

DfE Economic Commentary Summer 2017

Since our last edition, the NI economy has continued to grow with independent forecasters predicting a slightly higher growth for 2017 than our last commentary. The local economy has been boosted once more by the private sector with strong results in goods exports in particular. However, the latest labour market statistics continue to show a mixed picture.

Overview

The Economic Commentary reviews each of the key elements which contribute to economic growth:

The Economy

Over the medium term the economy has recorded solid growth in output and jobs which has been robustly underpinned by the private sector. However, recent output and employment statistics point to a potential slowing of growth.

Business

All major private sectors of the economy recorded growth when compared with the same quarter last year. All measures within the service sector posted increases over the period with robust growth in the transport and ICT sub sectors.

Rest of World

The latest HMRC statistics show that our goods exports continue to be in demand, growing by around 12% over the year. Looking ahead, independent forecasters have again revised their forecasts for global growth upwards.

Households

Since our last commentary the labour market has begun to post mixed results with both the unemployment and employment rate falling. Inflation has risen steadily over the year and has resided above the Bank of England target for a number of months.

Government

Whilst the pace of job reductions has begun to slow the number of public sector jobs has fallen over the year, with the NICS again registering the greatest reduction for the period.

Research Highlights

- The **Skills Barometer Report** for 2017 was completed by the Ulster University Economic Policy Centre. This provided an up to date assessment of the future skills needs of the Northern Ireland economy.
- Analytical Services research looking at **Trends in US Foreign Direct Investment 2003-15** demonstrates that NI has been one of the leading locations for US investors.
- The Department for Jobs, Enterprise and Innovation published a report on the **Cost of Doing Business in Ireland 2017** which benchmarks the main costs facing enterprises across 70+ metrics.
- IntertradeIreland research examining current cross-border trading patterns and **the Potential Impacts of WTO Tariffs** on overall trade highlights the impact of such barriers mainly on food sectors.
- The Centre for European Economic Research discussion paper on the **Dynamics of Over-qualification: Evidence from the Early Careers of Graduates** highlights that overqualification is highly persistent among tertiary graduates over the first ten years of their career cycle.

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The Economy

The local economy has continued to experience robust growth in both output and jobs, with the private sector taking the lead on both measures. Since the start of 2012 and the inception of the aim to rebalance the economy, the private sector has grown by 6.3% and added over 65,000 jobs to the local economy.

| | | | | |
|--|---|---|--|---|
| +0.3% <small>quarterly change in economic activity</small> | +2.4% <small>annual change in economic activity</small> | -600 <small>quarterly change in employee jobs</small> | +9,850 <small>annual change in employee jobs</small> | +1.1% <small>forecast economic growth in 2017</small> |
|--|---|---|--|---|

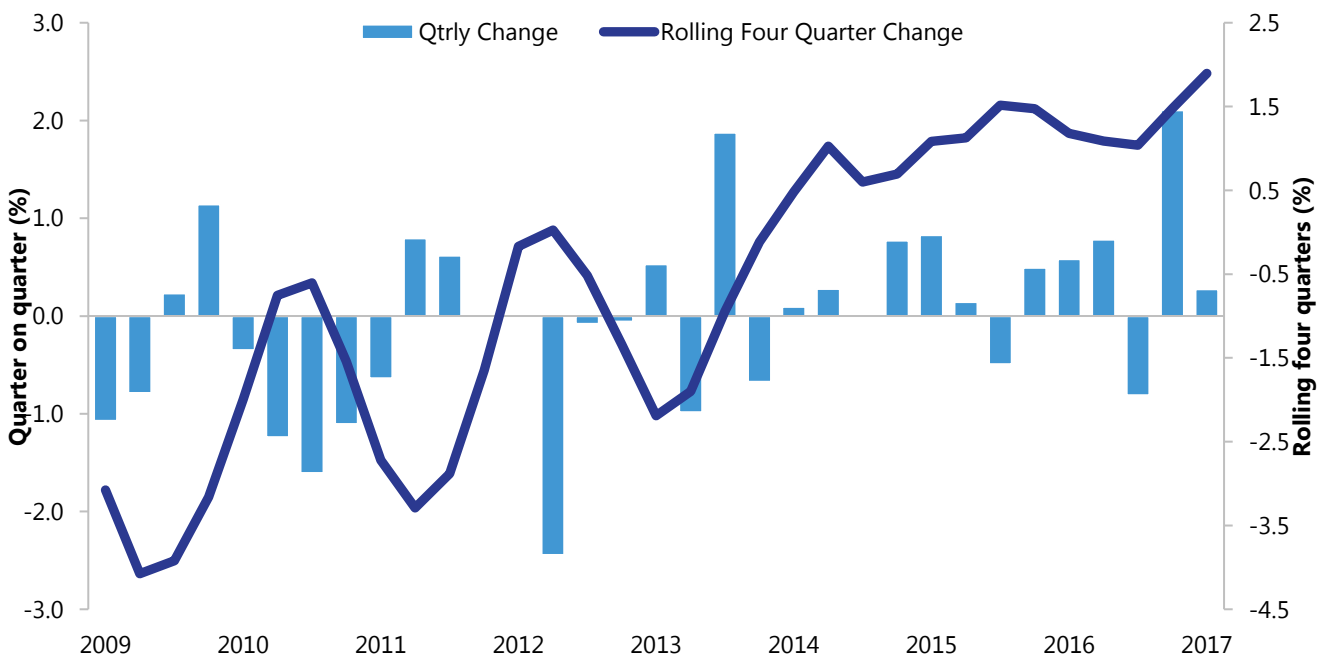
Economic Activity

The latest economic activity figures from NISRA's Composite Economic Index indicate that the local economic recovery is continuing, with activity estimated to have grown by 2.4% over the year to Q1 2017. Economic activity has increased over three of the last four quarters, with the latest quarterly rise in output being led once more by the private sector. The general increase in activity over the year has also been driven by the private sector with increases seen in the Services, Construction and Production sectors over the year.

Whilst the local economy experienced a dip in output in Q3 2016 it is clear that the general trend has been upward since early 2014. This has resulted in local economic activity moving to 6.5% higher than the recent low point reached in the second quarter of 2013.

However, local activity remains around 5% below the recent peak recorded in Q2 2007. By comparison, UK GDP has expanded by just under 9% over the same period.

Figure 1 - NI Composite Economic Activity

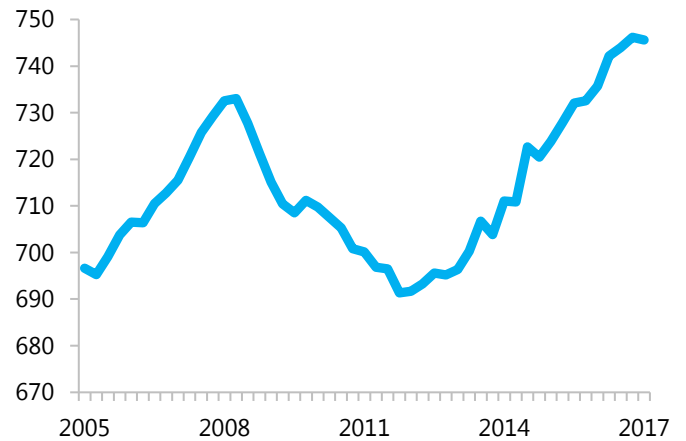


Employee Jobs

The latest figures from NISRA show that the number of jobs in the local economy fell by 600 over the quarter to March 2017. However, in spite of this recent fall, over the last four quarters the number of employee jobs has increased by just under 10,000 jobs.

Over the latest quarter both the services and other industries sectors witnessed falls in job numbers, though over the year all sectors experienced an increase in job numbers. The total number of employee jobs now stands at 745,580 with over 50,000 additional jobs created since the low point in December 2011. The majority of these additional jobs (44,000) have come from the services sector.

Figure 2 - Employee Jobs (000's)



Private Sector

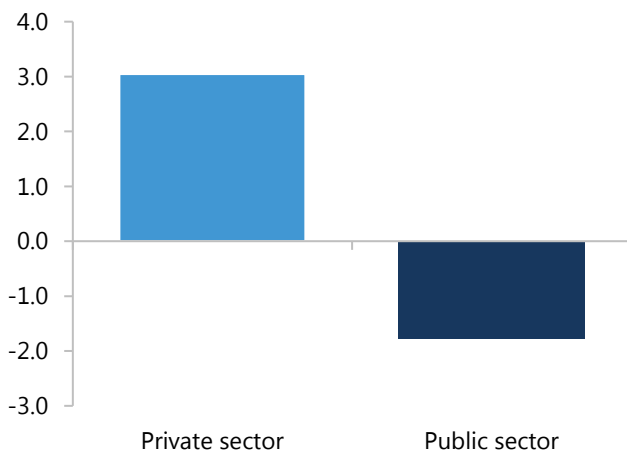
Over the latest quarter overall jobs growth has continued to be led by the private sector. Since the low point in total employee jobs in the last quarter of 2011 there have only been three quarters out of 22 where there was a fall recorded in the number of private sector jobs. Over the period the private sector has expanded by over 65,000 jobs.

The private sector is also leading in terms of activity, with sector output up 3.0% over the latest four quarters (to Q1 2017) compared with the previous four. Meanwhile, the latest Ulster Bank PMI survey for June 2017 shows continued growth in output, new business and export performance, albeit at a slower pace than recent months. It also notes that local companies remain optimistic on the 12 month outlook for output and had expansion plans set in place to support growth over the period.

Table 1 - Latest NI Growth Forecasts

| GVA | 2017 | 2018 |
|-------------------|-------------|-------------|
| Ulster University | 1.1% | 1.2% |
| Danske Bank | 1.2% | 1.0% |
| Ernst & Young | 1.1% | 0.8% |
| PwC | 1.0% | 0.9% |
| Average | 1.1% | 1.0% |

Figure 3 - Economic Activity (four quarters to Q1 2017)



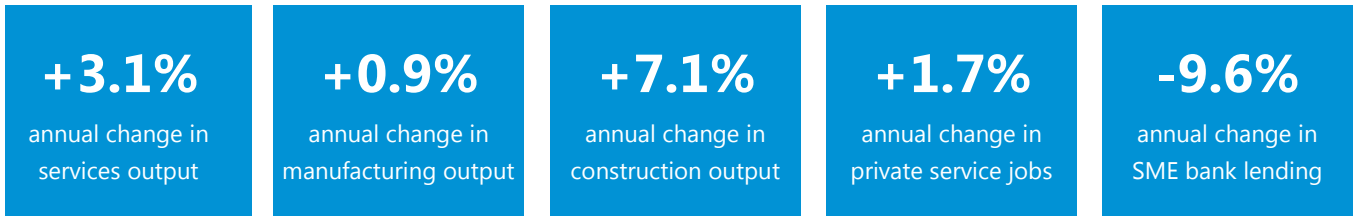
Outlook

DfE does not produce economic forecasts, but does monitor those from external providers:

- **Ernst and Young** recognises the pressures of inflation and tight public spending when forecasting modest growth in 2017 and 2018.
- In its latest forecasts **Ulster University Economic Policy Centre** notes continued steady albeit modest growth through to the end of the decade.
- The latest NI Quarterly Sectoral Forecast from **Danske Bank** has once again revised upwards its growth projections for 2017. However, growth in 2018 is subsequently forecast to moderate slightly as inflation weighs on consumer spending.
- In its latest Economic Outlook, **PwC** forecasts modest growth in 2017 and 2018 in NI; lower than that forecast for the UK as a whole.

Businesses

Over the year all major parts of the private sector have continued to record growth in output with the construction sector again recording the largest growth. Whilst others have seen greater growth in employment over the latest year, the service sector has driven employment growth over the past five years.



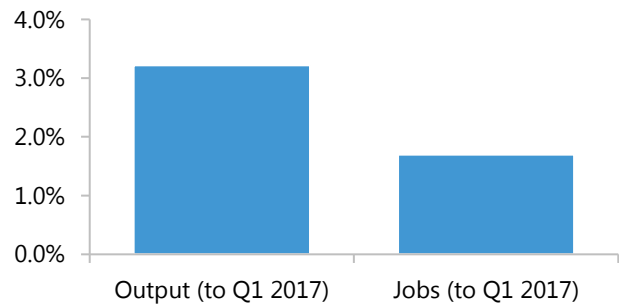
Services

Services sector output grew over the last quarter by 0.5% and over the year by 3.1%. The index has now recovered by 9.2% since the recent minimum value recorded in Q2 2012 but remains 4.7% below the peak output level recorded in Q4 2006.

The services sector lost almost 2,000 jobs in the quarter to March 2017. However, on a rolling four quarter basis jobs in the sector have grown by over 1.5%.

Over the last five years output from the sector has increased by just under 6.5% and contributed over 43,000 jobs to the NI economy.

Figure 4 - Rolling four quarter change in services output and jobs



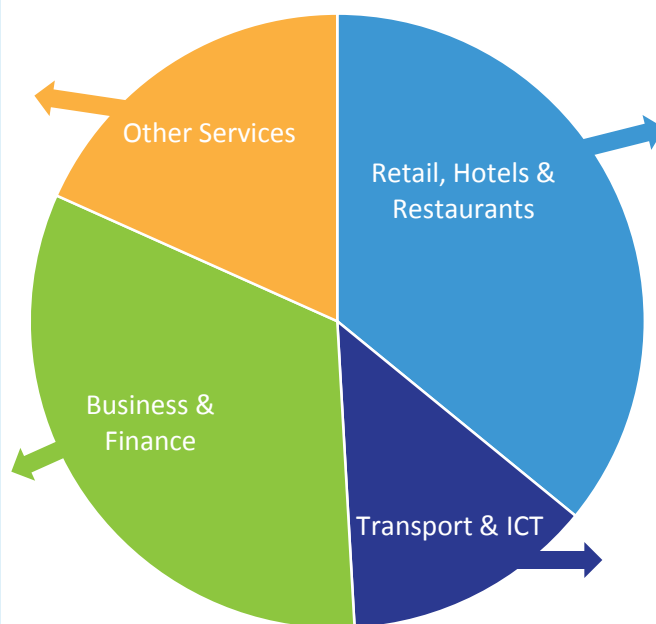
Other services

Output increased by 1.4% over the latest year and employment in this sector grew by 1,430 jobs over the period. This was once again driven by growth in the sports and recreation activities sub sector.

Business and Finance

Output rose by 5.0% over the year. The sub sector saw job growth of just over 2,900 over the period supported by growth in professional, scientific and technical activities.

Figure 5 - Relative Size of private services



Retail, Hotel & Restaurants

Whilst growth (2.6%) was recorded in this sub sector over the past year, sectoral employment experienced the weakest growth, but still witnessed an increase of 250 jobs.

Transport and ICT

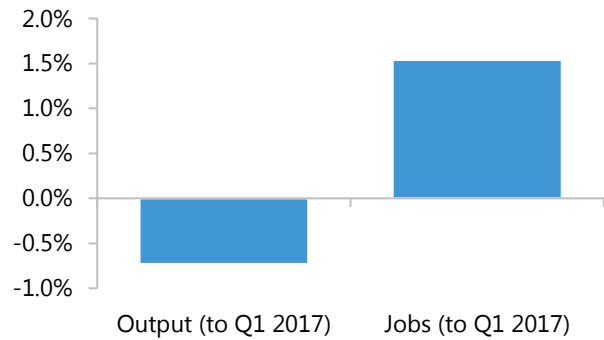
This sub sector reported the largest relative increase in output with annual growth of 8.9%. Sectoral employment grew by 1,400 jobs mainly driven by the rise in the number of jobs in land transport activities.

Manufacturing

Manufacturing output has generally outpaced UK growth since the recession, growing by over 19% since Q3 2009. However, growth has since slowed and on a rolling four quarter basis to Q1 2017 output has fallen slightly by 0.7%.

In the latest quarter six of the ten manufacturing subsectors saw an increase in their output which helped to contribute to a 0.9% increase in overall output. In terms of jobs, the sector grew by 0.5%, adding 430 jobs over the last year, bringing the total number of jobs in the sector to 81,890.

Figure 6 - Rolling four quarter change in manufacturing output and jobs

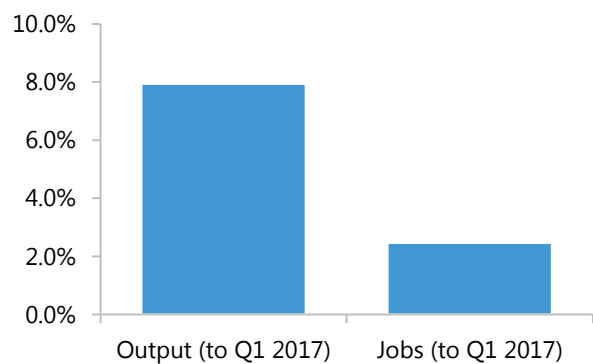


Construction

The latest Northern Ireland Construction Bulletin shows that the total volume of construction output decreased by 1.7% over the latest quarter. However, this latest decrease is very much against the general upward trend in evidence since late 2014 as evidenced by the fact that the total volume in Q1 2017 was 7.1% higher than Q1 2016.

Over the latest quarter, employment in the construction sector expanded by 900 jobs and by just over 1,500 jobs over the year. Furthermore, since the recent low in the construction sector job numbers in December 2014 an additional 3,360 jobs have been added to the sector.

Figure 7 - Rolling four quarter change in construction output and jobs



Key Business Trends

The latest figures from the British Banker's Association (BBA) show that approved bank loans to NI SMEs totalled approximately £413 million in Q1 2017. Whilst this represented a substantial (28%) increase over the quarter, it should be noted that on a rolling four quarter basis the value of loans fell by almost 10%. This picture was mirrored in both the number of loan applications and loans approved which increased over the quarter but fell on the rolling four quarter basis.

A number of positive announcements have been made recently regarding the provision of Invest NI support to local businesses some of which are highlighted below:

Table 2 – Selected Indigenous Investments

| November – January 2017 | Investment | Jobs |
|----------------------------|------------|------|
| Neueda | £12m | 165 |
| Global Equipment Spares | £1.9m | 61 |
| Funds-Axis Ltd | £1.7m | 29 |
| Restwell Manufacturing Ltd | £0.5m | 20 |

Other Business Surveys

Some key points from independent surveys monitored by the Department are included below:

Ulster Bank PMI

- Buoyed by stronger than expected output performance for the first quarter of 2017 the momentum has continued over the second quarter of the year, albeit with some signs of growth easing.

InterTradeIreland Quarterly Business Monitor

- Results from Q2 2017 indicate that 89% of business in NI and ROI were stable or growing in the last quarter. Around one third of exporters have experienced a negative impact due to EU exit but only 3% have a plan in place to deal with potential outcomes.

NI Chamber Quarterly Economic Survey

- Results from the latest Survey showed continued, albeit slow, local business growth with key balances remaining positive in Q2 2017. However, it highlights inflation, recruitment and EU exit as three key challenges currently facing business.

Engagement with the Rest of the World

Local export performance has continued to be robust over the latest period, with the UK generally experiencing similar export growth over the year. The local economy also continues to benefit from the expenditure of visitors as the tourism sector grows.



Exports

The latest HMRC Regional Trade Statistics (which cover goods only), show that total exports from NI grew by 6.5% over the last quarter to almost £2.2bn and by almost 12% on a rolling four quarter basis to £8.0bn. All four UK countries (including all regions of England), saw an increase in exports during the year. England rose by 12.2%; Wales by 11.9%, NI by 11.8% and Scotland by 8.5%.

The Republic of Ireland remains our largest single trading partner with total exports of £2.5bn representing an increase of 12.6% on the previous year. The RoI currently constitutes just over 30% of total HMRC exports from NI. Compared with the previous year we have seen the largest value increases to the Irish Republic (up £277m), the United States (up £233m) and the Netherlands (up £64m).

Furthermore, the latest available data from HMRC continues to show that the majority (55 per cent) of Northern Ireland's exports are destined for the EU. Over the year our exports to the EU increased by almost 14% to £4.4bn whilst exports to non EU countries increased by 9.3% to £3.6bn.

Over the latest 12 month rolling period (April 16 – March 17) the largest portion (32.8%) of our exports came from the machinery and transport sector, this was followed by chemicals at 19.8% and miscellaneous manufactures at 16.2%.

Over the same period Northern Ireland's goods export trade saw the largest value decreases with Malaysia down £27m and Saudi Arabia down £28m.

Figure 8i - Value of goods exports from NI (£bn)

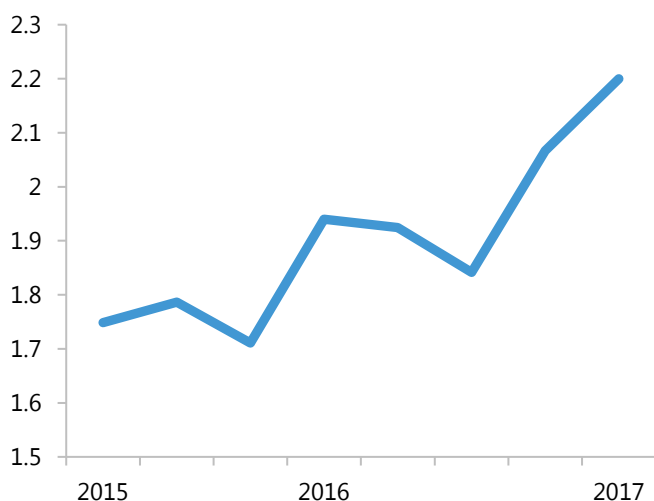
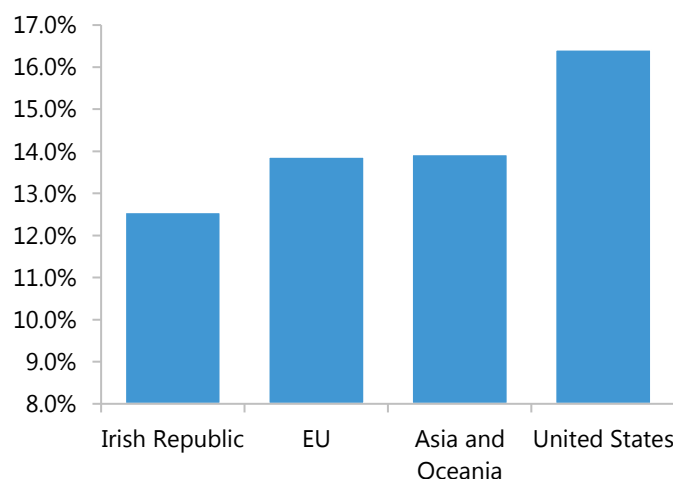


Figure 8ii - Annual growth in exports in key markets



Inward Investment

Since our Spring 2017 edition Invest NI has continued its role in providing support to businesses to help them grow and stimulate further investment in the economy. Once again this support has extended to new investment projects by Pearson Plc, Bazaarvoice, Anomali, Unosquare and Rakuten.

Over the period since our last commentary Invest NI has continued its work to secure investment from outside the UK. Most recently, in June they announced that Bazaarvoice, a consumer generated content and advertising company based in Texas, had chosen NI as its European base, creating almost 170 new jobs.

Invest NI also worked with the world's largest education company, Pearson Plc to open a new Finance Services Centre in Belfast. This new centre, encompassing 300 new finance and analyst jobs, has expanded Pearson's global finance function.

In the latest figures produced by the Department for International Trade, Northern Ireland contributed 34 new FDI projects with 1,622 new FDI jobs, which translated to 8.7 FDI jobs per 10,000 persons, higher than that recorded in Wales and England (excluding London).

Tourism

In 2016 there were 4.6 million domestic and external overnight trips in Northern Ireland, generating £851m visitor spend. Furthermore, air passenger flow statistics published this month reveal evidence of continued growth at Northern Ireland airports. In total there were 8.1 million air passengers flowing through Northern Ireland airports in 2016. The statistics show that air passenger flows through Northern Ireland airports have now returned to 2007 levels, and are moving closer toward their 2008 peak.

Figure 10 Non Resident trips and expenditure

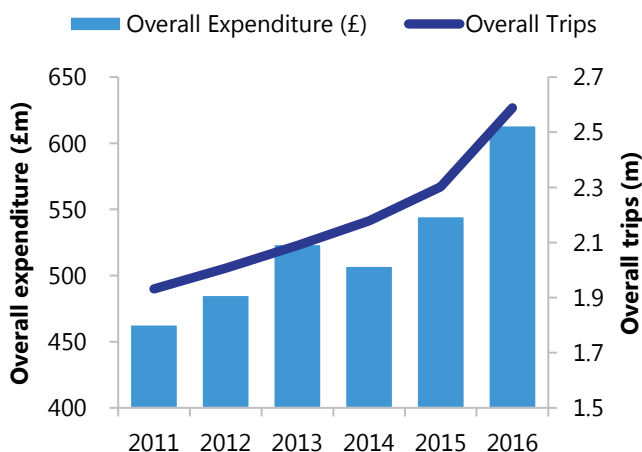


Table 3 – Selected Inward Investments

| November – January 2017 | Investment | Jobs |
|-------------------------|------------|------|
| Pearson Plc | £18.7m | 300 |
| Bazaarvoice | £10.9m | 168 |
| Anomali | £8.3m | 120 |

Figure 9 - FDI Jobs per 10,000 persons 2016-2017 (DIT)

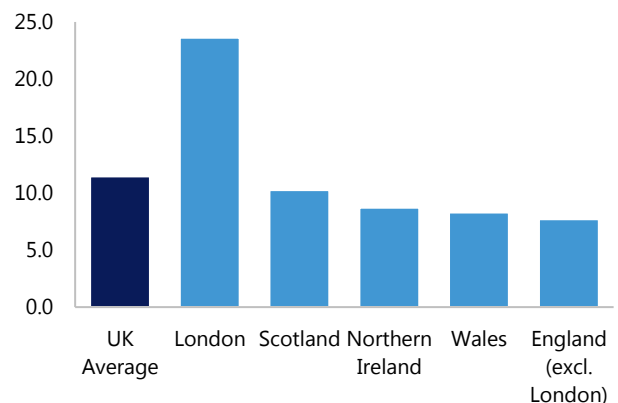


Table 4 – Key Market Growth Forecasts (OECD)

| GDP | 2017 | 2018 |
|----------|------|------|
| UK | 1.6% | 1.0% |
| Eurozone | 1.8% | 1.8% |
| US | 2.1% | 2.4% |
| Canada | 2.8% | 2.3% |
| China | 6.6% | 6.4% |

Key Markets Outlook

In its latest Global Economic Outlook for June 2017, the OECD notes that, after five years of comparatively weak growth, stronger business and consumer confidence coupled with improving trade flows have resulted in a moderate improvement in the global economic outlook. Consequently, it forecasts that global growth will pick up to 3.5% in 2017 and 3.6% in 2018. However, in spite of this renewed confidence, it points out that growth remains below the 20-year pre-crisis average against which expectations have been set. Furthermore, the report notes the economic challenges posed by persistent restrained productivity and wage growth.

Households

Whilst the local labour market has recovered well from the downturn, with claimant count in particular falling consistently, other indicators portray a more mixed picture with the employment rate falling back over the year yet unemployment continuing to fall. In addition, price inflation remains above the Bank of England target of 2.0%.



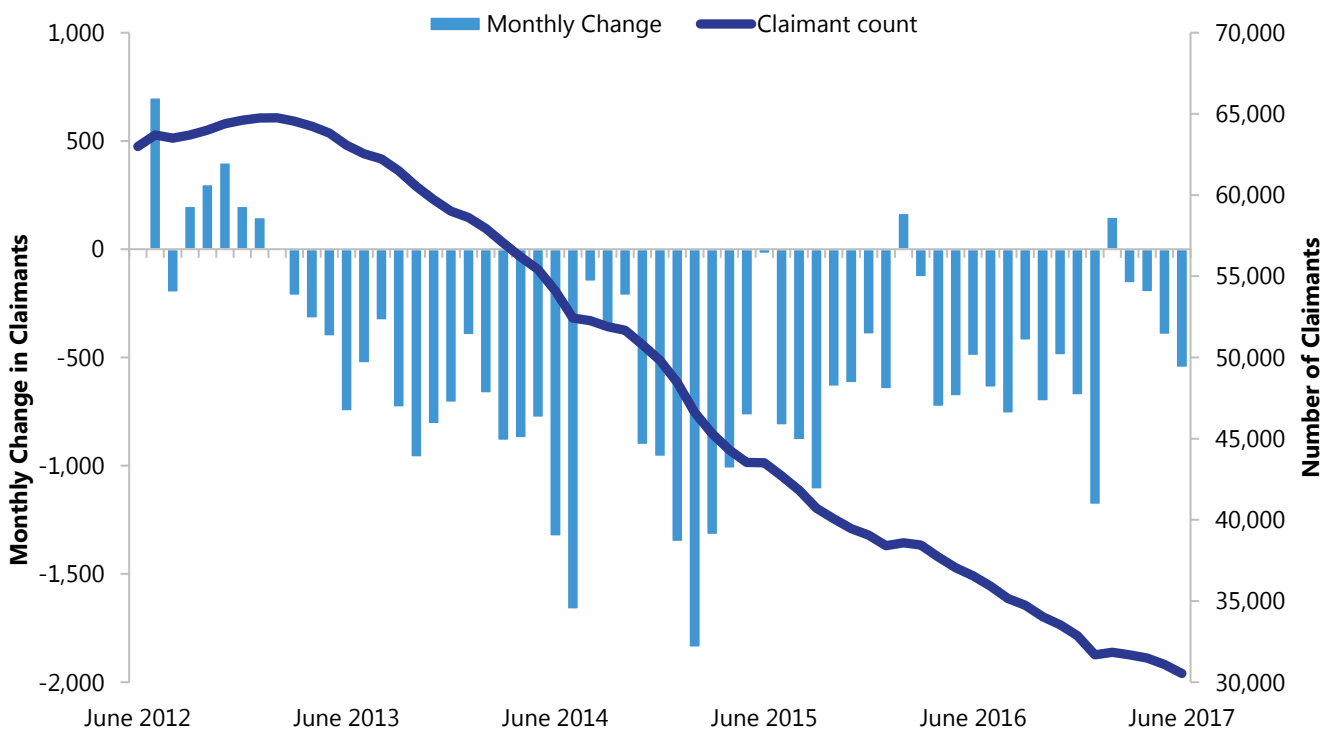
Unemployment

The number of people claiming unemployment benefits has fallen in almost every month since its peak in February 2013, increasing in just two months when it rose marginally (by a total of just over 300). Over the past year, the claimant count tally has fallen by 6,000, and has fallen by over half since the peak in claimants. However, the claimant count remains just under 30% higher than its recent low in September 2007. But, in this regard, there are reasons to remain positive. For instance, youth claimants have fallen by 22.8% over the year and long term claimants have fallen by 25.5% over the same period.

The LFS unemployment rate for the March to May 2017 period was 5.3%. The LFS rate has been trending downwards following its peak in December to February 2013 (when the rate was 8.2%). However, in spite of this progress NI remains above the UK rate of 4.5% but, as has been the trend over recent times, below the European Union (7.8%) and RoI (6.4%) rates for April 2017.

The long term unemployment rate (percentage of unemployed who have been unemployed for 1 year or more) was down 3.8pps over the year but at 48.3% remains stubbornly higher than the UK average rate of 26.7%.

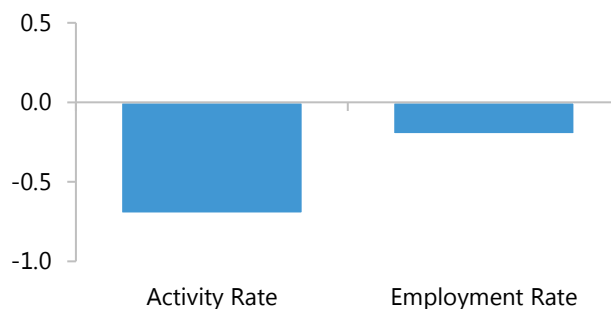
Figure 11 - Unemployment Benefit Claimants



Employment and Activity

The overall employment rate currently sits at 68.7%, which a decrease both over the last quarter (0.1pps) and the last year (0.2pps). The female employment rate continued to increase by 1.4pps over the year whilst the male employment rate decreased by 1.8pps. The employment rate peaked last year at 70% and whilst this recent fall is disquieting it is worth remembering that since the downturn the employment rate has generally been increasing. However, in spite of this it continues to be the lowest employment rate of all the UK regions.

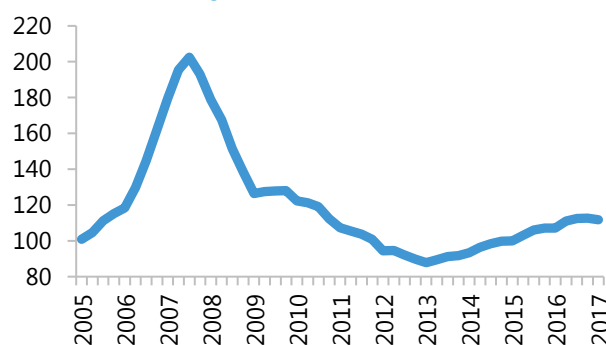
Figure 12 - Participation rates (annual percentage change)



Housing Market

According to the latest Northern Ireland House Price Index (HPI), house prices decreased by just under 1% over the quarter to Q1 2017 but have increased by 4.3% compared with the same quarter in 2016. All council areas reported an increase over the 12 months since Q1 2016. ONS estimates that UK house prices increased by 4.7% over the year to May 2017. All UK nations witnessed growth with England recording the highest growth of 5.0% over the year to May 2017.

Figure 13 - NI House Price Index (Q1 2015 = 100)



Consumer Spending

There have been positive signals across some household indicators recently, however footfall in retail has been changeable over the period:

Retail sector

- Following two consecutive months of growth in April and May the footfall data for NI showed that we experienced the fastest decline on the high street of all UK regions in June (-2.9%).

Domestic tourism

- In 2016 57% (2.6m) of all overnight trips were made by locals.
- However spend by locals on tourism accounted for just 28% (£237m) of total visitor expenditure over this time.

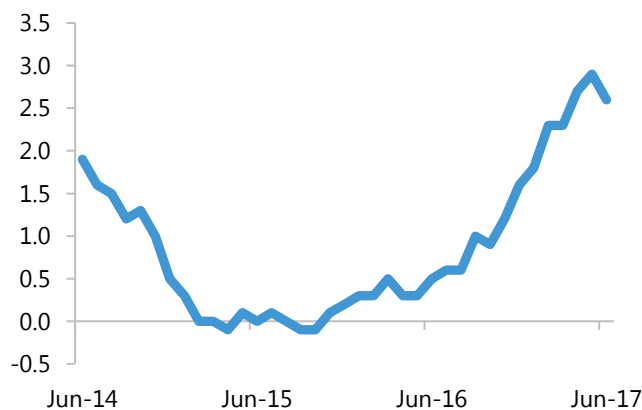
Consumer confidence

- According to Danske Bank Consumer confidence saw a substantial uplift of nine points in Q1 2017.
- Households' expectations of their financial position and how much they expect to spend on high value items also increased over the quarter.

Prices

Inflation in June 2017 fell for the first time since it began its recent upward trend in June 2016 and was down on the recent May 2017 peak of 2.9%. The current CPI rate in June 2017 is 2.6%, with the latest data showing the rate has now spent five months above the Bank of England's (BoE) target of 2%. In its latest Inflation Report, the BoE finds that much of the slowing in output growth in the first half of 2017 seems to have been driven by weaker household spending. UK GDP growth remained sluggish at 0.3% in Q2 2017.

Figure 14 - CPI Annual Inflation



Government

Over the year the recent contraction in jobs in the public sector has continued, with the Northern Ireland Civil Service experiencing the largest decrease in NI public sector jobs over the year. In Northern Ireland the rate of contraction over the year has exceeded that of the contraction in public sector jobs in the UK.

| | | | | |
|--|---|--|--|---|
| -1,680 annual change in number of public sector jobs | -0.8% annual change in number of public sector jobs | -3.8% annual change in NICS jobs | -0.1% annual jobs change in local government | 1.3% annual jobs change in NHS Trusts |
|--|---|--|--|---|

Jobs

Jobs within the NI local public sector have been trending downwards since September 2009 with the sector now just over 10% smaller and with approximately 23,000 fewer jobs. At the same time the private sector has grown by almost 10% and by over 60,000 jobs with most of these being within the services sector.

Over the same time period the UK public sector has contracted at a faster pace than Northern Ireland falling by over 15%.

However, the pace of contraction has slowed recently with UK public sector employment falling by just 0.4% over the last year. The Northern Ireland public sector in contrast has contracted by almost 0.9% over the year.

Table 5 – NI Selected Public Sector Jobs Breakdown

| | Jobs March 17 | Annual Change | |
|---------------------------------------|------------------|---------------|-------|
| | | No. | % |
| Total Public Sector Jobs | 203,404 | -1,680 | -0.8% |
| NI Central Government* | 106,496 | -494 | -0.5% |
| Northern Ireland Civil Service (NICS) | 23,499 | -918 | -3.8% |
| UK Central Government | 3,800 | 163 | 4.5% |
| Local Government | 11,684 | -14 | -0.1% |
| NHS Trusts | 69,683 | 876 | 1.3% |

*totals include NICS, Health and Education etc.

Figure 15 - NI Public Sector Jobs (000's)

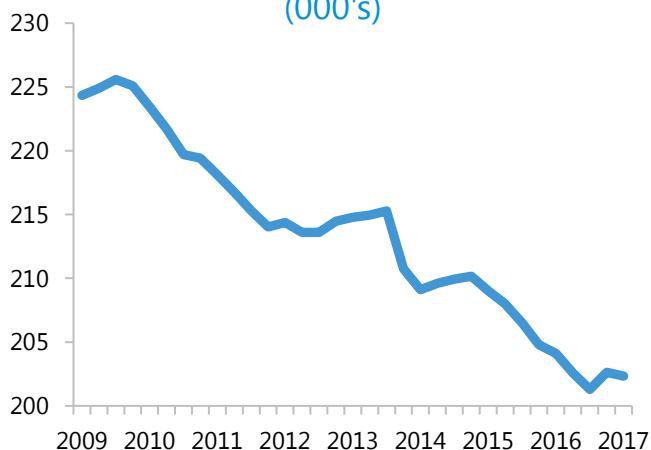
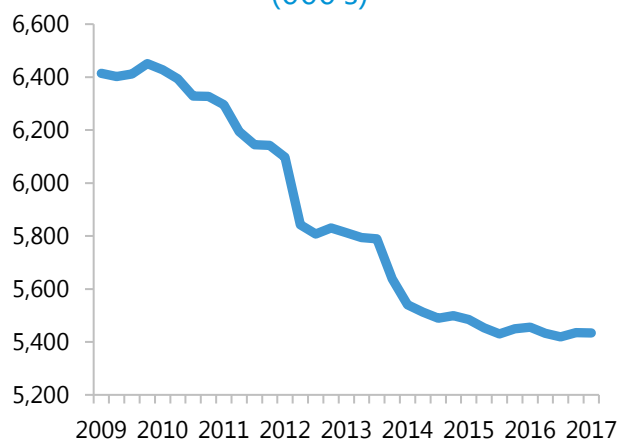


Figure 16 - UK Public sector jobs (000's)



Research Highlights

This section highlights recent publications in key economic policy areas that will be of interest to readers over the period March 2017 to July 2017. Links (where available) to each report can be found by clicking on the highlighted title.

Skills Barometer

The updated [Skills Barometer Report 2017](#) provides a new skills outlook incorporating the latest forecasts by the Ulster University Economic Policy Centre. Results suggest the largest supply gaps are likely to emerge in the mid-tier skills levels (NQF Levels 3-5) with the supply of high-skill levels (NQF Level 6-8) broadly in balance but needing more STEM subjects.

Small Advanced Economy Competitiveness

Two reports which underpin the draft Industrial Strategy have recently been published. Analytical Services research on [Benchmarking Competitiveness of Small Advanced Economies](#) finds that NI's competitiveness is similar to New Zealand, Estonia and Israel but lags behind leading economies of Singapore, Finland, Denmark and Republic of Ireland. Landfall Strategy Ltd has provided [Insights into Small Advanced Economies](#) to highlight key lessons from their success; these include coherence of strategies, prioritisation of high potential sectors, high levels of international engagement and a strong base of human capital.

High Growth Firms

Two research reports on High Growth Firms have been released recently. The latest update bulletin [Measuring High Growth Firms 2013-16](#) shows a strong increase in the number and rate of high growth firms. A [Strategic Policy Appraisal of High Growth Firms](#) produced by a consortium led by University of St Andrews has provided guidance on supporting local businesses to scale. This includes supporting sustainable growth by targeting firms with a strong track record.

WTO Trade Tariffs

IntertradeIreland published research examining current cross-border trading patterns and [the Potential Impacts of WTO Tariffs](#) on overall trade. The conclusions highlight that the overall effect of tariffs and estimated non-tariff barriers is largely driven by their impact on the food sectors. Indeed half of the estimated reduction in trade from NI to Ireland comes from the effects of tariffs and no tariff barriers on milk and cream.

US Inward Investment

Analytical Services published research assessing [Trends in Foreign Direct Investment from the United States 2003-15](#). This highlights that NI has been the leading UK location for US tradable services FDI outside of London, mainly due to success in design, development & testing alongside R&D and customer contact centres.

Employer Perspectives Survey

The [Employer Perspectives Survey 2016](#) was published by the Department for Education GB to understand what drives employers' decisions around recruitment and people development. It was revealed that employers in Northern Ireland were the least likely to have vacancies (44%); this compared to 53% in England and 49% in both Scotland and Wales.

Graduate Over-Qualification

A discussion paper from the Centre for European Economic Research on the [Dynamics of Over-qualification: Evidence from the Early Careers of Graduates](#) focused on panel data for two cohorts of graduates who participated in interviews conducted 1, 5, and 10 years after graduation. The results show over-qualification is highly persistent and a permanent phenomenon for a substantial share of graduates.

Cost of Doing Business

The Department for Jobs, Enterprise and Innovation report on the [Costs of Doing Business in Ireland](#) highlighted labour as the most significant driver of business costs for most firms – particularly for services firms. After labour costs, facility or property costs represent the next significant cost factor in the profile of business costs. Whilst energy, water, transport and finance costs represent the remainder.

Notes and Sources

Notes:

Statistical publications often refer to an annual change when referring to the latest reference period compared with the same period one year earlier. However, results for individual quarters are often highly volatile, and looking at changes just within this specific reference period across years can give a misleading picture as to what trend performance actually is. We prefer to look at the latest four quarters compared with the previous four quarters for many variables to give a better overview of actual trend performance, which is particularly relevant when looking at output/activity as this is what annual GDP/GVA relates to. For ease of reference we have used the term 'annual change' to represent a four quarter change for some indicators. However, for indicators such as job numbers, annual change continues to refer to the latest quarter compared to the same quarter one year earlier. To avoid confusion, our references to annual change may therefore differ from those in published statistics relating to:

- Economic activity
- Production output
- Services output
- Construction output
- Exports of goods
- Tourism statistics

Sources:

| Sources | |
|--|---|
| The Economy | NI Composite Economic Index (NISRA); Quarterly Employment Survey (NISRA); Economic Eye (Ernst and Young); Quarterly Sectoral Forecast (Danske Bank); NI Economic Outlook (PwC); Forecasts Subscription (Oxford Economics) |
| Businesses | Index of Services (NISRA); Index of Production (NISRA); NI Construction Bulletin (NISRA); Quarterly Sectoral Forecasts (Danske Bank); NI Banking Statistics (British Bankers Association); Invest NI; Insolvency Statistics (The Insolvency Service); Redundancies (DETI); Purchasing Managers Index (Ulster Bank); Business Monitor (InterTradeIreland); Quarterly Economic Survey (NI Chamber of Commerce and Industry) |
| Engagement with the Rest of the World | Regional Trade Statistics (HMRC); Broad Economy Sales and Exports Statistics (BESES); Invest NI; Tourism Statistics (NISRA); World Economic Outlook (International Monetary Fund) |
| Households | Claimant Count (NISRA); Labour Force Survey (NISRA); NI Residential Property Price Index (NISRA); House Price Index (ONS); Quarterly Employment Survey (NISRA); Footfall (Northern Ireland Retail Consortium); Tourism Statistics (NISRA); Consumer Confidence Index (Danske Bank); Consumer Prices Index (ONS) |
| Government | Quarterly Employment Survey (NISRA); Public Sector Employment (ONS) |

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