DISTRICT COUNCIL AREA DATA – COVER NOTE

1. Following the publication of the paper on Northern Ireland Trade and Investment Data under No Deal[1], the Northern Ireland Civil Service (NICS) had requests from stakeholders in relation to providing a further breakdown of some of the data we hold by district council area.

2. While much of the information in that paper cannot be replicated at the district council level, we have gathered a range of relevant economic related statistics for each area. This paper provides a summary of the available economic information throughout the 11 council areas. In addition, specific data for each council area can be found at Annexes 1 – 11. A list of web-links to useful data sources can be found at the end of each Annex.

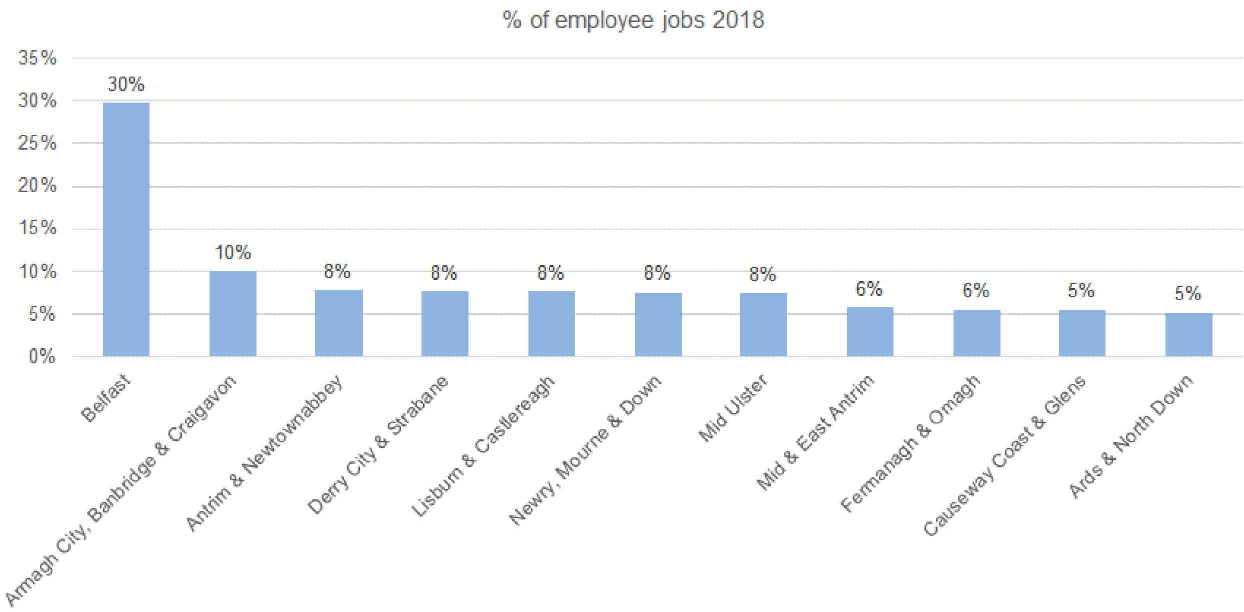
3. The statistics in this paper give the current context of different council areas and the differences between them. In order to identify the potential impact of a no deal exit, this paper should be read in conjunction with other papers, particularly our paper on Trade and Investment under No Deal.

4. This paper does not represent the NICS's view on matters of policy around EU Exit. It simply sets out the evidence for stakeholders to use. A decision on policy would clearly be for a Minister to consider.

Employment

5. In 2018, there were 759,358 jobs within Northern Ireland (NI). Belfast had the highest percentage of jobs (30%) followed by Armagh City, Banbridge & Craigavon (10%)[2] (see Figure 1).

Figure 1: % of Employee Jobs by District Council, 2018



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[1] Department for the Economy, NI Trade and Investment Under No Deal
[2] NI Business Register and Employment Survey

6. Sectoral analysis of employment[3] by District Council area shows variations in the sectoral employment base across NI. Wholesale and retail is NI's largest sector in terms of employee jobs (18%) and it represents around 20% of employee jobs in 10 of 11 of the District Council areas, with the exception of Belfast (12%). Human Health and Social Work Activities is the second largest sector in NI (17%) and is in the top three in terms of employee jobs representation across all District Council areas.

7. Over 80,000 employee jobs (11% of total NI jobs) are in manufacturing. This sector is of significant importance to Mid Ulster with close to 30% of employee jobs in manufacturing in that area. In addition, around one in five employee jobs in Mid and East Antrim and Armagh City, Banbridge and Craigavon council areas are in manufacturing. Mid Ulster is also more reliant on construction jobs compared to other District Council areas, where almost 1 in 10 jobs are in that sector within that area. Accommodation and Food Service Activities account for 10% of the jobs in both Ards and North Down and Causeway Coast and Glens council areas – the highest proportions across all council areas.

8. The private sector accounted for 73% of all employee jobs in 2018. The proportion of private sector jobs is highest within Mid Ulster (82%) and Antrim and Newtownabbey (77%). In contrast, the public sector accounted for 27% of all employee jobs with almost a half of total public sector jobs located in the three council areas of Lisburn & Castlereagh, Fermanagh & Omagh and Belfast.

Productivity

9. Productivity is a key challenge for NI alongside lower wages, employment rates longstanding high economic inactivity rates & sectoral composition. Our productivity levels have historically lagged behind most of the UK's regions and the UK as a whole. In the last 5 years, the gap between NI and the UK has only marginally closed.

10. Productivity levels differ between Local Government Districts (LGDs) based on the sectoral composition of their economy. Productivity in sectors such as financial activities, manufacturing, public administration and defence, and information and communications is higher than the NI average, while productivity in sectors such as agriculture, hospitality, health and social work is lower than the NI average.

11. In 2017[4], NI GVA per head was £21,172. Belfast had the highest GVA per head of £47,893 while Ards and North Down had the lowest of £10.064 (see Figure 2). It is

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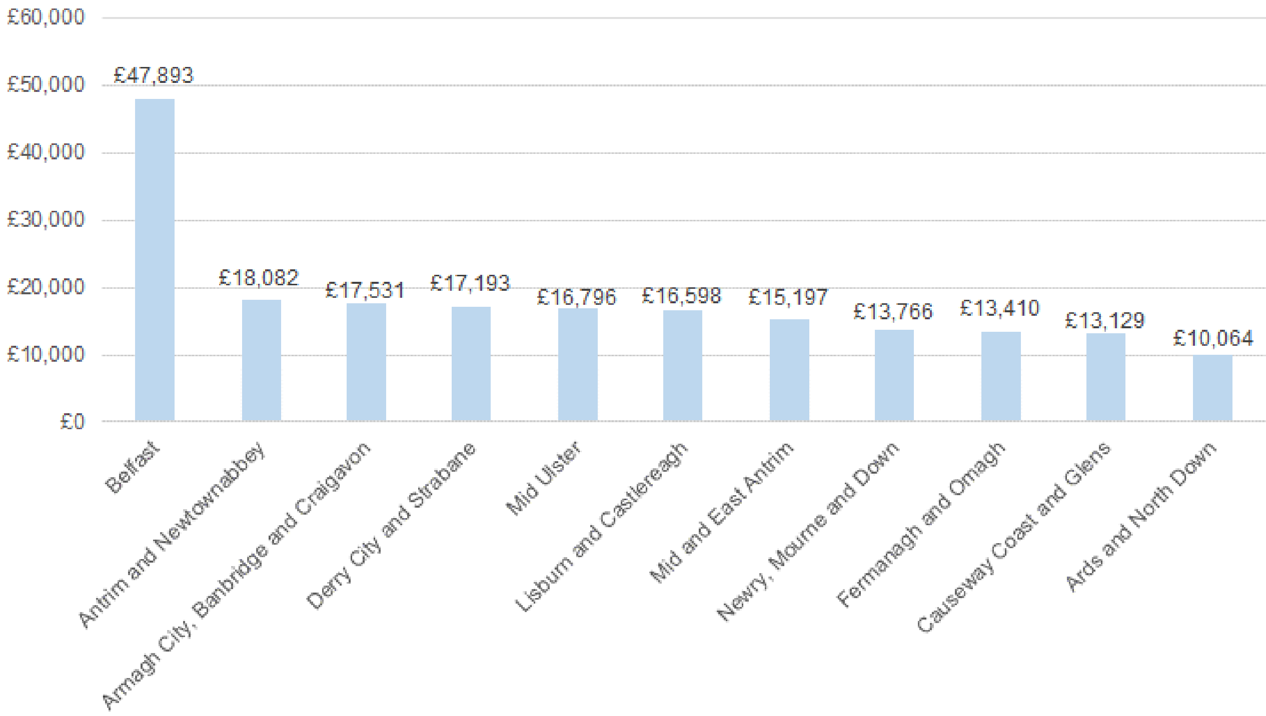
[3] NISRA, Business Register and Employment Survey, 2017
[4] Office for National Statistics (ONS)

important to note that these statistics are workplace rather than residence based and therefore commuters from outside of the Belfast area contribute to Belfast's GVA, but not to its population, inflating the figure as a result.

Figure 2: GVA per head by District Council, 2017



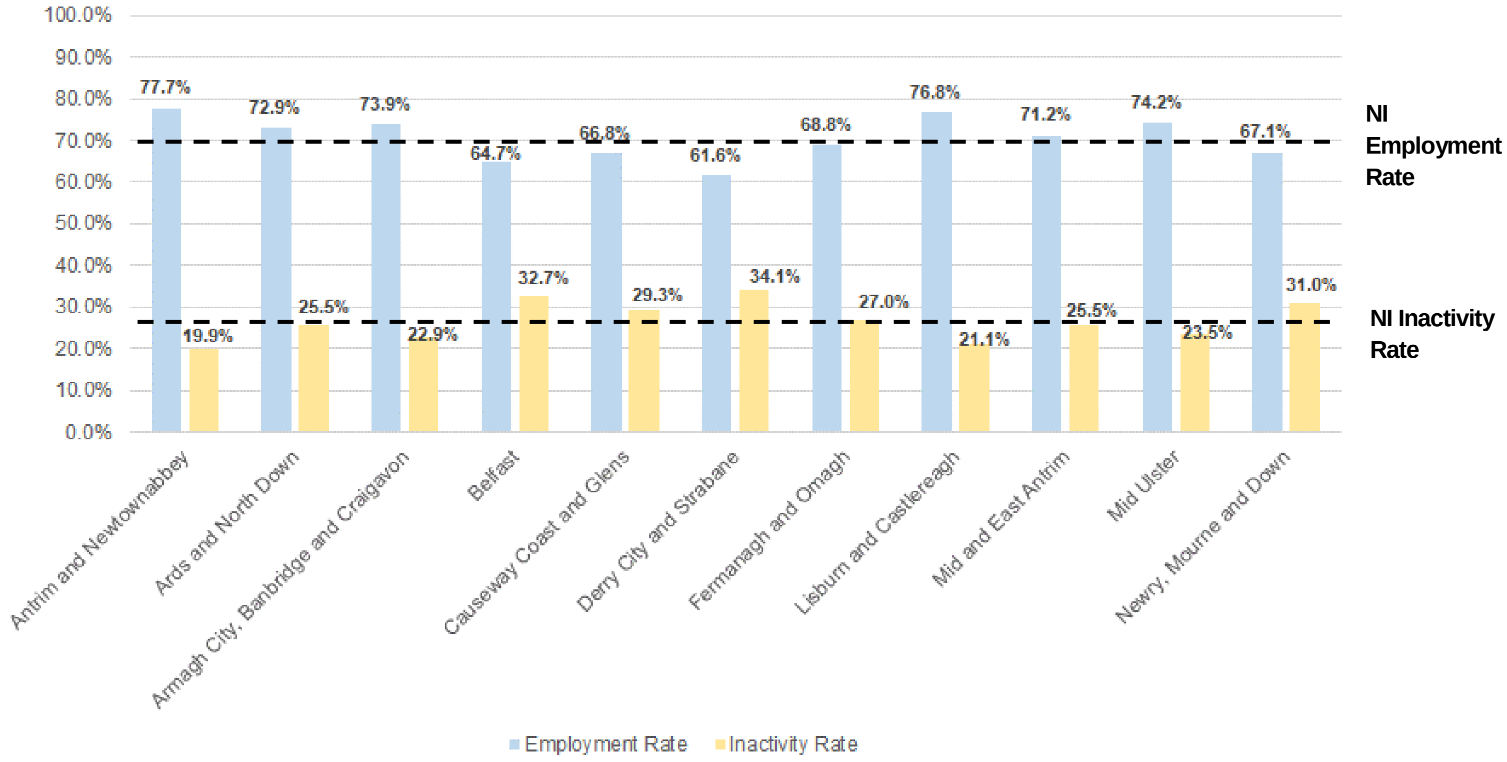
Employment / Inactivity

12. In 2018, the employment rate for NI was 70.0% and the economic inactivity rate was 27.2%[5]. By comparison, the UK employment rate was 75.6% and the economic inactivity rate was 21.1%.

13. The employment and inactivity rates varied across the Local Government Districts in 2018 (see Figure 3). Derry City and Strabane and Belfast reported the lowest employment rates, 61.6% and 64.7% respectively, and the highest inactivity rates in NI. Newry, Mourne and Down and Causeway Coast and Glens also had employment rates below the NI rate and inactivity rates higher than the NI rate.

[5] Labour Force Survey, 2018

Figure 3: Labour market structure by council area, 2018



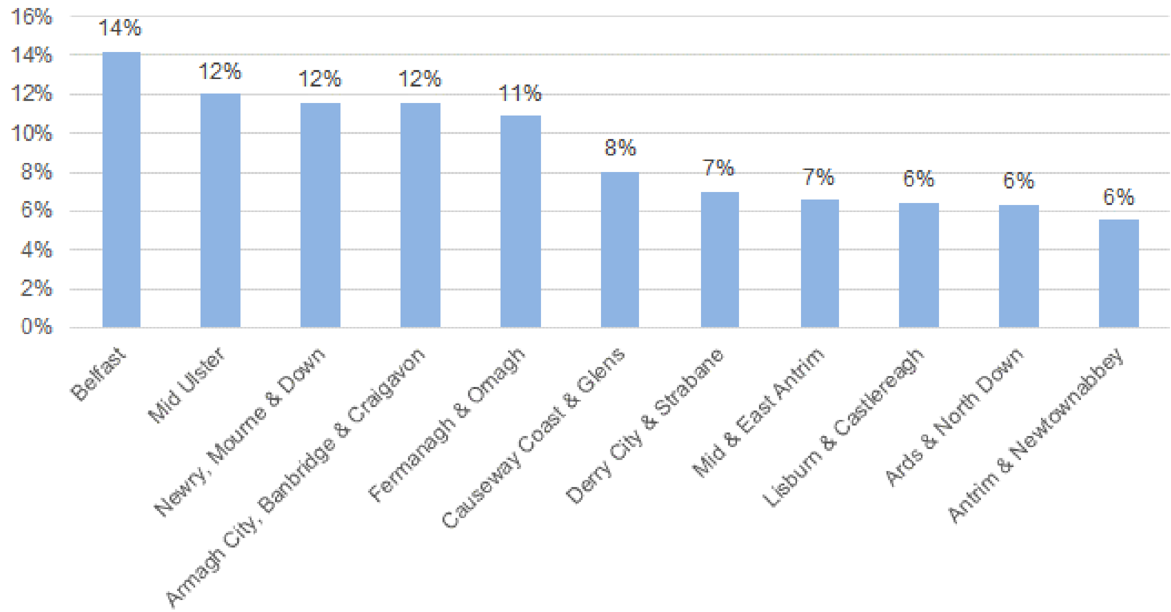
14. Fermanagh and Omagh was the most similar to the NI averages, with an employment rate of 68.8% (within 1.2 percentage points of the NI rate) and an inactivity rate (27.0%) within 0.2 percentage points of the NI rate, followed by Mid and East Antrim and Ards and North Down. Armagh City, Banbridge and Craigavon and Mid Ulster councils showed similar characteristics, both were above the NI employment rate (73.9% and 74.2%) and below the NI inactivity rate (22.9% and 23.5%).

Business Profile

15. In 2019 there were 75,490 businesses within NI[6]. The vast majority (89%) are classified as micro (0-9 employees). Belfast accounted for 14% of all the businesses in NI followed by Mid Ulster, Newry, Mourne & Down and Armagh City, Banbridge & Craigavon at 12% (see Figure 4).

[6] Inter Departmental Business Register, NISRA

Figure 4: Share of total NI businesses by District Council, 2019



16. The agriculture, forestry & fishing sector had the highest proportion of businesses in NI (25%). Almost three-quarters (71%) of businesses in this sector were in the five southern Border council areas. This data only includes businesses that are registered for VAT and / or PAYE as such all businesses (including farming) that are not registered for VAT and do not operate a PAYE scheme are excluded.

Agriculture

17. Table 1 shows[7] the highest number of farms are located in Councils in the South and West of NI. These are Fermanagh and Omagh, Mid Ulster, Newry, Mourne and Down, and Armagh City, Banbridge and Craigavon. As would be expected given that they are more urban, the council of Belfast and those bordering Belfast have the lowest number of farms. There are significant differences between Councils as regards average farm business size. Average Standard Output per farm is significantly lower in Fermanagh and Omagh and Newry, Mourne and Down compared to other Councils and less than half of that in Ards and North Down. Very small farms predominate across all Councils but comprise a particularly high proportion of farms in Fermanagh and Omagh and Newry, Mourne and Down. Medium and large farms constitute only 12% of farms in NI and form the highest proportion of farms in Councils covering the North and East of NI – Causeway Coast and Glens, Antrim and Newtownabbey, Lisburn and Castlereagh, and Ards and North Down.

[7] DAERA, June Agricultural Census 2018

Table 1: Number of farms by farm business size and by District Council in NI, June 2018

District Council	Average SO/farm (€ '000)	Farm business size: Number of farms					Percentage distribution				
		V. Small	Small	Medium	Large	Total	V.Small	Small	Medium	Large	Total
Antrim and Newtownabbey	**96.8**	612	125	42	93	**872**	70	14	5	11	**100**
Armagh City, Banbridge and Craigavon	**98.1**	2,421	366	175	291	**3,253**	74	11	5	9	**100**
Belfast	**94.8**	25	1	3	2	**31**	81	3	10	6	**100**
Causeway Coast and Glens	**89.8**	1,740	352	155	254	**2,501**	70	14	6	10	**100**
Derry City and Strabane	**74.3**	1,324	230	89	128	**1,771**	75	13	5	7	**100**
Fermanagh and Omagh	**54.2**	4,220	503	189	182	**5,094**	83	10	4	4	**100**
Lisburn and Castlereagh	**93.4**	615	90	51	86	**842**	73	11	6	10	**100**
Mid and East Antrim	**85.1**	1,310	246	105	132	**1,793**	73	14	6	7	**100**
Mid Ulster	**89.1**	3,254	457	215	236	**4,162**	78	11	5	6	**100**
Newry, Mourne and Down	**53.9**	3,224	362	121	173	**3,880**	83	9	3	4	**100**
Ards and North Down	**117.4**	443	92	45	116	**696**	64	13	6	17	**100**
Total	**77.6**	**19,188**	**2,824**	**1,190**	**1,693**	**24,895**	**77**	**11**	**5**	**7**	**100**

Note: Farm business size classification is calculated from Standard Labour Requirements.

18. These differences in farm business size are mainly driven by land quality. Cattle and sheep farms tend to have the lowest standard output per farm of all farm types and have a dominant presence in Less Favoured Areas. Cattle and Sheep farms constitute 80% of farms in NI and are by far the most numerous across all Councils. They are however very dominant in Fermanagh and Omagh and Newry, Mourne and Down where they comprise over 85% of farms. Dairy farms comprise nearly 20% of all farms in Ards and North Down, well above the NI average of 10%. Cereal farming is also significant in this Council area where 6% of farms are so classified compared to 1% across NI. The highest number of pigs and poultry farms (non-land based) are found in Mid Ulster which reflects where the associated processing businesses are based.

Earnings

19. There is a wide variation in earnings between LGDs[8]. When analysed by place of work, median yearly earnings in 2018 ranged from £18,767 in Fermanagh & Omagh to £25,912 in Belfast with a NI average of £21,923. When analysed by place of residence Derry City and Strabane had the lowest median yearly earnings at £18,564 and Lisburn and Castlereagh had the highest at £24,934 (compared to a NI average of £21,923). The differences between median earnings by place of work and place of residence reflect a range of factors including commuting patterns and concentrations of higher and lower paid sectors in particular areas.

Education

20. NI has lower levels of third level qualification and higher levels of no qualifications than the UK as a whole. In 2018, 34.9% of those aged 16-64 years were qualified to NVQ Level 4 and above in NI compared to 39.2% for the UK as a whole; and 14.7% had no qualifications compared with 8% in the UK as a whole.[9]

21. Table 2 shows that the those areas with the highest proportion of people educated to NVQ level 4 and above were Lisburn & Castlereagh (41.8%), Belfast (39.1%) Ards & North Down (38%) and Antrim & Newtownabbey (37.7%). All remaining LGDs were below the NI average of 34.9%. Causeway Coast and Glens and Mid Ulster had the highest rates of 16-64 year olds who had no qualifications (19.8% and 19.4% respectively). Antrim and Newtownabbey had the lowest rate with no qualifications (6.8%).

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[8] Annual Survey of Hours and Earnings, NISRA
[9] NISRA, Labour Force Survey 2018

Table 2: Qualifications of working age population (16-64) by District Council, 2018

	Achieved NVQ level 4 and above[10]	Achieved below NVQ level 4	No qualifications
Antrim and Newtownabbey	37.7%	55.4%	6.8%
Ards and North Down	38.0%	49.1%	12.9%
Armagh City, Banbridge and Craigavon	32.4%	53.5%	14.0%
Belfast	39.1%	45.0%	15.9%
Causeway Coast and Glens	33.8%	46.5%	19.8%
Derry City and Strabane	33.1%	51.7%	15.3%
Fermanagh and Omagh	29.4%	56.9%	13.7%
Lisburn and Castlereagh	41.8%	52.0%	*
Mid and East Antrim	30.1%	52.6%	17.3%
Mid Ulster	33.9%	46.7%	19.4%
Newry, Mourne and Down	30.2%	51.9%	17.9%
NI	**34.9%**	**50.4%**	**14.7%**

* Sample size was too small for a reliable estimate

People movements

22. Analysis of Mobile Network Operator (MNO) information[11] found that approximately 92% of border crossings by NI residents from NI to Ireland started in LGDs[12] next to the border. Figure 5 illustrates the border crossings from NI to ROI by NI Residents. The darker shaded areas in the map highlight where most crossings start from. Almost 44% of crossings started in Derry City and Strabane District Council, 17% started in Fermanagh and Omagh District Council, 15% in Newry, Mourne and Down District Council, 9% in Armagh City, Banbridge and Craigavon Borough Council and almost 8% in Mid Ulster District Council. Approximately 4% of crossings started in Causeway Coast and Glens Borough Council and 2% in Belfast City Council.

23. The analysis also estimated that 87% of all crossings from Ireland to NI by Irish residents end in border LGDs. The most popular LGD destinations were Fermanagh and Omagh (24%), Newry, Mourne and Down (22%), Derry City and

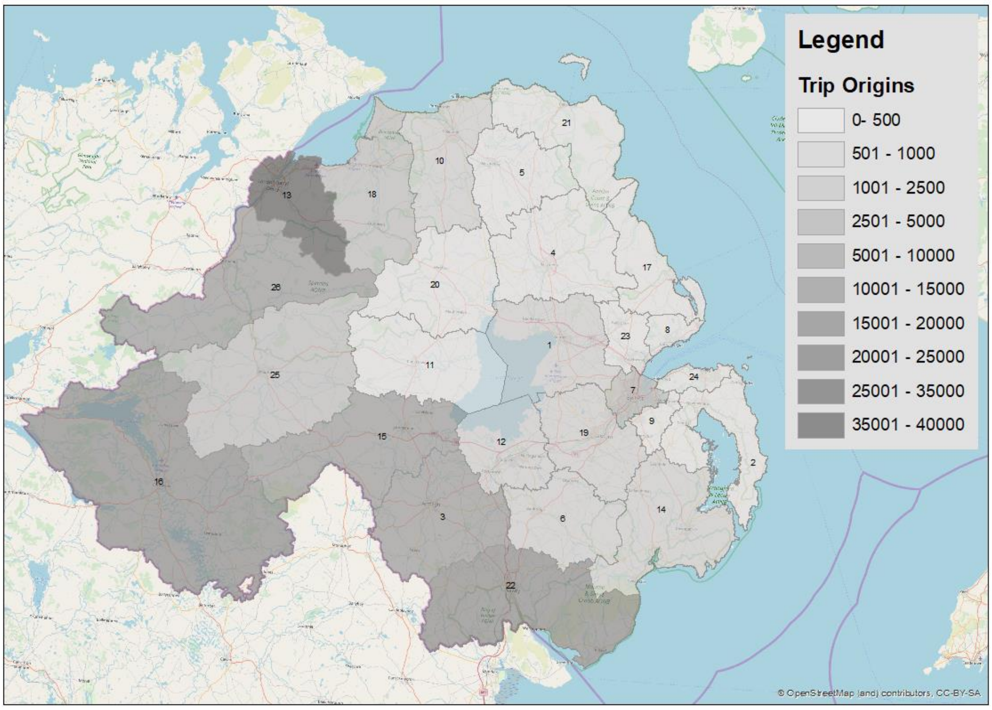
[10] Includes degree level and above which includes foundation degrees, higher degrees, teaching and nursing degrees

[11] DfE (2018) Cross Border Movements: The movement of people across the Northern Ireland - Republic of Ireland border

[12] The original MNO analysis used the 26 Local Government Districts (LGD1992) to provide greater granularity in the results. However, the MNO analysis in this paper is presented for current 11 LGDs (LGD2014).

Strabane (21%), Armagh City, Banbridge and Craigavon (12%), and Mid Ulster (8%). 4% of crossings ended in the Causeway Coast and Glens and 1% in Belfast.

Figure 5: The origin of NI to Ireland border crossings, NI residents (average weekday)



24. The NI Life and Times 2016 survey[13] data provides further support for this. The analysis of cross-border journeys found that:

- 80% were accounted for by adults living in the border District Councils of: Derry City and Strabane, Fermanagh and Omagh, Mid Ulster, Armagh Banbridge and Craigavon, and Newry Mourne and Down;
- 6% were accounted for by adults living in Belfast District Council; and
- 14% accounted for by adults living in the remaining Council areas in the east of NI comprising: Causeway Coast and Glens, Mid and East Antrim, Antrim and Newtownabbey, Lisburn and Castlereagh and North Down and Ards.

25. Analysis from the Transport Model[14] indicates that 81% of trips made by cars and light goods vehicles started in the areas next to the border. 45% of trips started in Derry, with 12% in Enniskillen, 10% in Newry, 7% Strabane, 4% Armagh and 2% in Dungannon. 5% of trips to ROI started in Belfast.

26. For HGVs 41% of cross border trips to Ireland started in the councils next to the border. 13% started in Newry, 12% in Enniskillen, 6% Dungannon, 5% Armagh

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[13] The NI Life and Times (NILT) is an annual survey, which collects information on the attitudes, values and beliefs of the people of NI on a wide range of social and economic issues. The data can be sourced from: http://www.ark.ac.uk/nilt/2016/Political_Attitudes/CROSSBDR.html

[14] The NI transport model presented its results for 26 NI Councils (LGD1992).

and 2% in Derry. Belfast was the starting location for 26% of HGV trips to Ireland, with a further 7% starting in Omagh.

Purpose of Travel

27. Analysis of Mobile Network Operator (MNO) information indicates that on average for all NI residents, 65% of cross border travel was for social and leisure purposes, with 35% of border crossings for work related purposes.[15] The highest share of work related crossings was in Derry City and Strabane at 38%, which compares to 35% in Newry Mourne and Down, and 33% in Belfast and the Causeway Coast and Glens. The lowest percentage of work related crossings was 23% for trips starting in Antrim and Newtownabbey, Ards and North Down and Mid and East Antrim. The corresponding share of social/leisure crossings was therefore lowest in Derry City and Strabane at 62% and highest in Antrim and Newtownabbey, Ards and North Down and Mid and East Antrim at 77%.

Frequency of Travel

28. The MNO analysis found that people living closest to the border are the most frequent crossers and they account for the vast majority of such trips. 60% of people who crossed the border lived in the border LGDs and they made 92% of all crossings. The home location of the traveller is important because it shows that cross border travel is not uniform and those closest to the border make the most trips.

29. The people living in the border LGDs who crossed the border made almost 3 cross border trips per week compared to 0.4 trips per week for people living in non-border LGDs. NI residents in Derry, City and Strabane made on average 4 cross border trips per week compared to 2.5 per week for NI residents in Fermanagh and Omagh, and 1.5 per week in Newry, Mourne and Down, 1 per week in Armagh, Banbridge and Craigavon and Mid Ulster.

30. NI residents in Belfast, Antrim and Newtownabbey, and the Causeway Coast and Glens made around 1 trip per fortnight. NI residents in the other LGDs, who crossed the border, made on average around 1 cross border trip per month.

[15] DfE (2018) Cross Border Movements: The movement of people across the NI - Republic of Ireland border

Conclusion

31. There are significant differences in the economic characteristics of different council areas across NI. There are differences that we would expect, for example between urban and rural areas in the number of jobs or the number of farms. Other differences are explained through differences in geographic characteristics. We can see this in the predominance of cattle and sheep farms and very small farms in Less Favoured Areas, in particular in Fermanagh and Omagh and Newry, Mourne and Down. Geography also explains people movements; proximity is a significant driver of frequency of cross-border travel.

32. There are also differences arising from historical association patterns of economic development and sectoral concentration. Examples of this can be seen in the importance of the manufacturing sector in Mid Ulster or the relative differences in employment/inactivity rates across NI. Differences in economic development, and the predominance of different sectors in different areas goes some way to explain the differences in average wages across NI. Those working in Belfast had the highest yearly earnings, and those working in Fermanagh and Omagh had the lowest yearly earnings. We also see the continued impact of historical trends around inactivity in the high inactivity rates in Derry City and Strabane and Belfast. However, we can also see that certain statistics can hide differences within Council areas, for example Belfast was both one of the top council areas in terms of the percentage of the population with qualifications at degree level or higher, but also had an above average percentage of people with no qualifications.

33. Overall, these statistics provide some evidence around the current economic context of different council areas. While these statistics do not directly address EU Exit issues, they provide necessary context to begin to understand how different areas of NI are exposed.

Annexes 1-11: District Council Area Profiles

- Antrim and Newtownabbey
- Ards and North Down
- Armagh City, Banbridge and Craigavon
- Belfast
- Causeway Coast and Glens
- Derry City and Strabane
- Fermanagh and Omagh
- Lisburn and Castlereagh
- Mid and East Antrim
- Mid Ulster
- Newry, Mourne and Down

Each profile can be found at: https://www.economy-ni.gov.uk/publications/district-council-area-data

Annex 12: Web-links to useful data sources

Labour Force Survey

Claimant Count

Regional analysis and trends

Quarterly Employment Survey

Business Register and Employment Survey

Annual Business Inquiry

Redundancies

Annual Survey of Hours and Earnings

Regional Gross Value Added (Balanced)

NI Composite Economic Index

Broad Economy Sales and Exports Statistics

Inter Departmental Business Register

Agricultural Census 2018

Local Government Tourism Statistics

Invest NI Regional Profiles
- Eastern
- North Eastern
- North Western
- Southern
- Western

Northern Ireland Life and Times Survey 2018

Northern Ireland Trade and Investment Under 'No Deal'

The movement of people across the Northern Ireland - Republic of Ireland border

An analysis of migrant workers from the NI census