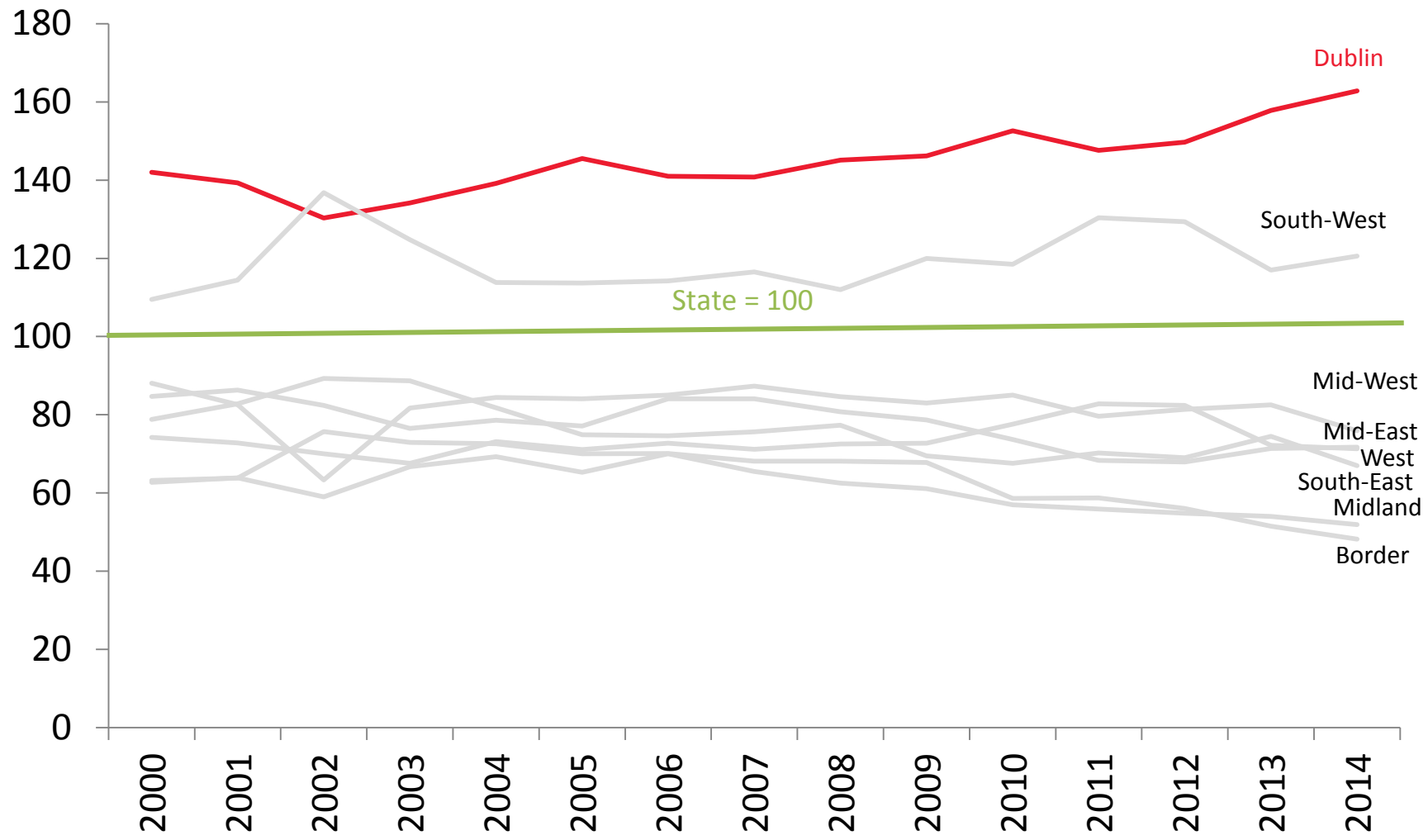
- Market & non-market services
- Manufacturing, building & construction
- Agriculture, forestry & fishing

- Market & non-market services
- Manufacturing, building & construction
- Agriculture, forestry & fishing

# GVA per person at basic prices (euro)

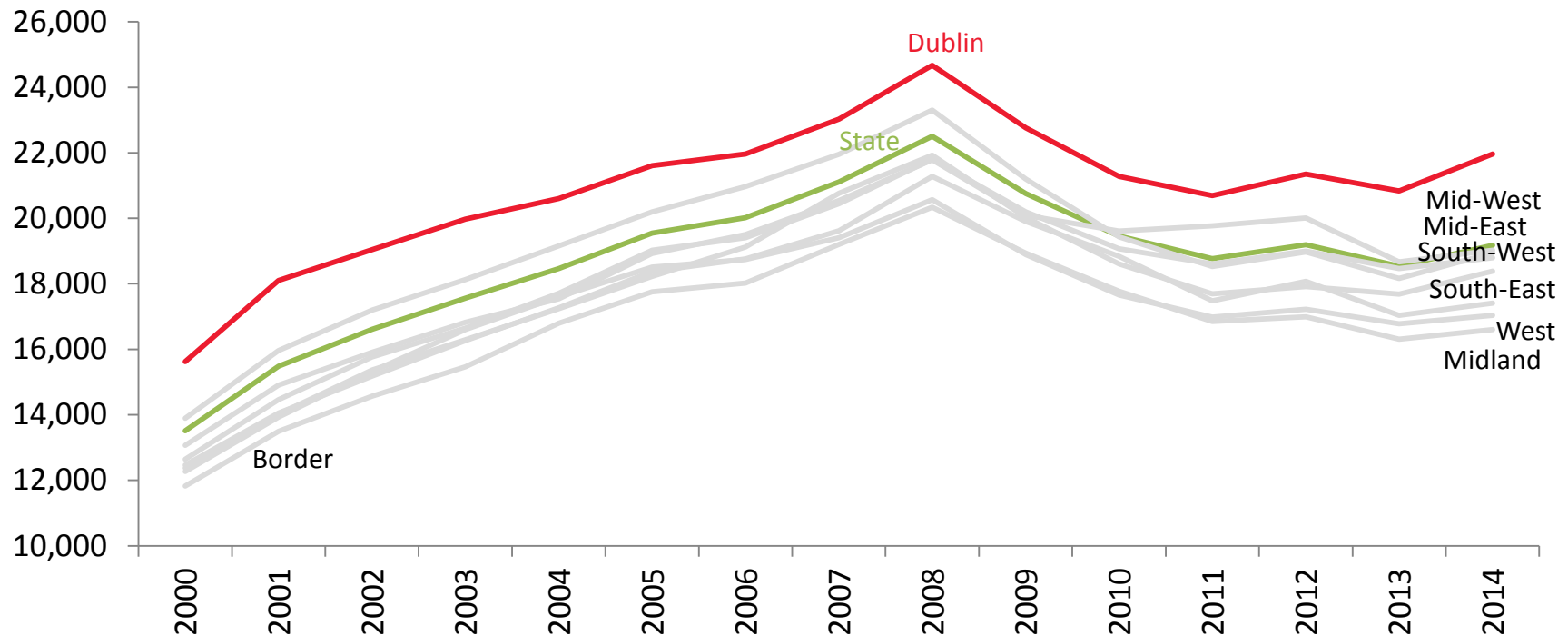


# Indices of Gross Value Added (GVA) per person at basic prices by region (State = 100)



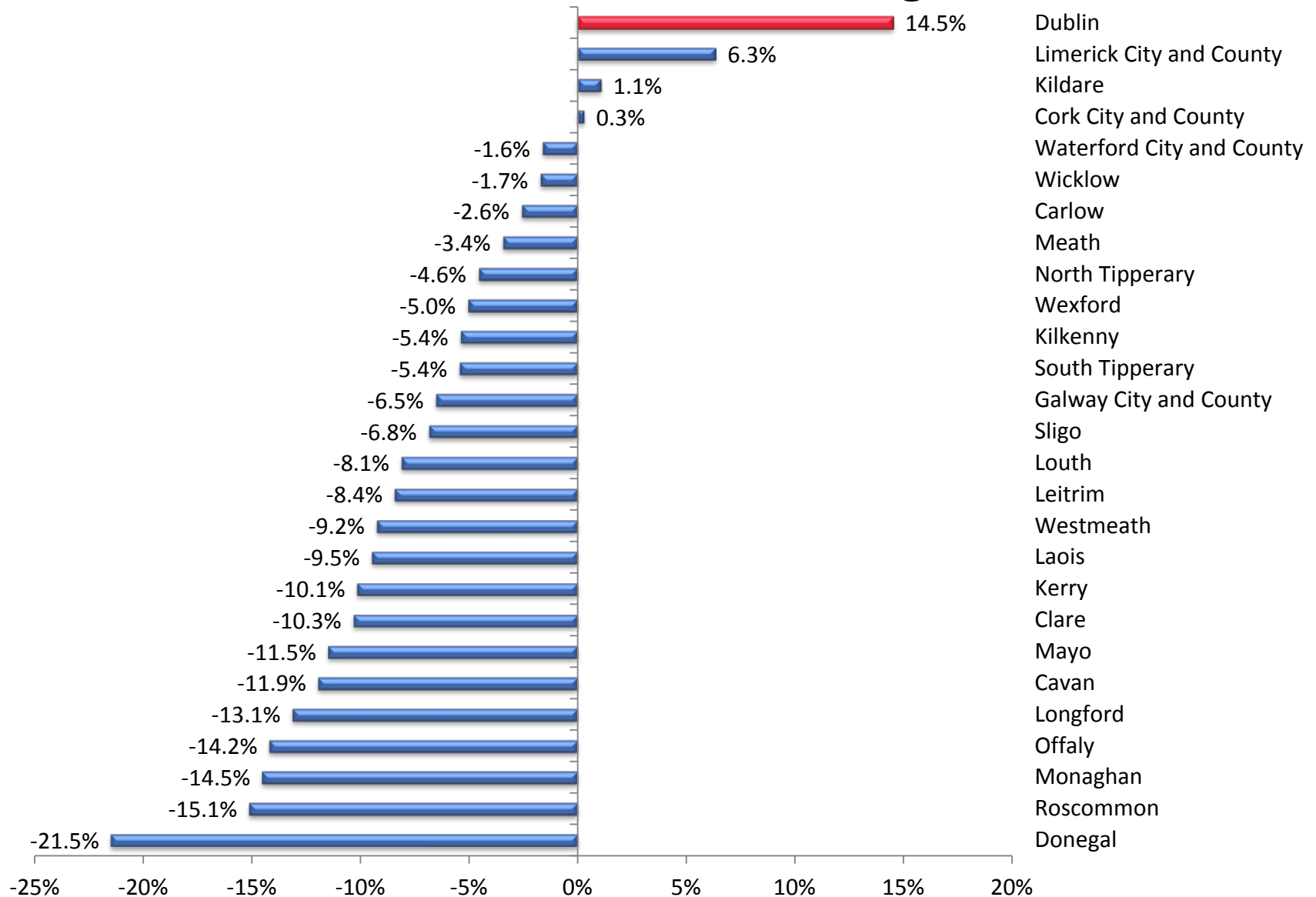
Source: Analysis by SOLAS (SLMRU) based on CSO County Incomes and Regional GDP 2014

# Disposable income per person by region, 2000-2014 (euro)

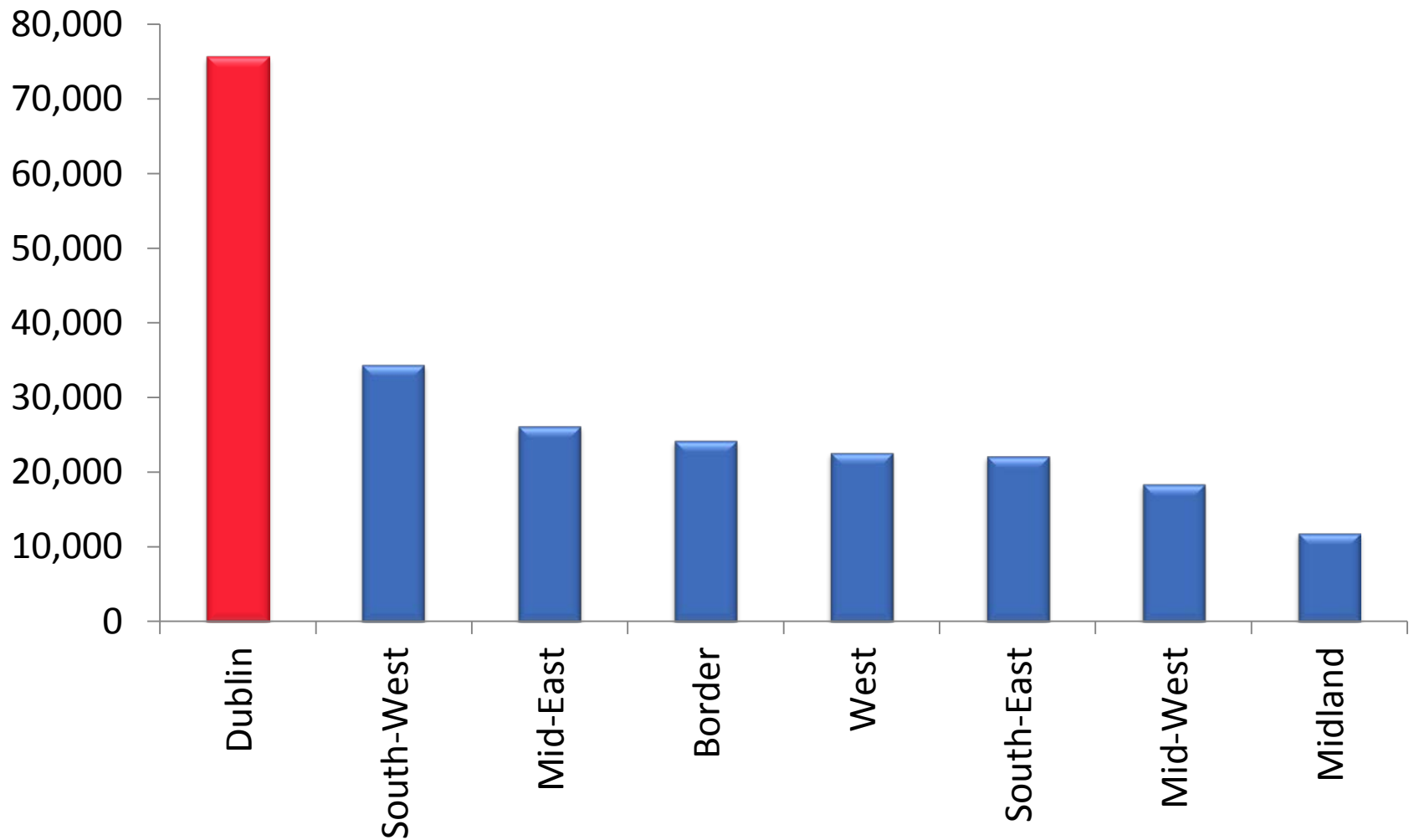


	2008	2012	2013	2014	% change 2013-2014	% change 2008-2014	% Deviation from State average (2014)
Dublin	24,673	21,347	20,834	21,963	5.4%	-11.0%	14.5%
<b>State</b>	<b>22,504</b>	<b>19,190</b>	<b>18,536</b>	<b>19,178</b>	<b>3.5%</b>	<b>-14.8%</b>	

# Disposable income per person by county, percentage deviation from the State average, 2014



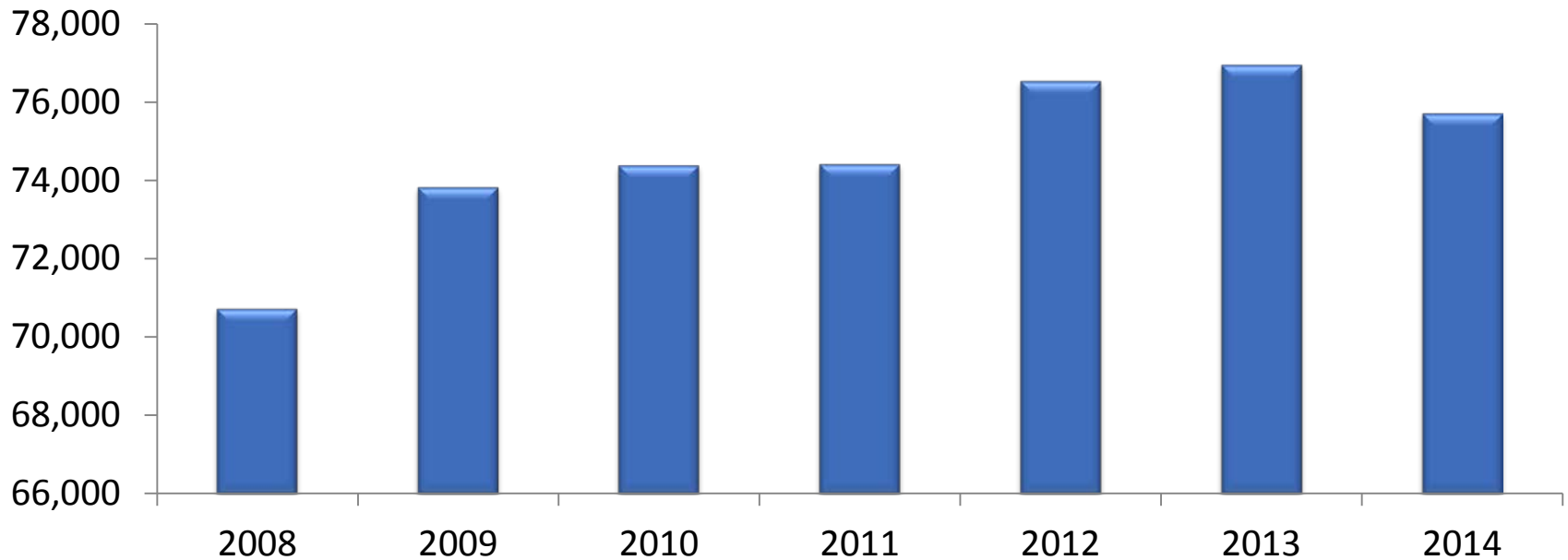
# Number of active enterprises by region (private business economy), 2014



Source: Analysis by SOLAS (SLMRU) based on CSO Business Demography 2014

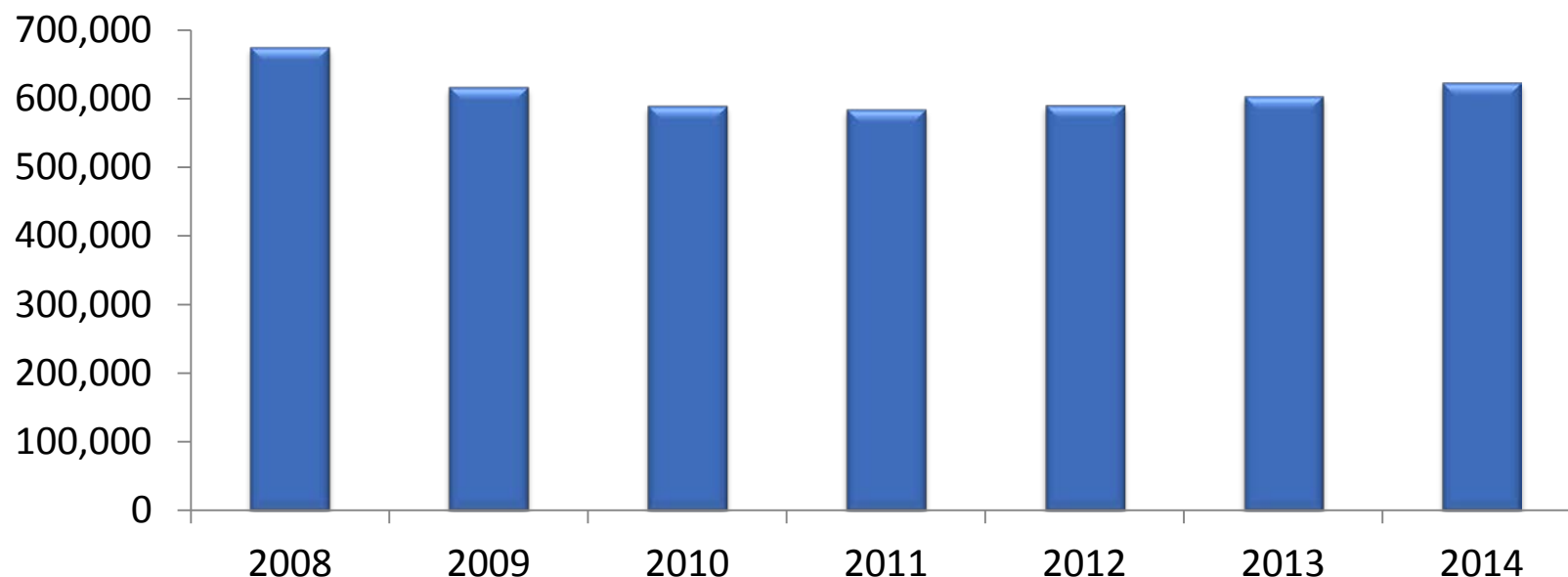
Note: Private business economy covers NACE Rev. 2 sectors B to N (excluding activities of holding companies)

# Number of active enterprises (private business economy), Dublin, 2008-2014



	2008	2013	2014	% change 2013-2014	% change 2008-2014
Dublin	70,743	76,956	75,713	-1.6%	7.0%
<b>State</b>	<b>244,195</b>	<b>243,571</b>	<b>238,249</b>	<b>-2.2%</b>	<b>-2.4%</b>

# Number of persons engaged (private business economy), Dublin, 2008-2014

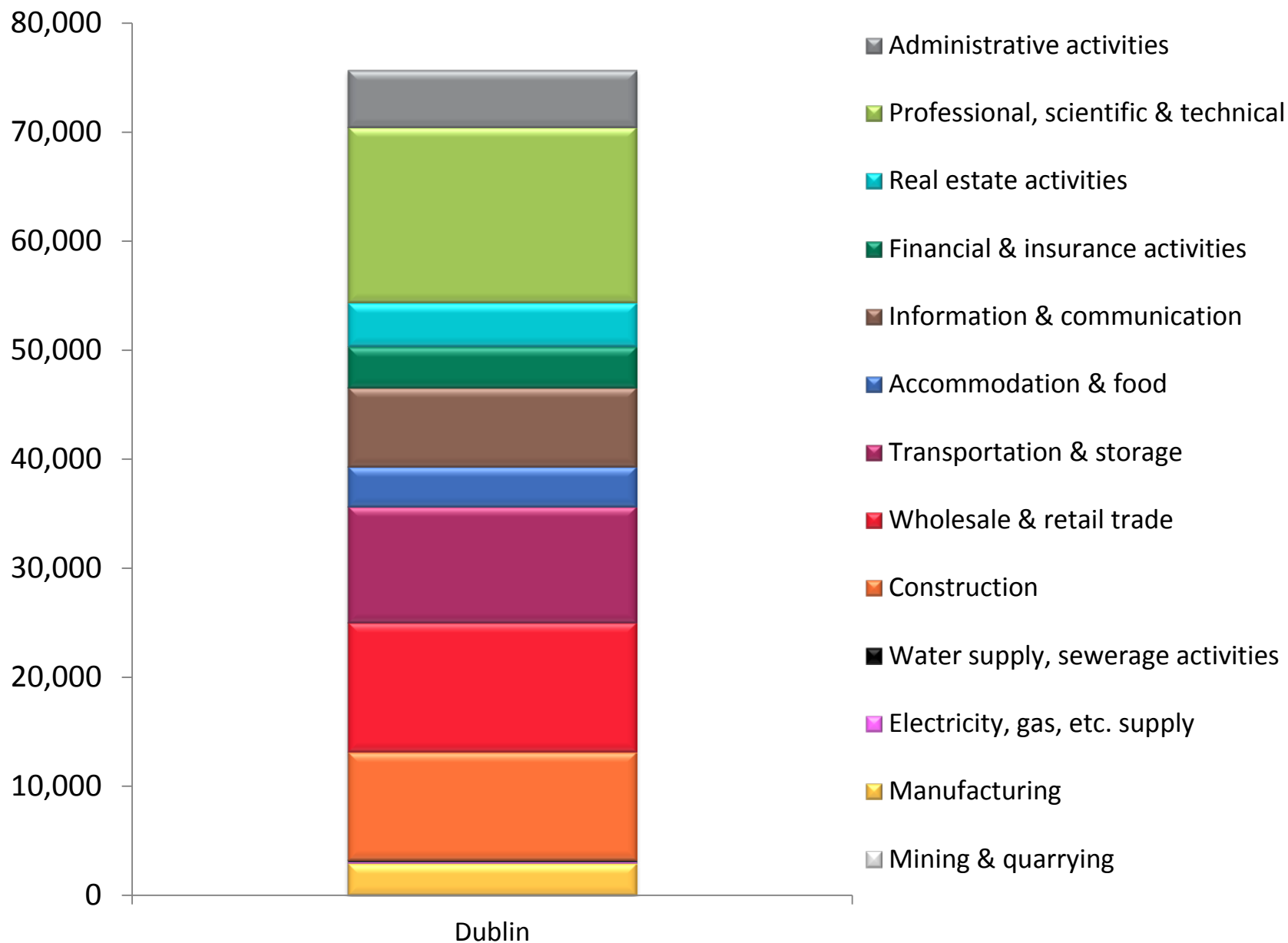


	2008	2013	2014	% change 2013-2014	% change 2008-2014
Dublin	674,673	603,501	622,780	3.2%	-7.7%
<b>State</b>	<b>1,511,920</b>	<b>1,288,017</b>	<b>1,334,291</b>	<b>3.6%</b>	<b>-11.7%</b>

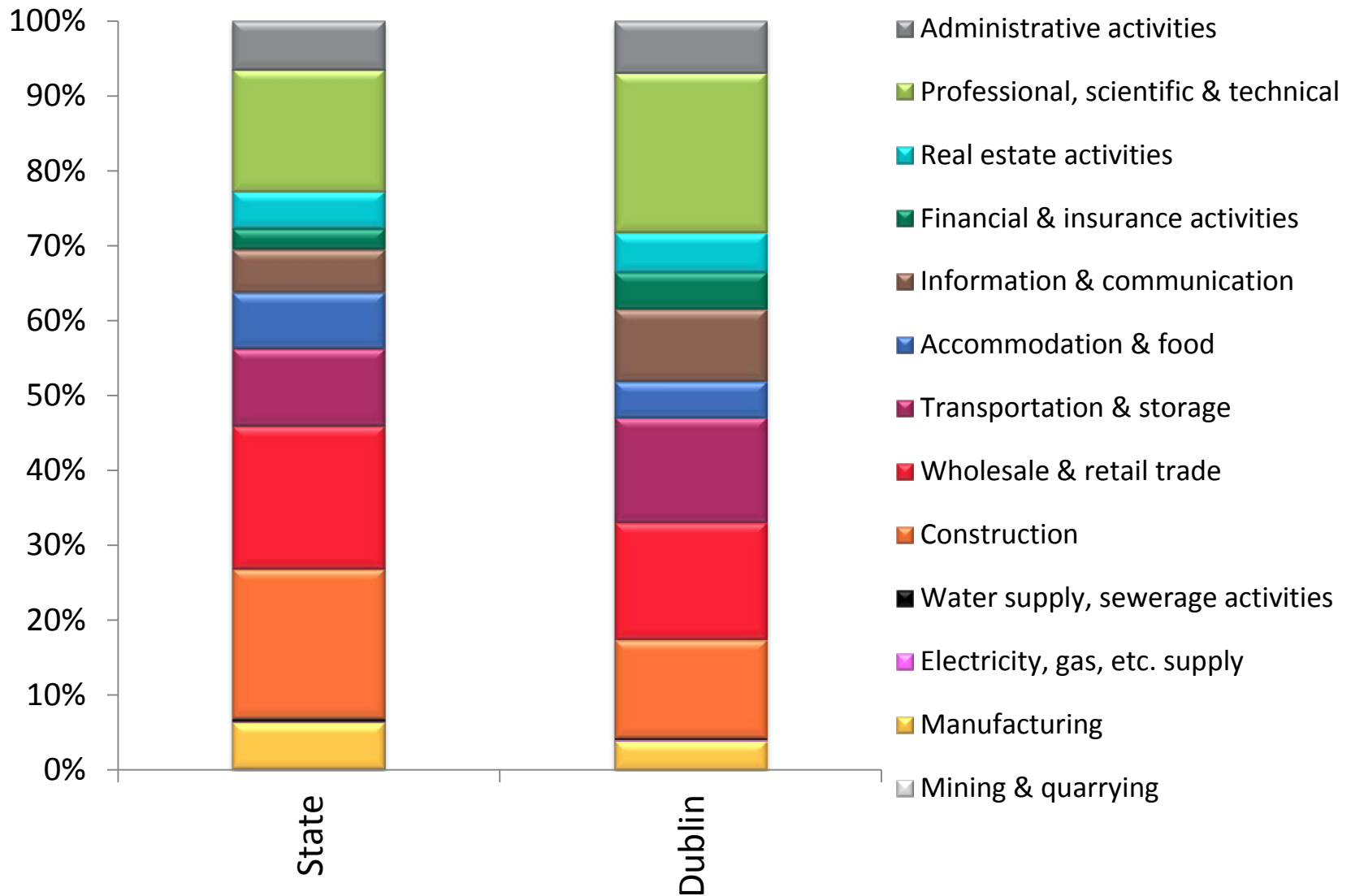
Source: Analysis by SOLAS (SLMRU) based on CSO Business Demography 2014

Note: Private business economy covers NACE Rev. 2 sectors B to N (excluding activities of holding companies)

# Number of active enterprises by sector, Dublin, 2014

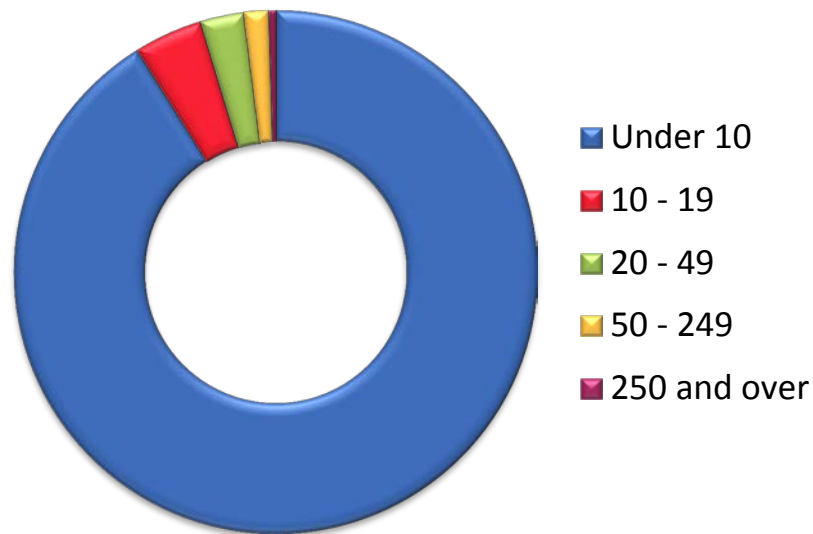


# Distribution of active enterprises by sector, Dublin, 2014

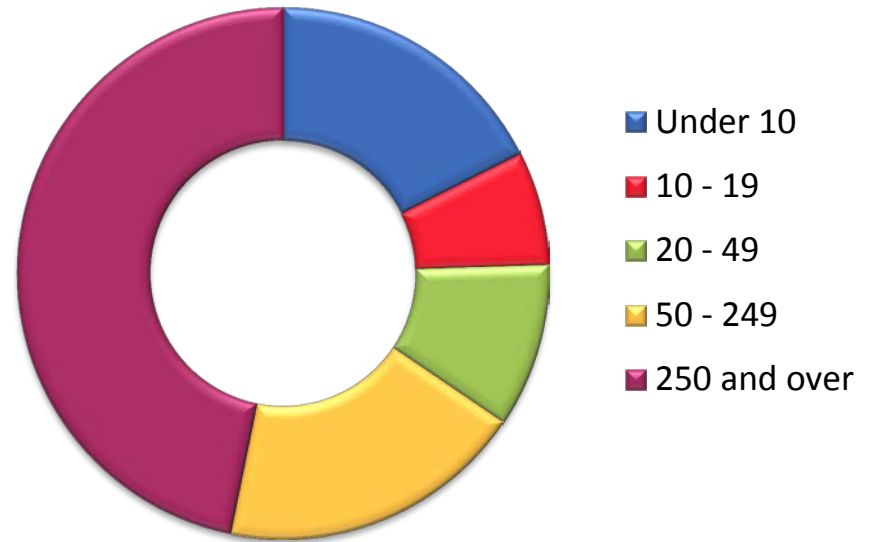


# Distribution of active enterprises and persons engaged by company size, Dublin, 2014

Active enterprises



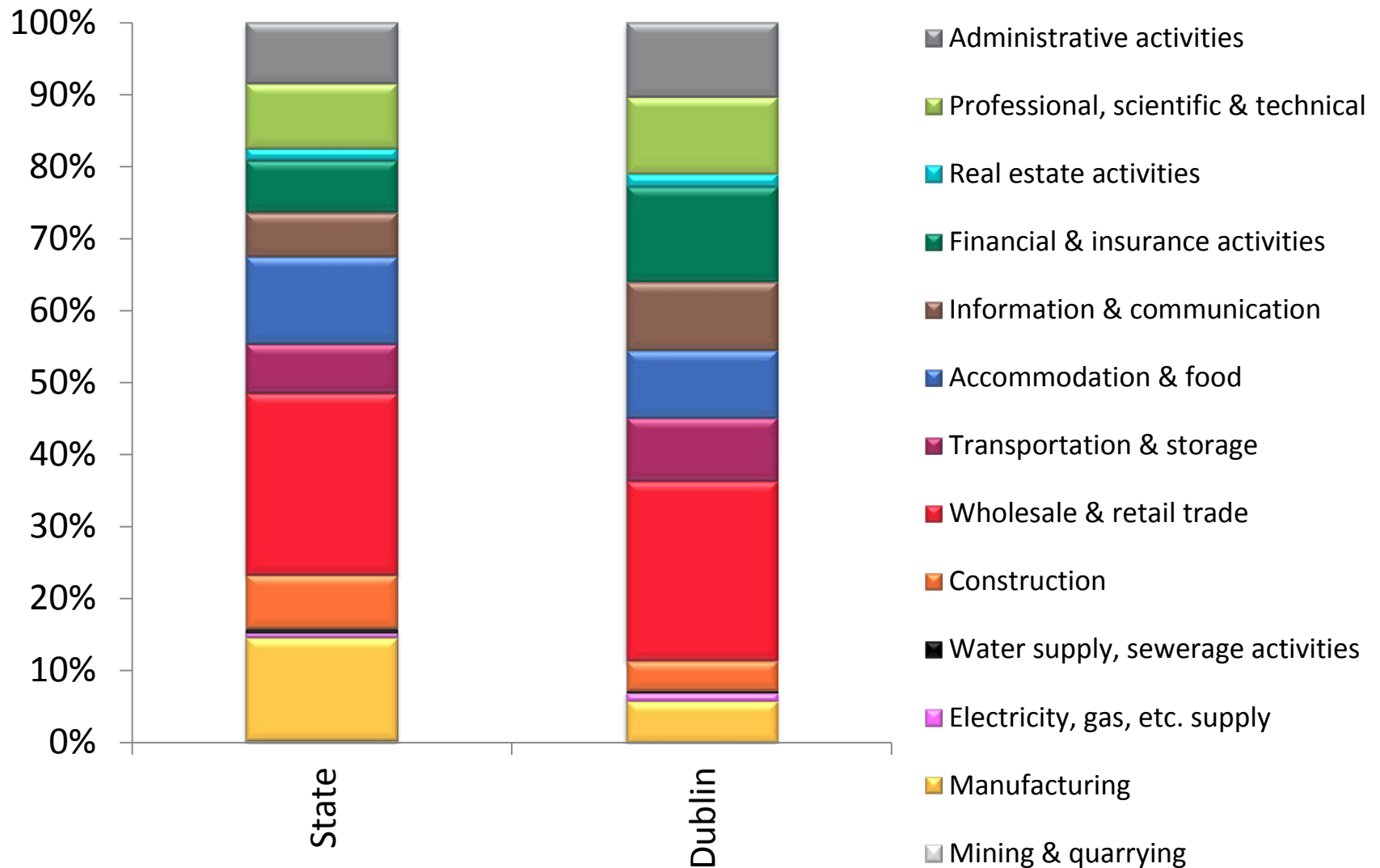
Persons engaged



Size class	Dublin
Under 10	91.1%
10 - 19	4.2%
20 - 49	2.7%
50 - 249	1.5%
250 and over	0.4%

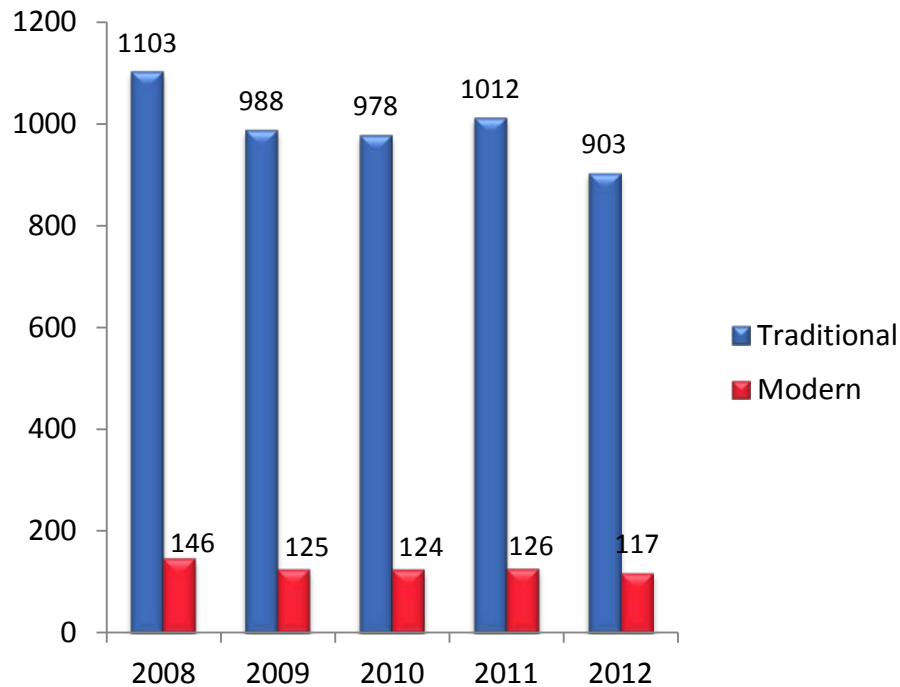
Size class	Dublin
Under 10	18%
10 - 19	7%
20 - 49	10%
50 - 249	19%
250 and over	47%

# Distribution of persons engaged by sector, Dublin, 2014

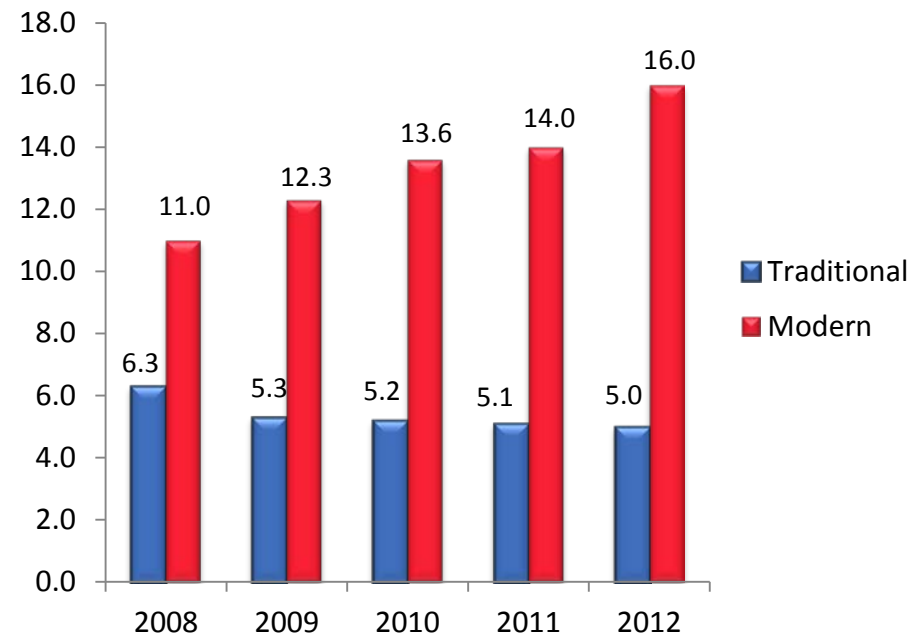


# Industrial activity, Dublin

## Industrial units by sector



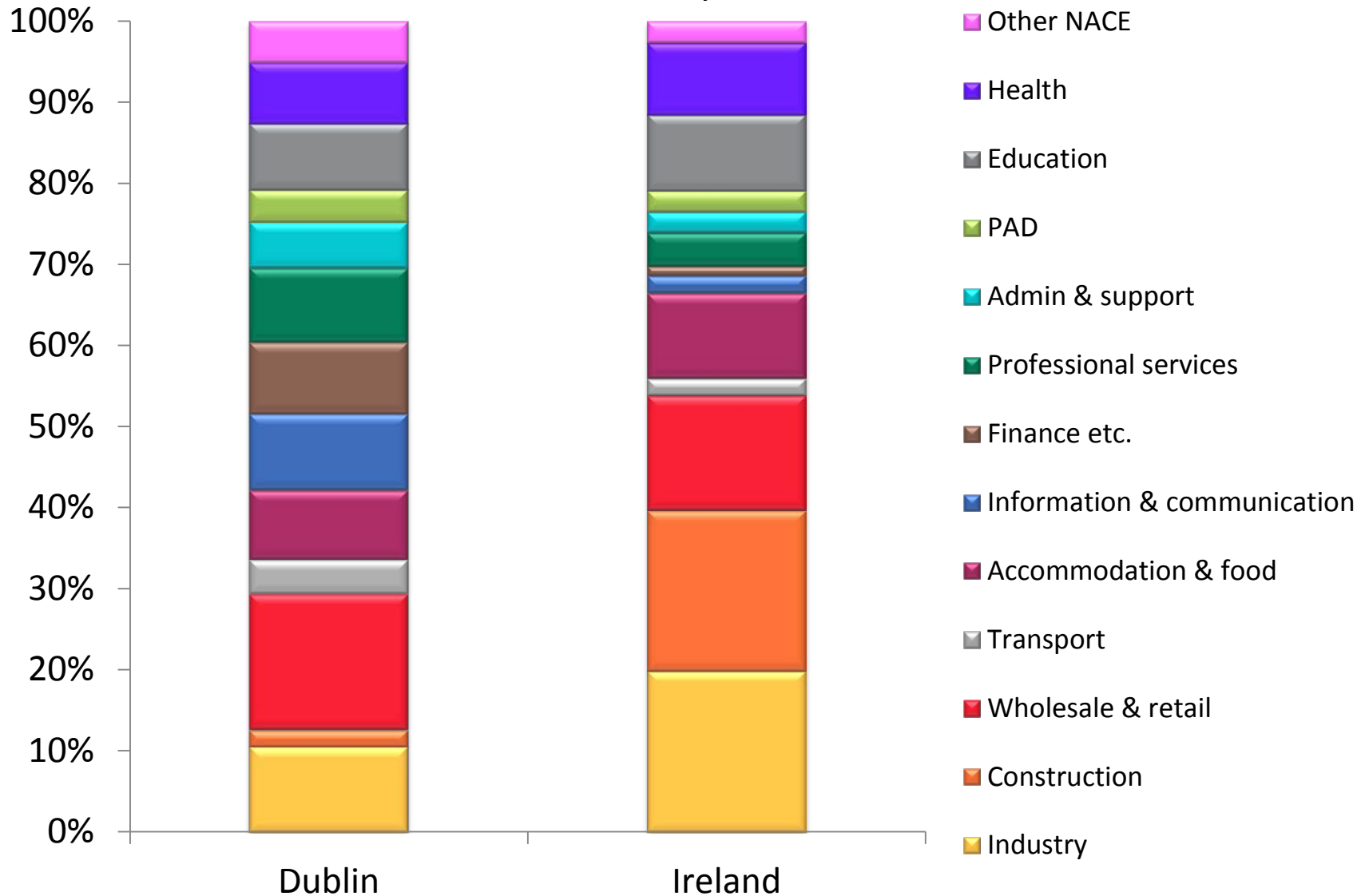
## Gross output (€ billion) in industrial units, by sector



# Number of medium-large business by sector, Dublin, 2015

Sector	Dublin
Industry	180
Construction	36
Wholesale & retail	287
Transport	72
Accommodation & food	146
Information & communication	161
Finance etc.	151
Professional services	156
Admin & support	97
PAD	68
Education	139
Health	129
Other NACE	87
Total	1,709

# Distribution of companies (medium-large) by sector, Dublin, 2015



Employers: wholesale & retail (200 employees+), Dublin



Source: SLMRU analysis of DataIreland (Kompass) data

Employers: transport & storage (medium-large), Dublin



Source: SLMRU analysis of DataIreland (Kompass) data

Employers: finance & insurance (medium-large), Dublin



Source: SLMRU analysis of DataIreland (Kompass) data

# Employers: information & communications\* (medium-large), Dublin



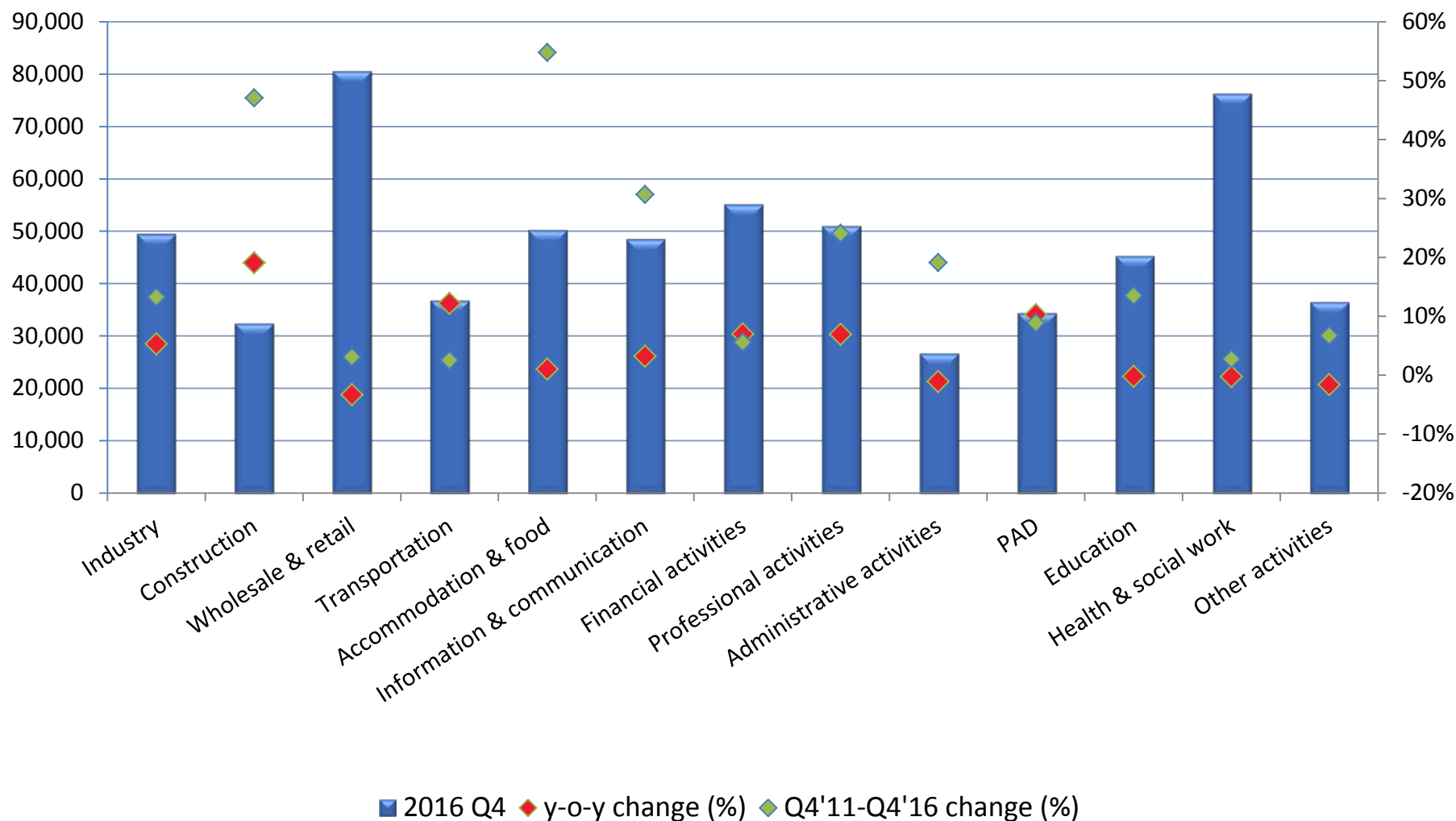
\*excludes information services and TV production & broadcasting

# Labour market & associated indicators, Dublin

Indicator / Statistic	Dublin	State	*Target (if / where relevant)
Population (15-64)	889,800	3,018,600	
Labour Force	670,200	2,195,600	
Participation Rate	63.5%	60.1%	
Employment (15 and above)	629,900	2,048,100	
Employment Rate (20-64)	73.8%	71.2%	*69%-71%; **75%
Self-Employment	11%	16%	
Unemployment (15-74)	40,300	147,400	
Unemployment Rate (15-74)	6.0%	6.7%	
Youth Unemployment Rate (15-24)	14.2%	15.2%	
Youth Unemployment Ratio (15-24)	5.9%	5.8%	
Long Term Unemployment Rate	3.0%	3.6%	
Early School Leavers (ESL) (18-24)	5%	6%	*<8%; **<10%
NEET (15-24)	10%	12%	
Tertiary Level Education (30-34)	62%	54%	*≥60%; **≥40%
Life Long Learning (LLL) participation rate	8.7%	6.7%	*10% ; **15%

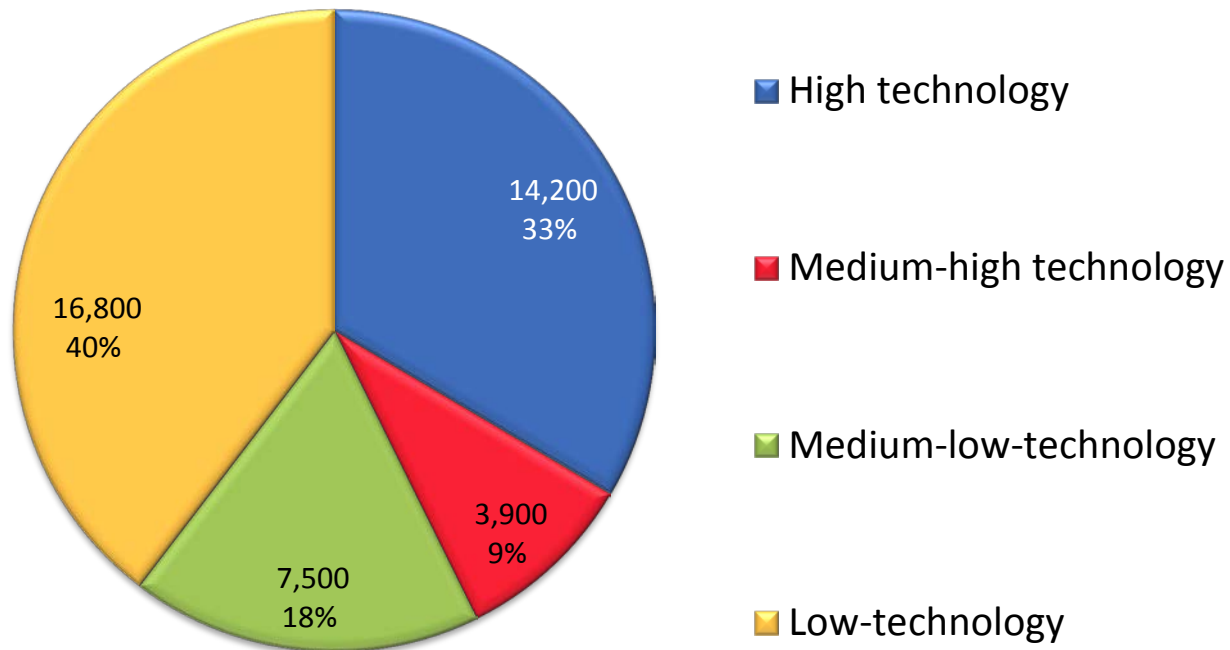
Source: SLMRU analysis of CSO QNHS data Q4 2016; \*Ireland's NSS targets; \*\*EU 2020 targets

# Employment by sector (persons and % change), Dublin

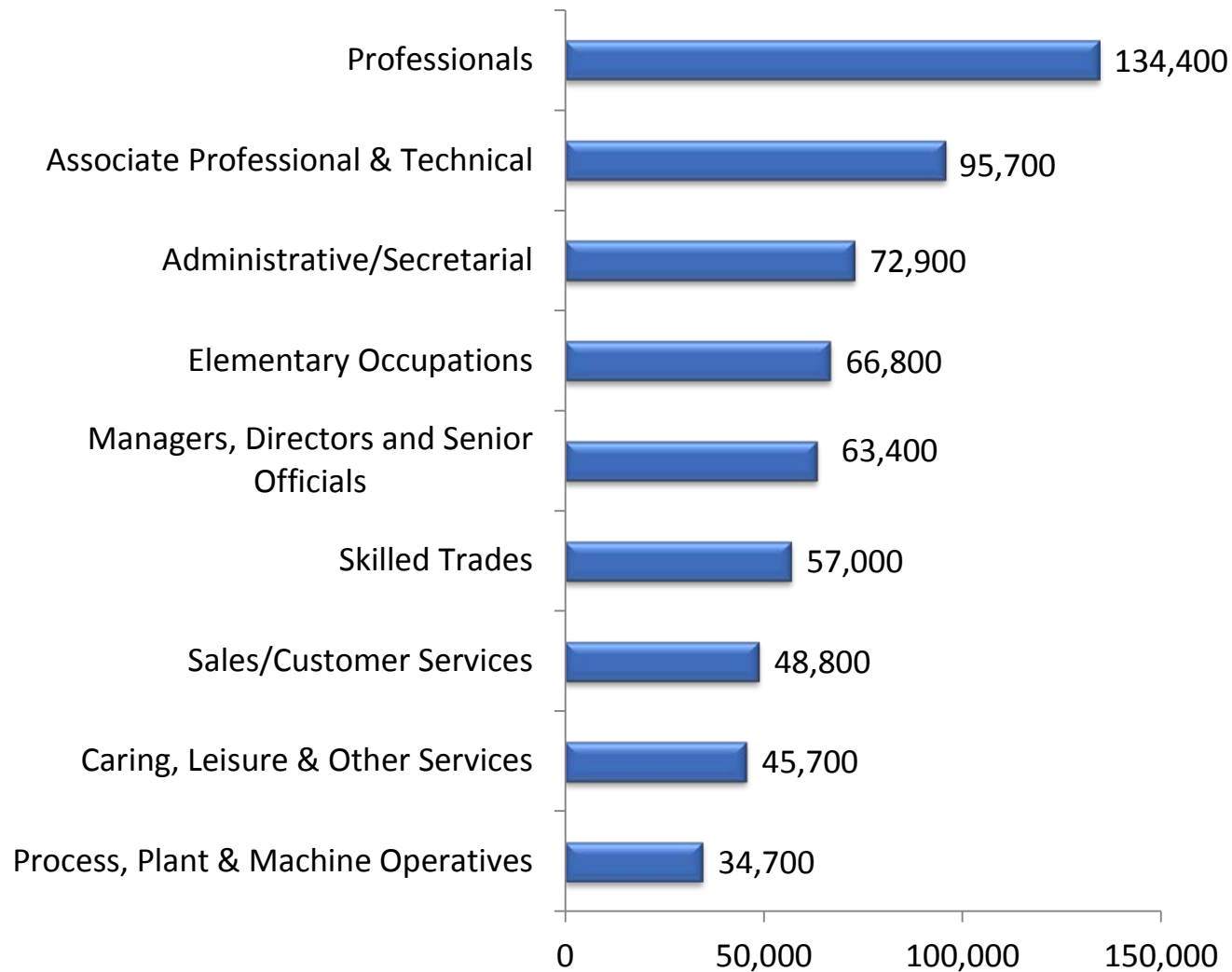


\* Numbers in agriculture are too small to report

# Manufacturing employment by technological intensity, Dublin, Q4 2016

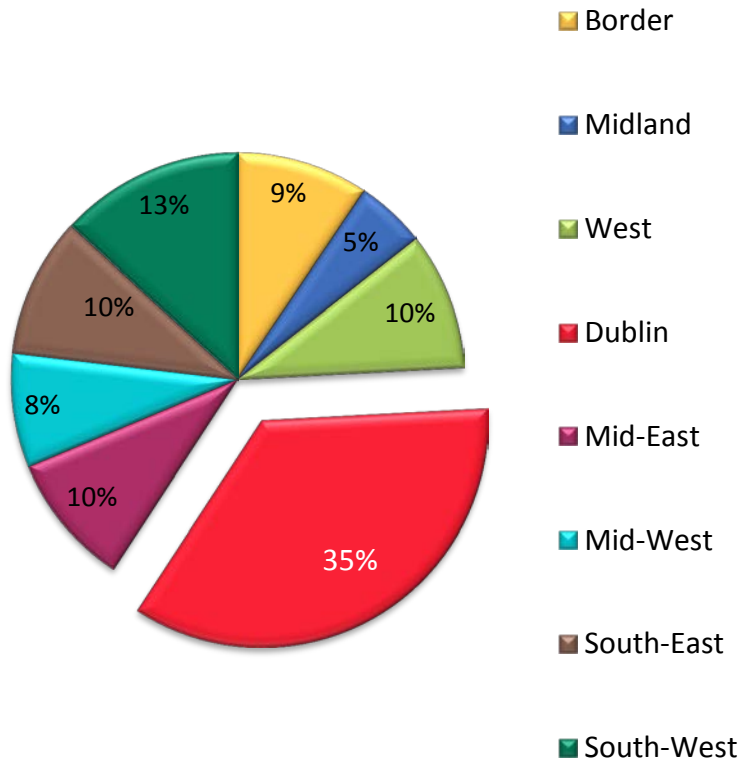


# Employment by occupation, Dublin, Q4 2016

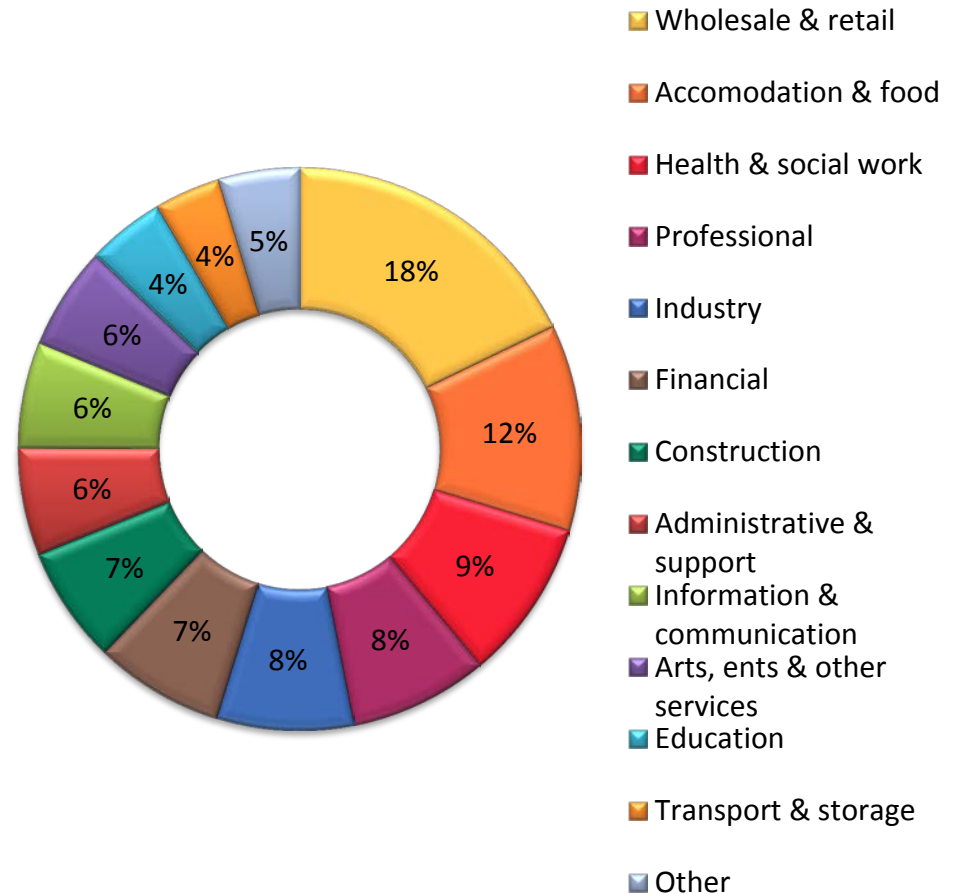


# Recent job hires, 2016

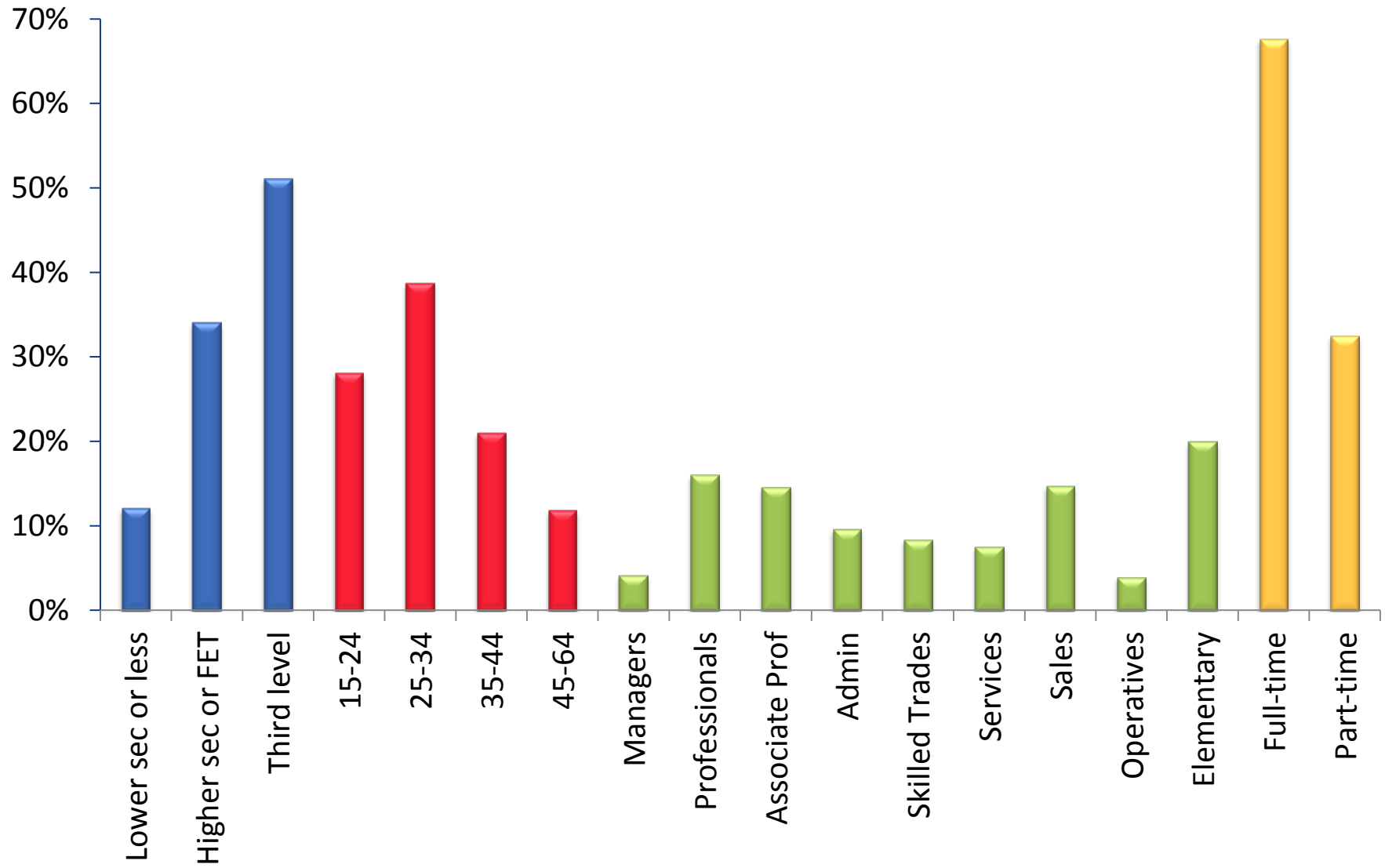
Recent hires by region, 2016



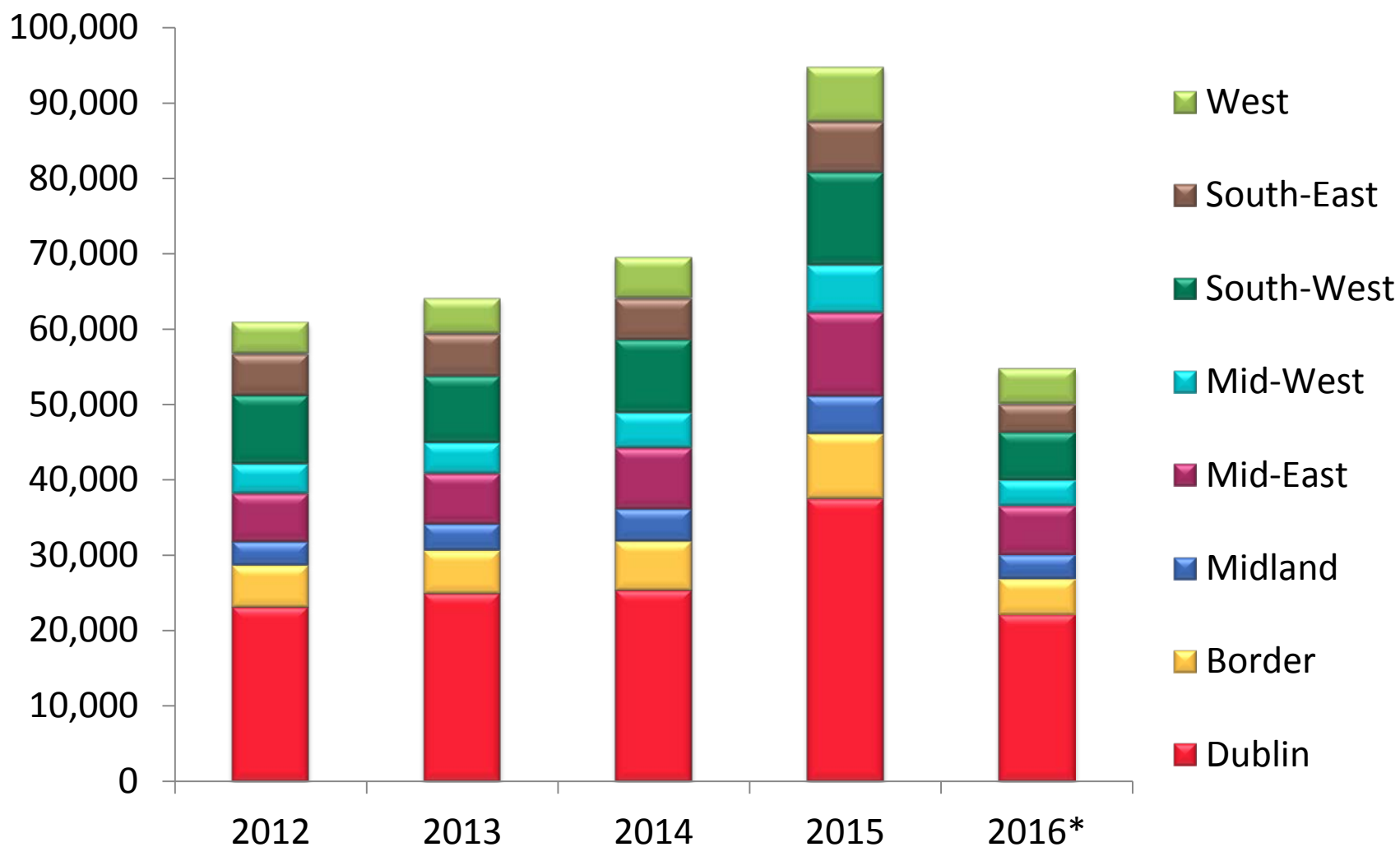
Recent hires by sector, Dublin, 2016



# Recent job hires, Dublin, 2016

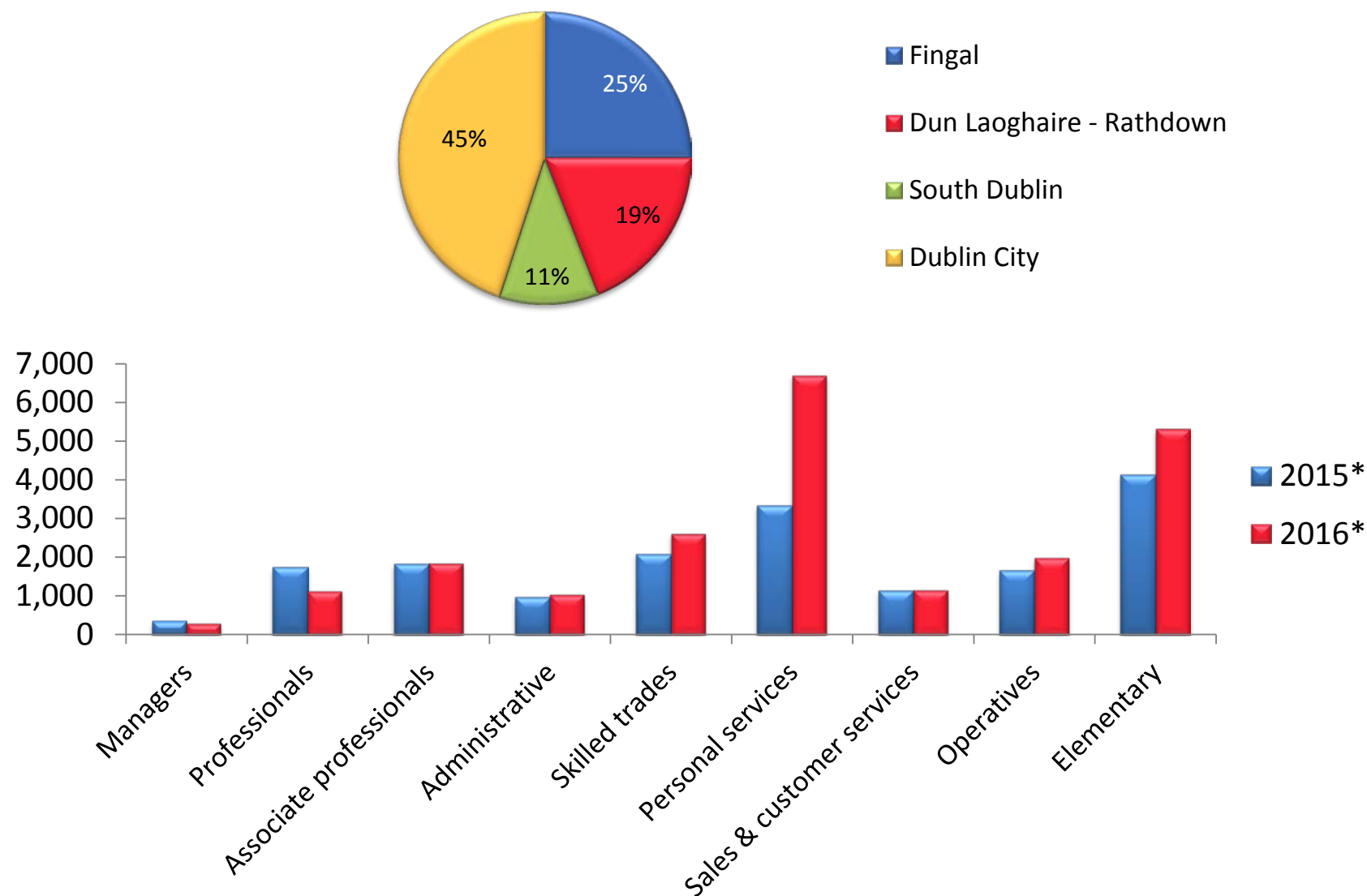


# DSP Jobs Ireland vacancies, 2012-2016



Source: DSP Jobs Ireland; \*2016 refers to Jan-Jun only

# DSP Jobs Ireland vacancies, Dublin, 2016\*

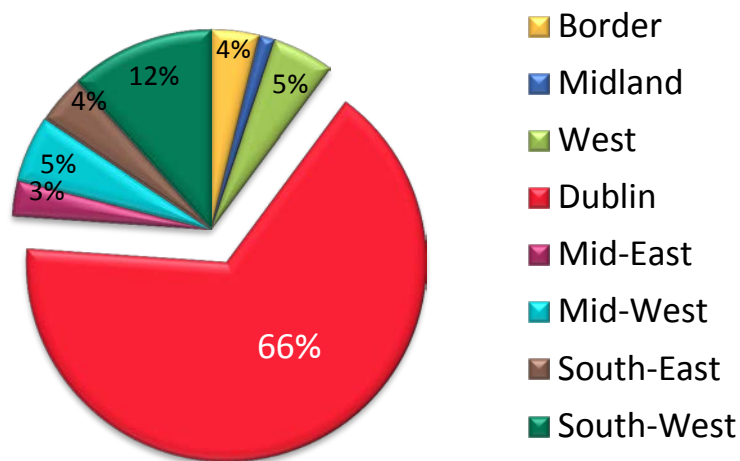


# DSP Vacancies by occupation, Dublin, 2016

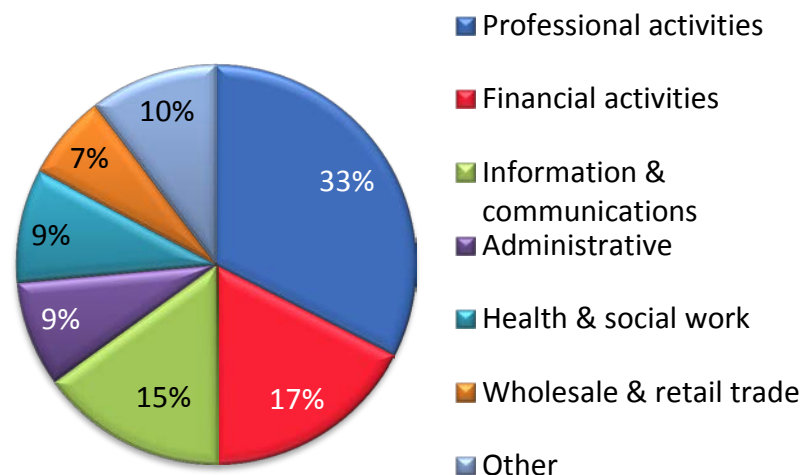
	Dublin City	Fingal	Dún Laoghaire-Rath	South Dublin
Managers	Hotel front office/restaurant mgr. Store managers/ HR managers			
Professionals	Higher ed lecturers/TEFL teachers Auditors/accountants, nurses Civil/site/structural engineers Software developers	Nurses	TEFL teachers Nurses Video games testers Quantity surveyors	Auditors/accountants
Associate prof	Sales & marketing exec/fundraisers Tech support (with languages) Interpreters Recruitment consultants	Tech support (with languages) Field sales agents Fundraisers	Field sales agents Fundraisers	Sales exec/fundraisers
Admin	Office administrator/receptionists Bookkeeper/payroll admin	Office administrators	Office administrators	Office administrators
Skilled trades	Chefs Electricians, carpenters Maintenance fitters/mechanics	Chefs Electricians, carpenters Steel erectors, mechanics	Chefs Mechanics	Chefs Electricians
Personal services	Care workers, childcare workers Hairdressers/beauticians Beauticians/nail technicians	Care workers Childcare workers Airport check-in agents	Care workers Childcare workers	Care workers
Sales	Retail assistants Stock-taker	Retail assistants Stock-taker	Retail assistants	Retail assistants
Operatives	Drivers (rigid, artic, HGV) Teleporter drivers, delivery drivers Scaffolders Mobile/tower crane operators	Drivers (rigid, artic, HGV) Baggage handlers Other drivers (machine, teleporter, reach truck)	Groundworkers	Drivers (rigid, artic, HGV) Coach drivers General operatives
Elementary	Security guards Cleaners Kitchen assist., waiters, bar staff, Construction labourers	Warehouse operatives Cleaners Kitchen assistants Security guards	Cleaners Security guards Kitchen assistants Waiters	Cleaners Warehouse operatives Kitchen assistants Security guards

# IrishJobs.ie vacancies, Dublin, 2016

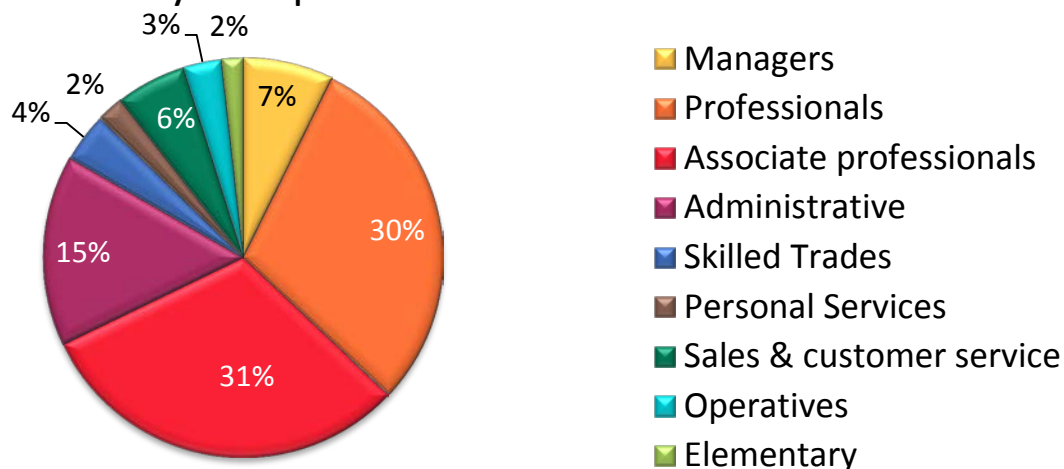
## Overall vacancies



## Vacancies by sector



## Vacancies by occupation



# IrishJobs.ie vacancies by occupation, Dublin, 2016

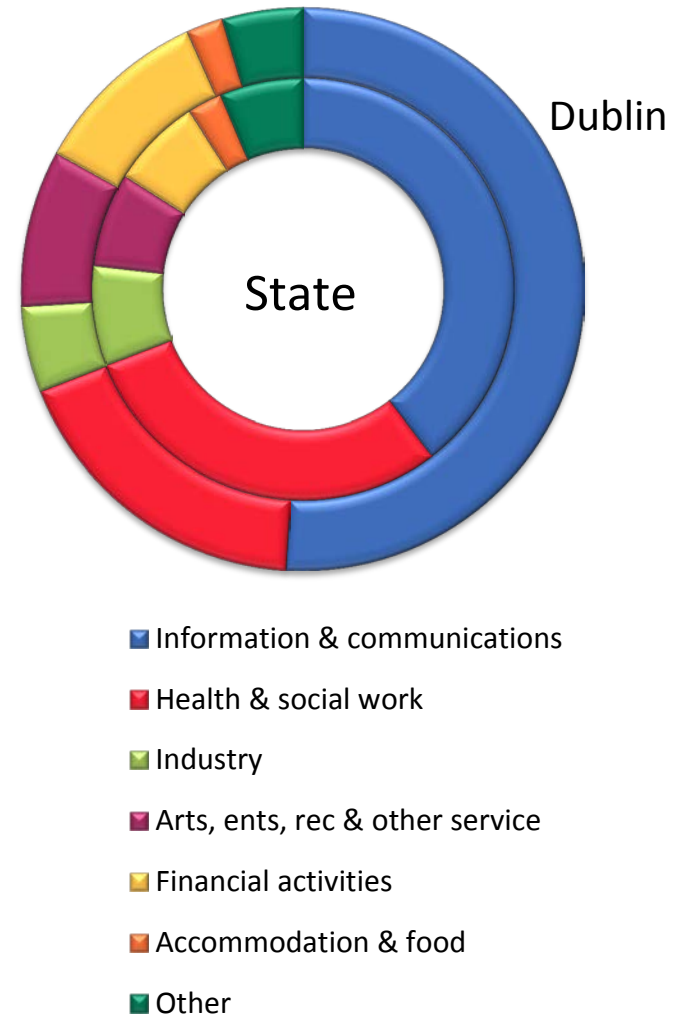
	Job title
Managers	Finance, HR, procurement
Professionals	IT: software developer/engineer, systems analyst, solutions architect Business/financial: project manager, financial accountant/controller, risk manager Industry: process engineer, development technologist Health: registrars (anaesthesia, psychiatric, cardiology), nurses (staff, theatre, clinical, psychiatric)
Associate prof	Claims officer (with languages e.g. German, French, Spanish, Arabic); fund accountants Data analyst Technical support executive Helpline officers (with languages)/ IT support technicians Marketing/brand managers
Admin	Payroll manager Accounts assistant Administrator
Sales & customer	Client services officer/ customer services representative (with languages) Sales/deli assistants Telesales

# Employment permits

Employment permits by region, 2013-2016



New employment permits, Dublin, 2016



# Job announcements, Dublin, 2016-2017

## Industry

### Manufacturing

Plusvital, Biopharma  
Engineering, Alter Pharma,  
Mallinckrodt, Genomics  
Medicine Ireland, Paragon,  
IdentiGEN, Takeda, Nuritas,  
Alexion Pharma

## Construction

Microsoft, FBD Hotels,  
Dublin Airport, Alexion  
Pharmaceuticals,  
Mallinckrodt

## Retail

JD Sports, Iceland,  
JoeDuffy Group,  
Domino's Pizza,  
Camile Thai, Harvey  
Norman,  
Liffey Valley,  
Pennys, Chopped

## Services

Maxol, Fish Shack,  
Next Generation Dublin,  
Johnson Hana International,  
Zervas Communications,  
FBD Hotels,  
Grant Thornton Ireland,  
Monsoon Consulting,  
Voxpro, Tickets.ie, Siro,  
INDEED, Inside Sales

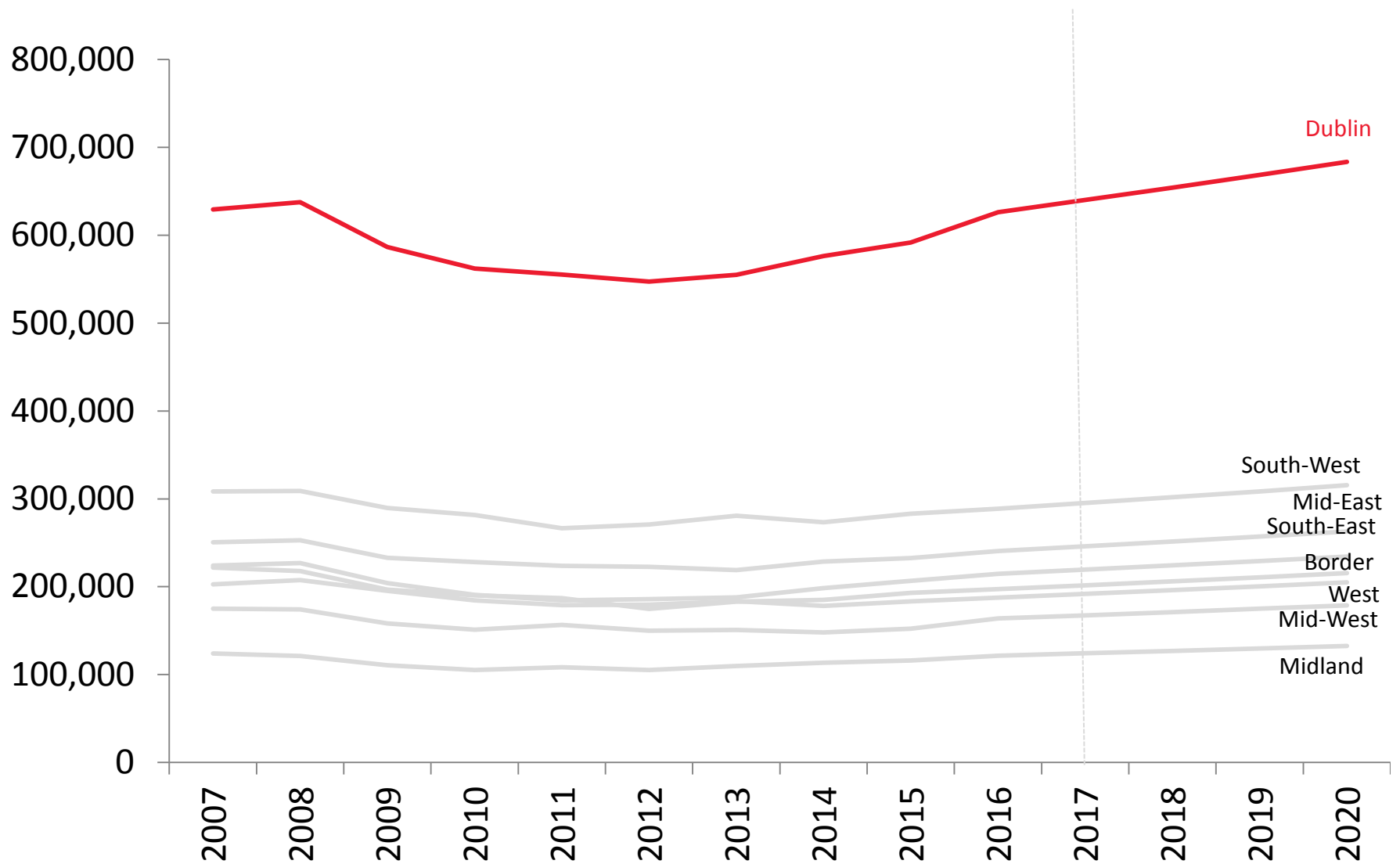
## Finance

OSG, Deloitte, EY, DMS  
Governance, Touchtec,  
Deutsche Bank, KPMG,  
TPGS,  
MDO Management,  
Evo Payments

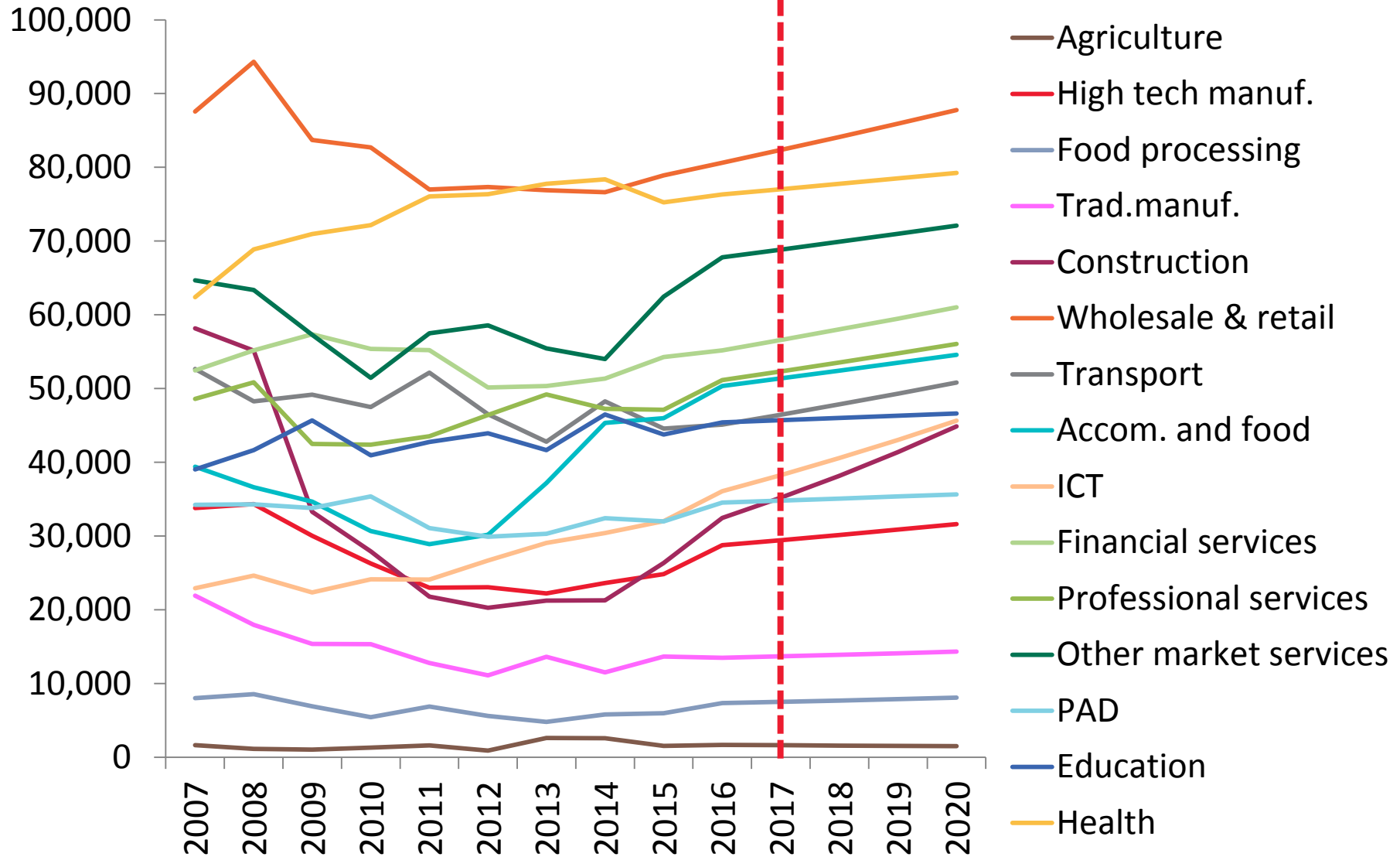
## ICT

Microsoft, Brown Bag, Qstream,  
Amazon, Datalex, Fleetmatics, Arkphire  
Kaseya, PTC, SAP Ireland, Exaxe,  
SoftwareOne, Wrike, Fenargo, Tenable,  
Version 1  
Integrity360, Smartfrog,  
Cloudbeds, Overcast, Tech Mahindra,  
Nostra, BrowserStack,  
Ricoh, VE Interactive, Kaspersky Lab,  
Fitbit, Cubic Telecom, MacStadium,  
Linkedin, Ricoh  
Microsoft, Convergys

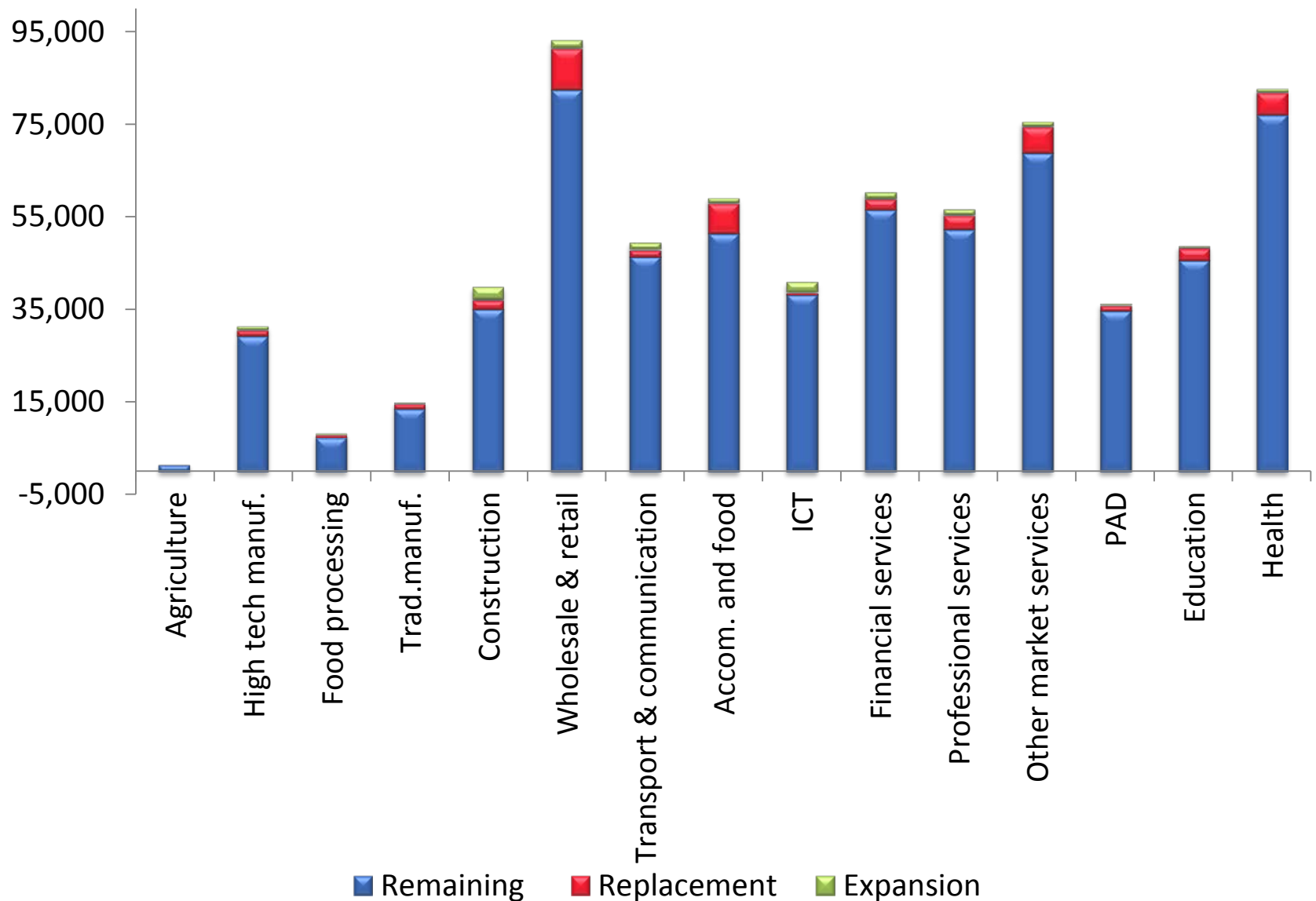
# Employment Projections to 2020



# Employment Projections by sector, Dublin



# Estimated annual replacement and expansion demand 2017, Dublin



Source: SLMRU projections

# Estimated annual replacement, expansion and recruitment requirement, Dublin

	Replacement	Expansion	Recruitment requirement
Agriculture	<1,000	<1,000	<1,000
High tech manuf.	1,300	<1,000	2,000
Food processing	<1,000	<1,000	<1,000
Trad. manuf.	1,100	<1,000	1,300
Construction	2,000	2,700	4,700
Wholesale & retail	9,000	1,700	10,700
Transport & communication	1,500	1,400	2,900
Accommodation & food	6,600	1,000	7,600
ICT	<1,000	2,200	2,700
Financial services	2,300	1,400	3,700
Professional services	3,100	1,200	4,300
Other market services	5,700	1,000	6,700
PAD	1,200	<1,000	1,500
Education	2,700	<1,000	3,000
Health	4,900	<1,000	5,600
Total	43,200	13,900	57,100

Source: SLMRU projections

# Education and training providers, Dublin

## FET Providers

Dublin City ETB

Dublin and Dun Laoghaire ETB

## Higher Education Providers

Trinity College Dublin

University College Dublin

Dublin City University

Royal College of Surgeons

National College of Art & Design

St. Patrick's College Drumcondra

Mater Dei Institute

Tallaght Institute of Technology

Blanchardstown Institute of Technology

Dublin Institute of Technology

Dun Laoghaire Institute of Art and Design

## Private HE providers (not included in data)

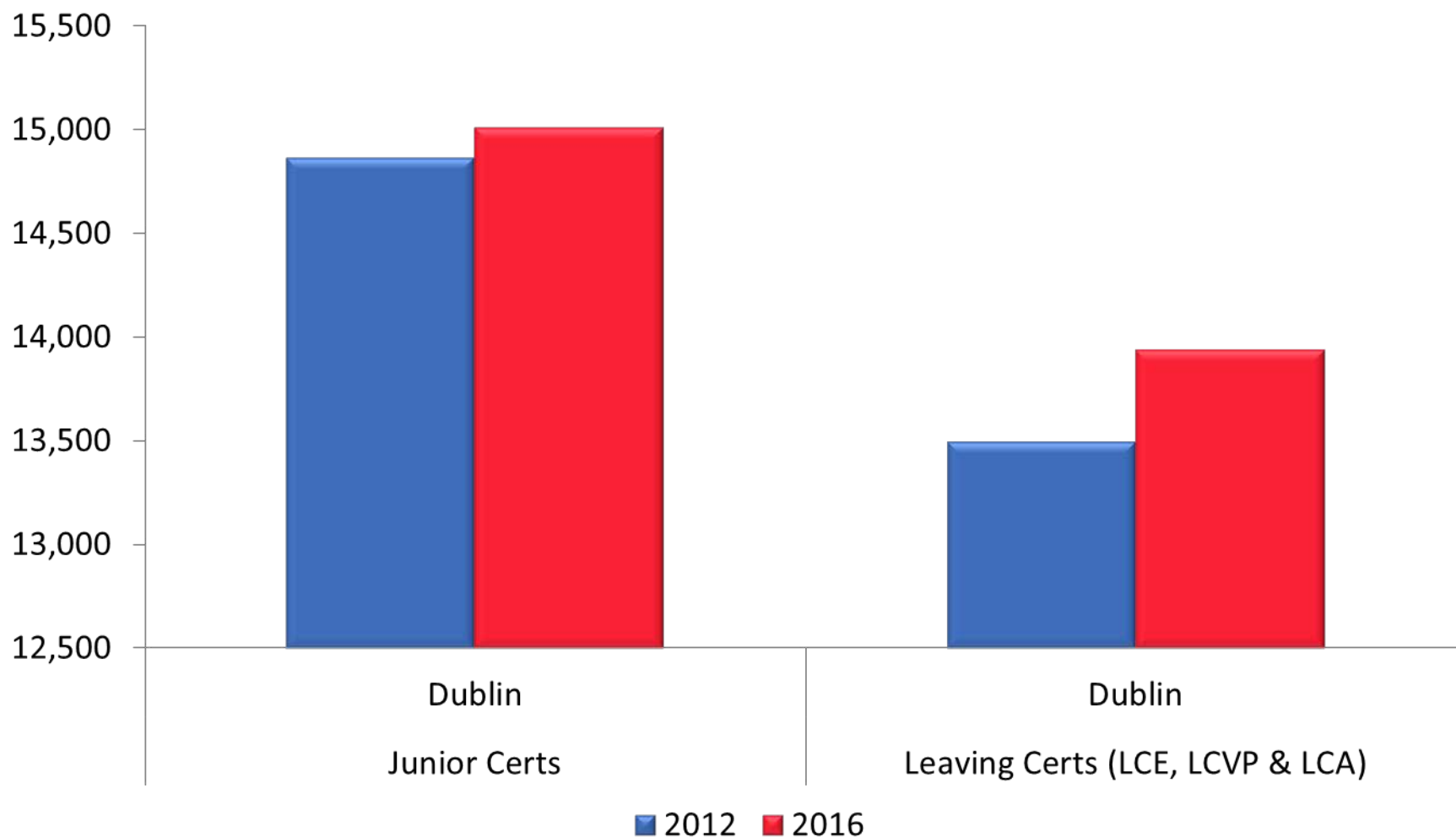
Dublin Business School

Griffith College

Hibernia College

Other private providers

# Junior Cert & Leaving Cert sits, Dublin, 2012 and 2016



Source: State Examinations Commission

# Destination of school leavers, Dublin

	Dublin City	DL-Rathdown	Fingal	South Dublin	National
<b>Total Cohort</b>	<b>5,485</b>	<b>2,425</b>	<b>2,740</b>	<b>3,085</b>	<b>54,825</b>
Of which enrolled in					
Higher education	34%	55%	39%	39%	44%
Second level/FET	31%	21%	29%	29%	28%
Total education/training	65%	76%	69%	69%	72%
Of those remaining					
Social welfare activity	10%	3%	5%	7%	10%
Employment activity	12%	8%	12%	12%	12%
Labour market participation	22%	11%	17%	20%	22%
Other (emigration, work abroad)	*	*	*	*	18%

# FET

- Awards data limited (to QQI awards)
- No awards data for other awarding bodies
  - City & Guilds
  - ICS (ECDL)
  - Vendor certification (e.g. Microsoft, Cisco etc)
- Incomplete enrolment data
  - Confined to PLC enrolments
  - Other data refers to both places/learners and calendar/academic years; an estimate of volume of learning is not possible

# Apprenticeship: new registrations, Dublin, 2016

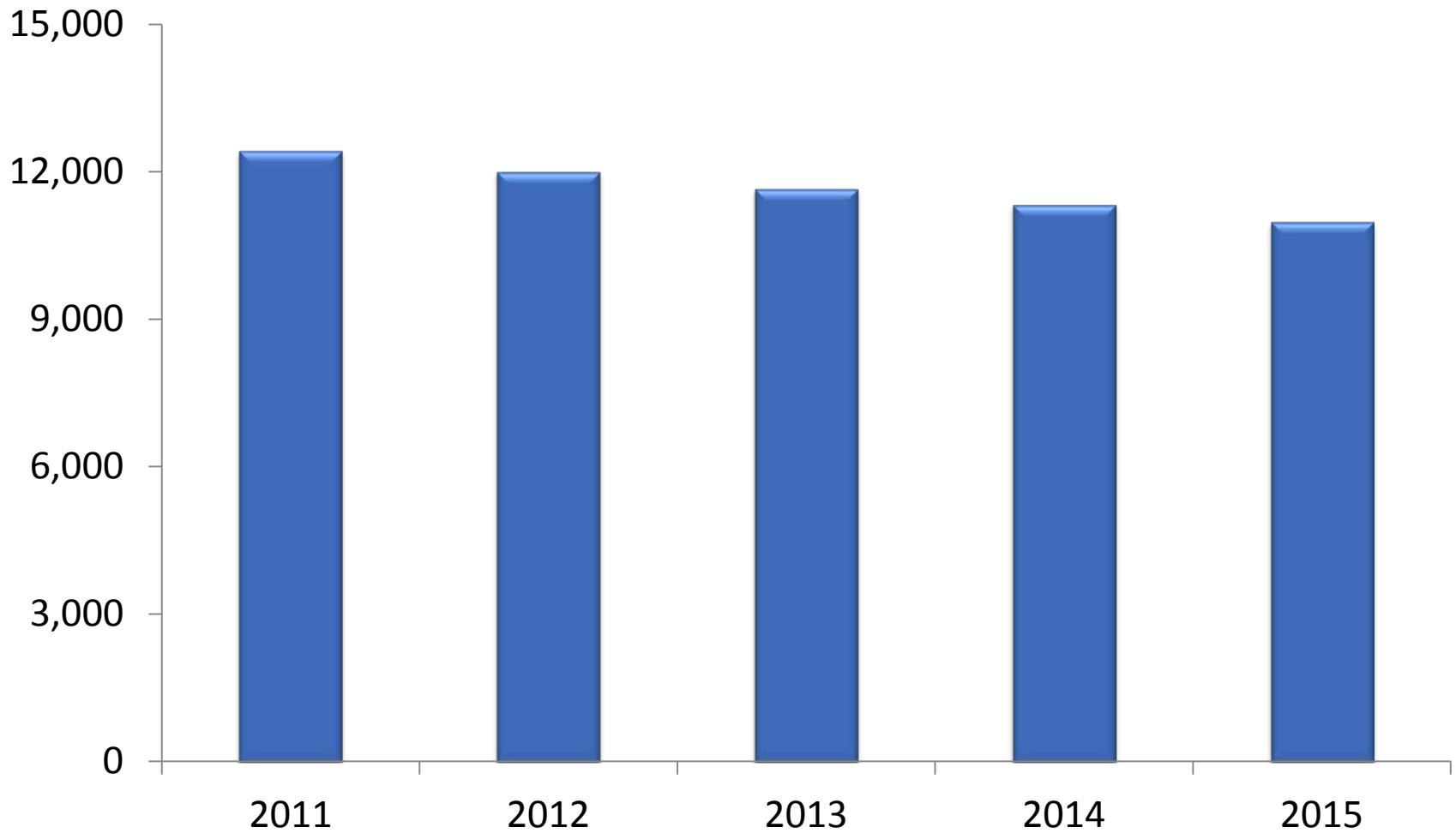
	City of Dublin	Dublin DunLaoghaire
<b>Construction</b>	<b>105</b>	<b>158</b>
Brick and Stonelaying	2	8
Carpentry and Joinery	34	54
Painting and Decorating	5	6
Pipefitting	2	
Plastering		7
Plumbing	59	78
Stonecutting and Stonemasonry		
Wood Manufacturing and Finishing	3	5
<b>Electrical</b>	<b>146</b>	<b>438</b>
Aircraft Mechanics	3	22
Electrical	123	402
Electrical Instrumentation	1	2
Electronic Security Systems	5	4
Industrial Electrical Engineering		
Instrumentation		
Refrigeration	14	8

\*Part of this ETB is located in another region

# Apprenticeship: new registrations, Dublin, 2016 (ctd)

	City of Dublin	Dublin DunLaoghaire
<b>Engineering</b>	<b>28</b>	<b>34</b>
Farriery		
Industrial Insulation	1	1
M.A.M.F.	8	19
Metal Fabrication	6	10
Sheet Metalworking	11	3
Toolmaking	2	1
<b>Financial Services (Insurance Practice)</b>	<b>18</b>	<b>11</b>
<b>Motor</b>	<b>96</b>	<b>73</b>
Agricultural Mechanics	1	
Construction Plant Fitting	1	8
Heavy Vehicle Mechanics	38	6
Motor Mechanics	48	52
Vehicle Body Repairs	8	7
<b>Printing &amp; Paper</b>	<b>1</b>	<b>1</b>
<b>Grand Total</b>	<b>394</b>	<b>715</b>

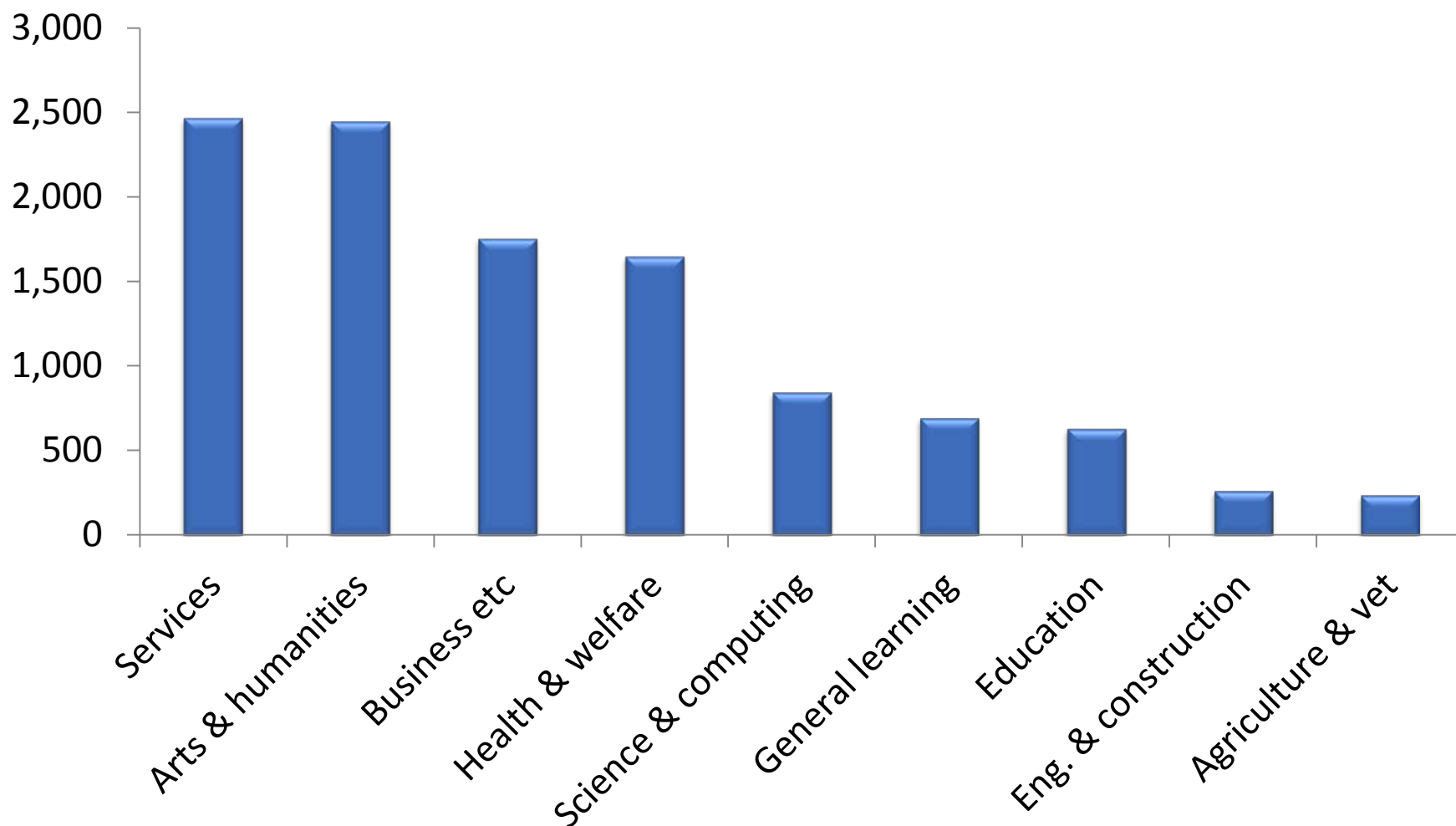
## PLC enrolments, Dublin, 2011 – 2015<sup>†</sup>



Source: DES

<sup>†</sup> Academic year (e.g. 2015 refers to 2015/2016 academic year)

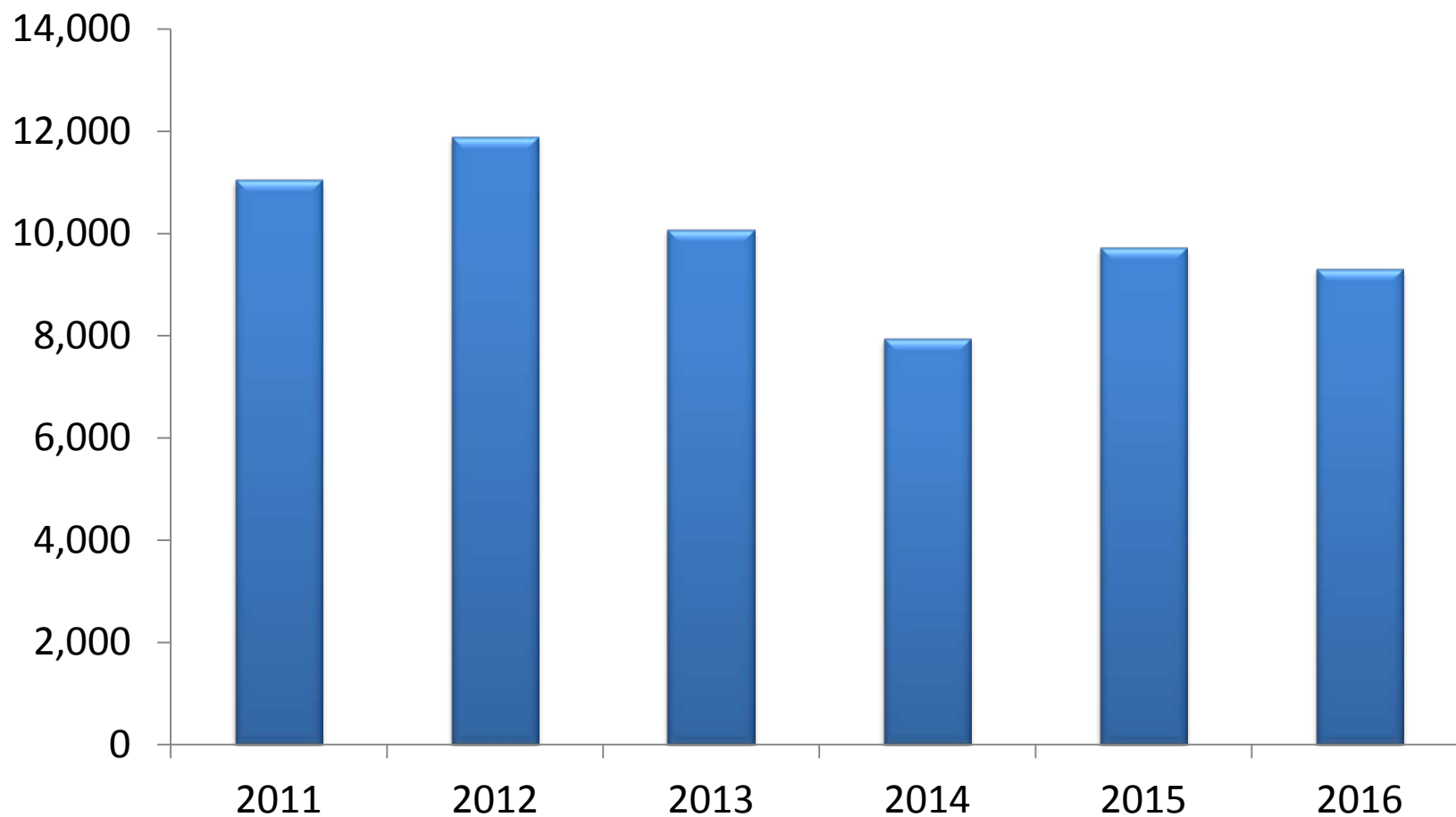
# PLC enrolments by field of study, Dublin, 2015<sup>†</sup>



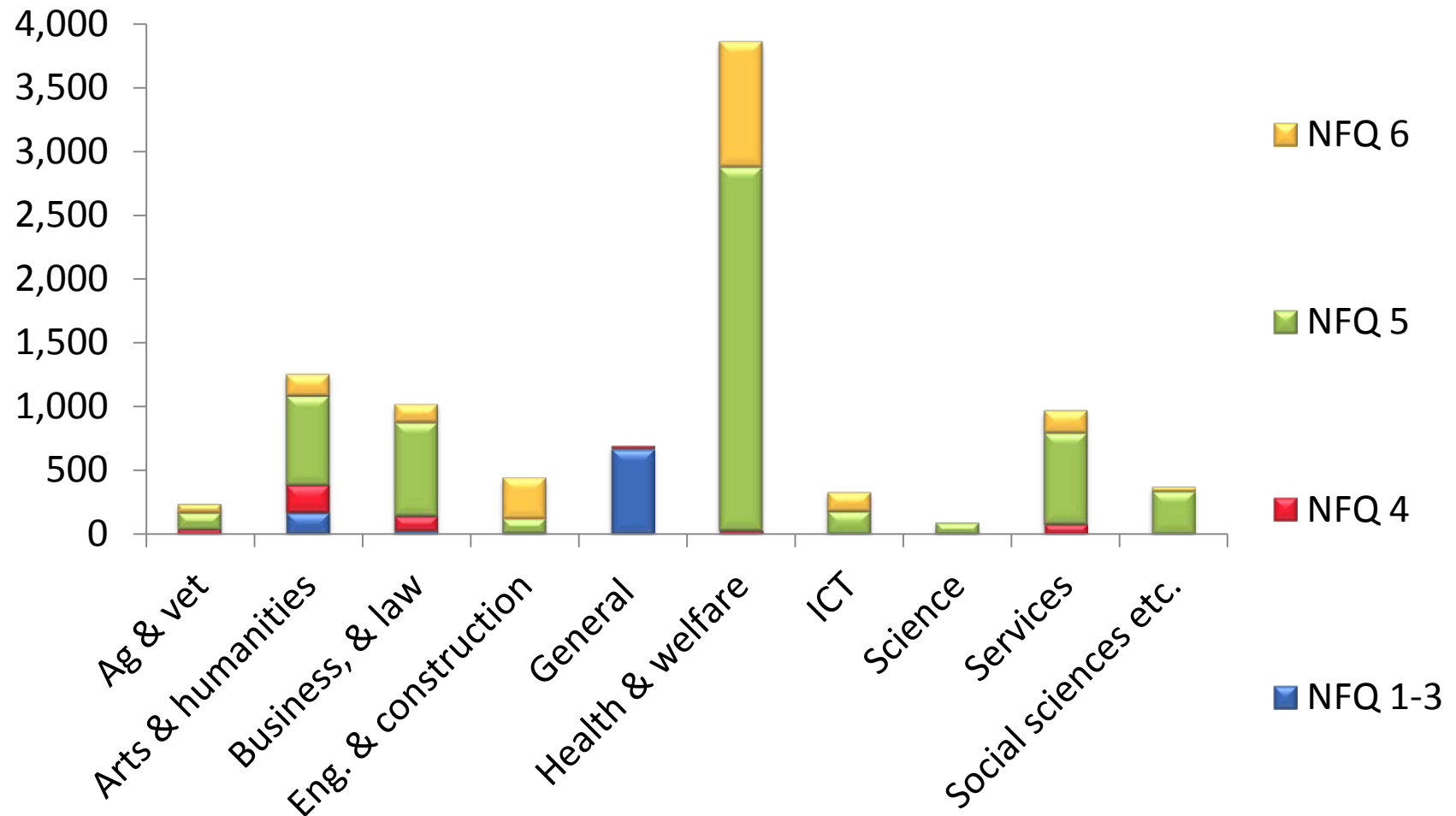
Source: DES

<sup>†</sup> Academic year (e.g. 2015 refers to 2015/2016 academic year)

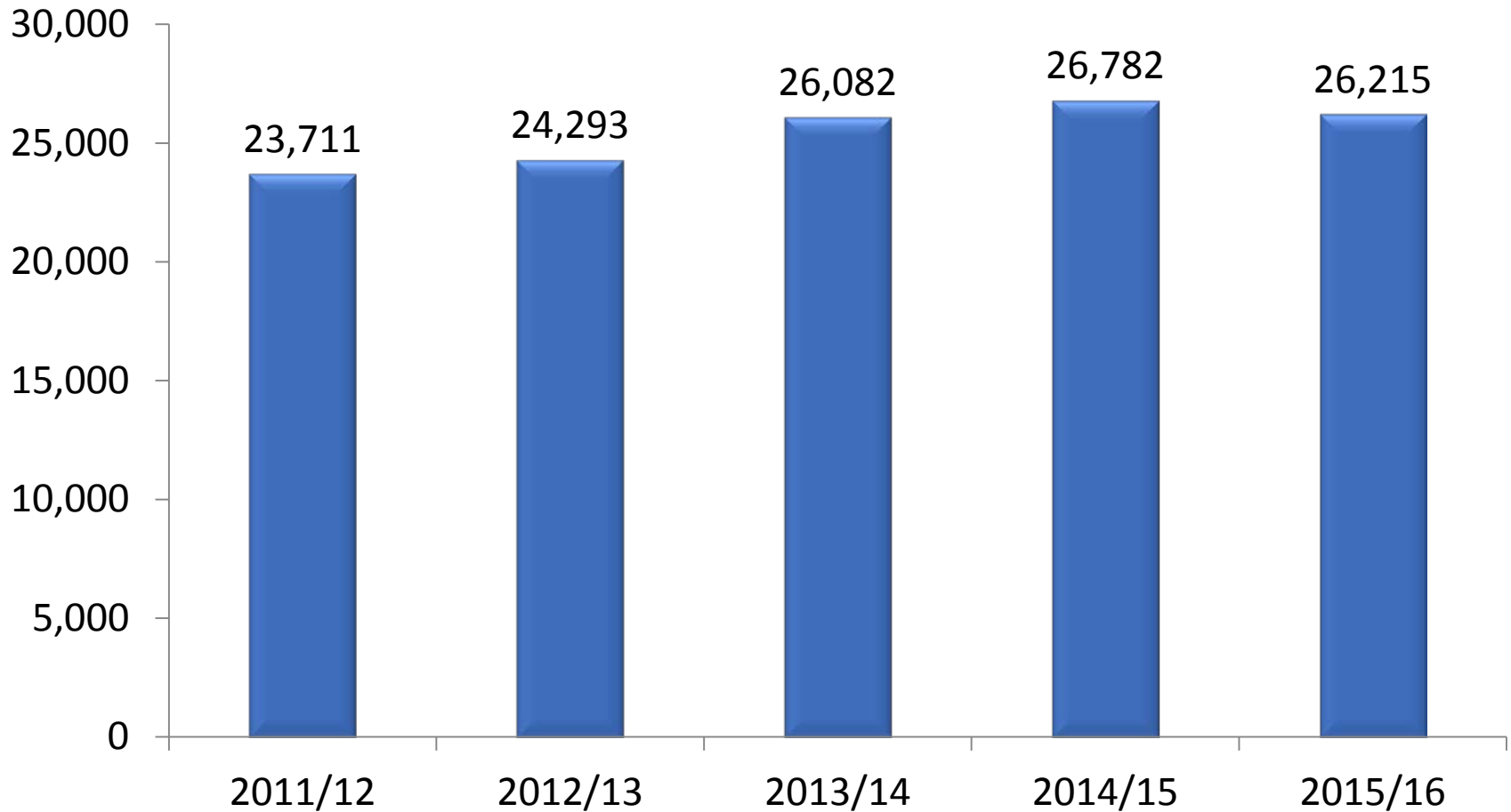
## QQI (FET) major awards, Dublin, 2011-2016



# QQI (FET) major awards\* by field & level, Dublin, 2016

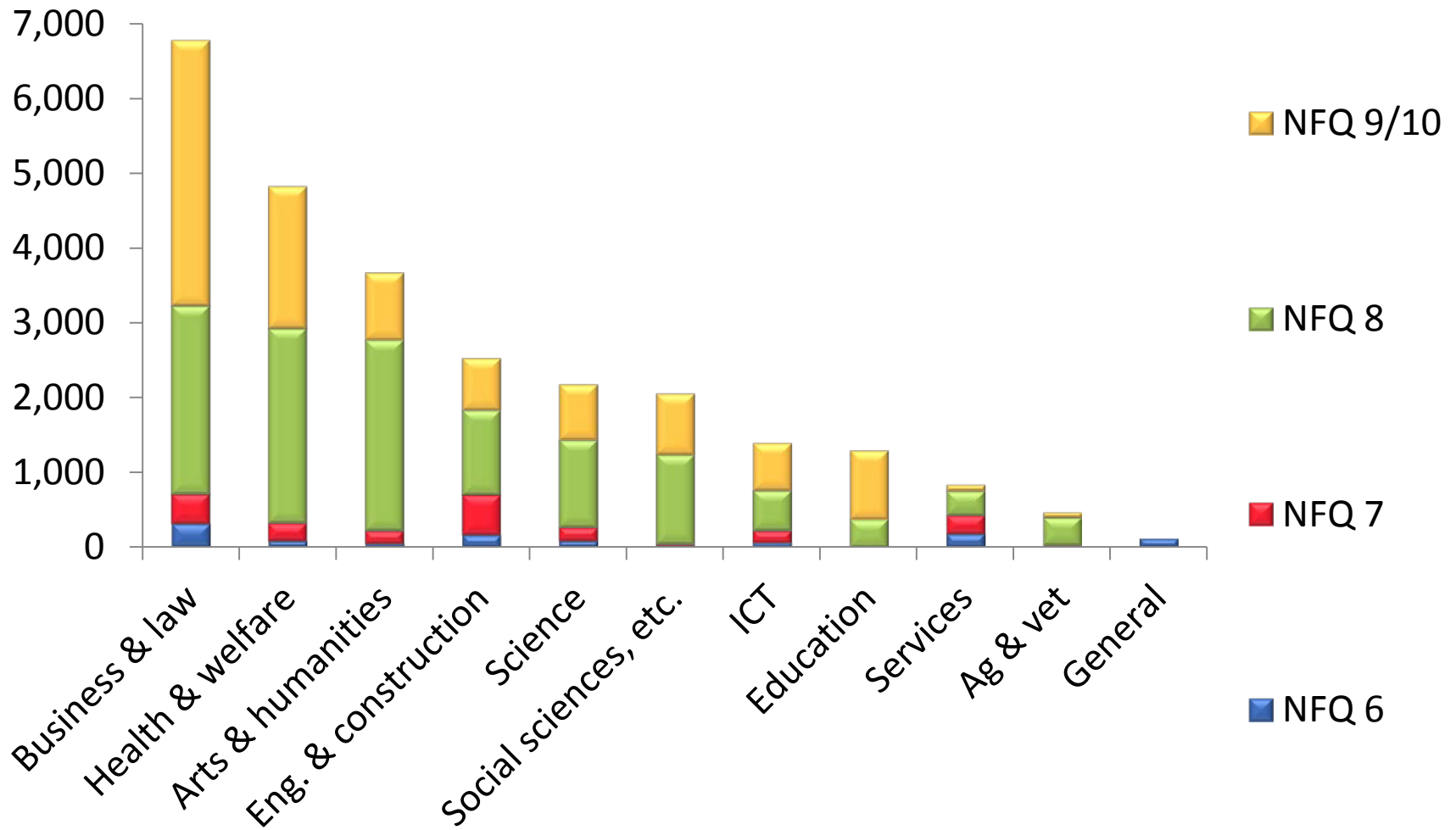


# Higher education awards, Dublin, 2011/12 - 2015/16

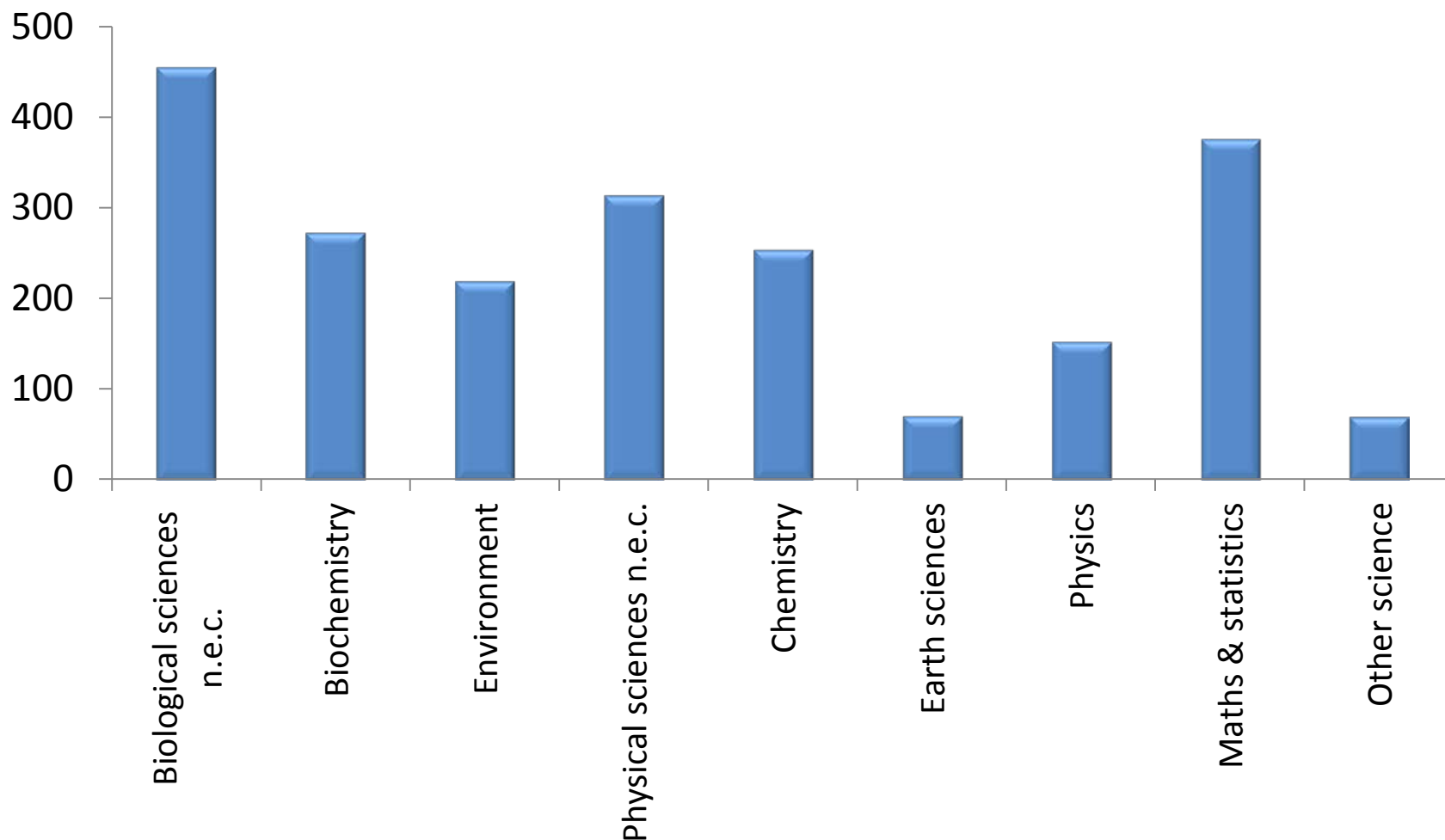


Source: HEA

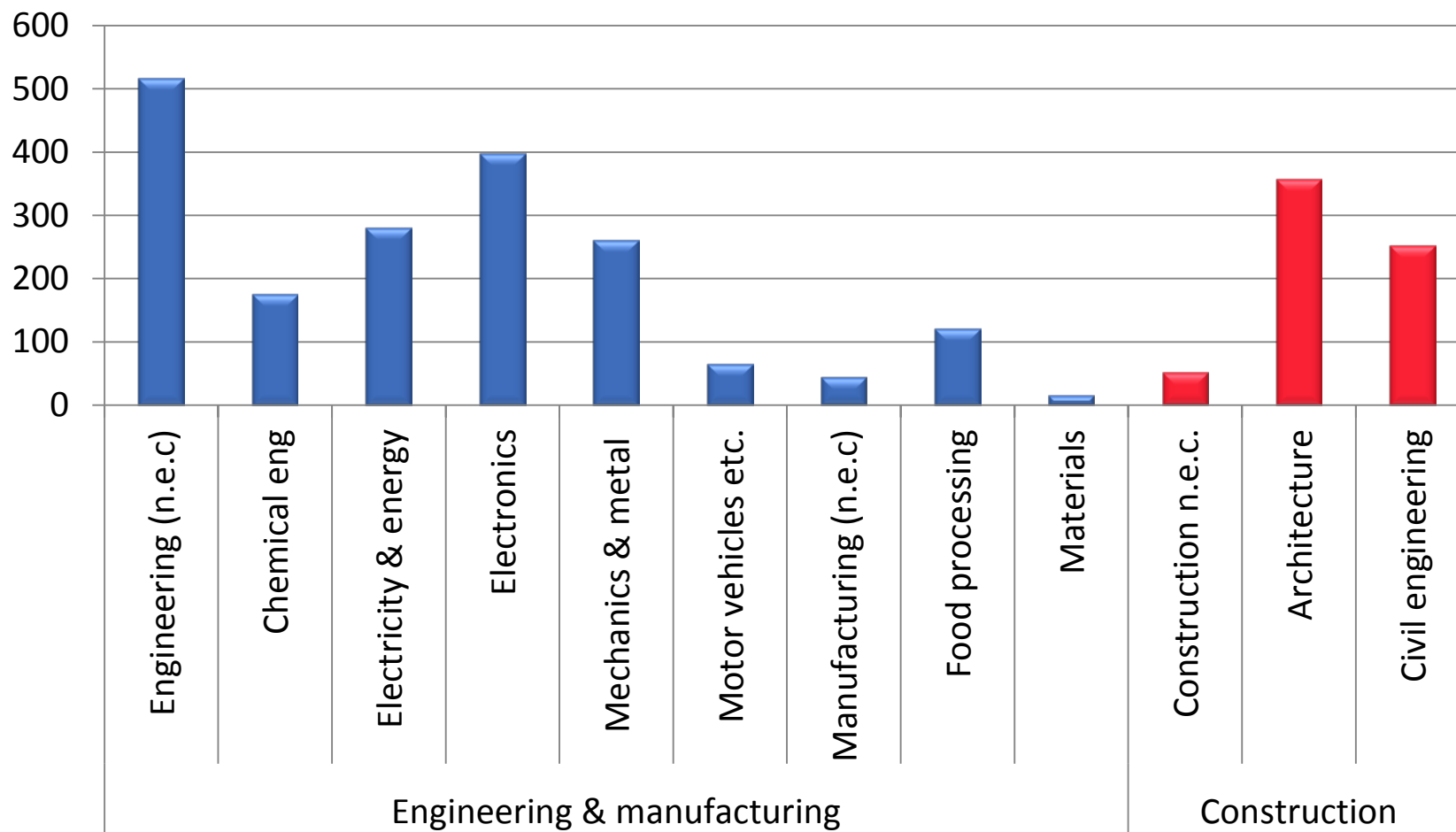
# Higher education awards by field and level, Dublin 2015/2016



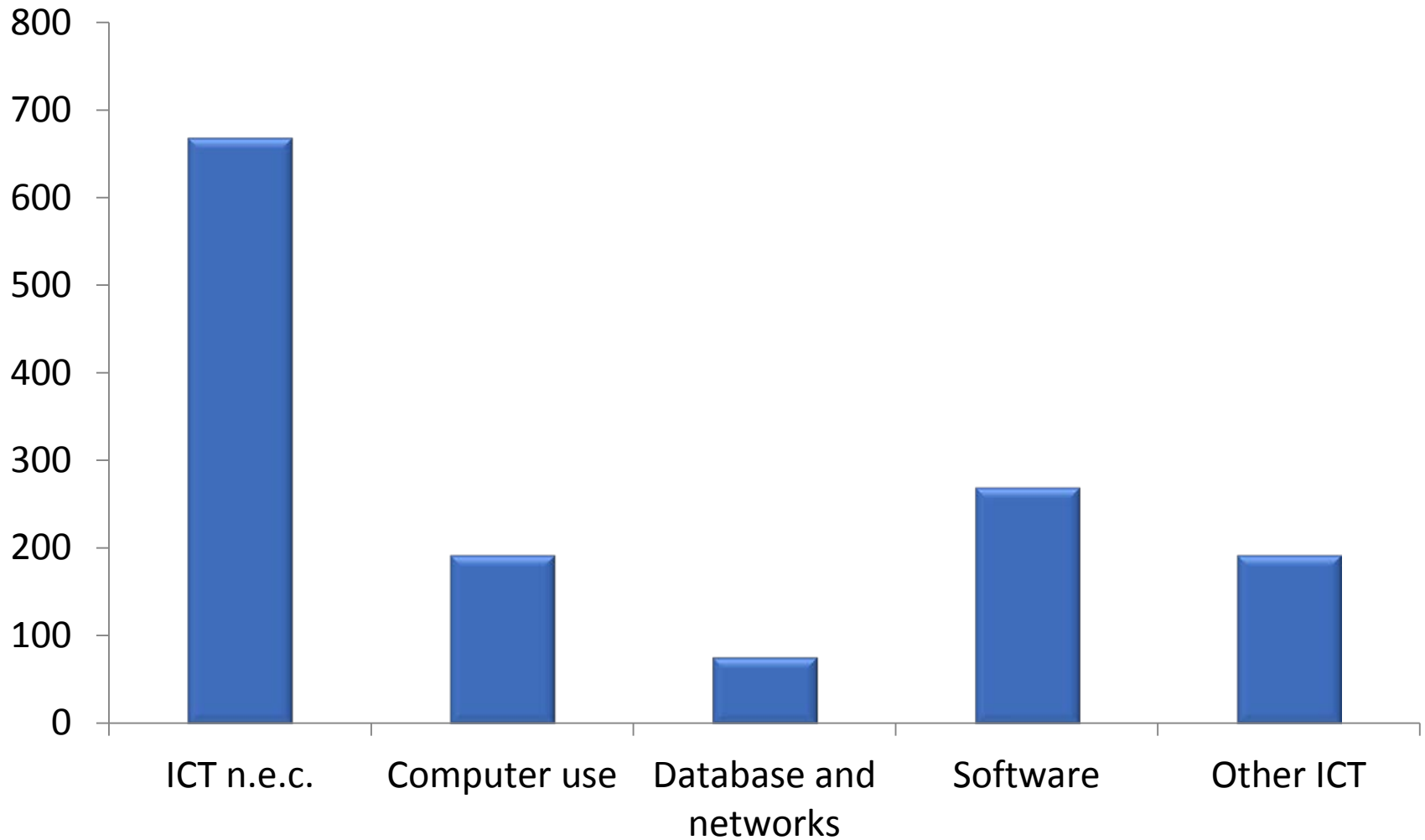
# HE awards (all levels) by detailed field – science, Dublin, 2015/16



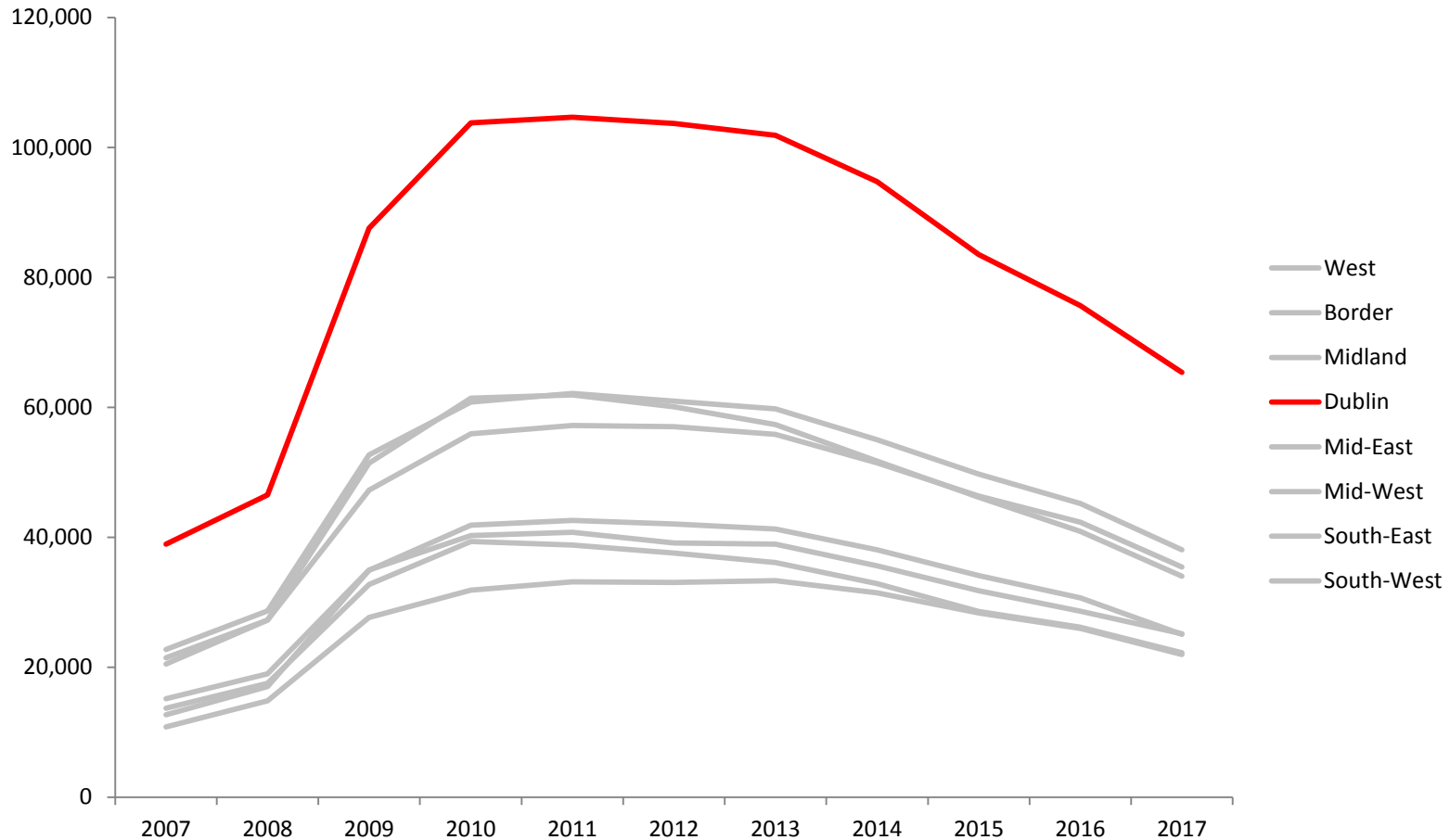
# HE awards (all levels) by detailed field – engineering & construction, Dublin, 2015/16



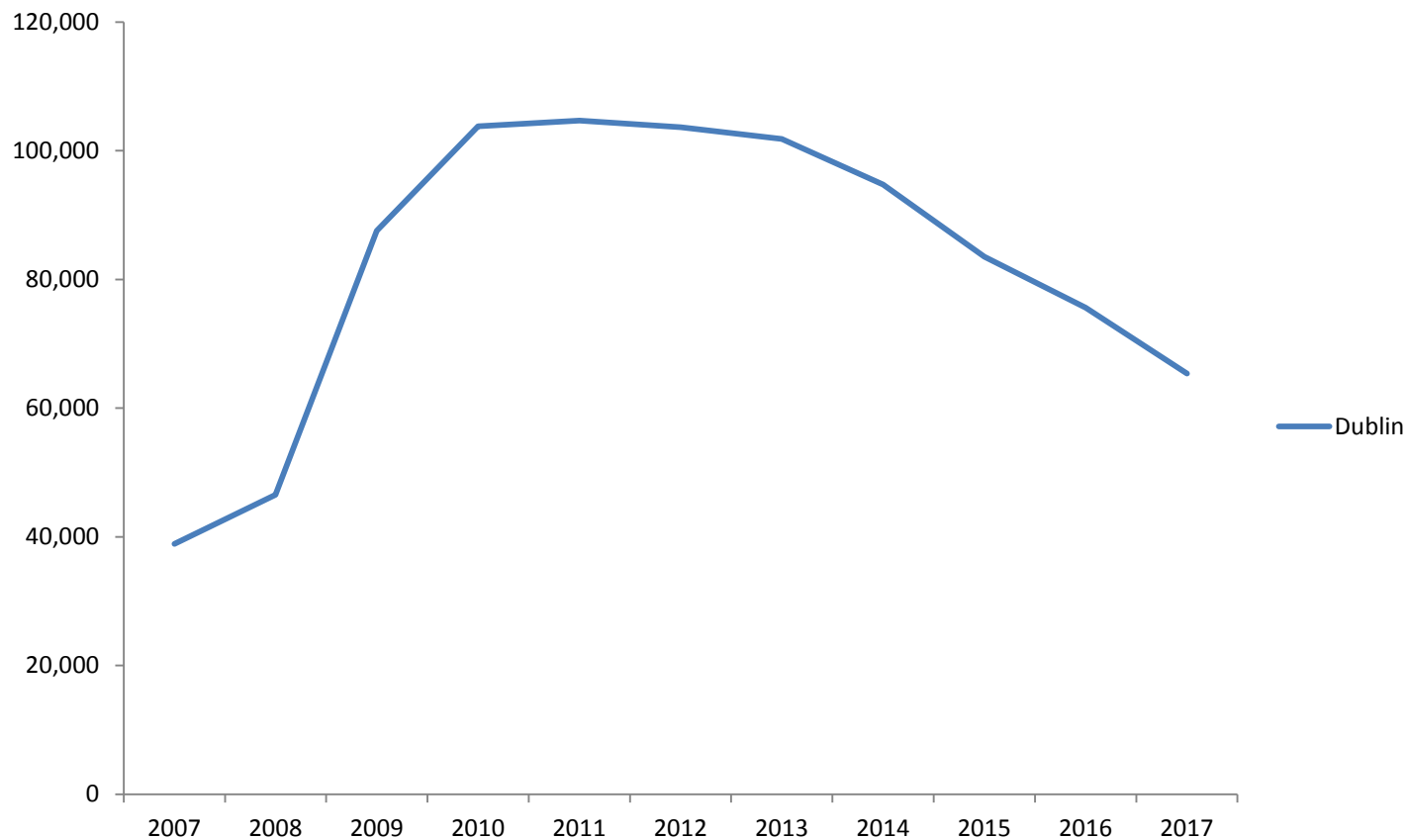
# HE awards (all levels) by detailed field – ICT, Dublin, 2015/16



# Live Register, 2007 - 2017



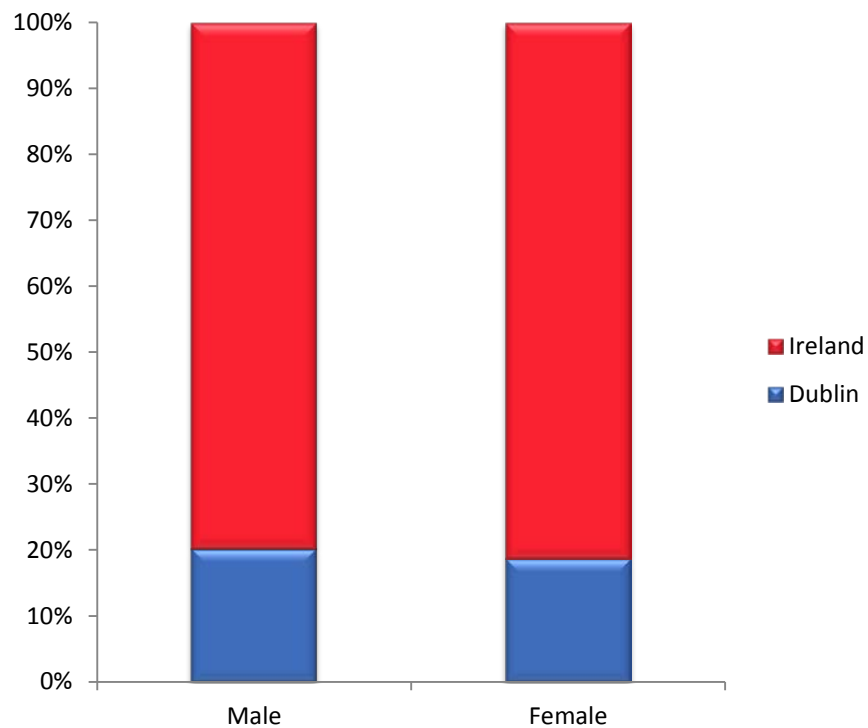
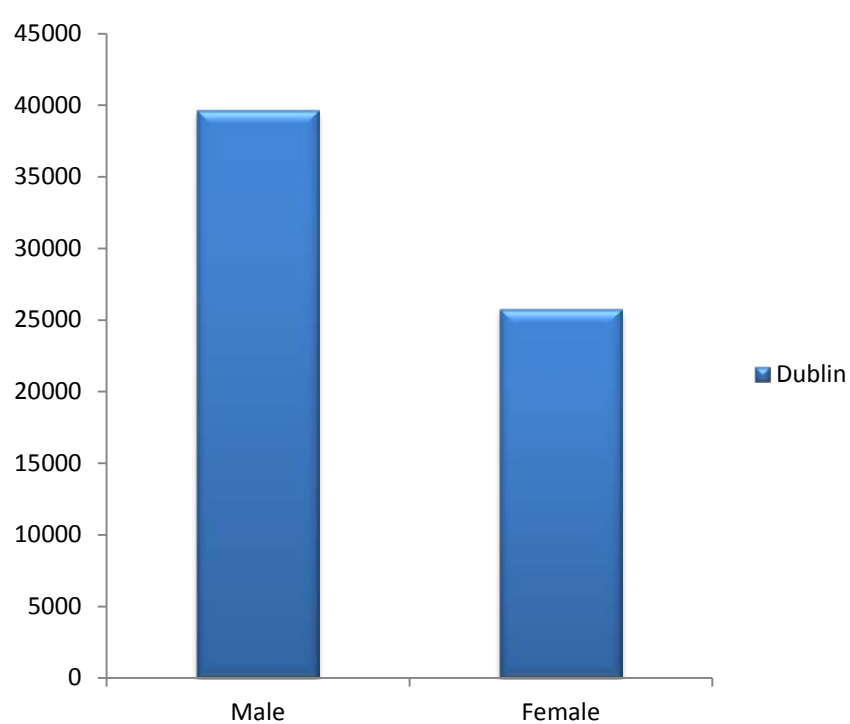
# Live Register, Dublin, 2007 - 2017



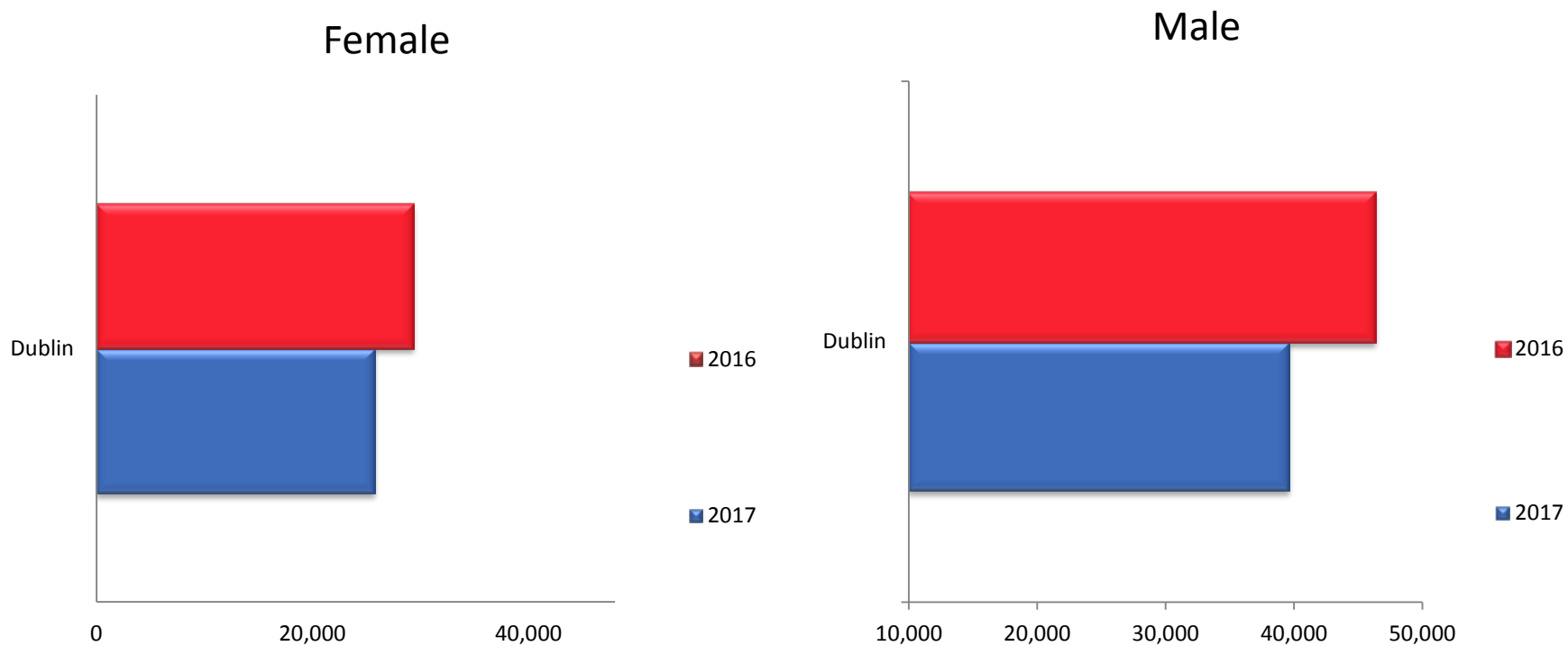
# Live Register by county and age, Dublin, 2017



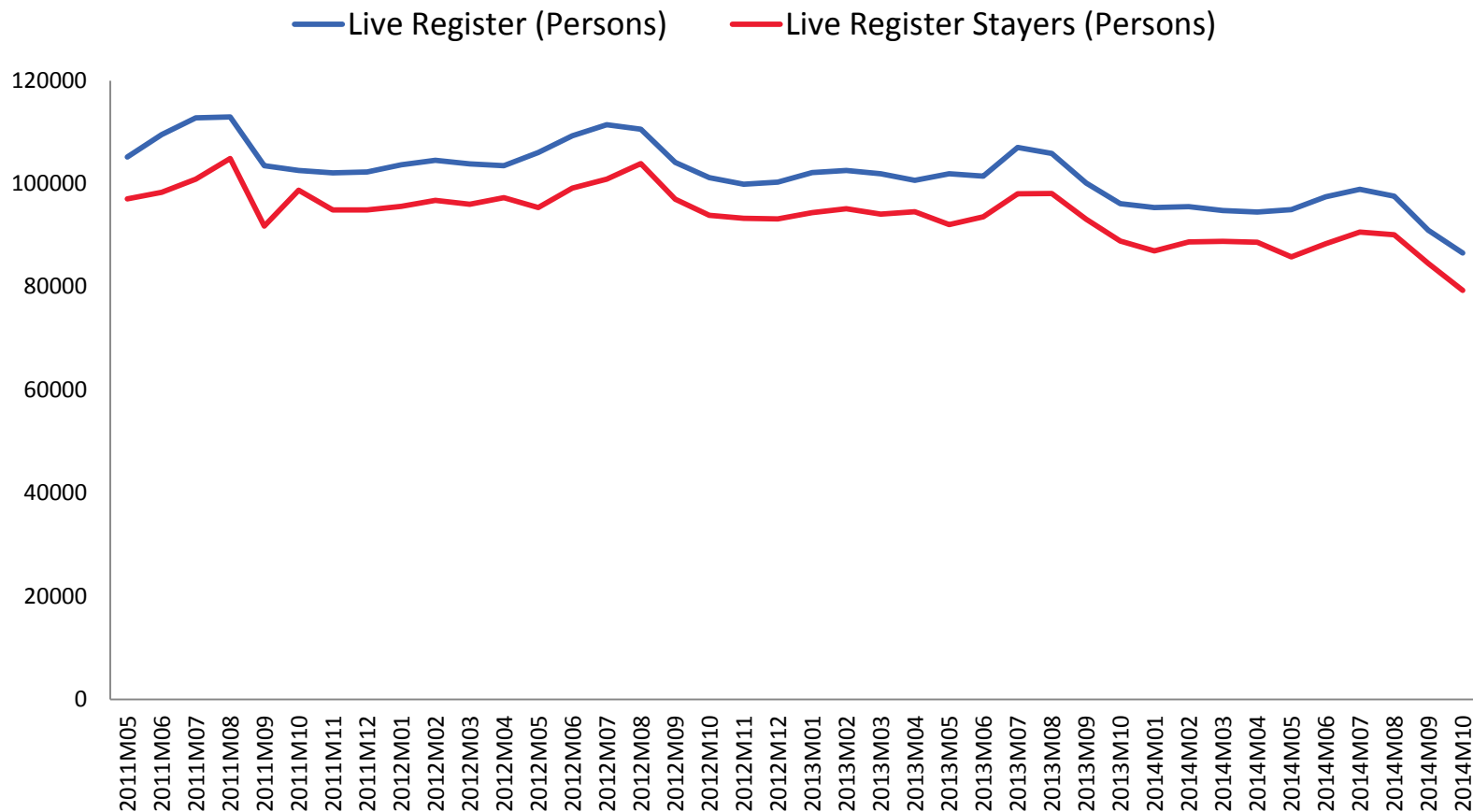
# Live Register by gender, Dublin, 2017



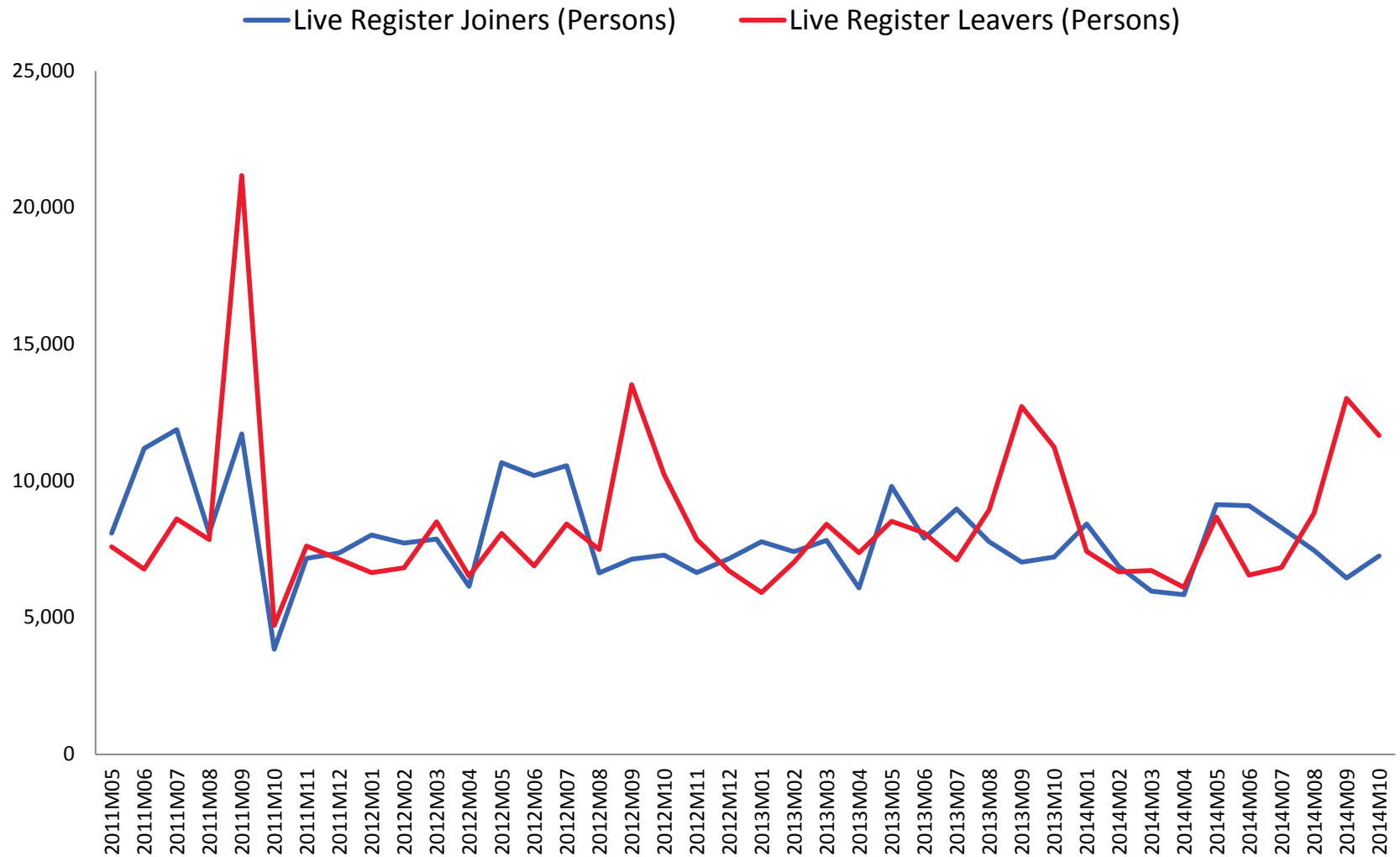
# Live Register by gender, Dublin, 2016-2017



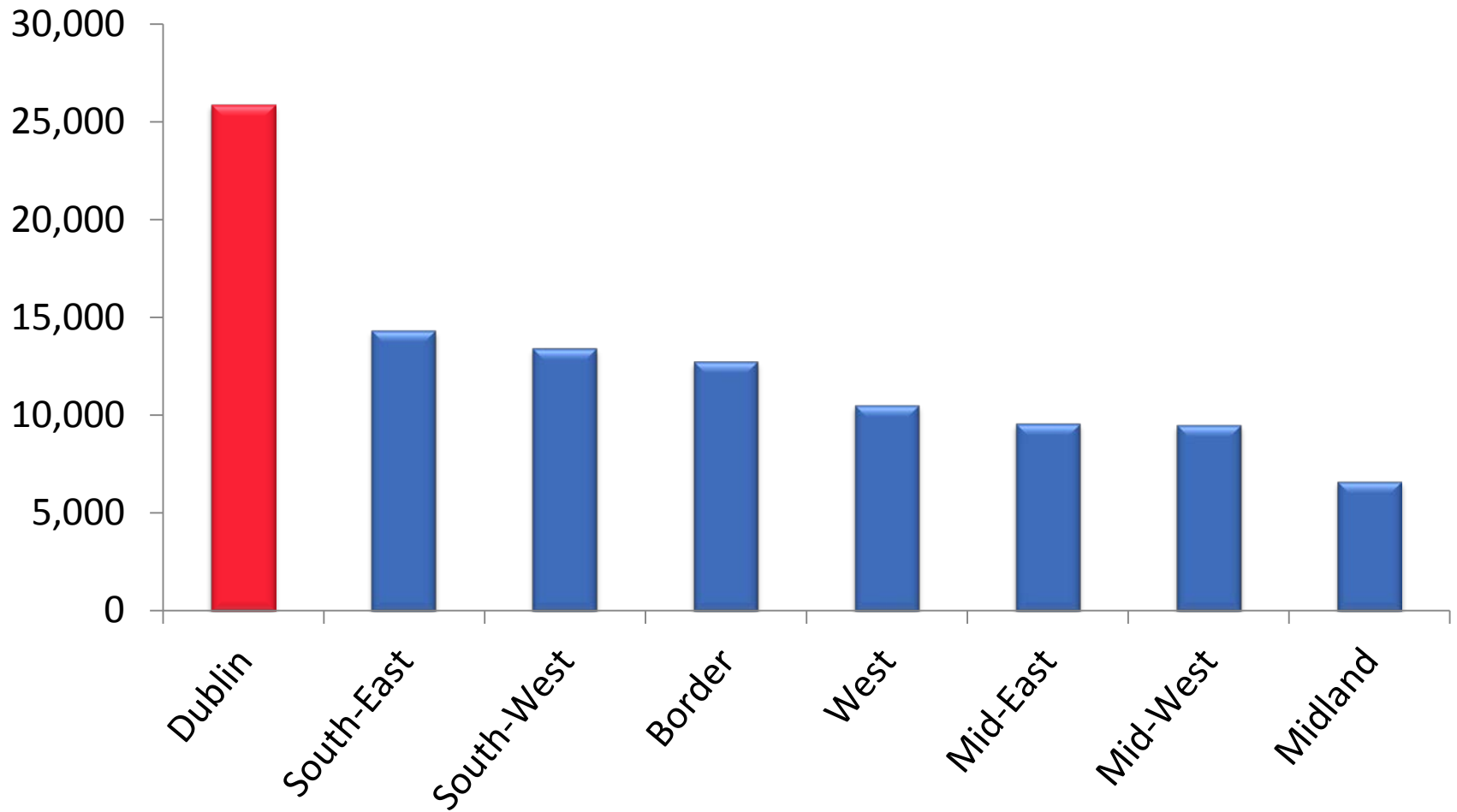
# Live Register, Dublin, 2011 - 2014



# Live Register, Dublin 2011 – 2014



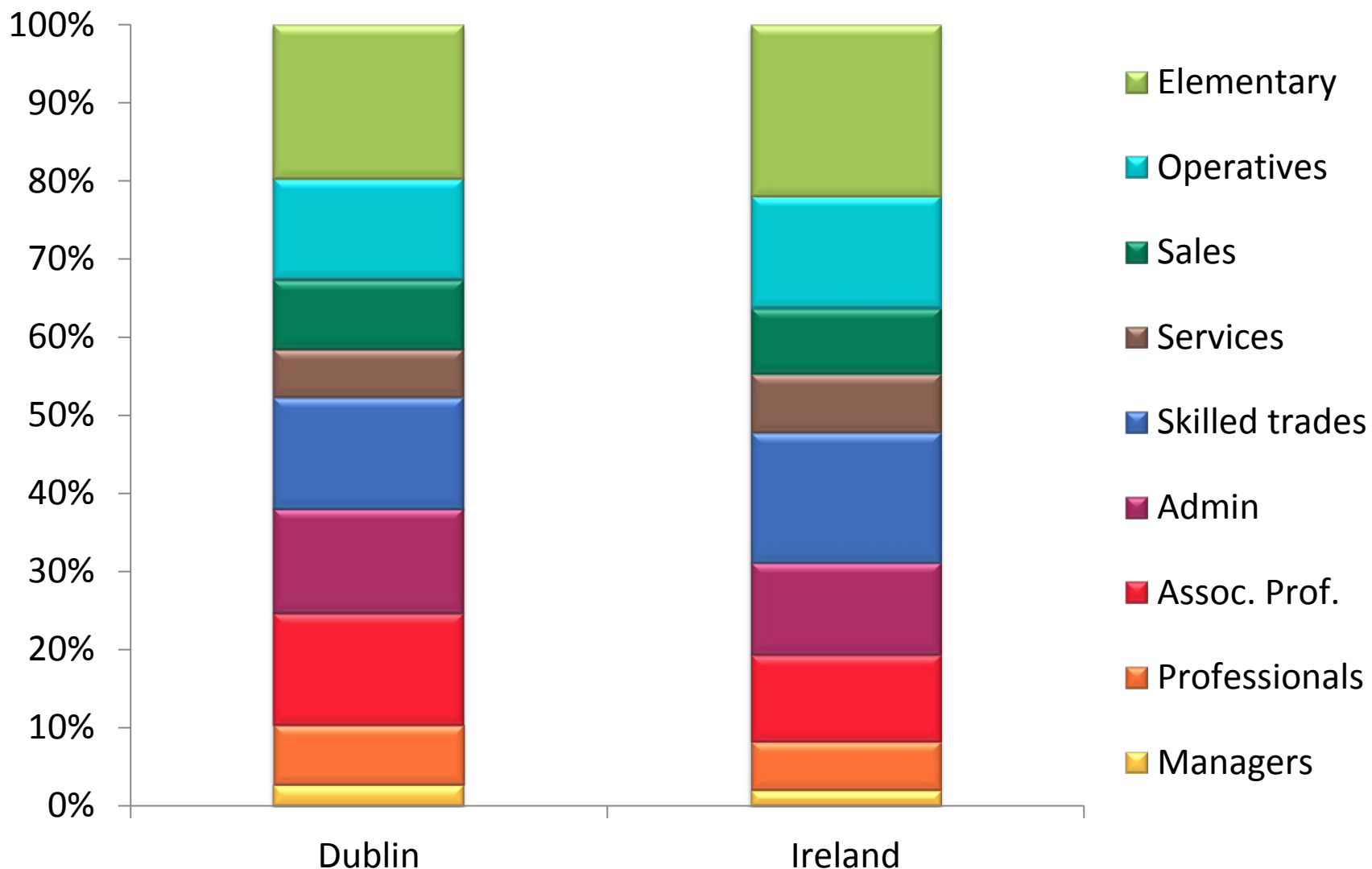
# Job-ready job seekers, Dublin, April 2017



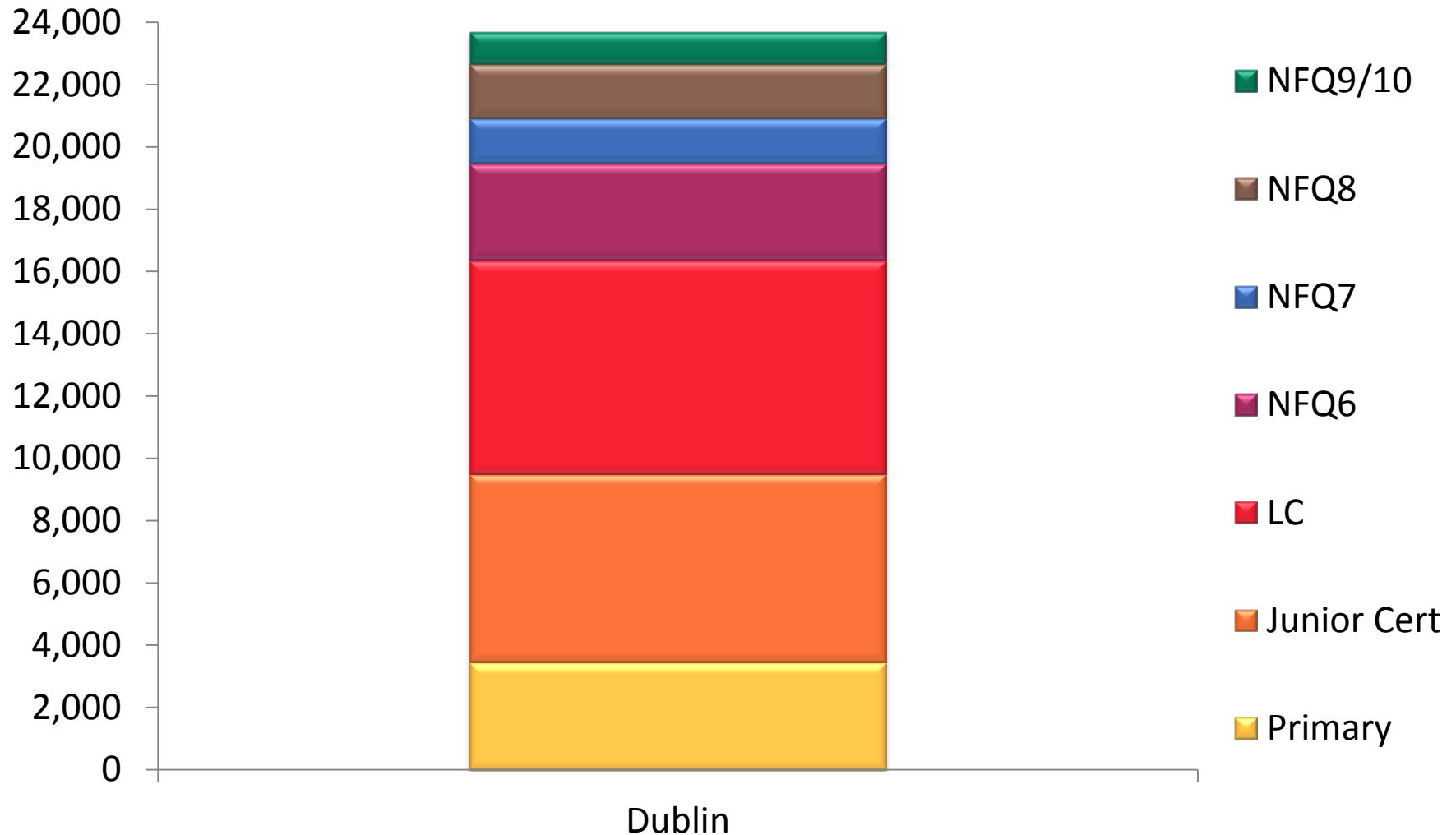
# Job-ready job seekers by occupation, Dublin, April 2017



# Job-ready job seekers, occupational composition, Dublin, April 2017



# Job-ready job seekers, by education, Dublin, April 2017



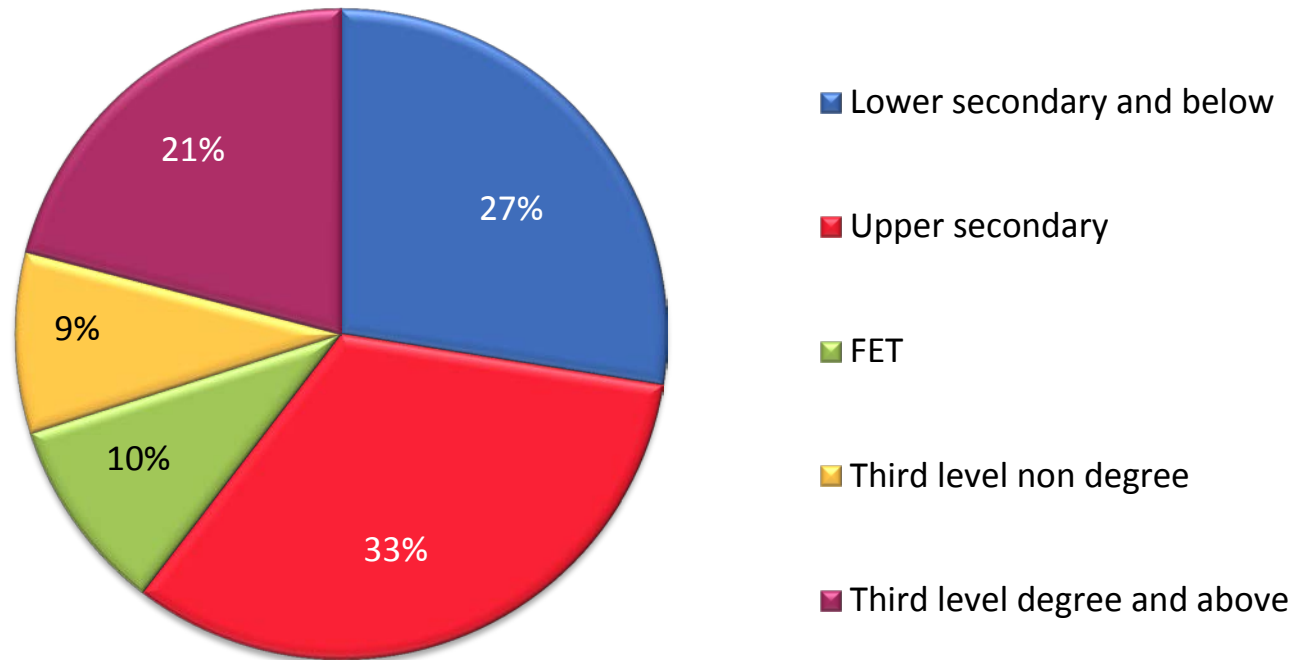
# Job-ready job seekers, occupational composition, Dublin, April 2017



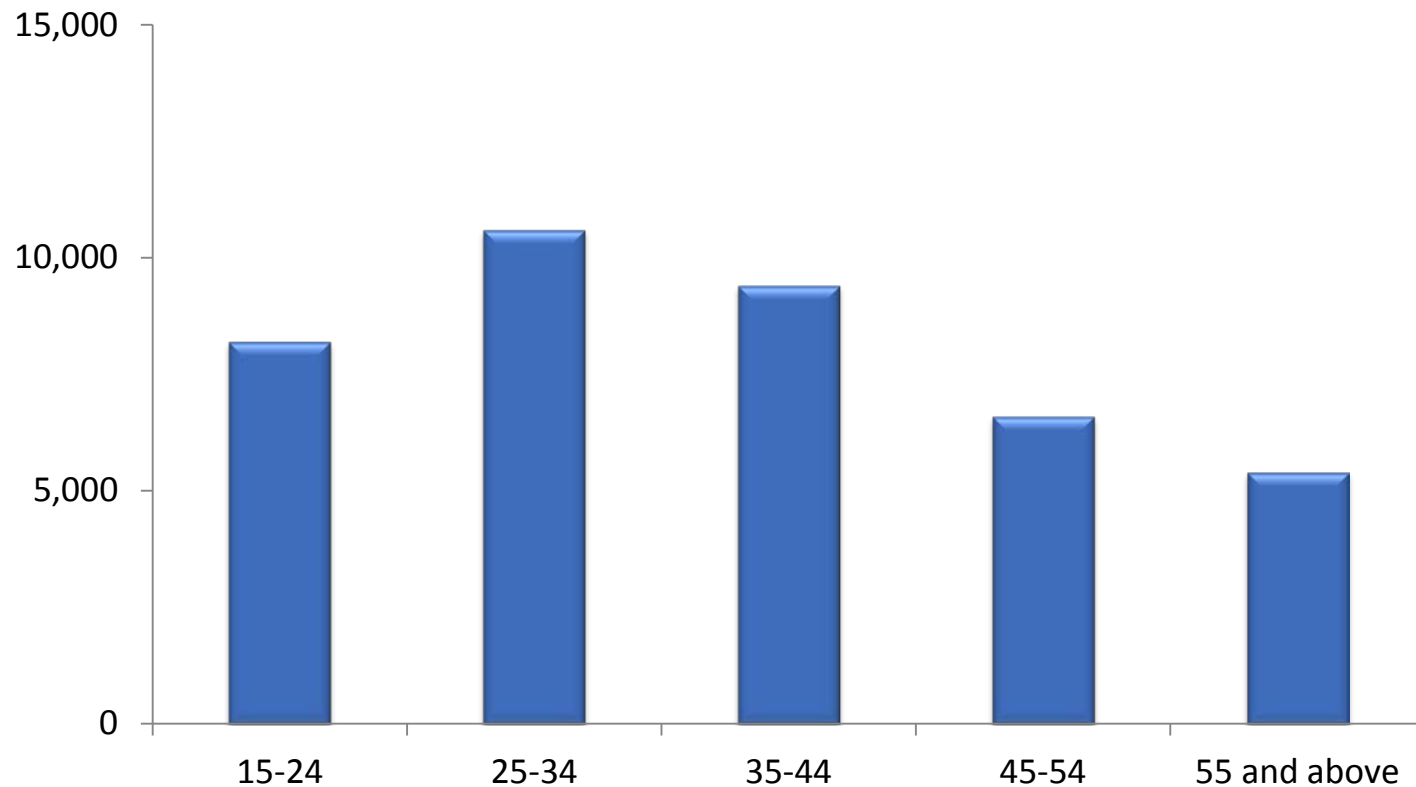
# Unemployment, Dublin, Q4 2016

- Approximately
  - 40,000 unemployed persons
  - a half were seeking a job for at least 12 months
  - three-in-five (60%) were male
  - a quarter had no previous employment experience
- **Age:** 20% were younger than 25; youth unemployment rate was 14%
- **Education:** almost 30% had attained at most lower secondary education
- **Sector:** wholesale & retail and industry accounted for the largest shares of unemployed
- **Occupation:** majority were previously employed in elementary occupations

# Unemployment by education, Dublin, Q4 2016



# Unemployment by age, Dublin, Q4 2016



Source: SLMRU analysis of CSO QNHS data

# Skills Shortages, Ireland, 2016

- **Professionals/associate professionals**
  - ICT (software developers, cloud, databases/big data, testing, security, technical support, networking and infrastructure)
  - Engineering (production, process, quality, validation, product design/development, electronic, electrical, mechanical and chemical)
  - Science (analytical development chemist, formulation scientist, microbiologist, QC analyst/validation technician)
  - Business & finance (risk, compliance, accounting, business intelligence, data analytics)
  - Health (doctors, nurses, radiographers, niche area specialists (e.g. prosthetists, radiation therapists, audiologists), managers)
  - Construction (construction and quantity surveyors with BIM (building information modelling), CAD), project managers)
- **Clerical** (multilingual financial clerks in fund accounting/administration, credit controllers, payroll specialists)
- **Skilled trades** (chefs, tool making, welding (TIG, MIG), butchers/de-boners, steel-erectors, curtain wallers, glaziers, steelfixers, steel erectors, pipelayers, shuttering carpentry, shift managers and supervisors)
- **Sales** (technical sales, multilingual customer support)
- **Operatives** (CNC, drivers (fork lift and special vehicle))
- **Retention issues** (care, chefs, butchers/de-boners, elementary)

# Turnover

- Turnover defined as either inter or intra occupational movement of persons in employment
- Turnover typically higher at the lower end of the skill scale, but some exceptions
- Occupations with estimated high turnover rates: general clerks, sales assistants, food operatives, care workers, elementary occupations (e.g. hospitality, cleaning, construction labourers), but also some higher skilled (e.g. computer programmers, financial accounts managers, sales accounts & business development managers)
- Implication for employees: employment conditions, career path and job security
- Implication for employers: difficulty in attracting and retaining staff
- Up-skilling / re-skilling