

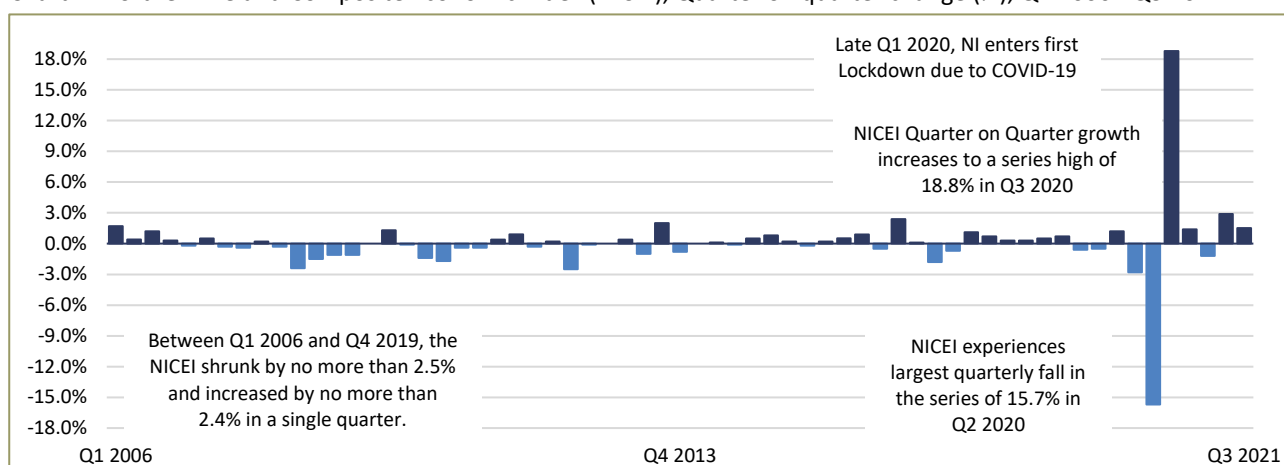
# Economic Activity in Northern Ireland by quarterly NI Composite Economic Index (NICEI)

Experimental statistics

Quarter 3 (July – September) 2021

**Economic activity increased by 1.5% in real terms over the quarter to Quarter 3 2021, which coincided with further relaxing of lockdown restrictions. The NICEI experienced positive quarterly growth in 4 of the last 5 quarters to Q3 2021.**

Chart 1: Northern Ireland Composite Economic Index (NICEI), Quarter on quarter change (%), Q1 2006 – Q3 2021



Quarterly growth	Annual growth	Biennial growth (2 years)*	Annualised growth	Private Sector		Public Sector	
				Quarterly	Annual	Quarterly	Annual
<b>1.5%</b>	<b>4.6%</b>	<b>3.0%</b>	<b>5.8%</b>	<b>1.7%</b>	<b>5.4%</b>	<b>0.8%</b>	<b>2.0%</b>
Q3 2021 compared with Q2 2021	Q3 2021 compared with Q3 2020	Q3 2021 compared with Q3 2019	Q4 2020 to Q3 2021 compared with Q4 2019 to Q3 2020	Biennial	Annualised	Biennial	Annualised
				<b>3.1%</b>	<b>7.2%</b>	<b>2.9%</b>	<b>1.2%</b>

\* We have temporarily included the biennial change (i.e. Q3 2021 vs. Q3 2019) to illustrate to users the impact compared to the same quarter pre pandemic.

The results for the NICEI for Quarter 3 2021 show that economic output in Northern Ireland in real terms, increased by 1.5% over the quarter and by 4.6% over the year to Quarter 3 2021. If we consider biennial growth, i.e. growth over the last two years comparing Q3 2021 with Q3 2019 (i.e. the previous Q3 before the pandemic), NI economic output has increased by 3.0%. Annualised average growth (average of the four quarters to Quarter 3 2021 compared with the previous four quarters) equated to an increase of 5.8%.

Although the measures are not produced on a fully equivalent basis, [UK Gross Domestic Product \(GDP\)](#) increased by 1.1% over the quarter and by 6.8% over the year to Quarter 3 2021. Over the last two years (Biennial change), UK GDP has reduced by 1.6% between Q3 2019 and Q3 2021. Over the same timeframe, GDP in [Ireland](#) increased by 0.9% over the quarter, 11.4% over the year and 23.7% over the last two years to Quarter 3 2021.

## Context

The Northern Ireland Composite Economic Index (NICEI) is a quarterly measure of economic activity in NI based on available official statistics<sup>1</sup>. The NICEI statistics in this release are experimental statistics, which are still undergoing evaluation and are subject to revision (please refer to the background notes for further information).

This report covers the period 1<sup>st</sup> July to 30<sup>th</sup> September 2021 (Q3 2021) and is the seventh NICEI release to cover the COVID-19 shock to the economy. Q2 2020 featured some of the strictest lockdown restrictions for the majority of the period resulting in the NICEI dropping to an all-time low. Q3 2020 was generally characterised with an easing of restrictions for the majority of the period, thereby allowing business activity to resume to a certain extent resulting in increasing output.

That said, a number of further restrictions were announced going into Q4 2020 in mid-October and again in mid-November. There was a relaxation of lockdown restrictions for two weeks in December, but lockdown was reintroduced at the end of December and extended throughout Q1 2021, thereafter starting to ease towards the end of April (i.e. Q2 2021). There was further relaxation of restrictions through May, June, July and August 2021. In addition, the roll out of the vaccination programme continued successfully and was extended to young people aged 12 to 15 in September 2021.

NI Economic output subsequently increased by 1.5% in real terms over the quarter to Q3 2021. The NICEI experienced positive quarterly growth in 4 of the last 5 quarters to Q3 2021.

A timeline of the restrictions put in place in NI is detailed in Appendix 1.

NICEI estimates for Quarter 3 2021 are subject to more uncertainty than usual due to the impact of the COVID-19 pandemic and subsequent periods of business closure. Further information is available in the Quality and methodology section of this release.

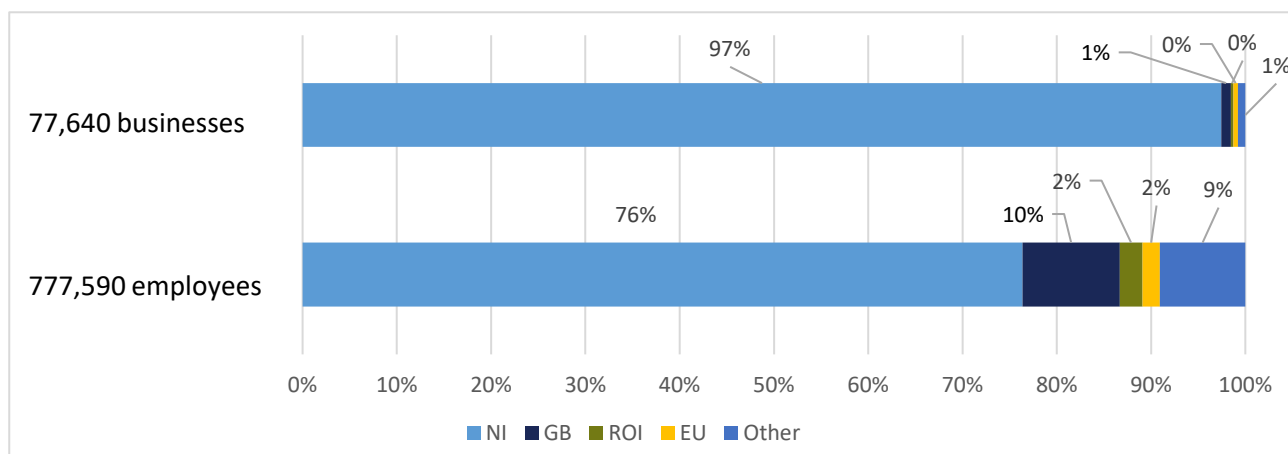
## Profile of the Northern Ireland Economy

Latest figures from the NISRA [Inter Departmental Business Register](#) (IDBR) show that the number of VAT and/or PAYE registered businesses operating in Northern Ireland in 2021 is estimated to be 77,640; with 1,970 (2.5%) of these businesses having an ownership based outside of Northern Ireland. However despite the small share of the overall number of businesses, these organisations employ 183,680 (23.6%) of all employees in NI as demonstrated below.

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<sup>1</sup> Published quarterly indices (Index of Services, Index of Production, Quarterly Construction Enquiry), public sector employee jobs data from the Quarterly Employment Survey, plus unpublished agricultural output data from the Department of Agriculture, Environment and Rural Affairs, are weighted using the ONS Regional Accounts Gross Value Added (GVA) data and combined to provide a proxy measure of total economic output.

Chart 2: Breakdown of NI Businesses &amp; Employees by country of ownership

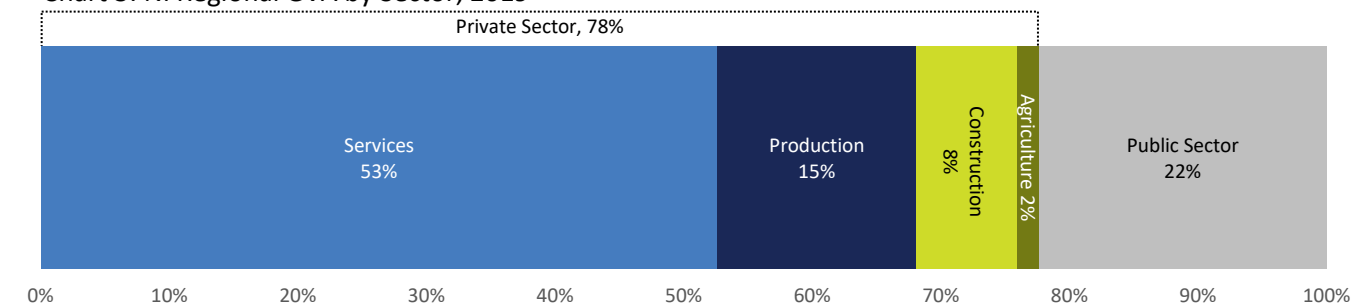


Source: NISRA [Inter Departmental Business Register](#); June 2021

Furthermore, the Department for Business, Energy and Industrial Strategy (BEIS) estimates that in 2021 there were approximately 51,000 unregistered businesses operating in Northern Ireland employing 55,000 people<sup>2</sup>, which is in addition to the figures reported by the IDBR.

In terms of the value of the Northern Ireland economy, the Office for National Statistics (ONS) estimate that in 2019 Gross Value Added (GVA)<sup>3</sup> was £42.2bn. The chart below illustrates the sectoral breakdown of the NI Economy based on ONS regional GVA data. These figures are used to weight the respective industries' contribution to the overall output calculations for NI. We estimate the public split of GVA using detailed industry level employment shares as detailed in the [NICEI methodology paper](#).

Chart 3: NI Regional GVA by Sector, 2019



### Uses of the NICEI

The NICEI is broadly equivalent to the output measure of Gross Domestic Product (GDP) produced by the Office for National Statistics (ONS) and is used to measure the performance of the NI economy.

The NICEI is used to help monitor progress of a range of key government strategies in NI, notably the [Industrial Strategy](#) and the [10X Economic Vision](#). The statistics in this release are also used by a broad range of users with

<sup>2</sup> [Business population estimates 2021 - GOV.UK \(www.gov.uk\)](#)

<sup>3</sup> As measured using the balanced approach. Further information can be found [here](#).

an interest in assessing and reporting on the level of economic activity here, such as the Office for National Statistics (ONS), economists in the public and private sector, academics, media and the general public.

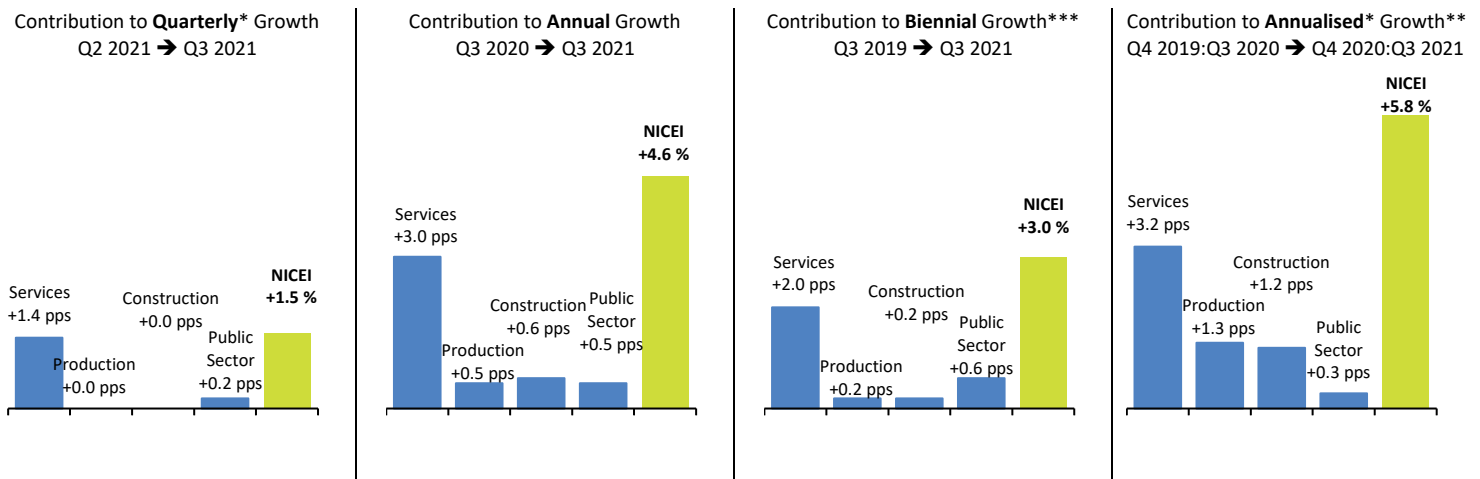
We welcome feedback to help us improve and add value to these statistics. Users with an in-depth interest in the area are also welcome to join our economic accounts user group. Contact [David.Leonard@nisra.gov.uk](mailto:David.Leonard@nisra.gov.uk).

The most up-to-date official statistics on the economy and labour market are available via the [Economic Overview](#) and the interactive [Quarterly Economic Output dashboard](#) sections of the [Economic and Labour Market Statistics \(ELMS\)](#) subsection of the NISRA website.

## Contribution of sectors to overall NICEI growth

The increase in economic growth over the quarter, year, biennial and rolling annual average to Q3 2021 was largely driven by the positive contributions by the services sector, which reached its series high in Q3 2021. Biennial growth, which compares growth between Q3 2021 and Q3 2019 (i.e. the previous Q3 before the pandemic) was characterised with flatter growth over the period compared with annual growth, the only exception to this was the growth in the Public sector, which increased at a marginally higher rate over the Biennial period compared to change over the year.

Chart 4: NICEI, Contribution of sectors to quarterly, annual, biennial and annualised growth



\* May not sum due to rounding.

\*\* Annualised growth rates are helpful in determining long-term trends. Rates are calculated after the index is 'smoothed' on a rolling 4 quarter average basis. The annualised rate is less prone to short-term volatility than the annual rate.

\*\*\* We have temporarily included annual change over two years to illustrate to users the impact compared to the same quarter pre pandemic (i.e. Q3 2021 vs. Q3 2019).

The growth in the NICEI over the latest quarter (1.5%) was driven by increased activity in the Services and Public Sectors; which had positive contributions of 1.4 percentage points (pps) and 0.2 pps respectively.

Where annual growth in the NICEI appears particularly strong when compared with the other time periods in chart 4, it is important to acknowledge, since Q1 2020 lockdown measures to mitigate the spread of COVID-19 have been implemented and eased on a number of occasions. This led to the NICEI achieving the series quarterly growth low in Q2 2020 (-15.7%), followed by the quarterly growth high the following quarter (i.e. 18.8%). Given the potential volatility in comparing economic output over the period, we have included details of the biennial change, which compares the change over two years i.e. Q3 2021 and Q3 2019 (the previous Q3 before the pandemic).

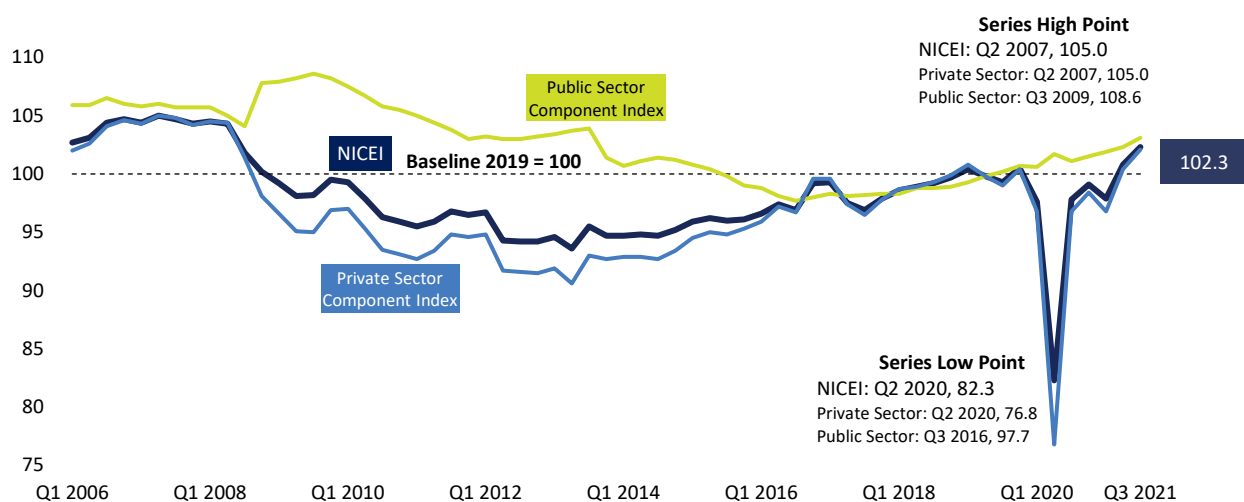
In terms of biennial change, the NI economic output has increased 3.0% compared to Q3 2019 and remains flatter than annual change (4.6%). Over the last two years positive growth was largely driven by the Services sector (+2.0 pps) but also had positive contributions from the Public sector (+0.6pps), Construction (+0.2pps) and Production (+0.2pps) sectors.

The 5.8% annualised increase in the NICEI (i.e. average of the four quarters to Quarter 3 2021 compared with the previous four quarters) was driven by increased activity in the Services sector (a positive contribution of 3.2 pps), Production sector (a positive contribution of 1.3 pps), Construction sector (a positive contribution of 1.2 pps) and the Public sector (a positive contribution of 0.3 pps).

## Long-term NICEI trend

Economic activity had increased gradually in recent years (2013-2019) until the onset of the pandemic, following the prolonged downturn post 2007. Recently the NICEI and Private Sector Component Indices have recovered from their respective series lows in Q2 2020, reaching a 13 year high in Q3 2021 and returning to levels of economic output last exceeded in Q3 2008.

Chart 5: Northern Ireland Composite Economic Index (NICEI), Q1 2006 – Q3 2021



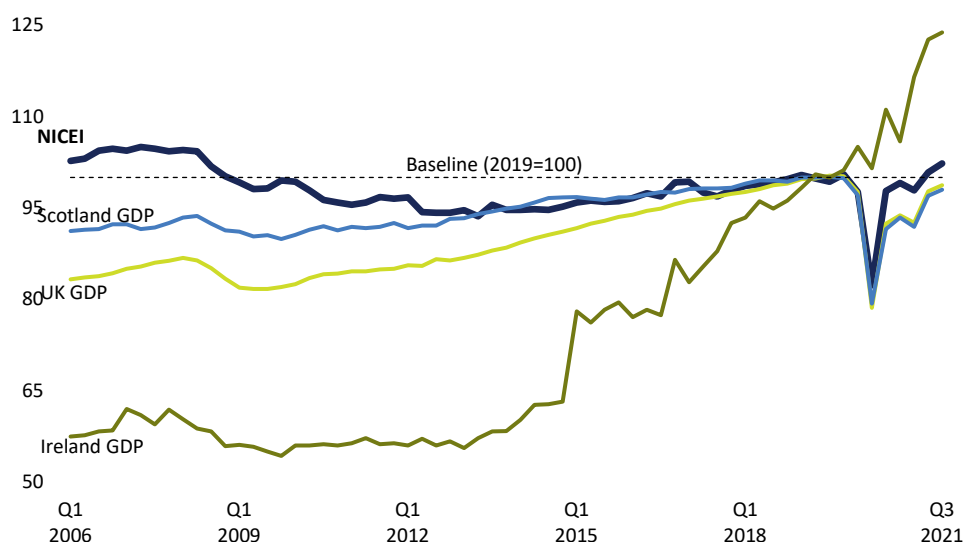
Economic Output as measured by the NICEI is at a 13 year high and currently 2.5% below the maximum value recorded in Quarter 2 2007. Over the last 5 years, annualised growth has ranged between -5.8% and 5.8%, averaging 0.1% annualised growth per annum. The notable changes in the NICEI and Private Sector Component Index from Q2 2020 to date coincide with periods of imposing and relaxing lockdown restrictions in response to COVID-19. In particular, the NICEI (and Private Sector Component Index) fell to a series low in Q2 2020, with the NICEI decreasing 15.7% over the quarter then increasing 18.8% over the next quarter (Q3 2020) as restrictions eased, resulting in a pronounced 'V' in economic output.

The NICEI time series is available in Table 1 in Appendix 2 and the accompanying data spreadsheet.

## Comparison with measures of GDP

The level of economic activity in NI has increased over the quarter, continuing the general upward trend from the series low in Q2 2020. Resulting in the NICEI reaching a 13 year series high in Q3 2021 and achieving a level of NI economic output last exceeded in Q3 2008. UK GDP has also recovered from the prominent reduction in output in Q2 2020 (an 18 year low) and broadly speaking UK economic activity is just above the levels experienced in Q1 2020.

Chart 6: NICEI, comparison with selected GDP measures Q1 2006 – Q3 2021



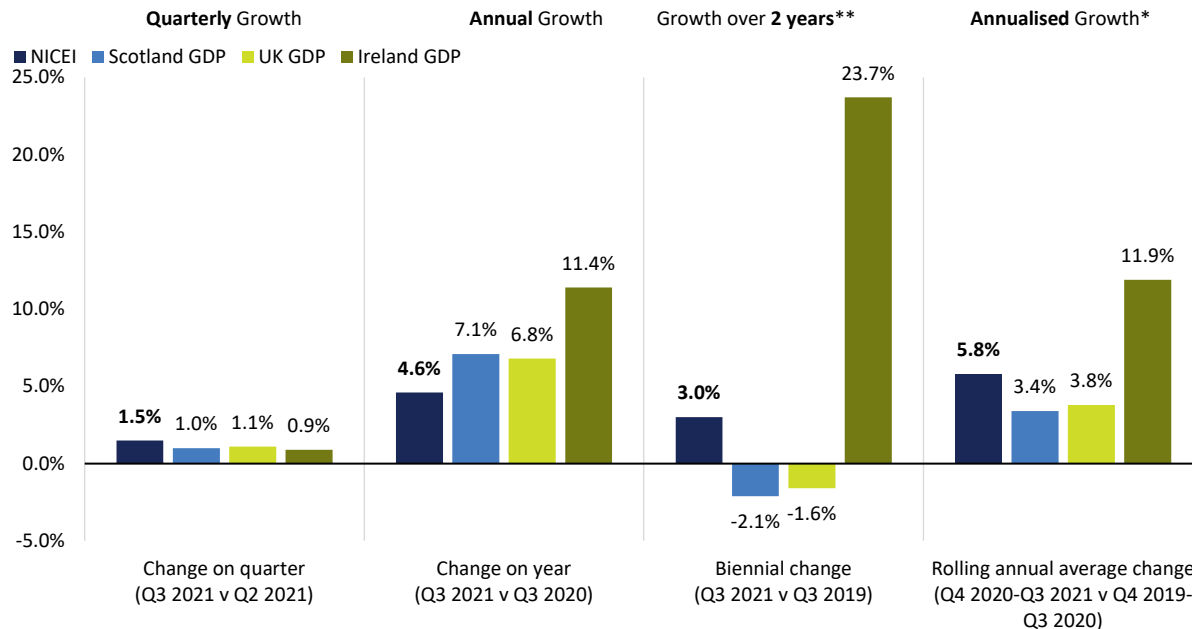
Although the [NICEI methodology](#) has been shown to provide a close short term approximation to the UK GDP series, readers are advised that due to differences in the underlying methodologies the measures presented here should not be considered as precisely like-for-like. The data are provided to give readers an indicative comparison of the levels of economic activity in the relevant countries.

Over the last 10 years, the UK has reported GDP growth in 34 of the last 40 quarters, whereas the NICEI has reported growth in 23 of the last 40 quarters. Recently growth has been growing slowly and over the last 2 years, NI has experienced 'positive growth' in 5 of the last 8 quarters. Over the same period the UK experienced 4 quarters of 'positive growth'.

While the NICEI is currently 2.5% below the maximum value recorded in Quarter 2 2007, UK GDP in Quarter 2 2021 is estimated to be 13.7% higher than its pre-economic downturn peak of Quarter 1 2008. That said, it's worth noting in Chart 6, that the NICEI achieved its series high in Q2 2007, whereas the UK reached its series high much more recently in Q3 2019. This suggests that the UK has had a shorter downturn since the 2008 recession and a faster recovery.

**NI experienced an increase in output over the quarter, year, 2 year and rolling annual average. By comparison the UK and Scotland also experienced increases in economic output over the quarter, year and rolling annual average, but experienced reductions in Biennial output (i.e. over 2 years). Ireland experienced positive growth in Economic activity over the quarter, the year, 2 year and the rolling annual average.**

Chart 7: Quarterly, annual and annualised change, NICEI compared with selected GDP measures to Q3 2021



\*Annualised growth rates are helpful in determining long-term trends. Rates are calculated after the index is 'smoothed' on a rolling 4 quarter average basis. The annualised rate is less prone to short-term volatility than the annual rate.

\*\* We have temporarily included annual change over two years (biennial growth) to illustrate to users the impact compared to the same quarter pre pandemic (i.e. Q3 2021 vs. Q3 2019).

The NICEI indicates NI Economic Activity increased at a faster rate than UK GDP over the quarter (1.5% vs 1.1%), biennially (i.e. over 2 years, 3.0% vs -1.6%) and the rolling annual average (5.8% vs 3.8%). However, UK GDP grew at a faster rate than the NICEI over the year (4.6% for NI and 6.8% for the UK). Furthermore, both the UK and Scotland experienced a reduction in output (2.1% and 1.6%) when compared to Q3 2019. In terms of growth rates NI performed the best over the quarter, while Ireland performed the best over the year, 2 year and annualised 4 quarters.

## ONS Regional Accounts

In May 2021 ONS published regional Balanced Gross Value Added balanced (GVA (B)) and Gross Domestic Product (GDP) for 2019<sup>4</sup>. These figures indicate that Northern Ireland had the third lowest real GVA (B) per head of population (£22,298) amongst the UK countries and 12 regions of the UK in 2019 (International Territorial Level (ITL) 1)<sup>5</sup>. NI GVA (B) per head increased by 2.0% in 2019, compared to 2.9% growth in the UK.

Further information on the GVA(B) estimates, including regional comparisons and details of the income components of GVA<sup>6</sup> can be found on the [ONS website](#).

<sup>4</sup> [Regional economic activity by gross domestic product, UK - Office for National Statistics \(ons.gov.uk\)](#)

The production of regional and sub-regional GVA and GDP estimates is the responsibility of the Office for National Statistics (ONS). Any queries should therefore be addressed to ONS.

<sup>5</sup> ONS note that while GDP per head can be a useful way of comparing regions of different size, comparisons can be affected by commuting flows into or out of the region. They should therefore be used with caution.

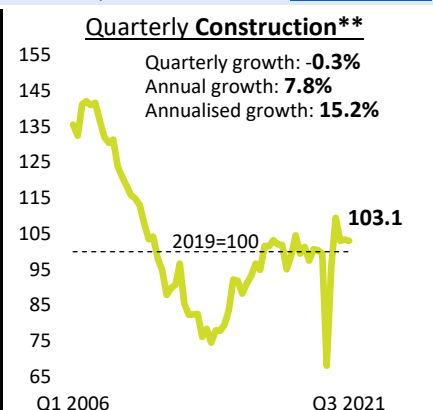
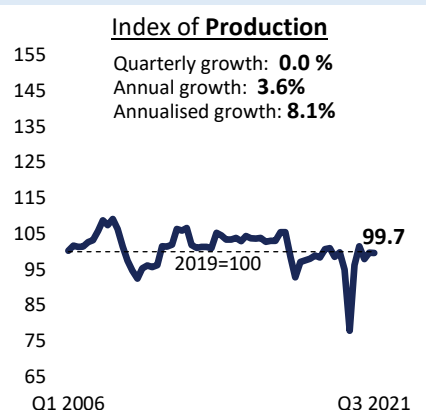
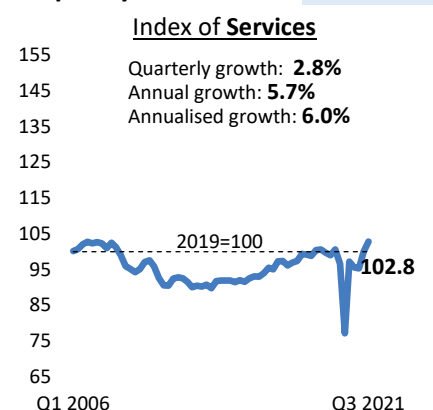
<sup>6</sup> The income components of GVA comprise compensation of employees, plus gross operating surplus, plus mixed income, plus taxes on production, less subsidies on production.



## Economic context to Q3 2021

### Output by sector

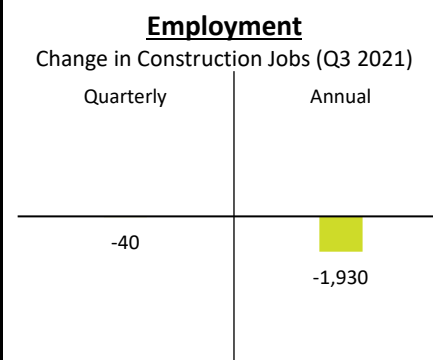
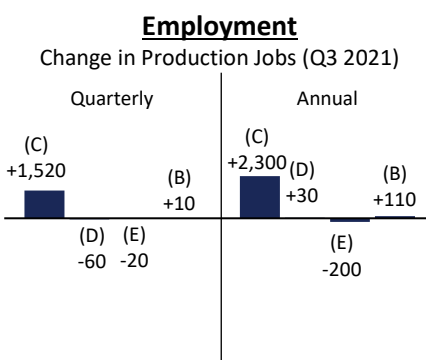
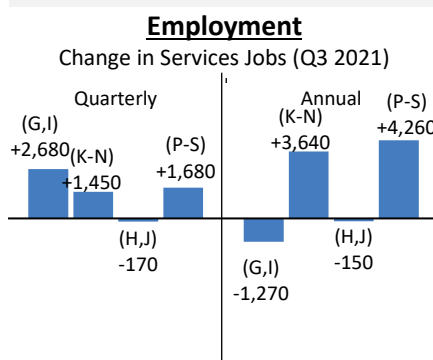
To access further detail, click on the underlined titles which link to the publications on the [NISRA website](#)



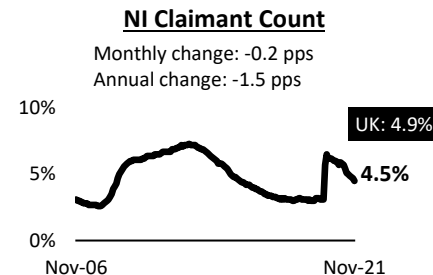
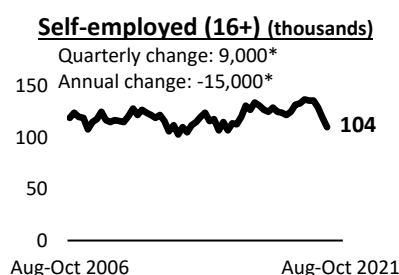
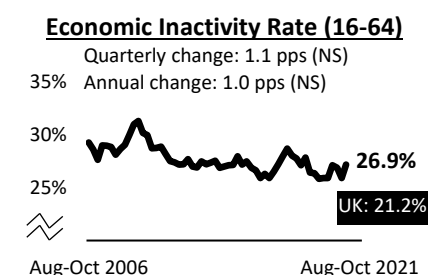
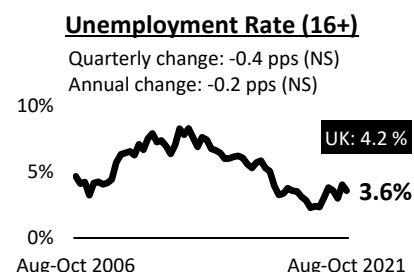
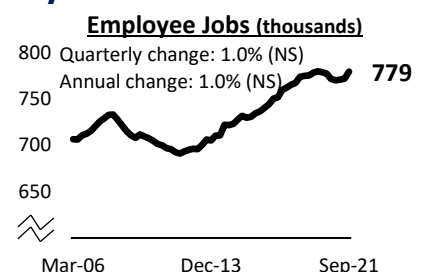
Growth by Sector	Quarterly	Annual	Annualised
<b>(G,I)</b> Wholesale & retail, motor vehicle repair, accommodation & food	<b>2.2%</b>	<b>2.7%</b>	<b>4.7%</b>
<b>(K-N)</b> Business services & finance	<b>4.0%</b>	<b>17.0%</b>	<b>11.8%</b>
<b>(H,J)</b> Transport, storage, Information & communication	<b>0.1%</b>	<b>7.3%</b>	<b>6.5%</b>
<b>(P-S)</b> Other services	<b>4.8%</b>	<b>8.5%</b>	<b>3.6%</b>

Growth by Sector	Quarterly	Annual	Annualised
<b>(C)</b> Manufacturing	<b>0.3%</b>	<b>0.5%</b>	<b>7.2%</b>
<b>(D)</b> Electricity, gas, steam & air conditioning	<b>-1.8%</b>	<b>2.6%</b>	<b>2.4%</b>
<b>(E)</b> Water supply, sewerage & waste	<b>6.9%</b>	<b>30.0%</b>	<b>15.2%</b>
<b>(B)</b> Mining & quarrying	<b>-3.5%</b>	<b>12.8%</b>	<b>38.5%</b>

Growth by Sector	Quarterly	Annual	Annualised
New work	<b>-0.9%</b>	<b>7.5%</b>	<b>12.2%</b>
Repair & Maintenance	<b>-3.5%</b>	<b>8.6%</b>	<b>21.8%</b>



## Key Labour Market Indicators



\*statistically significant change (NS) not a statistically significant change \*\*All construction i.e. including public sector

## **Economic commentary**

The following section discusses the performance of the NI economy, how the NICEI component sub-sectors have performed and how the NICEI results compare with comparable figures for the UK, Scotland and Ireland.

This section provides an overview of how other important indicators, such as the labour market, mobility of people, consumer confidence and trade have performed since our last publication. These indicators all play a role in illustrating how the NI economy is affected by the current climate and help to understand what is driving the NICEI results.

We also provide an overview of some government interventions introduced to support businesses in these challenging times. Which provides further insight into the climate NI businesses are currently operating and the state of the local economy.

This is discussed under the following sub-sections:

- NICEI results in context;
- The NICEI and sub-sector results;
- Labour market performance;
- Impact on Mobility;
- Consumer spending;
- Measures implemented in response to COVID-19;
- Trade; and
- Looking forward.

### **NICEI results in context**

This report covers the period 1<sup>st</sup> July to 30<sup>th</sup> September 2021 (Q3 2021) and is the seventh NICEI release to cover the COVID-19 shock to the economy.

The lockdown restrictions which started at the end of Q4 2020, carried on through Q1 2021 and were extended on a number of occasions. Restrictions were beginning to ease towards the end of April (Q2 2021), which included the reopening of all Retail on the 30<sup>th</sup> April.

Appendix 1 provides a detailed overview of the implementation/easing of specific restrictions in response to the pandemic in NI since March 2020.

### **NICEI and sub-sector results**

In terms of NI's economic performance to Q3 2021, the NICEI indicates NI economic output increased by 1.5% in real terms over the quarter and by 4.6% over the year to Quarter 3 2021.

Where annual growth in the NICEI appears particularly strong, it is important to recognise there has been some volatility in the NICEI during the COVID pandemic. As lockdown measures were introduced and eased to mitigate the spread of COVID-19, this led to the NICEI falling to a series low in Q2 2020, followed by the highest quarterly increase in the NICEI to Q3 2020.

As a result, it is perhaps worth considering biennial change opposed to annual change to mitigate any volatility arising from the pandemic in the NICEI. Biennial change compares the change over two years i.e. Q3 2021 vs

Q3 2019 (the previous Q3 before the pandemic). In terms of biennial change, the NI economic output has increased at a flatter rate (3.0%) compared to the annual change (4.6%) in the NICEI to Q3 2021.

The annualised rate of growth (i.e. the most recent four quarters compared to the previous four quarters) increased by 5.8% over the period.

It is evident in Chart 4 that the Services sector, which accounts for 53% of NI GVA, has been driving the performance in terms of the growth over the quarter, year, biennial and rolling four quarter average. Furthermore, it is worth noting the Index of Services reached its series high in Q3 2021, exceeding the previous high achieved in Q4 2006, pre the 2007/08 global financial crisis. In addition, the remaining NI sectors (Production, Construction & Public) did not negatively impact growth over the quarter, year, biennial or rolling four quarter average.

Over the shorter term (i.e. quarter) the overall increase in the NICEI was driven primarily by the Services sector (1.4 pps), followed by a positive contribution by the Public Sector (0.2 pps) whilst the Construction and Production sectors made no contribution. Over the medium term (i.e. annual) the large increase in the NICEI was driven by a growth in the Services sector (3.0 pps) which was further boosted by positive contributions from the Construction (0.6 pps), Production and the Public sectors (both 0.5 pps). When comparing biennial growth, i.e. Q3 2021 vs. Q3 2019 (Pre pandemic), the growth was driven largely by positive contributions from the Services sector (2.0 pps) and Public sector (0.6 pps). There were also further positive contributions in both the Production and Construction sectors (both 0.2 pps).

Looking at the performance of the sub-sectors of the Index of Services (IoS) in the Economic Context to Q3 2021 section (Page 9), broadly speaking, there was a notable increase over the quarter, year and rolling annual average. The (K-N) Business services & finance sector saw the largest increase over the year and rolling annual average with 17.0% and 11.8% respectively. That said, the (P-S) Other services category achieved the highest quarterly growth of 4.8%.

Meanwhile both (G,I) Wholesale & retail, motor vehicle repair, accommodation & food and (H,J) Transport, storage, Information & communication sectors experienced increases over the quarter, the year and rolling average annual. (G,I) experienced a growth of 2.2% over the quarter and 2.7% over the year. Similarly (H,J) grew at a slower rate of 0.1% over the quarter, but grew at a faster rate over the year 7.3%.

The Index of Production sub-sectors achieved growth across the board over the year and rolling annual average. (E) Water supply, sewerage & waste achieved the largest increases over the quarter and the year with 6.9% and 30.0% respectively. (B) Mining & Quarrying experienced the highest positive growth over the rolling annual average (38.5%) but experienced a reduction over the quarter (-3.5%). (D) Electricity, gas, steam & air conditioning achieved positive growth over the year (2.6%) and rolling annual average (2.4%) but experienced a reduction over the quarter (-1.8%). (C) Manufacturing experienced growth over the quarter, year and rolling annual average (0.3%, 0.5% and 7.2% respectively).

Looking at the breakdown of the Construction sector, (via the Quarterly Construction Enquiry) on page 9, the decrease over the quarter reflects a decrease in both 'New Work' (-0.9%) and in 'Repair & Maintenance' (-3.5%). Over the year to Q3 2021 there was positive growth in 'Repair & Maintenance' (8.6%) and 'New Work' (7.5%).

Furthermore comparisons with the GDP of the UK, Scotland and Ireland (see chart 7) indicates a broadly similar picture over the quarter and year. NI achieved a higher level of growth compared to the UK over the quarter (1.5% vs 1.1%) whereas the UK grew at a faster rate over the year (4.6% for NI and 6.8% for the UK). Both NI and Ireland showed positive rates of growth over 2 years (biennial) at 3.0% and 23.7%, in contrast, the UK and Scotland experienced a reduction in biennial change (-1.6% and -2.1% respectively). Ireland had the largest growth over the year, biennial change and rolling annual average with increases of 11.4%, 23.7% and 11.9% respectively.

Chart 6 indicates NI, Scotland and UK output all fell to their minimum level over the time period in Q2 2020. It can also be seen that the NICEI achieved its series high in Q2 2007 whereas the UK reached its series high much more recently in Q3 2019. This suggests that the UK has had a shorter downturn since the 2008 recession and a faster recovery prior to COVID-19.

That said, the NICEI reached a 13 year series high in Q3 2021, achieving a level of NI economic output last exceeded in Q3 2008. As a result the NICEI is currently 2.5% below the maximum value recorded in Quarter 2 2007, UK GDP in Quarter 2 2021 is estimated to be 13.7% higher than its pre-economic downturn peak of Quarter 1 2008.

### **Labour market performance**

Looking at the recent trends from the latest labour market statistics published by NISRA, the NI Claimant Count, which includes Jobseeker's Allowance claimants and those claimants of Universal Credit who were claiming principally for the reason of being unemployed, decreased to 4.5% of the NI workforce in November 2021 (44,500 people). The November claimant count is 30% less than the recent peak in May 2020, and 46% higher than the pre-pandemic count in March 2020.

Data for August to October 2021 shows that the annual and quarterly changes to NI Employee Jobs, Unemployment Rate (16+), the Employment Rate (16-64) and Economic Inactivity Rate (16-64) were not statistically significant. However, the quarterly increase and annual reduction in Self-Employed (16+) was statistically significant.

Labour Force Survey estimates were reweighted from January 2020 and released in July 2021. The estimates for NI have not had the non-response bias adjustment from the recent reweighting fully applied and in addition there was a small error in the implementation of the reweighting methodology affecting all UK estimates. When calculating three-month averages for the PAYE real-time information (RTI) the months used were the previous three month average. The impact of this time lag on LFS economic activity estimates at UK level is mostly below 0.1% and the impact on rates is less than 0.02 percentage points. Accordingly, users are advised to assess trends in NI estimates based on LFS data. ONS will continue to investigate this and will keep users advised.

It should be noted that the employment rate and also employee jobs figures quoted both include furloughed workers, as those who are temporarily away from work and expected to return to work are included within the Employment definition (further detail on the number of furloughed workers and those claiming through the self-employed support scheme is available on page 16).

### **Impact on Mobility**

One of the key characteristics of the pandemic has been the impact on mobility, people movement and transportation. Since the onset of the pandemic, there has been large reductions in the volume of traffic around the NI and Ireland border, air traffic and commercial footfall. The subsequent fluctuations in mobility with the imposing and easing of lockdown restrictions, has likely impacted on consumer spending, tourism and general business activity during the pandemic and subsequently affected economic output.

- Cross Border Traffic flows

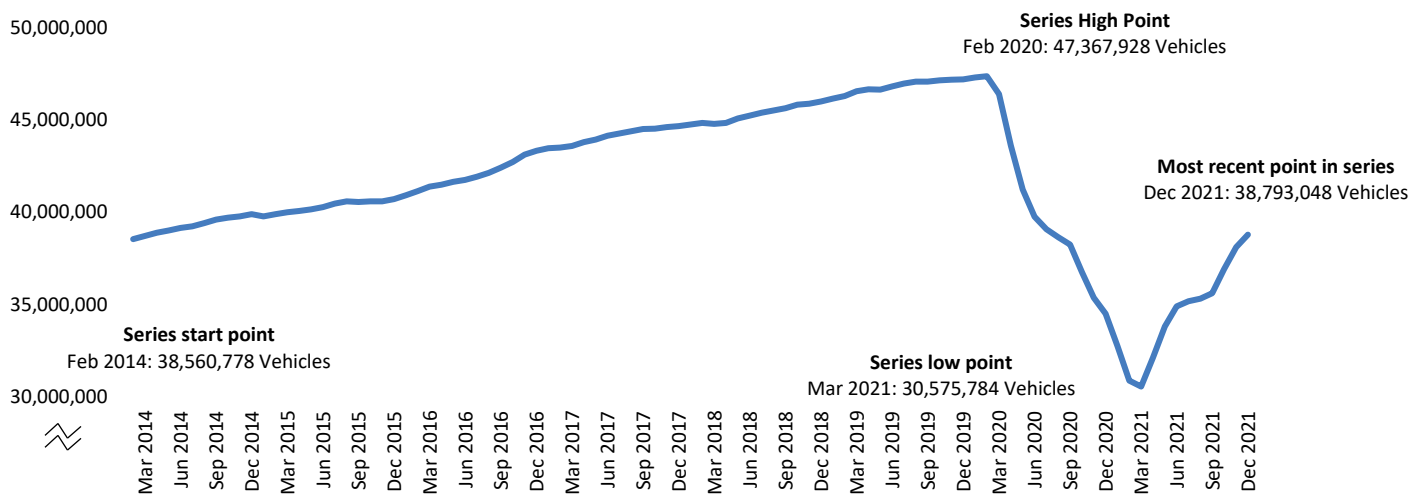
Latest figures from the Transport Infrastructure Ireland (TII) Traffic Data website which is collected from 15 traffic counters at border locations<sup>7</sup> on the National Road Network of Ireland shows the volume of traffic dropped from 2.9m vehicles in March 2020 to 1.1m in April 2020, a decrease of 61.3%. In December 2021, the monthly volume of traffic decreased to 3.5m vehicles, the lowest level since June 2021.

Further NISRA analysis of the data<sup>8</sup> shows the reduction in traffic at these border locations when compared to the same month in 2019 (i.e. pre COVID-19) is less marked than compared to the equivalent month in 2021. For example in October 2021 compared to October 2019 the volume of traffic was 4.9% less, November 2021 compared to November 2019 (-4.8%) and in December 2021 the volume of traffic was 5.7% less than that recorded in December 2019.

The chart below shows the rolling 12 month volumes for all traffic from March 2014; the impact of the pandemic and associated lockdown measures can be clearly seen from March 2020.

**There has been a 26.9% increase in all vehicle traffic at border locations on the National Road Network of Ireland between the series low in March 2021 and December 2021. This follows the sharp 35.5% reduction in all vehicle traffic at border locations between February 2020 and March 2021 as measured by the rolling 12 month counts.**

Chart 8: Transport Infrastructure Ireland (TII) traffic count of all vehicles at the fifteen NI-IE border sites; rolling 12 months Feb 2014 onwards



As previously stated, when we compare the most recent monthly traffic data at the 15 border locations with their last pre COVID-19 equivalent month for comparison, it is evident the decline in cross border traffic between March 2020 and March 2021 has reversed and has been increasing between April 2021 and December 2021. In December 2021, 3.5m vehicles were observed by the 15 traffic counters at border locations, 670,000 vehicles (or 23.9%) more than observed in December 2020 and 210,000 vehicles (or 5.7%) less than recorded in December 2019 (i.e. pre COVID-19).

- Activity at NI airports

<sup>7</sup> Users should note that the data is collected at fifteen border locations, and are therefore a subset of all border crossings and would not present full coverage of all vehicle border crossings. Due to the location of the traffic counters, it is possible that vehicles captured in the data do not cross the Northern Ireland-Ireland border.

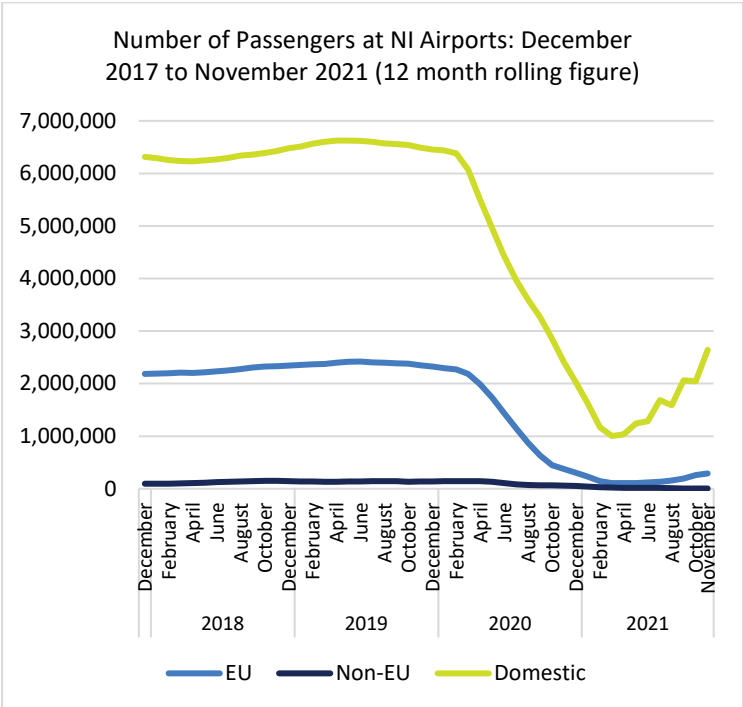
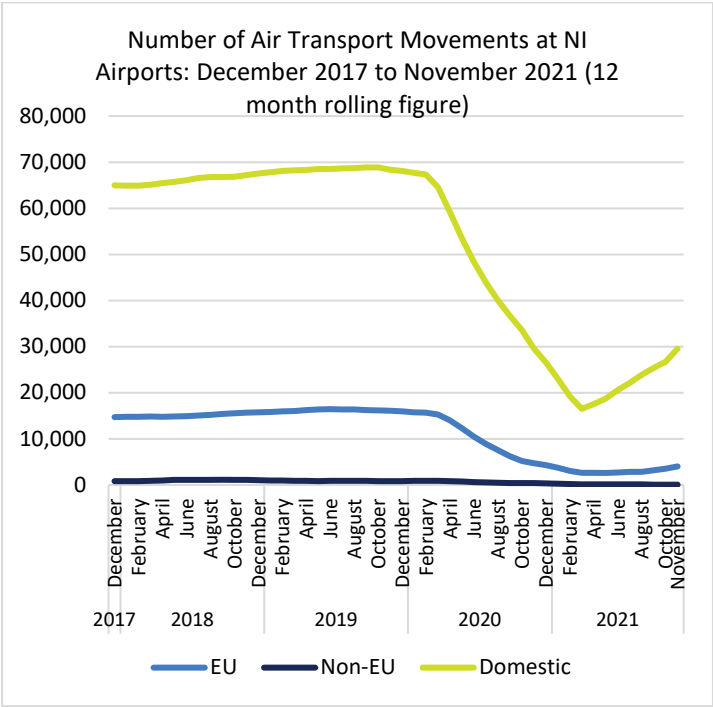
<sup>8</sup> More detailed analysis by vehicle types and month can be found [here](#).

Similarly, Civil Aviation Authority (CAA) data shows a sharp decline in the number of air transport movements at NI airports since February 2020. Air travel has dropped significantly since lockdown was introduced. In February 2020 there were 559,213 passengers moving through NI airports; this fell to 296,860 in March 2020, a 46.9% reduction. The numbers continued to fall to May 2020 when there were only 6,078 passengers recorded across all three of NI’s airports. This represents a reduction of 99.3% compared to May 2019. That said, passenger numbers started to increase since May 2020 rising to 254,499 in August 2020 before, broadly speaking, entering a downward trajectory falling to 40,186 in February 2021. Since February 2021 the number of passengers travelling through NI Airports has started to increase rising to 401,719 in November 2021.

The scale of the decline in activity is clear when you look at the rolling 12-month numbers of transport movements and passenger numbers at NI airports i.e. the sum of movements over the 12 months up to the current period.

**There has been a reduction in air transport movements at NI Airports since February 2020. Falling 3.3% between November 2020 and November 2021 as measured by the rolling 12 month figure. In contrast the Number of passengers at NI airports has grown 3.2% in the same period, albeit from a low base.**

Chart 9: Civil Aviation Authority (CAA) number of transport movements and air passengers at NI airports, December 2017 – November 2021



Source: [Airport Data, Civil Aviation Authority](#)

- Mobility Report

The Department of Health publishes a [COVID-19 Mobility Report](#), based on data from [Google’s Community Mobility Reports](#) which is publically available. The data captures movement trends in NI across a number of categories, namely ‘Retail & recreation’, ‘Supermarket & Pharmacy’, ‘Parks’, ‘Public Transport’, ‘Workplace’ and ‘Residential’.

Comparing mobility on the 31<sup>st</sup> December 2021 against the baseline day for that day of the week between 3<sup>rd</sup> January and 6<sup>th</sup> February 2020, at the NI Council average, NI mobility was notably higher in the 'Parks', 'Supermarket & Pharmacy' and 'Residential' categories at 25%, 20% and 17% respectively above normal levels. Notable decreases in NI activity were observed in the 'Workplace', 'Public Transport' and 'Retail & recreation' categories – reductions of 62%, 46% and 18 % respectively compared to normal levels.

## **Consumer spending**

Uncertainty around job security combined with the imposition and relaxation of restrictions on people movement and business operations has meant that consumer spending has been volatile over the last number of quarters. This is apparent in the variance in quarterly growth experienced by the Wholesale and retail trade; repair of motor vehicles and motorcycles; accommodation and food service (sectors G & I) as reported by the NISRA [Index of Services](#). Sectors G & I decreased by 20.6% (to a series low) over the quarter to Q2 2020, and increased by 28.8% over the subsequent quarter. Over the two subsequent quarters G & I declined, decreasing by 4.2% to Q4 2020 and falling again by 1.4% to Q1 2021, before increasing by 6.4% and 2.2% over Q2 and Q3 2021 as lockdown restrictions were eased.

- Consumer confidence

Danske Bank report there has been a decrease in consumer confidence in the third quarter of 2021 but was higher than at the same time in 2020. The Danske Bank Northern Ireland Consumer Confidence Index<sup>9</sup> decreased to 137 in Q3 2021, down from 149 in Q2 2021, and above the value of 119 reported in Q3 2020.

Other notable points from the report include 45% of people said the vaccine program had the largest positive impact on their confidence. In terms of factors, which negatively impacted confidence, 36% of people said that the new post-Brexit trading arrangements in Northern Ireland made them feel less confident.

Looking forward, 24% of respondents expected their finances to improve over the next twelve months compared to 25% who expect their financial position to worsen. It was also reported that 14% of respondents expected to become more secure in their job, while 9% of those surveyed expected their job security to deteriorate.

- Car registrations

According to [The Society of Motor Manufacturers and Traders](#) there has been an increase in new car registrations at the UK level. To the end of December 2021 there has been a 1.0% increase in new car registrations over the year to date (1,647,181), compared with the same period last year (1,631,064).

## **Measures implemented in response to COVID-19**

Although the full effects of COVID-19 on the local economy aren't known at this stage, the impact is likely to be significant. Government has been implementing a range of measures to support businesses and workers to help mitigate the economic shock. An update on a number of these measures is provided below.

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<sup>9</sup>[Danske Bank Northern Ireland Consumer Confidence Index 2021 Q3](#) - Note that the survey was carried out during September 2021.

- **UK Government Measures**

In response to the pandemic the UK government implemented a range of support packages to help businesses to survive the sudden shock to the economy. The uptake of these schemes also provides a further indication of the scale of the downturn in economic activity.

The UK government implemented the Coronavirus Job Retention Scheme (CJRS)<sup>10</sup> on the 20<sup>th</sup> March 2020 in order to support employers who have been unable to undertake their normal activities through the COVID-19 period. The CJRS ended on the 30<sup>th</sup> September 2021.

HMRC report that when it closed, (end of Q3 2021) 26,600 staff in Northern Ireland were either fully or partially furloughed through the CJRS, (out of 746,300 eligible employments, an up take rate of 3.6%). Final figures report that in Northern Ireland a total of 287,100 employments were on furlough during the scheme with Belfast being the local authority with largest employments over the scheme in the UK with 51,200.

In addition, the government also introduced the Self-Employment Income Support Scheme (SEISS) which provided support for self-employed individuals whose business has been adversely affected by COVID-19. The fifth and final SEISS grant was available to eligible self-employed individuals whose business was trading and impacted by reduced demand due to coronavirus or had been trading but was temporarily unable to do so due to coronavirus between May 2021 and September 2021. The fifth grant opened to claims from late July 2021 and was worth either 80% or 30% of average monthly trading profits, paid out in a single instalment covering three months' worth of profits, and capped at £7,500 for the higher percentage or £2,850 for the lower percentage.

To the 30<sup>th</sup> September 2021, 294,000 claims were made to the Self-Employment Income Support Scheme (SEISS); these claims totalled £783m<sup>11</sup>.

- **NI Government Measures**

At the Northern Ireland level, the NI Executive has announced a number of additional support packages throughout the pandemic aimed at mitigating the impact of COVID-19. The latest interventions to be launched, include:

**High Street scheme 'Spend Local' prepaid card scheme**

As part of the NI Executive's Coronavirus (COVID-19) recovery programme, NI residents aged 18 and over, were eligible to apply for a £100 [Spend Local](#) pre-paid card to spend in local businesses across Northern Ireland. The applications portal opened on the 27<sup>th</sup> September and closed 25<sup>th</sup> October 2021.

The High Street Scheme was due to close the 30<sup>th</sup> November 2021 but was extended until the 19<sup>th</sup> December 2021. Over 1.4 million people applied for the Spend Local card which boosted the economy by over [£137.5 million](#).

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<sup>10</sup> [Coronavirus Job Retention Scheme statistics: 16 December 2021 - Official statistics announcement - GOV.UK \(www.gov.uk\)](#)

<sup>11</sup> [Self-Employment Income Support Scheme statistics: December 2021 - GOV.UK \(www.gov.uk\)](#)



### **Omicron Hospitality Payment**

On the 23<sup>rd</sup> of December, the NI Executive announced a £40 million support package for businesses in the hospitality sector. Over 3,200 businesses will be eligible for a one-off grant under the [Omicron Hospitality Payment](#) which will range between £10,000 and £20,000 based on the rateable value of the business.

### **Economic Recovery Innovation Grant (ERIG)**

On the 10<sup>th</sup> November, the Department for the Economy announced a new grant to support local businesses to develop and implement innovative projects. The £4 million [ERIG scheme](#) will provide up to £5,000 of support to SMEs to develop new, or improve existing, products, services or processes through innovation and to help them recover from the economic impact of the Covid-19 pandemic

## **Trade**

The [HMRC Regional Trade Statistics](#)<sup>12</sup> provides a dis-aggregation of the UK Overseas Trade in Goods Statistics, including a breakdown at the NI level. The UK regional trade in good statistics covering Q3 2021, is scheduled for release at the same time as this NICEI publication, as a result it has not been possible to consider the HMRC RTS publication in this release.

Users should be aware that there are differences in how ONS and HMRC record and report trade figures vis-à-vis how Eurostat report them. Trade statistics for imports can be reported on a country of dispatch and country of origin basis. Whereas for exports only country of destination is recorded. This fundamental accounting difference can produce varying estimates from the different sources. Further information is available in this [ONS Blog](#).

On the 15<sup>th</sup> December 2021 NISRA published the annual [Broad Economy Sales and Exports Statistics \(BESES\) for 2020](#) which provides estimates of local businesses sales to markets outside Northern Ireland. In 2020, total sales by companies in Northern Ireland were estimated to be worth £67.1 billion. Sales within NI amounted to £45.9 billion accounting for 68.4% of total sales. The remainder of sales were fairly evenly split between those to GB (£10.9 billion) and sales to markets outside the UK (i.e. exports) of £10.3 billion, accounting for 16.3% and 15.3% of total sales respectively in 2020.

The Central Statistics Office (CSO) Ireland recently published preliminary figures on the [value of goods exports and imports in October 2021](#), the CSO note in their publication ‘...from 1<sup>st</sup> January 2021 all trade in goods with Great Britain (excluding Northern Ireland) is treated as non-EU trade and must be reported to Revenue’s Customs declaration systems. Prior to this, data on trade with Great Britain were collected via the Intrastat survey. Under the Revised Protocol on Ireland and Northern Ireland, Northern Ireland is legally part of the customs territory of the UK, but effectively remains within the EU Single Market for the movement of goods. In practise, this means that trade in goods with Northern Ireland continue to be reported on the Intrastat survey and on VAT returns. ...’

CSO report that imports from Great Britain decreased by €519 million (-26%) to €1,482 million in October 2021 compared with October 2020, whilst exports to Great Britain increased by €37 million (4%) in October 2021 to €1,054 million when compared with October 2020.

Conversely, trade with Northern Ireland increased over the period with CSO reporting that imports from Northern Ireland increased by €168 million (66%) to €422 million in October 2021 compared with October 2020, whilst exports to Northern Ireland increased by €107 million (53%) in October 2021 to €311 million when compared with October 2020.

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<sup>12</sup> Note that HMRC do not collect any data on trade between NI and GB

It should be noted that care needs to be taken when interpreting these trade statistics because of the changes to how the figures have been collected following the UK's exit from the EU.

## **Looking forward....**

The 1.5% increase in economic activity in NI over the quarter to Q3 2021 coincides with an easing of lockdown restrictions and continued rollout of the COVID vaccination programme. The NICEI increased by 4.6% over the year to Q3 2021.

The NI COVID-19 vaccination scheme has continued and in November, the Department of Health published its [Booster Vaccination Plan](#). To date the Department of Health has [administered](#) 1.4 million 1<sup>st</sup> doses (which accounts for circa 88% of eligible population), 1.3 million 2<sup>nd</sup> doses and 0.9 million 'Booster' vaccines were administered. In addition, the NI Executive announced [further measures](#) in December to mitigate the spread of the Omicron variant, which included recommendations around a reduction in the number of households mixing and working from home where possible. The Danske Bank Consumer Confidence Index<sup>13</sup> noted the rollout of the NI vaccination programme had the largest positive impact on the confidence levels on 45% of respondents.

In December 2021, the [Bank of England](#)'s Monetary Policy Committee (MPC) voted to increase the Bank of England Base rate by 0.15 percentage points to 0.25%. The summary of the MPC meeting referenced the emergence of the Omicron COVID variant, which appears to be more transmissible than the Delta variant and the increase in twelve-month CPI inflation. Bank staff expect inflation to remain around 5% through the majority of the Winter, peaking at around 6% in April.

In addition, to addressing the impact of COVID-19 on the NI economy NI will also need to adapt to the new arrangements set out in the [NI Protocol](#) to ensure goods flow effectively between Great Britain and NI.

Adapting to the new landscape created by COVID-19 on a global scale in addition to the outworking's of the NI Protocol means that NI businesses are faced with a challenging time ahead. The extent of the full impact of the pandemic and the outworking's of the NI Protocol will become clearer as more data becomes available in the future.

### **Recent ELMS publications you may have missed...**

[Quarterly Employment Survey](#) - 14/12

[Labour Market Report](#) - 14/12

[Broad Economy Sales and Exports Statistics](#) – 15/12

[Supply-Use Tables 2016-2017](#) – 16/12

[Index of Production](#) – 16/12

[Index of Services](#) – 16/12

Other NISRA publications can be found on the [NISRA website](#).

### **Recent DfE publications you may have missed...**

[Q3 2021 Research Digests](#) – 18/11

[Research Bulletins 2021](#) - 15/12

### **Other recent publications you may have missed...**

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<sup>13</sup>[Danske Bank Northern Ireland Consumer Confidence Index 2021 Q3](#) - Note that the survey was carried out during September 2021.

[The public finances in NI: a comprehensive guide | NI Fiscal Council](#) – 23/11

[GDP, UK regions and countries - Office for National Statistics](#) – 25/11

[Quarterly regional labour productivity, gross value added, hours and jobs - Office for National Statistics](#) – 25/11

[Model-based early estimates of regional gross value added in England, Wales, Scotland, and Northern Ireland - Office for National Statistics](#) – 29/11

[FCNI Interim Report - More fiscal devolution for Northern Ireland? | Fiscal Commission NI](#) – 13/12

[Quarterly economic commentary - Office for National Statistics](#) – 22/12

[UK economic accounts: July to September 2021 - Office for National Statistics](#) 22/12

[ONS-GDP monthly estimate, UK : October 2021](#) – 10/12

[Business insights and impact on the UK economy - Office for National Statistics](#) – 06/01

[Economic activity and social change in the UK, real-time indicators - Office for National Statistics](#) – 06/01

#### **Upcoming ELMS releases**

<a href="#">Monthly Labour Market Review</a> – 18/01	<a href="#">Business Demography, Northern Ireland - 2020</a> – 27/01	<a href="#">Index of Services &amp; Index of Production</a> - 16/03
<a href="#">Quarterly Construction Enquiry &amp; NICEI</a> – 31/03		

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## Quality and methodology

### Uncertainty

All estimates are subject to statistical uncertainty and for many well-established statistics we measure and publish the sampling error and non-sampling error associated with the estimate, using this as an indicator of accuracy.

Unlike many indicators that NISRA publish, there is no simple way of measuring the accuracy of the NICEI. The NICEI is constructed from a variety of data sources, some of which are not based on random samples or do not have published sampling and non-sampling errors available. As such it is very difficult to measure both error aspects and their impact on the NICEI. As a result we don't publish a measure of the sampling error or non-sampling error associated with the NICEI.

One dimension of measuring accuracy is reliability, which can be measured using evidence from analyses of revisions to assess the closeness of earlier to subsequent estimates. Revisions are an inevitable consequence of the trade-off between timeliness and accuracy. It is our role to produce the best possible estimate of the NICEI using all of the available information at that time. Therefore, the only way to avoid subsequent revisions would be to either delay publication until all the relevant information has been received, or to publish an estimate and then ignore any subsequent new data and any methodological improvements. So, revisions should be treated as generally a good thing, as long as we document the reasons for them and communicate this to users.

All NICEI estimates are provisional and subject to revision in light of:

- Ongoing data validation and clarification of responses from individual businesses and late responses to surveys and administrative sources which form input to the Index.
- Revisions to seasonal adjustment factors, which are re-estimated every month and reviewed annually.
- Changes to the methodological processes used to gather and process the data and other revisions and developments implemented by the input sources.
- Incorporating new annual GVA data from the ONS.

The NICEI back series is calculated each quarter, typically the revisions to the NICEI are reasonably minor. Comparing the Q3 2021 NICEI back series with the Q2 2021 back series, revisions to each quarter of the index ranged between -0.2 and 0.9 index points between Q3 2019 and Q2 2021. Prior to Q2 2019, each quarter of the index was revised between -0.6 to 0.1 index points.

This variance was driven by revisions in the Index of Production (IOP) and Index of Services (IOS). Normally, revisions in the IOS and IOP back series are relatively minor but throughout the Covid-19 pandemic period these revisions have been larger, primarily due to lower response rates and an increased number of late returns from businesses. There have also been methodology changes applied to the deflators used; deflators chain linked from Q3 2020 onwards, and double deflation using Supply and Use Tables (SUTs) implemented from Q3 2021. This has resulted in larger than normal changes in the back series data. Further information on the revisions to these input sources can be found on the [IOS](#) and [IOP](#) webpages.

A full comparison of the NICEI Series at Q3 2021 and Q2 2021 is available in Table 12 of the [NICEI spreadsheet](#).

### Comparability with ONS regional annual GDP

ONS released [balanced estimates of Gross Value Added \(GVA \(B\)\) and GDP for the countries and regions of the UK](#) on 26<sup>th</sup> May 2021. This is the second annual estimate of GDP published by ONS at this level of disaggregation. Users should be aware that NISRA acknowledge that the trends presented by the NICEI do not align with these new experimental Regional GDP figures from ONS. This is due to methodological differences. NISRA statistics are produced on a bottom-up basis whereas the ONS figures are produced on a top-down basis, where UK level GVA and GDP figures are apportioned to regions using various apportionment methods. NISRA continue to engage with ONS to better understand the differences and the drivers behind their figures and where possible identify areas where coherence in the figures can be improved.

### NICEI component data

**Agricultural Output Index:** The agricultural output index is an unpublished dataset based on survey and administrative sources held by the Department of Agriculture, Environment and Rural Affairs (DAERA).

**HMF:** The number of Her Majesty's Forces (HMF) stationed in Northern Ireland is included in the NICEI. This data is published by the Ministry of Defence (MoD) and further information can be found [here](#).

**IOP:** The quarterly NI Index of Production (IOP) is currently based on a sample of around 1,200 businesses out of a population of c. 5,500. This covers approximately 92% of the turnover of the population at the time of selection and a targeted response rate of 75%. This includes a census of all companies employing 40 or more employees as well as those employing 0 to 39 employees and having a turnover of £10 million or more. The sample has been designed to have a minimum precision of 10% for each of the production subsectors.

**IOS:** The quarterly NI Index of Services (IOS) is currently based on a sample of around 3,600 businesses out of a population of c. 43,000. The sample consists of a census of dominant companies and a Neyman stratified random sample of the remaining companies and covers approximately 75% of turnover. The census element consists of all companies employing 100 or more employees as well as those employing 0 to 99 employees and having a turnover of £10 million or more.

**LFS:** The Labour Force Survey (LFS) is a quarterly sample survey carried out by interviewing people about their personal circumstances and work. Typically each quarter's LFS sample of around 4,500 households in NI is made up of 5 waves with around 1,300 private households selected for the first time in wave 1 and the remaining 3,200 private households spread across waves 2 to 5. This results in a total of around 7,000 individuals included each quarter. Self-employed estimates from the LFS are incorporated into the NICEI.

NISRA suspended all face-to-face household interviews in the middle of March 2020 due to COVID-19 and from April 2020 all LFS interviews have been conducted by telephone. This has reduced the achieved sample size and precision of the estimates. The total eligible sample for the January-March 2021 LFS consisted of 9,551 addresses (2,573 chosen at random from the Land and Property Services (LPS) list of domestic properties and 6,978 carried forward from the previous quarter). The response rate for January-March 21 was 21% and the achieved sample size was 23% lower than the same time last year.

**QCE:** From a sampling universe of approximately 10,000 firms, a disproportionate sample of 750 construction firms is randomly selected to take part in the NI Quarterly Construction Enquiry (QCE). The sample is disproportionately stratified (into six strata) using Inter Departmental Business Register (IDBR) turnover as the stratification variable. This includes a census of all companies with a turnover of £5.25m or greater, and a representative sample of smaller businesses. Further information on the QCE sample coverage and methodology can be found [here](#). NICEI includes private sector construction only.

**QES:** The Quarterly Employment Survey (QES) provides short-term employee jobs estimates for Northern Ireland. It has a sample size of approximately 6,000 and covers all private sector firms with 25 or more employees, all public sector employers and a representative sample of smaller firms. The QES excludes the self-employed, HM Armed Forces, private domestic servants, homeworkers and training for success trainees without a contract of employment (non-employed status). The number of jobs are counted rather than the number of persons with jobs. For example, a person holding both a full-time job and part-time job, or someone with two part-time jobs, will be counted twice.

### **Weighting the components**

Weights are based on the balanced estimate of [Gross Value Added \(GVA \(B\)\)](#) by industry obtained from [Regional Accounts produced by ONS](#). The latest available GVA by industry published in May 2021 includes provisional figures for 2019. The NICEI calculations are based on GVA balanced figures up to and including the 2019 year.

### **Annual chain-linking**

Annual chain-linking is a method for aggregating volume measures on a yearly basis - it can be thought of as rebasing every year rather than having a fixed base year to which all subsequent years are weighted. In this way dynamic changes in the structure of the economy are better reflected in the index. Instead of referring back to value shares from a base year, volume measures for each year are produced in prices of the previous year. These volume measures are then “chain-linked” together to produce a continuous time series, preserving the growth rates of the underlying component series. The use of annual chain-linking is standard National Accounts practice. Using chained volume measures makes use of more up-to-date weights and is therefore more relevant. Rebasing will affect the relative movements between periods.

### **Re-referencing**

The reference year for the index is currently 2019 (i.e. 2019=100). NISRA changes the NICEI reference period (a process known as re-referencing) from time to time, but not frequently. This is because frequently changing the reference base is inconvenient for users. Re-referencing should not be confused with rebasing. Re-referencing does not change the relative movements between periods

### **Seasonal adjustment**

The indirect method of seasonal adjustment was employed. Seasonally adjusted figures were input (where possible) and when the combined output series were tested for seasonality there was no residual seasonality found, therefore no seasonal adjustment was required.

### **Experimental Statistics**

These statistics are experimental statistics which are still undergoing evaluation and are subject to revision. NISRA is currently working to develop a quarterly measure of GDP for NI which builds upon the NICEI. It is our goal that the new quarterly measure of GDP will undergo assessment by the Office for Statistics Regulation to ensure compliance with the standards of the [Code of Practice for Statistics](#).

Please refer to the [NICEI Methodology report](#) for further information.

## Appendix 1 – Timeline of NI Lockdown measures in response to the COVID-19 Pandemic: March 2020 - June 2021

2020 Q1	<a href="#">23 March 2020</a>	The Prime Minister announces a nationwide lockdown to mitigate the spread of COVID-19. Measures included the closure of all shops selling non-essential items. People were only permitted to leave their home to shop for basic necessities, to exercise, for a medical need or to commute to work, but only where it is absolutely necessary and cannot be done from home.
2020 Q1	<a href="#">28 March 2020</a>	The Executive agreed to adopt new powers from 11pm in response to the threat to public health posed by COVID-19. The powers compelled the closure of certain premises, prohibited anyone from leaving home without a reasonable excuse and gatherings of more than two people were banned.
2020 Q2	<a href="#">14 May 2020</a>	Lockdown measures begin to be eased, with garden centres and household recycling centres permitted to open the following week. Marriage ceremonies were permitted in certain circumstances.
2020 Q2	<a href="#">18 May 2020</a>	Further restrictions lifted - outdoor gatherings are permitted for up to six people not from the same household. Churches were allowed to open for private prayer, sports such as golf and tennis were permitted.
2020 Q2	<a href="#">11 June 2020</a>	Restrictions lifted included indoor visits with one other household for those living alone, the provision of day-care places of worship and community centres, the opening up of the remainder of the retail sector and the housing market.
2020 Q3	<a href="#">3 July 2020</a>	Hotels, pubs, cafes and restaurants were permitted to open their doors for the first time since lockdown.
2020 Q3	<a href="#">9 July 2020</a>	A number of announcements relating to further easing of the lockdown arrangements were made including:  The reopening of indoor fitness studios and gyms; bingo halls and amusement arcades; outdoor leisure playgrounds, courts and gyms; and cinemas from 10 July.  The resumption of horse racing and outdoor equestrian competitions and outdoor competitive games and sporting events from July 11 for grassroots and professional sport but with no spectators allowed.  The reopening of libraries from July 16, with protocols enacted to ensure social distancing.  The reopening of indoor sport and leisure facilities, including skating rinks and leisure centres on July 17, but excluding swimming pools.
2020 Q3	<a href="#">24 July 2020</a>	Further easing of lockdown restrictions, including:  The maximum number of people who can gather in a residential setting increased from six to 10, with a requirement that they come from no more than four different households and an expectation that social distancing and other public health advice is observed.  Wet treatments in spas, such as saunas, steam rooms and hydrotherapy pools will be permitted to resume.



		<p>Spectators will be able to attend outdoor competitive games with numbers to be determined by the venue in line with public health advice.</p> <p>Swimming pools in leisure centres, hotels and private facilities will be able to open.</p> <p>Bowling alleys will be allowed to reopen.</p>
2020 Q3	<a href="#">20 August 2020</a>	Restrictions tightened to reduce the number of people that can meet indoors to six people from two households. The number of people that can participate in an outdoor gathering, including in a private garden, reduces to 15 people.
2020 Q3	<a href="#">21 September 2020</a>	Further restrictions announced including no mixing of households in private dwellings with certain exemptions and no more than six people from two different households to gather in a garden.
2020 Q3	<a href="#">23 September 2020</a>	Restrictions eased wet pubs permitted to open.
2020 Q3	<a href="#">29 September 2020</a>	Restrictions announced for Hospitality sector pubs, bars, restaurants and cafes must close at 11pm.
2020 Q4	<a href="#">14 October 2020</a>	<p>Further restrictions announced including:</p> <ul style="list-style-type: none"> <li>• Closure of hospitality sector apart from deliveries and takeaways for food, closing time of 11pm remains.</li> <li>• Close contact services such as hairdressers and beauticians not permitted to open.</li> <li>• Gyms may remain open for individual training only.</li> <li>• Work from home unless unable to do so.</li> <li>• No unnecessary travel should be undertaken.</li> <li>• Half term break for schools and colleges extended to a two week break to run from 19<sup>th</sup> to 30<sup>th</sup> October.</li> </ul>
2020 Q4	<a href="#">19 November 2020</a>	<p>Two-week circuit breaker announced which included:</p> <ul style="list-style-type: none"> <li>• Closure of all retail except essential retail.</li> <li>• Closure of close contact services and driving instruction (not motorcycles).</li> <li>• Closure of all hospitality (except for accommodation for essential travel), Takeaway and delivery services permitted to remain open.</li> <li>• Closure of all leisure and entertainment.</li> <li>• Schools and childcare to remain open.</li> </ul>
2020 Q4	<a href="#">4 December 2020</a>	Restrictions eased. Shops, hairdressers, restaurants, places of worship and hotels permitted to re-open from 11 <sup>th</sup> December.
2020 Q4	<a href="#">8 December 2020</a>	NI COVID-19 Vaccination programme begins.
2020 Q4	<a href="#">26 December 2020</a>	<p>Restrictions increased for a period of 6 weeks from December 26<sup>th</sup> to 6<sup>th</sup> February with a review on 21<sup>st</sup> January. Staying at home is a legal requirement, unless there is a reasonable excuse to leave.</p> <p>All retail businesses are required to close, except for essential retail.</p>



		<p>Hospitality venues such as cafes, restaurants, pubs, bars and social clubs must remain closed with the exception of takeaway, drive through and delivery. Leisure and entertainment venues are not permitted to open.</p> <p>Pre-school, primary and post primary schools are required to provide remote learning to pupils until the half term break in mid-February.</p>
2021 Q1	<a href="#">15 January 2021</a>	Travel Corridor Suspended – All arrivals other than those on the short list of exemptions are required to isolate for 10 days on arrival.
2021 Q1	<a href="#">21 January 2021</a>	Lockdown restrictions are extended until 5 March.
2021 Q1	<a href="#">18 February 2021</a>	Lockdown restrictions are extended until 1 April.
2021 Q1	<a href="#">18 February 2021</a>	Pre-school, nursery and primary school pupils P1 to P3 will return to full-time teaching from 8 March. Years 12 to 14 will return to face to face teaching from 22 March.
2021 Q1	<a href="#">2 March 2021</a>	The Executive outlined its pathway to gradual easing of current restrictions. With formal reviews to be held on the 16 March, 15 April, 13 May and 10 June.
2021 Q1	<a href="#">16 March 2021</a>	All primary school pupils to return to face to face teaching on 22 March. All remaining pupils (Years 8 to 11) will return on 12 April after Easter break.
2021 Q2	<a href="#">7 April 2021</a>	COVID-19 Vaccination figures from NI's Department of Health indicate that 790,860 first dose vaccinations and 167,923 second dose vaccinations have been administered.
2021 Q2	<a href="#">15 April 2021</a>	<p>The Executive agrees a package of relaxations to the current Coronavirus Health Regulations. Including:</p> <p>From 23 April:</p> <ul style="list-style-type: none"> <li>• Resumption of driving instruction and theory tests;</li> <li>• Re-opening of close contact services including training;</li> <li>• Re-opening of outdoor visitor attractions including outdoor activity centres; and</li> <li>• Competitive outdoor sport organised by a club, individual or individuals affiliated, with participant numbers not exceeding 100 and no spectators permitted can return.</li> </ul> <p>From 30 April:</p> <ul style="list-style-type: none"> <li>• Reopen all of retail;</li> <li>• Increase the numbers permitted to gather in Domestic Setting Outdoors – to 15 people from no more than 3 households;</li> <li>• Reopen and permit overnight stays in self-contained tourist accommodation for one household only; and</li> <li>• Reopen unlicensed premises, outdoors only with a maximum of 6 people from 2 households per table and contact details recorded.</li> </ul>

2021 Q2	<a href="#">24 May 2021</a>	<p>Executive announces a pathway for May because of the success of the vaccination program</p> <ul style="list-style-type: none"> <li>• The relaxation of indoor/outdoor hospitality group limits from 6 to 10 and no meal requirement;</li> <li>• Allowing indoor domestic visits - 6 people from no more than 2 households;</li> <li>• Resume indoor group exercise and training in numbers limited to suit the venue; and</li> <li>• Increase numbers for outdoor gatherings to 500 or capped at risk assessment level if lower. This would allow up to 500 spectators at any outdoor event.</li> </ul>
2021 Q2	<a href="#">21 June 2021</a>	<p>Executive announces the next phase of Pathway out of restrictions for the month of June.</p> <ul style="list-style-type: none"> <li>• Permit indoor gatherings in a domestic setting of 10 people from no more than two households;</li> <li>• Permit outdoor gatherings to the maximum allowed as per risk assessment for venue across all sectors. Over 30 people must be an organised gathering and would require a risk assessment; and</li> <li>• Enable close contact services to open without appointments but with remaining mitigations.</li> </ul>
2021 Q2	<a href="#">27 June 2021</a>	<p>The number of vaccines administered in Northern Ireland has passed the 2 million mark which includes both 1st and 2nd doses. 80% of the Adult population have received their first jab and close to 60% have had their 2nd.</p>
2021 Q3	<a href="#">22 July 2021</a>	<p>The executive announced further easing of restrictions which include</p> <ul style="list-style-type: none"> <li>• At outdoor domestic settings a maximum of 15 people from an unlimited number of households will be permitted. Children aged 12 and under are not counted in the total number.</li> <li>• Within close contact services the requirement for an appointment will be removed and overlapping appointments will be allowed.</li> </ul>
2021 Q3	<a href="#">02 August 2021</a>	<p>The Executive publishes a COVID recovery plan Building Forward. The plan is to inform the Governments priorities over the next 24 months through 83 interventions to stimulate recovery.</p>
2021 Q3	<a href="#">12 August 2021</a>	<p>The executive announced further easing of restrictions which include</p> <ul style="list-style-type: none"> <li>• People who are fully vaccinated will no longer need to self-isolate for 10 days if someone they have been in close contact with test positive for COVID-19. Instead they should get a PCR test on day 2 and 8 of the 10 day period.</li> <li>• The restriction on the number of people who can gather outdoors at a domestic setting will be removed, including the ban on outdoor house parties.</li> <li>• The limit of numbers permitted at tables will be removed. This will also apply to post marriage celebrations.</li> <li>• The requirement for school bubbles will be removed for the beginning of the school year with mitigating measures remaining in place.</li> </ul>

2021 Q3	<a href="#">24 September 2021</a>	<ul style="list-style-type: none"> <li>The Department of Health announced young people aged 12 to 15 in Northern Ireland will be offered one dose of the Pfizer/BioNTech Covid-19 vaccine.</li> </ul>
2021 Q3	<a href="#">27 September 2021</a>	<ul style="list-style-type: none"> <li>As part of the Executive's Coronavirus (COVID-19) recovery programme, Residents in Northern Ireland who are aged 18 or over, are eligible to apply to receive a £100 Spend Local pre-paid card to spend in local businesses across Northern Ireland.</li> </ul>
2021 Q3	<a href="#">27 September 2021</a>	<ul style="list-style-type: none"> <li>To date 2,517,067 Covid-19 Vaccines have been administered in NI. That's 1,310,435 1<sup>st</sup> dose vaccines and 1,205,042 2<sup>nd</sup> dose vaccines.</li> <li>22,013 1<sup>st</sup> dose vaccines have been administered to 16 &amp; 17 year olds.</li> </ul>
2021 Q4	<a href="#">19 October 2021</a>	<p>The Executive announce a plan that sets out rules that will remain in place over the Winter months. Which includes</p> <ul style="list-style-type: none"> <li>the retention of a legal requirement for face coverings in public indoor settings</li> <li>the continued legal requirement for risk assessments to be carried out in certain settings and for visitor and attendee details to be recorded to support the work of the Test, Trace and Protect system.</li> </ul>
2021 Q4	<a href="#">15 November 2021</a>	The department of Health outline the booster Vaccination program with timescales and delivery models
2021 Q4	<a href="#">26 November 2021</a>	Department of Health release evidence to support the COVID certification
2021 Q4	<a href="#">22 December 2021</a>	<p>The executive announced new measures to limit the spread of the Omicron variant which include</p> <ul style="list-style-type: none"> <li>Work from home where possible</li> <li>Household mixing should be reduced to a maximum of 3 households.</li> <li>Nightclubs will close.</li> <li>Dancing in all hospitality venues will not be allowed. (Does not apply to weddings or civil partnership celebrations)</li> <li>All indoor standing events will not be allowed.</li> <li>You will be required to be seated in all indoor hospitality settings with a maximum of 6 people</li> </ul>

## Appendix 2 - NICEI and component indices by quarter and year

Table 1: NICEI and component indices by quarter, Q1 2006 – Q3 2021

	NICEI	Component			Indices	
		Private Sector	Public Sector	Services	Production	Construction
2006 Q1	<b>102.7</b>	102.0	105.9	100.2	100.3	134.8
2006 Q2	<b>103.1</b>	102.6	105.9	100.7	101.7	134.7
2006 Q3	<b>104.4</b>	104.1	106.5	102.1	101.4	143.0
2006 Q4	<b>104.7</b>	104.6	106.0	102.8	101.5	143.1
2007 Q1	<b>104.4</b>	104.3	105.8	102.3	102.6	137.8
2007 Q2	<b>105.0</b>	105.0	106.0	102.7	103.2	143.2
2007 Q3	<b>104.7</b>	104.8	105.7	102.3	105.8	137.1
2007 Q4	<b>104.3</b>	104.2	105.7	101.0	108.8	131.4
2008 Q1	<b>104.5</b>	104.5	105.7	102.5	107.5	127.6
2008 Q2	<b>104.3</b>	104.4	105.0	101.2	109.2	131.4
2008 Q3	<b>101.8</b>	101.4	104.1	99.0	106.4	122.2
2008 Q4	<b>100.2</b>	98.1	107.8	95.9	101.4	118.9
2009 Q1	<b>99.2</b>	96.6	107.9	95.2	97.5	117.2
2009 Q2	<b>98.1</b>	95.1	108.2	94.3	94.7	115.1
2009 Q3	<b>98.2</b>	95.0	108.6	95.2	92.4	114.4
2009 Q4	<b>99.5</b>	96.9	108.2	97.1	95.3	112.1
2010 Q1	<b>99.3</b>	97.0	107.5	97.5	96.1	106.7
2010 Q2	<b>97.9</b>	95.3	106.7	95.9	95.7	102.2
2010 Q3	<b>96.3</b>	93.5	105.8	92.7	96.2	102.8
2010 Q4	<b>95.9</b>	93.1	105.5	90.6	101.5	96.2
2011 Q1	<b>95.5</b>	92.7	105.0	90.5	101.4	92.6
2011 Q2	<b>95.9</b>	93.4	104.4	92.4	101.9	85.6
2011 Q3	<b>96.8</b>	94.8	103.8	92.9	106.3	87.4
2011 Q4	<b>96.5</b>	94.6	103.0	92.6	105.9	88.1
2012 Q1	<b>96.7</b>	94.8	103.2	91.5	106.7	94.2
2012 Q2	<b>94.3</b>	91.7	103.0	90.1	101.9	83.2
2012 Q3	<b>94.2</b>	91.6	103.0	90.5	101.1	80.9
2012 Q4	<b>94.2</b>	91.5	103.2	90.2	101.3	80.6
2013 Q1	<b>94.6</b>	91.9	103.4	90.7	101.4	80.1
2013 Q2	<b>93.6</b>	90.6	103.7	89.8	101.0	74.2
2013 Q3	<b>95.5</b>	93.0	103.9	91.7	105.3	76.8
2013 Q4	<b>94.7</b>	92.7	101.4	91.9	104.6	72.2
2014 Q1	<b>94.7</b>	92.9	100.7	91.9	103.4	76.2
2014 Q2	<b>94.8</b>	92.9	101.1	91.9	103.4	76.5
2014 Q3	<b>94.7</b>	92.7	101.4	91.5	103.9	77.9
2014 Q4	<b>95.2</b>	93.4	101.2	92.0	103.0	82.3
2015 Q1	<b>95.9</b>	94.5	100.8	91.6	104.4	91.6
2015 Q2	<b>96.2</b>	95.0	100.4	92.5	103.8	92.2
2015 Q3	<b>96.0</b>	94.8	99.8	93.1	103.6	88.3
2015 Q4	<b>96.1</b>	95.3	99.0	93.0	103.8	91.2

	NICEI	Component			Indices	
		Private Sector	Public Sector	Services	Production	Construction
2016 Q1	96.6	95.9	98.8	94.0	102.7	93.2
2016 Q2	97.4	97.2	98.1	95.5	103.1	97.2
2016 Q3	96.9	96.7	97.7	95.0	103.0	95.5
2016 Q4	99.2	99.6	98.0	97.3	105.4	102.3
2017 Q1	99.3	99.6	98.3	97.4	105.4	101.6
2017 Q2	97.5	97.4	98.1	96.1	98.6	104.2
2017 Q3	96.9	96.5	98.2	97.0	92.8	102.8
2017 Q4	97.9	97.8	98.3	97.4	97.1	102.2
2018 Q1	98.6	98.7	98.3	99.4	97.6	94.3
2018 Q2	98.9	98.9	98.8	99.2	98.0	99.1
2018 Q3	99.2	99.3	98.8	98.8	98.9	104.8
2018 Q4	99.7	99.9	98.9	100.5	98.4	99.3
2019 Q1	100.4	100.8	99.3	100.7	100.7	100.4
2019 Q2	99.8	99.8	99.8	99.8	101.0	97.9
2019 Q3	99.3	99.0	100.2	99.0	98.6	100.8
2019 Q4	100.5	100.4	100.7	100.6	99.8	100.8
2020 Q1	97.6	96.8	100.6	96.6	94.9	99.1
2020 Q2	82.3	76.8	101.7	77.1	77.9	67.7
2020 Q3	97.8	96.8	101.1	97.3	96.2	96.0
2020 Q4	99.1	98.4	101.5	95.6	101.5	110.2
2021 Q1	97.9	96.8	101.9	95.4	98.0	102.6
2021 Q2	100.8	100.4	102.3	100.1	99.7	103.7
2021 Q3	102.3	102.1	103.1	102.8	99.7	103.2

Table 2: NICEI and component indices by year, 2006 – 2020

Year	NICEI	Component			Indices	
		Private Sector	Public Sector	Services	Production	Construction
2006	103.7	103.3	106.1	101.4	101.2	138.9
2007	104.6	104.6	105.8	102.1	105.1	137.4
2008	102.7	102.1	105.6	99.7	106.1	125.0
2009	98.7	95.9	108.2	95.4	95.0	114.7
2010	97.4	94.7	106.4	94.2	97.4	101.9
2011	96.2	93.9	104.0	92.1	103.9	88.4
2012	94.8	92.4	103.1	90.6	102.7	84.7
2013	94.6	92.1	103.1	91.0	103.1	75.8
2014	94.8	93.0	101.1	91.8	103.4	78.2
2015	96.0	94.9	100.0	92.6	103.9	90.8
2016	97.5	97.3	98.1	95.5	103.6	97.0
2017	97.9	97.8	98.2	97.0	98.5	102.7
2018	99.1	99.2	98.7	99.5	98.2	99.4
2019	100.0	100.0	100.0	100.0	100.0	100.0
2020	94.2	92.2	101.2	91.7	92.6	93.2

## List of Tables

Data accompanying this bulletin are available from the [NISRA website](#) in both Open Document and Excel formats. The spreadsheet includes the following tables.

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### Next NICEI publication: 31<sup>st</sup> March 2022

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