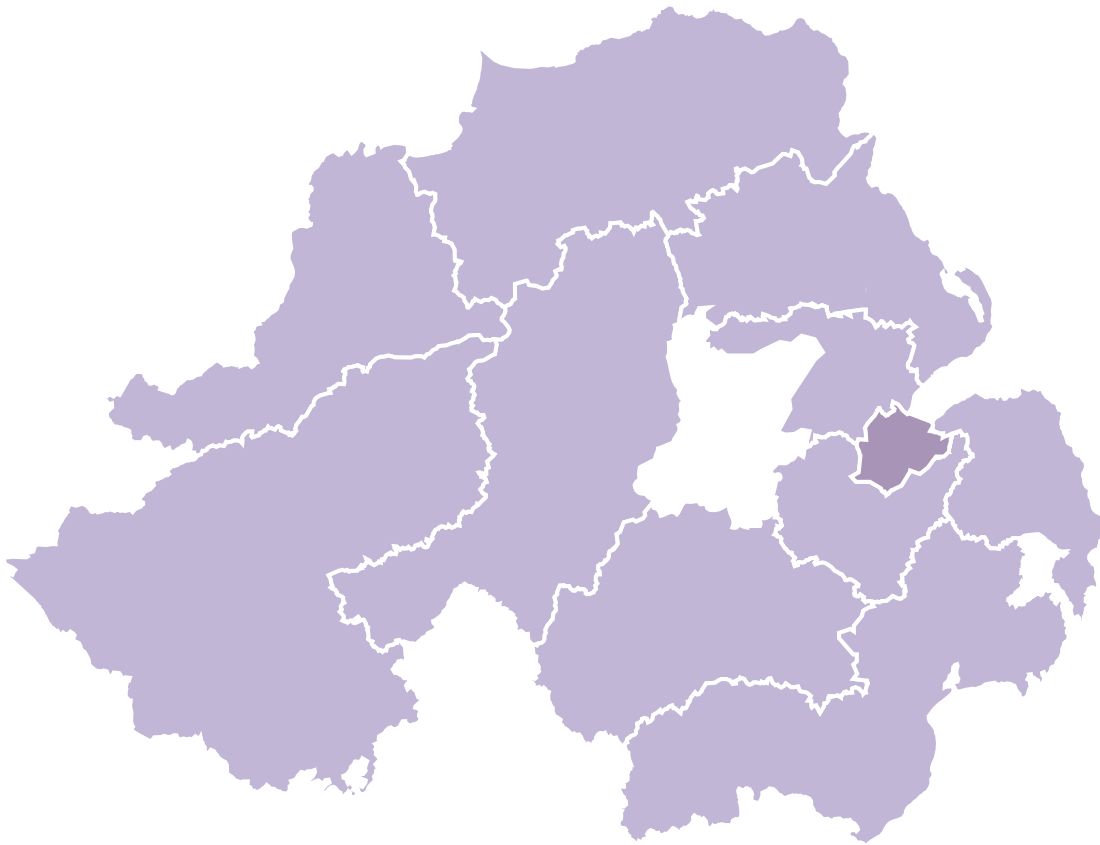


Eastern Regional Briefing:

Belfast City Council

June 2017



Contents

Background	2
-------------------	----------

Eastern Region Overview

Eastern Invest NI Activity	4
Eastern Invest NI Supported Businesses' Performance	6
Eastern Economic Profile	8
Eastern Sector Focus	12
Eastern Economic Development Partners	14

Appendices

Data Tables	16
Notes	23
Data Sources	25

Background

Invest NI has produced **Regional Briefings** for areas across Northern Ireland to help inform and support understanding of sub-regional economic performance. They are aligned to Invest NI's regional office network and each includes analysis for the relevant local councils.

The purpose of the briefings is to provide an overview of the latest available economic metrics from a range of data sources. This includes:

- Invest NI support to businesses and organisations in the area to stimulate job creation, investment and economic growth;
- Official statistics including; Population, Labour Market, Employee Jobs, Earnings, Qualifications, Business Base, Productivity and Tourism; and
- Information on Sectors and Economic Development Partners in the region.

Data tables, detailed notes on definitions and measures and sources are available in the appendices. The **Regional Briefings** are supported by an interactive dataset and access to these resources is available through the contact points below.

For further information please contact:

Moira Loughran

Regional Manager
Invest NI - Eastern Regional Office
moira.loughran@investni.com
028 9069 8325

Fiona Johnston

Statistical Support
Invest NI - Corporate Information Team
fiona.johnston@investni.com
028 9069 8288

Eastern Region Overview

Invest NI's Eastern Regional Office works with local entrepreneurs, start-ups and established businesses across the Belfast City Council area, assisting them to develop and grow their businesses and works in partnership with stakeholders to drive economic development across the city.

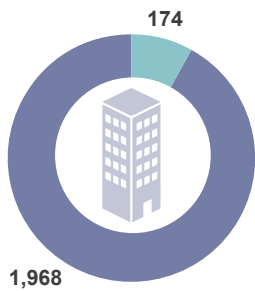
Eastern Invest NI Activity (2012-13 to 2016-17)

Over the five year period from 2012-13 to 2016-17, Invest NI has made **5,283** offers of support to **2,142** businesses located in the Eastern region. This support is valued at **£208.69m** and has contributed towards **£1,252.68m** of investment secured for the area, including the promotion of **14,743** new jobs.

The information below shows this support disaggregated by business ownership (locally-owned or externally-owned) and type of support.

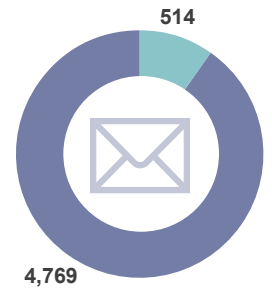
■ Locally-Owned Businesses
■ Externally-Owned Businesses

No. of Businesses = 2,142



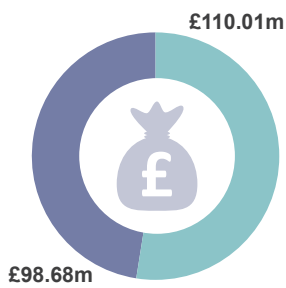
Year	Locally-Owned Businesses	Externally-Owned Businesses
2016-17	379	40
2015-16	505	56
2014-15	779	79
2013-14	704	63
2012-13	541	65

No. of Offers = 5,283



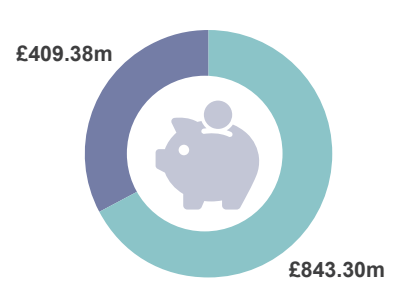
Year	Locally-Owned Businesses	Externally-Owned Businesses
2016-17	766	71
2015-16	800	89
2014-15	1,137	143
2013-14	1,117	98
2012-13	949	113

Total Support = £208.69m



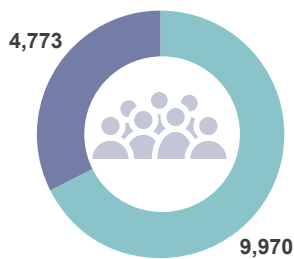
Year	Locally-Owned Businesses (£m)	Externally-Owned Businesses (£m)
2016-17	23.58	10.78
2015-16	13.11	8.07
2014-15	23.23	47.00
2013-14	23.88	26.76
2012-13	14.89	17.40

Total Investment = £1,252.68m



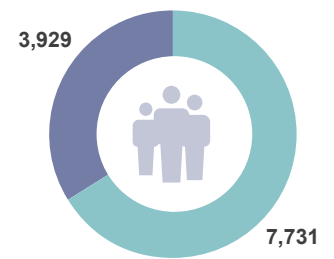
Year	Locally-Owned Businesses (£m)	Externally-Owned Businesses (£m)
2016-17	89.12	65.56
2015-16	48.16	61.93
2014-15	112.75	326.87
2013-14	110.92	258.58
2012-13	48.43	130.36

Jobs Promoted = 14,743



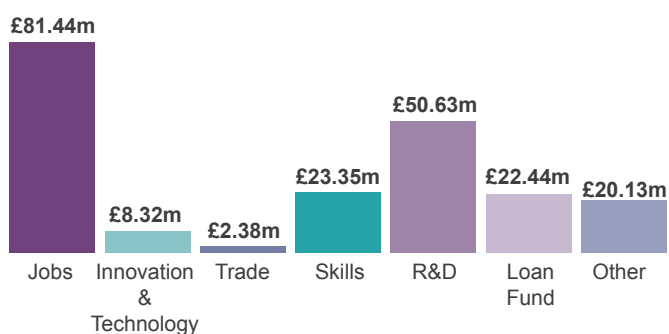
Year	Locally-Owned Businesses	Externally-Owned Businesses
2016-17	571	693
2015-16	433	805
2014-15	1,716	4,042
2013-14	1,373	3,181
2012-13	680	1,249

Jobs Created = 11,660



Year	Locally-Owned Businesses	Externally-Owned Businesses
2016-17	711	1,332
2015-16	406	2,458
2014-15	1,232	1,467
2013-14	938	1,151
2012-13	642	1,323

Type of Support



Notes

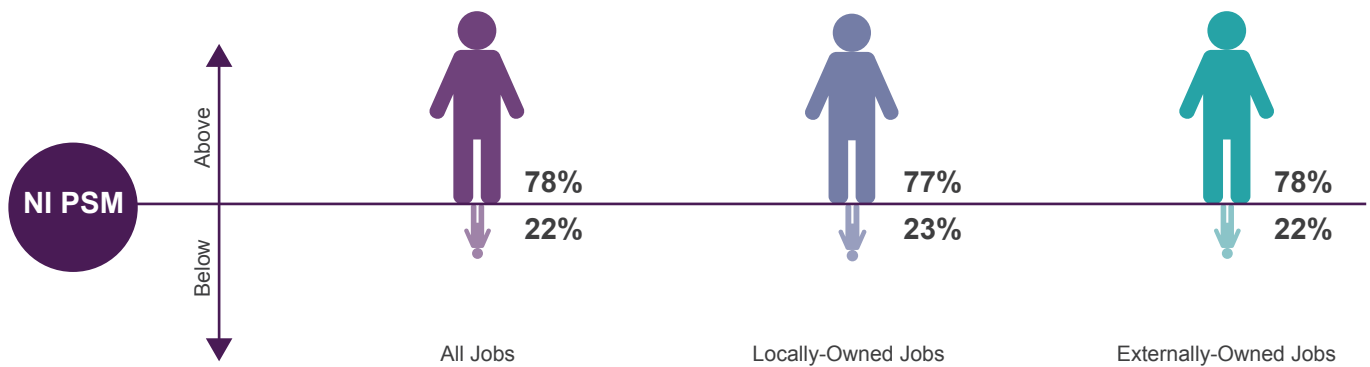
• Business totals may not add as a business can be supported in more than one year and can move from local to externally-owned during the 5 year period.

• Does not include **£110.22m** of support to External Delivery Organisations or universities, which contributes towards **£368.39m** of investment, as this benefits businesses across all of Northern Ireland.

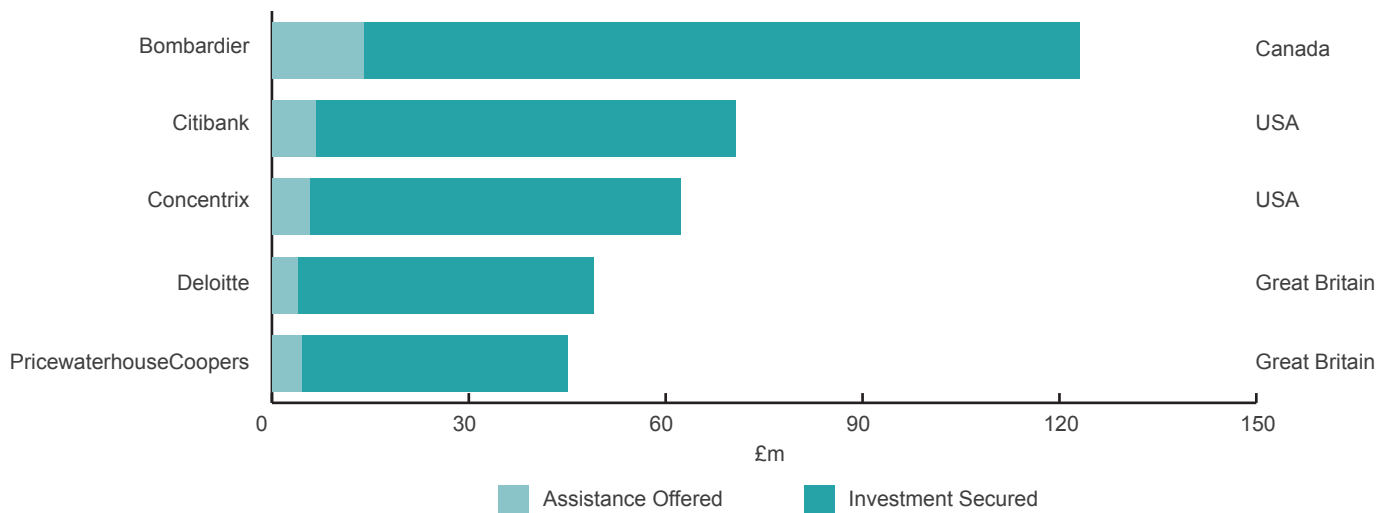
• 'Jobs Promoted' are those which are expected as a result of the implementation of a business plan. As this happens, they become 'Jobs Created'.

Jobs above NI Private Sector Median (PSM)

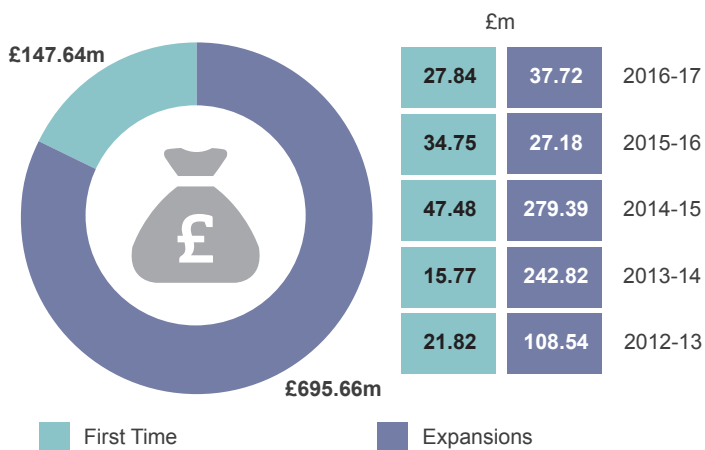
For specific projects Invest NI measures the quality of the jobs by the proportion of those jobs that attract salaries above the Northern Ireland PSM wage - the average annual wage for the private sector, which is **£20,800** for 2016.



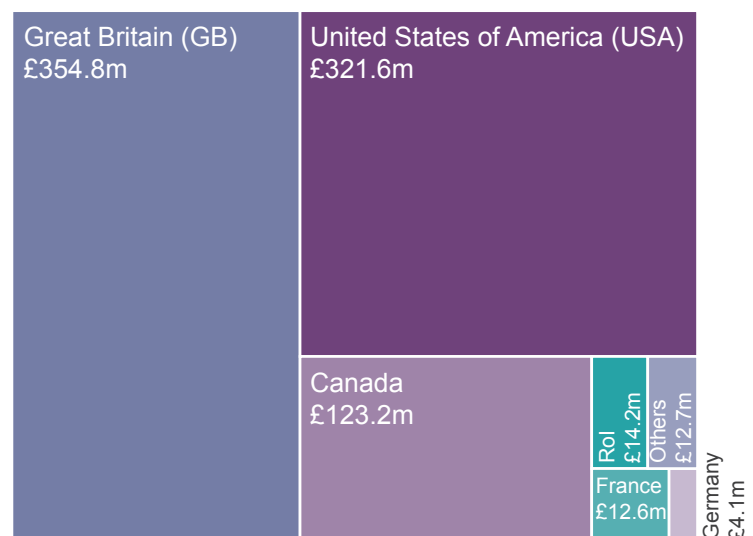
Top 5 Investors



Externally-Owned First Time Investment vs Existing Expansions



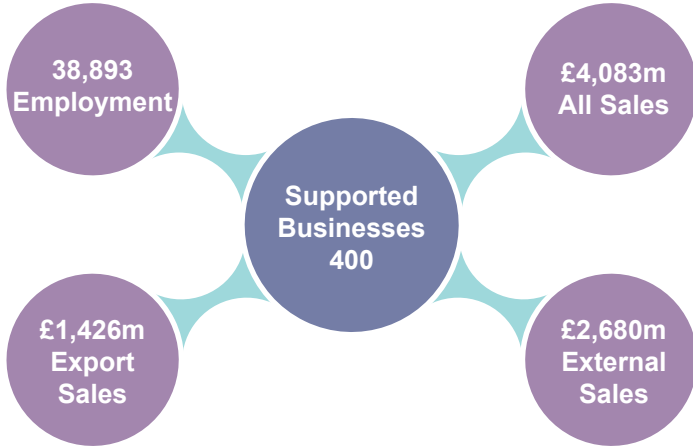
Externally-Owned Investment by Country



Total externally-owned investment secured was **£843.30m**. This is defined as investment in the area by businesses where at least 50% of ownership is based outside Northern Ireland. The figures include the support that Invest NI offers these businesses.

Eastern Invest NI Supported Businesses' Performance (2015)

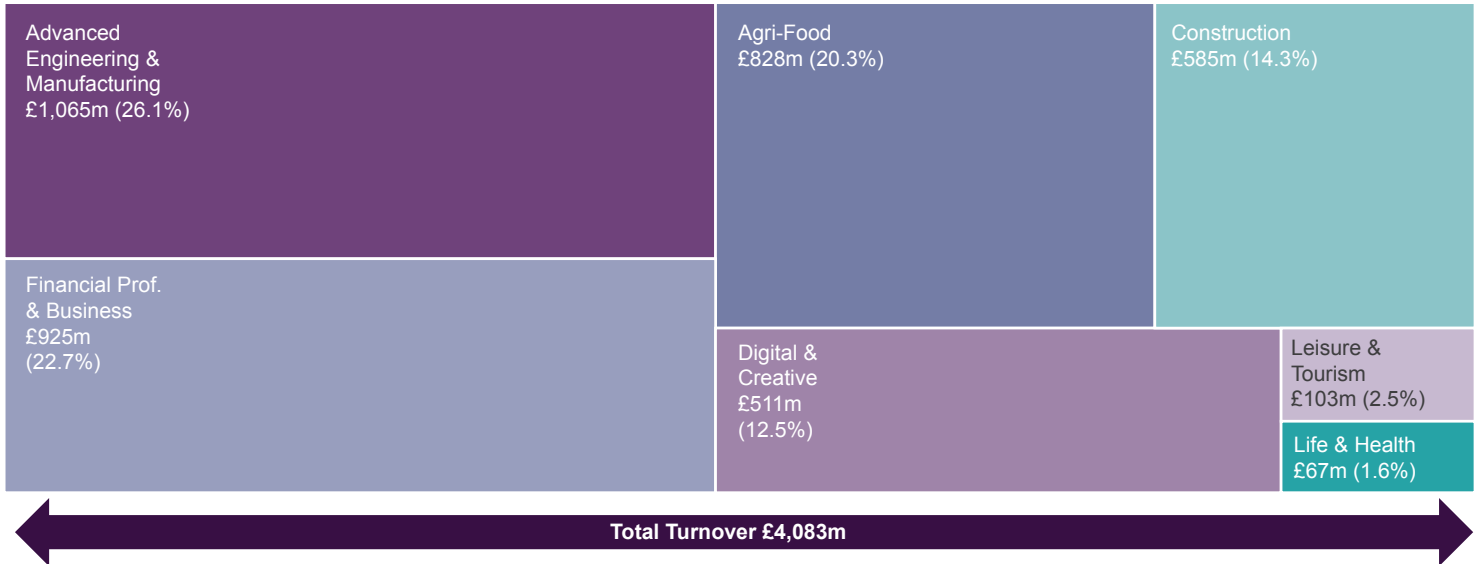
Key Performance Indicators (KPIs) are collected from a sub-set of Invest NI supported businesses with potential for growth through external markets. KPIs are geographically assigned based on the business' HQ location. These include all sales, external sales, exports and employment.



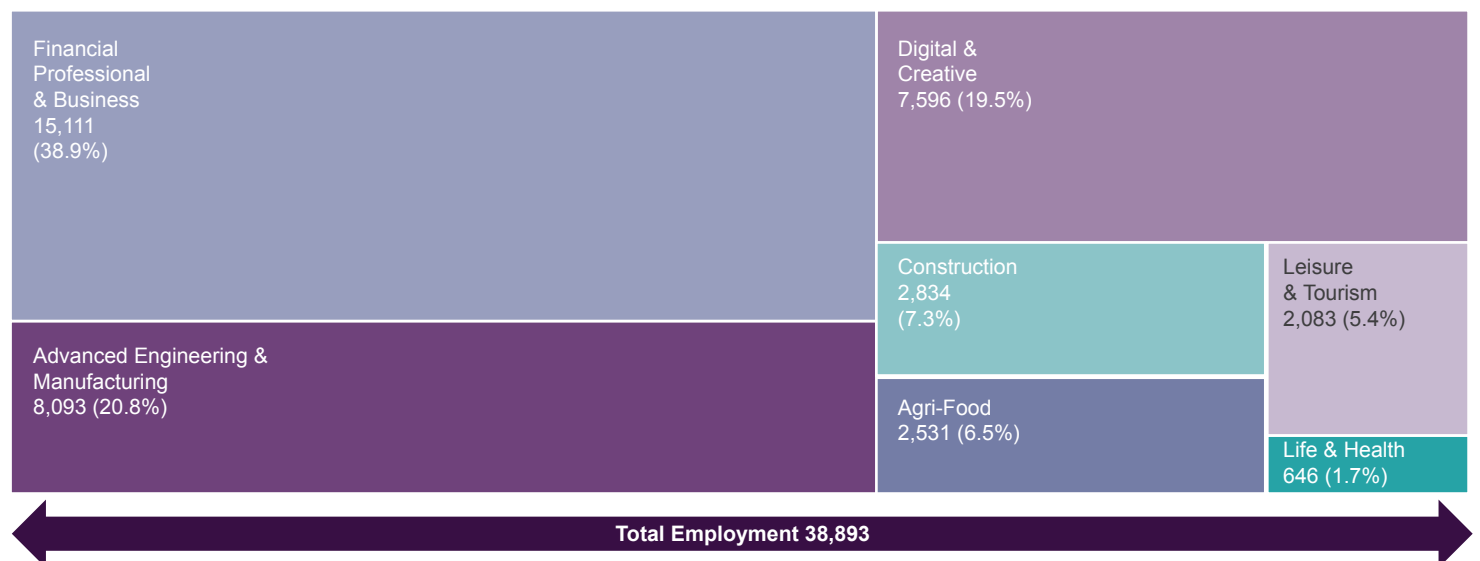
Per Employee Ratios		
	Eastern	All Invest NI Businesses
Sales per Employee	£104,978	£146,156
External Sales per Employee (Outside NI)	£68,913	£109,714
Export Sales per Employee (Outside UK)	£36,668	£52,704

Per employee ratios are provided to enable comparisons across all businesses in the Invest NI portfolio.

Turnover by Sector

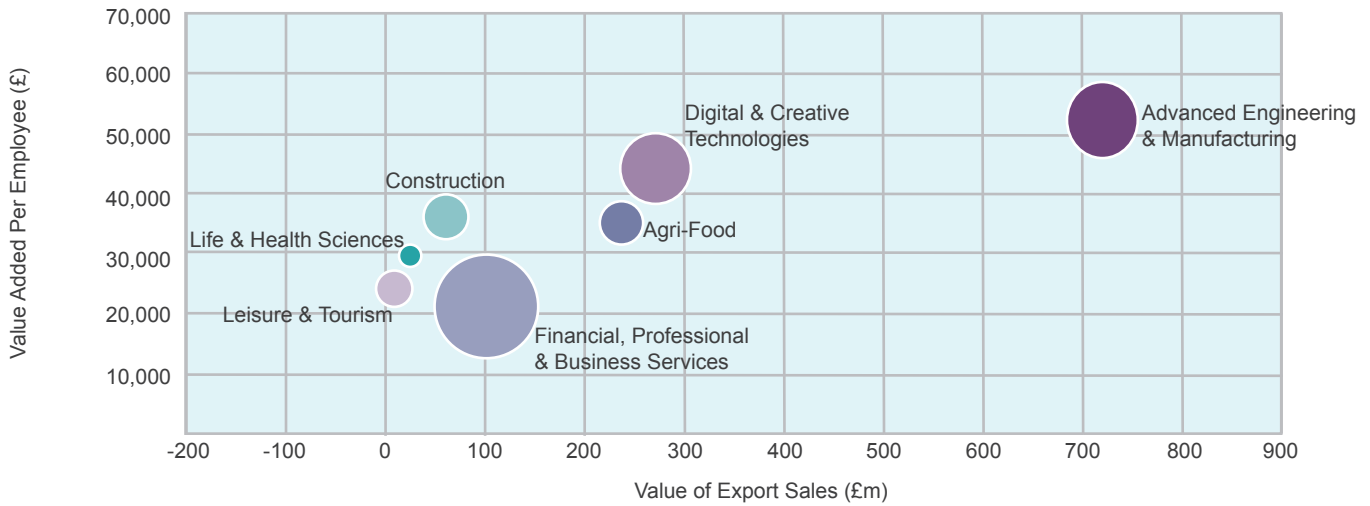


Employment by Sector



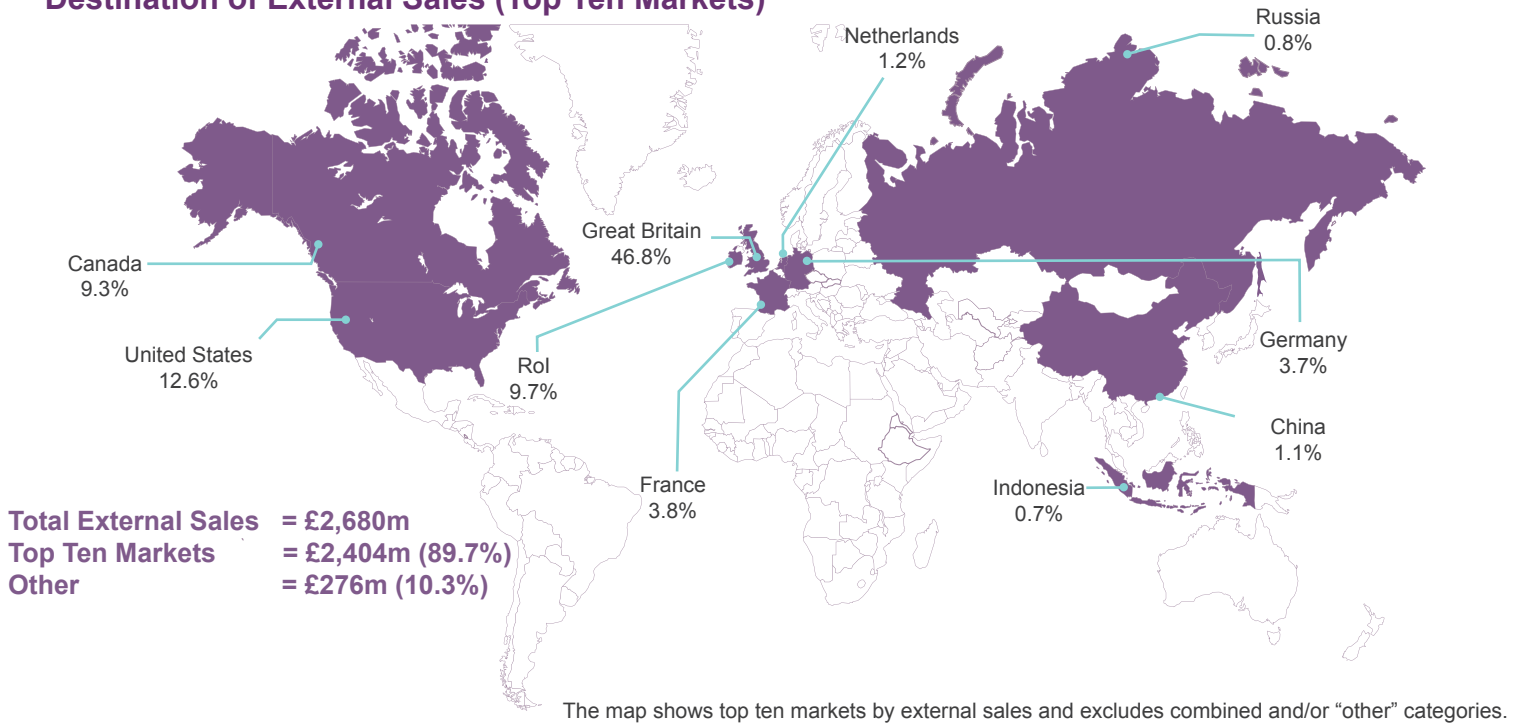
Sectors are classified according to Invest NI's sector reporting structure which is based on supported businesses' main product/service within Northern Ireland.

Relationship between Productivity, Exports & Employment

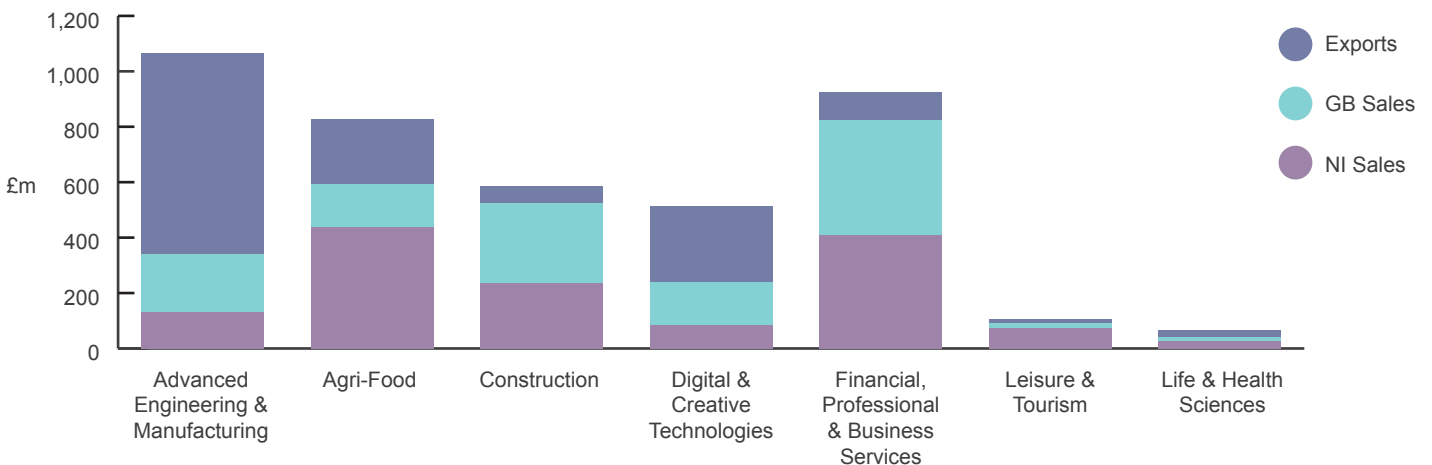


The chart represents the relationship between productivity (value added per employee), export sales and employment. The size of the bubble relates to the size of the sector in terms of employment.

Destination of External Sales (Top Ten Markets)



Breakdown of Sales by Sector



Eastern Economic Profile

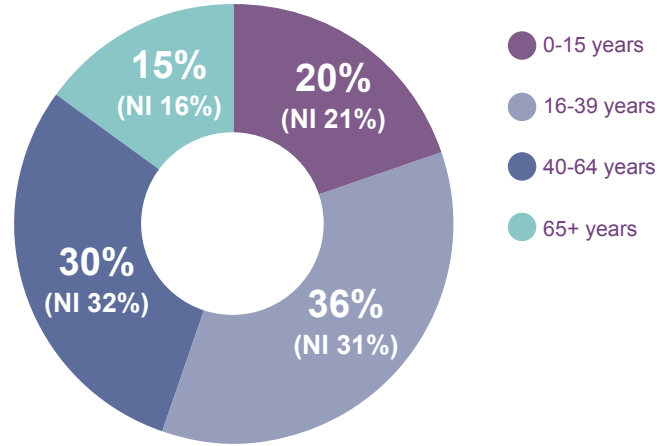
Population (2015)

Total Population
338,907



18% of total NI population

Population by Age



Source: Mid Year Population Estimates, NISRA

Labour Market Structure (2015)

Eastern



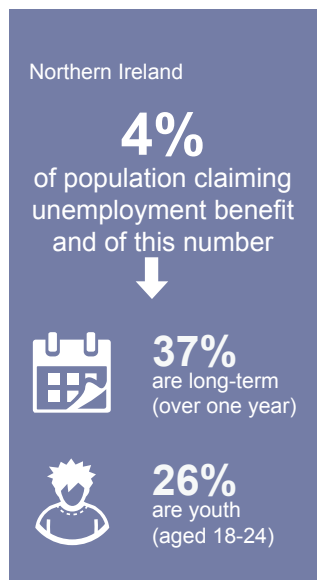
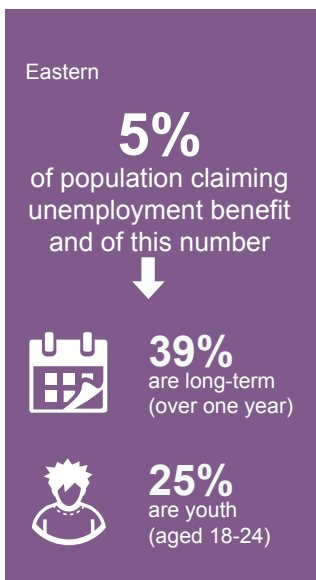
Northern Ireland



Source: Labour Force Survey, NISRA



Unemployment Claimants



Source: Claimant Count, NISRA

The labour market structure is composed of the economically active (people in employment and seeking work) and inactive (not seeking nor available for work). This data is provided through the Labour Force Survey (LFS), the largest regular household sample survey in Northern Ireland. **Total numbers in employment do not equate to total jobs as a person can have more than one job.**

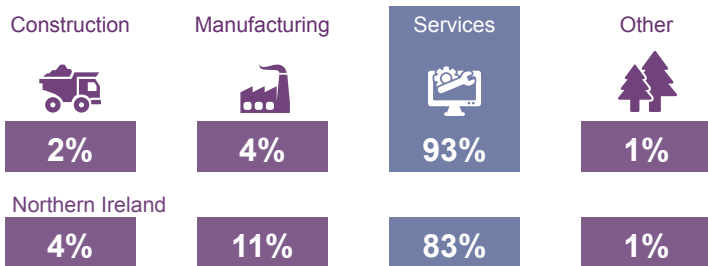
Unemployment annual averages data is derived from the Claimant Count as LFS figures fall below suppression thresholds. This is an administrative data source based on the numbers claiming unemployment-related benefits. It uses a different definition of unemployment to the LFS.

Both measures of the labour market are based on the working-age (16-64) population.

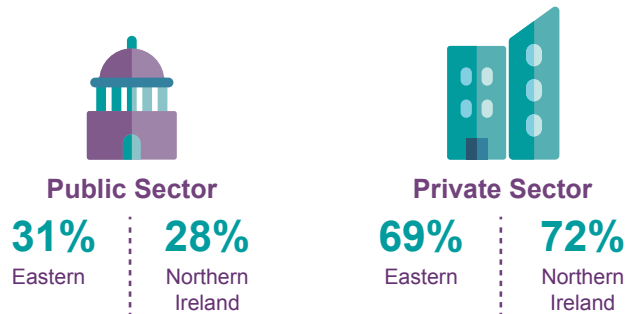
Employee Jobs (2015)

220,190 jobs within the region (31% of the Northern Ireland total)

Industry Sector



Public/Private Sector



The Business Register and Employment Survey is a business census which provides employee jobs estimates. **This is based on the location and number of jobs rather than the number of persons with a job; therefore someone with two jobs will be counted twice.** It excludes agriculture employee jobs and self-employed (not on a PAYE system).

Source: Business Register and Employment Survey, NISRA

Earnings (2015)

The median weekly earnings for Northern Ireland are **£389.8**

Place of Residence

Median weekly earnings based on people living in the area -

£420.6



Place of Work

Median weekly earnings based on people working in the area -

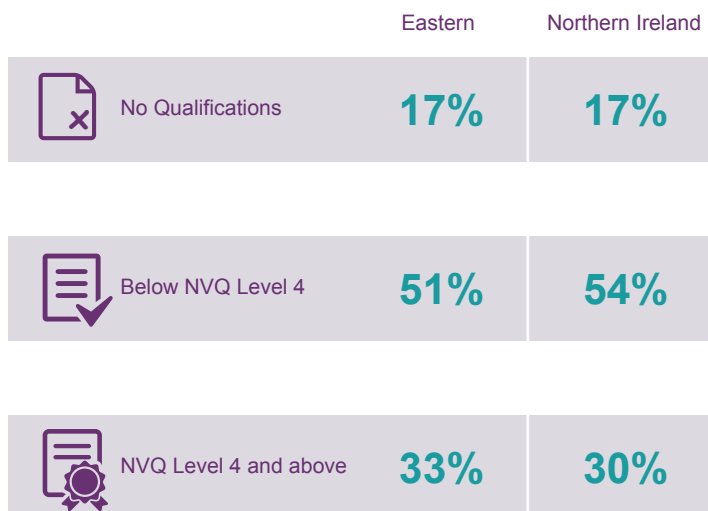
£471.7



Based on median, weekly, basic and other earnings for full-time employees (more than 30 hours per week) in the private sector.

Source: Annual Survey of Hours and Earnings, NISRA

Qualifications (2015)



This data is provided through the Labour Force Survey (LFS) which is a household survey and includes a measure of qualifications, based on the working-age population (16-64), using the following classification:

- No Qualifications
- Below NVQ Level 4 (Level 1 to Level 3)
- NVQ Level 4 and above (degree level and above)

Source: Labour Force Survey, NISRA

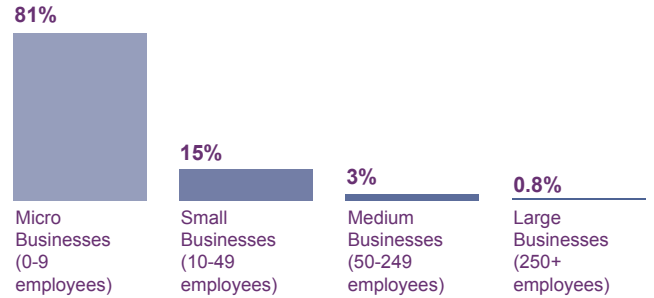
Business Base (2015)

The business population is defined here by the Inter Departmental Business Register which excludes smaller businesses and the self-employed who fall below the VAT registered/PAYE thresholds.

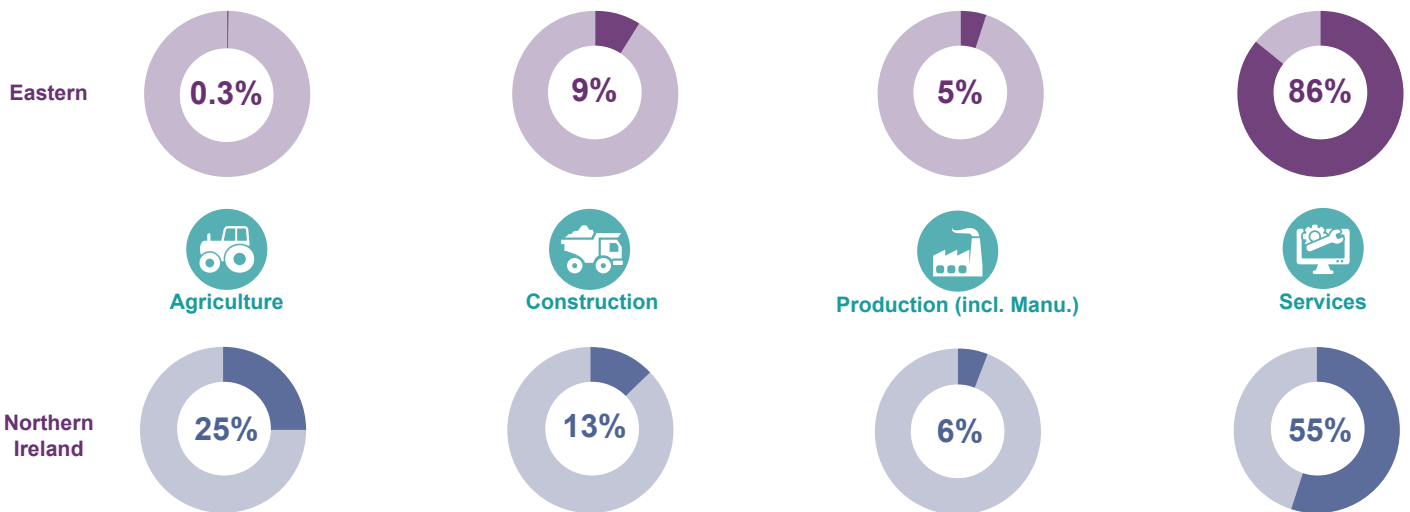
Number of Registered Businesses



Businesses by Size

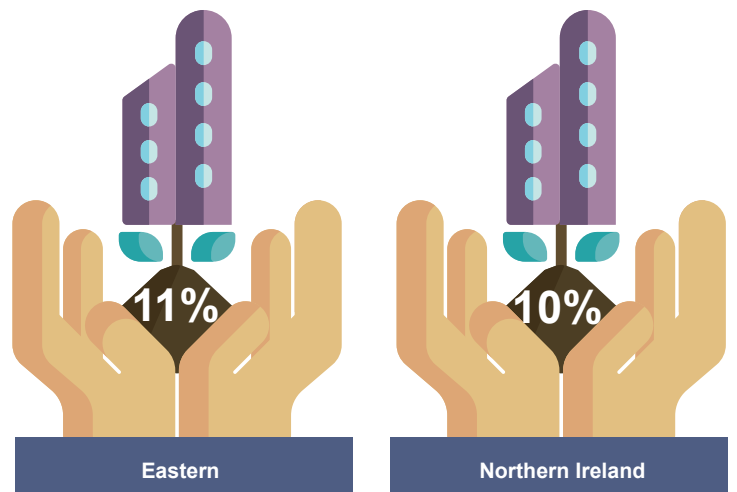


Businesses by Sector



Business Births

A business birth is identified as a business that was present in the latest annual active business population dataset, but not the two previous ones. The birth rate is expressed as a percentage of total active enterprises in the current year. Business demography data excludes the agriculture sector.



Source: Inter Departmental Business Register, NISRA

Productivity Work-Place Based (2014)

Productivity is based on the approximate Gross Value Added (aGVA) generated by the non-financial business economy (and excludes public sector). This is measured by the Northern Ireland Annual Business Inquiry based on income, less cost of goods and services used to create this income.

Per head calculations are made using total in employment, rather than the resident population as this can be subject to distortion (due to the effects of commuting and variations in age distribution).

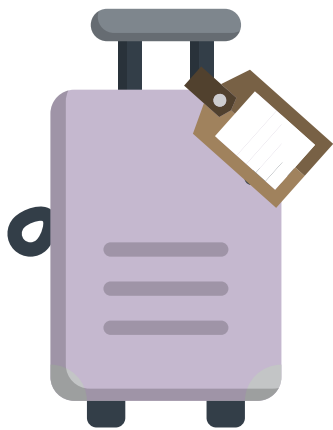


Source: Northern Ireland Annual Business Inquiry, NISRA

Tourism

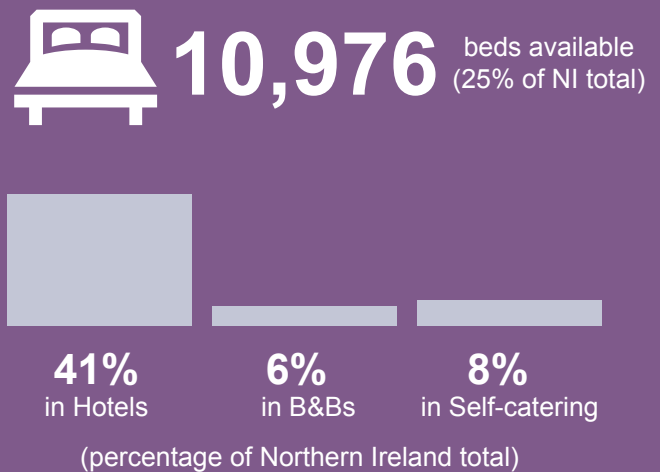
A variety of statistics are used to provide a picture of tourism. These include: passenger and household surveys which measure the number of overnight trips and associated expenditure; occupancy surveys of local hotels and commercial accommodation and the Visitor Attraction Survey.

Overnight Trips & Associated Spend (2015)



1.4m overnight trips to the Eastern Region (29% of NI total) resulting in **£278m** expenditure (37% of NI total)

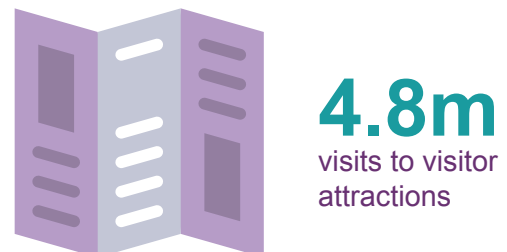
Availability of Accommodation (2015)



Tourism Jobs (2015)



Visitor Attractions (2015)



The most popular visitor attractions in 2015 were:-

Lagan Valley Regional Park	1,285,963
Titanic Belfast	621,521
Ulster Museum	464,762

Source: Tourism Statistics, NISRA

Eastern Sector Focus

Financial, Professional & Business Services

Belfast is a globally-renowned, low-risk, cost competitive location offering a high-quality and skilled workforce with proven experience in delivering services to international clients. Shared services, knowledge services and customer contact support is provided in a range of specialisms. These include customer service, technical/IT support, finance and accounting, legal services and HR. Key investors include Concentrix, Deloitte, Convergys and EY, many of which have re-invested and extended their operations.

The financial services sector in particular has seen significant growth in the city over the last few years. World-leading organisations based here include Citibank, Allstate NI and Liberty IT who provide specialist services in areas such as asset management, risk and analytics, legal services and shared services/technology support.

Recent investments include London-based Tullett Prebon and FinTru, which recently announced plans to re-invest in Belfast.



Digital & Creative Technologies

Belfast is currently witnessing significant growth in studio space offering a mixture of cutting-edge purpose-built studios and alternative build space. The newly developed Belfast Harbour Studios adds a further two state-of-the-art, purpose-built sound stages to complement the existing Titanic Studios and Britvic facilities.

In 2016, HBO's Game of Thrones returned to Northern Ireland for the seventh consecutive year. Other major studio productions include Universal Pictures' Dracula Untold and the continued success of the BBC drama The Fall (now in Series 3).

The city is also supported by a number of highly successful digital media, e-commerce, e-learning and animation businesses such as Mammoth, Export Technologies, Aurion Learning, Jam Media and Sixteen South.

The cyber-security sector presents a significant growth opportunity for the city. The success of the sector is being led by the Centre of Secure Information Technologies (CSIT) - the UK's largest cyber security research centre. CSIT's expertise has been recognised by Government Communications Headquarters and the Centre already has an excellent track record of spin-outs including Seven Technologies and Titan IC Systems.

Recent cyber-security investments include Anomali, White Hat and Rapid 7 from the US. Local successes include Rep Knight, which has made Tech UK's 'Future Fifty', and Titan IC Systems being named as one of the UK's hottest tech companies.



Advanced Engineering & Manufacturing

Belfast's rich heritage of advanced engineering companies began with Harland and Wolff in 1861 and continues today through the work of companies such as Bombardier, which produces the wings for its C-Series plane at its East Belfast plant. Bombardier accounts for a significant proportion of Northern Ireland exports and, through its supply chain, supports many other specialist engineering companies across both Belfast and Northern Ireland.

Other major engineering and manufacturing exporters include Thales, which provides advanced air defence solutions, RFD Beaufort which manufactures marine and aerospace survival systems and Huhtamaki Foodservice Delta Ltd which produces packaging solutions for many of the world's leading food and retail brands.

BOMBARDIER
the evolution of mobility

THALES

RFD **Huhtamaki**

Life & Health Sciences

The life and health sciences sector is strategically important to the Northern Ireland economy and is identified as one of the priority Northern Ireland knowledge-based growth sectors. Belfast is home to several Centres of Excellence such as the Centre for Cancer Research and Cell Biology facility at Queens University Belfast. This Centre has revolutionised cancer research and is currently engaged a £13m partnership with Almac to develop the ground-breaking new cancer drug ALM201.

Belfast is also home to several leading businesses, particularly in the fields of medical devices, precision medicine and health and well-being, including Kainos, HeartSine, Path XL and Fusion Antibodies.

pathxl

kainos

fusion
antibodies
from genes to proteins to antibodies

HeartSine

Leisure & Tourism

Belfast continues to be a major draw for tourists. In the past decade the Crumlin Road Gaol and the Ulster Museum have undergone significant refurbishment, while new attractions such as the MAC theatre, W5 and Titanic Belfast have proven massively popular with locals and tourists alike.

Titanic Belfast was named "World's Leading Tourist Attraction" at the prestigious World Travel Awards in 2016. It is an architectural triumph for the city and houses the world's largest Titanic visitor exhibition.

Within the last year Belfast Waterfront hall has expanded and now offers 7,000 meters square of purpose-built conference facility, which can deliver a brand new event experience for up to 5,000 delegates.



Eastern Economic Development Partners

Department for the Economy

DfE is responsible for, among other areas, economic policy development and aims to transform Northern Ireland into an innovative and globally competitive economy.

Invest NI

Invest NI works in partnership across Northern Ireland to support business development, increase productivity and export levels, attract inward investment and stimulate a culture of entrepreneurship and innovation. Invest NI offers financial support, tailored guidance, training and information. A free information service is available at: nibusinessinfo.co.uk

Chamber of Commerce

NI Chamber of Commerce and Industry is the network for business in Northern Ireland, enabling members to grow their organisation both locally and internationally and drive the development of the economy. There are local branches throughout Northern Ireland

Enterprise Agencies

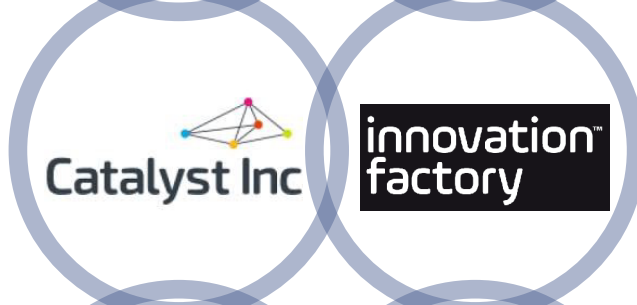
These agencies work with entrepreneurs helping them to set up their business in Northern Ireland, enabling them to grow and develop and providing support to established businesses through loan funding, trade support and premises.

Catalyst Inc

Catalyst Inc is home to a range of knowledge-based enterprises and research centres (including QUB's ECIT & CSIT) and has developed an entrepreneurial ecosystem which fosters innovation and actively encourages and facilitates collaboration.

NI Screen

NI Screen's purpose is to accelerate the development of a dynamic and sustainable screen industry and culture in NI.



Department for Communities

DfC responsibilities include urban regeneration, community and voluntary sector development and training and support for jobseekers and employers. It aims to bring communities together, tackle disadvantage and promote equality of opportunity.

Council

Among the many other functions councils control they now also provide a continuum of support to enable local economic development. Their programmes focus on starting a business, youth and social entrepreneurship, women in business and neighbourhood renewal.

Tourism Agencies

Both Tourism NI and Tourism Ireland are responsible for development and marketing to build the value of tourism to the local economy.

InterTradelreland

InterTradelreland helps SMEs across the island by offering practical cross-border business funding, intelligence and contacts.

The Innovation Factory

The Innovation Factory is the newest business community in Belfast and is already attracting national and international talent. The centre can provide flexible business space and wrap-around support for up to 100 businesses.

University & College

Belfast's universities are home to several internationally recognised research centres and are heavily focused on the commercial exploitation of R&D and development of spin-outs. BMC is the largest and longest established college in Northern Ireland and its e3 campus in West Belfast is dedicated to enterprise, employability and economic development.

Appendices



Data Tables

Population, 2015

Council or Region	Age Band 0-15	Age Band 0-15 %	Age Band 16-39	Age Band 16-39 %	Age Band 40-64	Age Band 40-64 %	Age Band 65+	Age Band 65+ %	All Population	All (% NI Population)
Antrim & Newtownabbey	29,484	21%	43,109	31%	45,495	32%	22,379	16%	140,467	8%
Ards & North Down	29,801	19%	43,239	27%	54,094	34%	31,663	20%	158,797	9%
Armagh, Banbridge & Craigavon	46,040	22%	65,286	31%	65,490	32%	30,981	15%	207,797	11%
Belfast	66,581	20%	122,942	36%	100,076	30%	49,308	15%	338,907	18%
Causeway Coast & Glens	28,506	20%	42,613	30%	47,597	33%	24,432	17%	143,148	8%
Derry & Strabane	32,745	22%	47,838	32%	47,955	32%	20,935	14%	149,473	8%
Fermanagh & Omagh	24,909	22%	34,679	30%	37,567	33%	18,156	16%	115,311	6%
Lisburn & Castlereagh	28,053	20%	41,571	30%	46,942	33%	23,639	17%	140,205	8%
Mid & East Antrim	26,224	19%	39,352	29%	46,711	34%	24,858	18%	137,145	7%
Mid Ulster	33,123	23%	47,646	33%	43,621	30%	19,612	14%	144,002	8%
Newry, Mourne & Down	39,734	23%	54,841	31%	55,933	32%	25,861	15%	176,369	10%
Eastern	66,581	20%	122,942	36%	100,076	30%	49,308	15%	338,907	18%
North Eastern	55,708	20%	82,461	30%	92,206	33%	47,237	17%	277,612	15%
North Western	61,251	21%	90,451	31%	95,552	33%	45,367	16%	292,621	16%
Southern	97,588	21%	139,651	29%	156,969	33%	81,163	17%	475,371	26%
Western	104,072	22%	147,611	32%	146,678	31%	68,749	15%	467,110	25%
NI	385,200	21%	583,116	31%	591,481	32%	291,824	16%	1,851,621	100%

Labour Market Structure, 2015 (16-64 Working-Age Population)

Council or Region	Economically Active Number	Economically Active Rate	Economically Inactive Number	Economically Inactive Rate	Employment Number	Employment Rate	Self-Employed Number	Self-Employed Rate	Claimant Count Number	Claimant Count Rate	Claimant Count 18-24	Claimant Count 18-24 (% of total)	Claimant Count Over One Year	Claimant Count Over One Year (% of total)
Antrim & Newtownabbey	65,000	75%	21,000	25%	61,000	71%	6,000	10%	2,330	3%	645	28%	730	32%
Ards & North Down	73,000	78%	21,000	22%	69,000	74%	11,000	16%	2,965	3%	750	25%	1,085	37%
Armagh, Banbridge & Craigavon	98,000	74%	35,000	26%	93,000	69%	9,000	10%	3,825	3%	965	25%	1,265	33%
Belfast	154,000	70%	66,000	30%	146,000	66%	9,000	6%	10,852	5%	2,685	25%	4,130	39%
Causeway Coast & Glens	61,000	70%	26,000	30%	55,000	62%	7,000	13%	3,373	4%	905	27%	1,240	37%
Derry & Strabane	66,000	67%	32,000	33%	58,000	60%	7,000	13%	6,720	7%	1,705	26%	3,000	46%
Fermanagh & Omagh	56,000	77%	17,000	23%	54,000	74%	11,000	20%	2,490	3%	575	24%	910	38%
Lisburn & Castlereagh	66,000	77%	20,000	24%	62,000	72%	*	*	1,969	2%	555	28%	595	31%
Mid & East Antrim	64,000	77%	19,000	23%	61,000	74%	*	*	2,489	3%	655	27%	770	32%
Mid Ulster	68,000	73%	25,000	27%	64,000	69%	9,000	14%	2,244	3%	570	27%	555	26%
Newry, Mourne & Down	79,000	70%	33,000	30%	74,000	66%	16,000	22%	3,769	3%	920	25%	1,380	37%
Eastern	154,000	70%	66,000	30%	146,000	66%	9,000	6%	10,852	5%	2,685	25%	4,130	39%
North Eastern	129,000	76%	40,000	24%	122,000	72%	12,000	10%	4,819	3%	1,300	29%	1,500	34%
North Western	127,000	68%	59,000	32%	113,000	61%	14,000	13%	10,093	5%	2,610	26%	4,240	43%
Southern	217,000	75%	74,000	26%	206,000	71%	33,000	16%	8,703	3%	2,225	26%	3,060	35%
Western	223,000	74%	77,000	26%	210,000	70%	29,000	14%	8,559	3%	2,110	24%	2,730	32%
NI	850,000	73%	317,000	27%	798,000	68%	98,000	12%	43,024	4%	10,925	26%	15,655	37%

*Sample size too small for a reliable estimate.

Employee Jobs, 2015

Council or Region	All Jobs	% of All Northern Ireland Jobs	Construction	Construction %	Manufacturing	Manufacturing %	Services	Services %	Other	Other %	Public Sector	Private Sector
Antrim & Newtownabbey	55,937	8%	2,587	5%	7,370	13%	45,086	81%	894	2%	14,356 (26%)	41,581 (74%)
Ards & North Down	38,182	5%	1,200	3%	2,825	7%	33,834	89%	323	1%	9,250 (24%)	28,932 (76%)
Armagh, Banbridge & Craigavon	70,101	10%	3,356	5%	11,757	17%	53,851	77%	1,137	2%	18,748 (27%)	51,353 (73%)
Belfast	220,190	31%	4,481	2%	9,643	4%	203,933	93%	2,133	1%	69,283 (31%)	150,907 (69%)
Causeway Coast & Glens	39,552	6%	2,074	5%	3,654	9%	33,354	84%	470	1%	10,557 (27%)	28,995 (73%)
Derry & Strabane	53,630	7%	2,235	4%	5,092	9%	45,658	85%	645	1%	18,453 (34%)	35,177 (66%)
Fermanagh & Omagh	39,426	5%	2,724	7%	4,809	12%	31,085	79%	808	2%	12,485 (32%)	26,941 (68%)
Lisburn & Castlereagh	54,092	8%	2,813	5%	5,141	10%	45,599	84%	539	1%	17,692 (33%)	36,400 (67%)
Mid & East Antrim	43,498	6%	2,053	5%	9,173	21%	31,344	72%	928	2%	10,195 (23%)	33,303 (77%)
Mid Ulster	50,156	7%	4,425	9%	13,880	28%	30,969	62%	882	2%	9,571 (19%)	40,585 (81%)
Newry, Mourne & Down	52,341	7%	3,458	7%	6,669	13%	41,018	78%	1,196	2%	13,771 (26%)	38,570 (74%)
Eastern	220,190	31%	4,481	2%	9,643	4%	203,933	93%	2,133	1%	69,283 (31%)	150,907 (69%)
North Eastern	99,435	14%	4,640	5%	16,543	17%	76,430	77%	1,822	2%	24,551 (25%)	74,884 (75%)
North Western	93,182	13%	4,309	5%	8,746	9%	79,012	85%	1,115	1%	29,010 (31%)	64,172 (69%)
Southern	144,615	20%	7,471	5%	14,635	10%	120,451	83%	2,058	1%	40,713 (28%)	103,902 (72%)
Western	159,683	22%	10,505	7%	30,446	19%	115,905	73%	2,827	2%	40,804 (26%)	118,879 (74%)
NI	717,105	100%	31,406	4%	80,013	11%	595,731	83%	9,955	1%	204,361 (28%)	512,744 (72%)

Earnings (Basic and Other, Full-Time, Private Sector), 2015 and Qualifications, 2015 and Productivity, 2014

Council or Region	Median Weekly Earnings Place of Residence	Median Weekly Earnings Place of Work	No Qualifications	Qualifications Below NVQ Level 4	Qualifications NVQ Level 4 and above	Productivity Gross Value Added per Head Workplace
Antrim & Newtownabbey	£399.9	£408.5	16,000 (19%)	43,000 (51%)	25,000 (30%)	£39,148
Ards & North Down	£440.0	£390.4	10,000 (11%)	49,000 (53%)	32,000 (35%)	£25,849
Armagh, Banbridge & Craigavon	£364.6	£357.4	24,000 (18%)	76,000 (58%)	32,000 (24%)	£34,178
Belfast	£420.6	£471.7	36,000 (17%)	109,000 (51%)	70,000 (33%)	£37,594
Causeway Coast & Glens	£340.8	£316.2	16,000 (18%)	53,000 (60%)	19,000 (22%)	£27,475
Derry & Strabane	£336.0	£340.0	20,000 (21%)	49,000 (51%)	27,000 (28%)	£30,351
Fermanagh & Omagh	£372.8	£372.8	11,000 (15%)	42,000 (59%)	19,000 (27%)	£33,130
Lisburn & Castlereagh	£458.3	£380.2	8,000 (10%)	40,000 (49%)	34,000 (41%)	£31,118
Mid & East Antrim	£392.3	£383.5	13,000 (17%)	47,000 (58%)	21,000 (26%)	£63,274
Mid Ulster	£365.0	£355.7	17,000 (20%)	48,000 (54%)	24,000 (27%)	£38,469
Newry, Mourne & Down	£384.6	£373.7	16,000 (14%)	57,000 (52%)	38,000 (34%)	£33,663
Eastern	£420.6	£471.7	36,000 (17%)	109,000 (51%)	70,000 (33%)	£37,594
North Eastern	£397.5	£395.7	29,000 (18%)	90,000 (54%)	46,000 (28%)	£49,459
North Western	£340.0	£325.6	36,000 (20%)	101,000 (55%)	46,000 (25%)	£29,065
Southern	£427.3	£380.8	34,000 (12%)	146,000 (51%)	104,000 (37%)	£30,711
Western	£364.7	£359.1	52,000 (18%)	166,000 (57%)	75,000 (26%)	£35,436
NI	£389.8	£389.8	188,000 (17%)	613,000 (54%)	342,000 (30%)	£36,392

Business Base, 2015

Council or Region	Number of Businesses	All (% NI Population)	Micro (0-9 employees)	Micro (0-9 employees) %	Small (10-49 employees)	Small (10-49 employees) %	Medium (50-249 employees)	Medium (50-249 employees) %	Large (250+ employees)	Large (250+ employees) %
Antrim & Newtownabbey	3,685	5%	3,175	86%	430	12%	65	2%	15	0.4%
Ards & North Down	4,285	6%	3,795	89%	430	10%	50	1%	10	0.2%
Armagh, Banbridge & Craigavon	7,770	11%	6,975	90%	665	9%	105	1%	20	0.2%
Belfast	9,015	13%	7,260	81%	1,375	15%	300	3%	75	0.8%
Causeway Coast & Glens	5,460	8%	4,955	91%	430	8%	65	1%	5	0.1%
Derry & Strabane	4,570	7%	4,045	89%	455	10%	60	1%	10	0.2%
Fermanagh & Omagh	7,310	11%	6,845	94%	385	5%	60	1%	10	0.1%
Lisburn & Castlereagh	4,315	6%	3,770	87%	460	11%	70	2%	10	0.2%
Mid & East Antrim	4,505	7%	4,065	90%	375	8%	55	1%	0	0.0%
Mid Ulster	7,950	12%	7,285	92%	550	7%	105	1%	5	0.1%
Newry, Mourne & Down	7,615	11%	6,930	91%	585	8%	95	1%	5	0.1%
Eastern	9,015	13%	7,260	81%	1,375	15%	300	3%	75	0.8%
North Eastern	8,190	12%	7,240	88%	805	10%	120	1%	15	0.2%
North Western	10,030	15%	9,000	90%	885	9%	125	1%	15	0.1%
Southern	16,215	24%	14,495	89%	1,475	9%	215	1%	25	0.2%
Western	23,030	34%	21,105	92%	1,600	7%	270	1%	35	0.2%
NI	68,085	100%	60,085	88%	6,485	10%	1,225	2%	295	0.4%

Business Base, 2015

Council or Region	Agriculture	Agriculture %	Construction	Construction %	Production (incl Manufacturing)	Production (incl Manufacturing) %	Services	Services %	Business Births	Business Birth Rate
Antrim & Newtownabbey	670	18%	510	14%	280	8%	2,220	60%	300	9%
Ards & North Down	585	14%	555	13%	295	7%	2,855	67%	395	9%
Armagh, Banbridge & Craigavon	2,305	30%	1,025	13%	495	6%	3,945	51%	605	10%
Belfast	30	0.3%	815	9%	425	5%	7,755	86%	1,165	11%
Causeway Coast & Glens	1,865	34%	800	15%	275	5%	2,510	46%	380	9%
Derry & Strabane	1,180	26%	655	14%	290	6%	2,445	54%	455	12%
Fermanagh & Omagh	3,405	47%	880	12%	380	5%	2,645	36%	390	9%
Lisburn & Castlereagh	630	15%	615	14%	325	8%	2,735	63%	395	10%
Mid & East Antrim	1,345	30%	540	12%	315	7%	2,295	51%	300	9%
Mid Ulster	2,950	37%	1,295	16%	720	9%	2,990	38%	495	9%
Newry, Mourne & Down	2,145	28%	1,215	16%	485	6%	3,775	50%	560	9%
Eastern	30	0.3%	815	9%	425	5%	7,755	86%	1,165	11%
North Eastern	2,015	25%	1,050	13%	595	7%	4,515	55%	600	9%
North Western	3,045	30%	1,455	15%	565	6%	4,955	49%	835	10%
Southern	3,360	21%	2,385	15%	1,105	7%	9,365	58%	1,350	9%
Western	8,660	38%	3,200	14%	1,595	7%	9,580	42%	1,490	9%
NI	17,255	25%	8,975	13%	4,380	6%	37,475	55%	5,440	10%

Tourism, 2015

Council or Region	Overnight Trips	Overnight Trips (% of NI Total)	Associated Spend During Overnight Trips (£)	Associated Spend During Overnight Trips (% of NI Total)	Total Number of Beds Available	Total Number of Beds Available %	Total Number of Hotel Beds 2015 %	Total Number of B&B Beds %	Total Number of Self-Catering Beds %	Tourism Jobs (2015)	Tourism Jobs (% All Jobs 2015)
Antrim & Newtownabbey	204,290	4%	£34,164,529	4%	3,384	8%	7%	3%	2%	4,197	8%
Ards & North Down	376,755	8%	£51,013,302	7%	1,878	4%	3%	6%	5%	4,954	13%
Armagh, Banbridge & Craigavon	149,449	3%	£22,476,581	3%	1,173	3%	3%	6%	2%	4,266	6%
Belfast	1,361,193	29%	£278,034,119	37%	10,976	25%	41%	6%	8%	18,607	8%
Causeway Coast & Glens	911,388	20%	£136,770,965	18%	10,285	24%	11%	33%	46%	4,823	12%
Derry & Strabane	223,172	5%	£42,502,028	6%	3,349	8%	9%	10%	4%	4,685	9%
Fermanagh & Omagh	341,051	7%	£54,585,277	7%	4,079	9%	6%	10%	16%	3,524	9%
Lisburn & Castlereagh	130,924	3%	£24,910,212	3%	1,072	2%	3%	3%	2%	3,806	7%
Mid & East Antrim	382,224	8%	£45,628,631	6%	1,947	4%	6%	8%	3%	3,959	9%
Mid Ulster	155,708	3%	£22,285,891	3%	1,189	3%	3%	3%	2%	3,489	7%
Newry, Mourne & Down	404,442	9%	£47,736,730	6%	4,283	10%	7%	13%	10%	4,953	9%
Eastern	1,361,193	29%	£278,034,119	37%	10,976	25%	41%	6%	8%	18,607	8%
North Eastern	586,514	13%	£79,793,159	10%	5,331	12%	13%	11%	5%	8,156	8%
North Western	1,134,560	24%	£179,272,993	24%	13,634	31%	20%	43%	50%	9,508	10%
Southern	912,121	20%	£123,660,245	16%	7,233	17%	14%	21%	17%	13,713	9%
Western	646,208	14%	£99,347,748	13%	6,441	15%	12%	19%	20%	11,279	7%
NI	4,640,596	100%	£760,108,265	100%	43,615	100%	100%	100%	100%	61,263	9%

Notes

All Invest NI results are provisional and subject to revision as more up-to-date information becomes available. For NISRA datasets please refer to the original data source.

Invest NI Activity Data:

- Number of offers of support is greater than the number of businesses supported, as a business can receive more than one offer from Invest NI per annum.
- Total investment figures include the assistance offered by Invest NI.
- In addition to the support offered directly to businesses detailed in the briefing, Invest NI offered support indirectly to businesses through other organisations like universities and External Delivery Organisations (EDOs) that administered schemes on our behalf. This support will benefit business in all areas across Northern Ireland.
- 'Jobs Promoted' are those jobs which supported businesses expect to create in future years as a result of the implementation of a business plan. Promoted jobs become 'Jobs Created' as the business plan is implemented and the promoted jobs are filled. Jobs Created may relate to investments secured in earlier years. Therefore, it is not possible to directly compare the number of jobs promoted in a particular period with those that have been created during the same period.
- When measuring Job Quality, or the number of jobs above the Northern Ireland Private Sector Median (PSM), support schemes designed to boost employment over the short-term are not included. This is due to wage levels not being taken into account in the final funding decision.
- Externally-Owned First Time Investment refers to Greenfield investment in Northern Ireland by an externally-owned business that has not been assisted before. Externally-Owned Existing Expansions refers to investment by externally-owned businesses that already have a presence in Northern Ireland.

Economic Profile Data:

- Population estimates are based on the Mid-Year Population Estimates derived from the Report of the Registrar General as of the 30 June each year.
- Labour market structure is based on the Labour Force Survey (LFS) Local Area Database which is an annual database comprising four consecutive quarters of the LFS and facilitates extensive sub-regional analysis. The LFS is the largest regular household survey in Northern Ireland and provides a rich source of information on the labour force using internationally agreed concepts and definitions.
- Unemployment statistics are based on Claimant Count Annual Averages which is an administrative data source, derived from Jobs and Benefits Offices systems, and records the number of people aged 16-64 claiming Jobseeker's Allowance. Claimants must declare that they are out of work, capable of, available for and actively seeking work during the week in which their claim is made.
- Employee Jobs are collected through the Business Register and Employment Survey which is a survey of employers in Northern Ireland. The survey provides employee job estimates for Northern Ireland as a whole, split by four broad industries: Construction, Manufacturing, Services and 'Other'. The 'Other' category includes the following sectors: Animal Husbandry Services, Hunting, Trapping and Game Propagation, Forestry and Fishing; Mining and Quarrying; Electricity, Gas, Steam and Air Conditioning Supply; and Water Supply, Sewerage, Waste Management and Remediation Activities.

- Earnings data is provided through the Annual Survey of Hours and Earnings, a UK wide survey that provides data on hourly, weekly and annual earnings by gender, work patterns, industry and occupation, including public versus private sector pay comparisons. Basic and other pay includes: all basic pay, relating to the pay period, before deductions for PAYE, National Insurance, pension schemes, student loan repayments and voluntary deductions. This includes paid leave, maternity pay, sick pay and area allowances. It also includes, for example, car allowances paid through the payroll, on call and standby allowances, clothing, first aider or fire fighter allowances. It excludes pay for a different pay period, shift premium pay, bonus or incentive pay, overtime pay, expenses and the value of salary sacrifice schemes and benefits in kind.
- Qualifications data is based on the Labour Force Survey (LFS) Local Area Database which is an annual database comprising four consecutive quarters of the LFS and facilitates extensive sub-regional analysis.
- Business base and births information comes from the Inter-Department Business Register (IDBR) which is a central register containing information on all businesses in the UK which are VAT registered or operating a PAYE scheme. The Northern Ireland element of the register is maintained by NISRA. IDBR does not include very small businesses which are not VAT registered (the threshold for VAT in 2015/16 was £82,000) unless they operate a PAYE scheme.
- Productivity data comes from the Northern Ireland Annual Business Inquiry which is a key resource for measuring the size, performance and structure of the Northern Ireland non-financial business economy. It collects both financial and employment information from businesses and other establishments and covers about two-thirds of the economy. The survey covers the Production, Construction, Distribution and Service industries but it excludes public sector activity for the most part. Approximate Gross Value Added (aGVA) represents the income generated by businesses, out of which is paid wages and salaries, the cost of capital investment and financial charges before arriving at a figure for profit. It includes taxes on production (e.g. business rates), net of subsidies but excludes subsidies and taxes on products (e.g. VAT and excise duty). This is an output-based measure of aGVA and all published aGVA is given at basic prices.
- Tourism statistics use a series of measures to form a more complete picture of tourism within Northern Ireland. Two key measures of tourism are the number of overnight trips and the associated expenditure (based on passenger and household surveys). Other measures include rooms sold in commercial accommodation (monthly occupancy surveys), visitor attraction visits (annual Visitor Attraction Survey) and tourism employment (Business Register and Employment Survey). Local tourism can be impacted by initiatives from government, tourism agencies and events as well as the local film industry and the political and economic situation.

Data Sources

Population: Mid Year Population Estimates, 2015 (NISRA)

Labour Market: Labour Force Survey - Local Area Database, 2015 (NISRA)

Claimant Count: Claimant Count Tables, December 2016 (NISRA)

Jobs: Business Register and Employment Survey, 2015 (NISRA)

Earnings: Annual Survey of Hours and Earnings, 2015 (NISRA)

Qualifications: Labour Force Survey - Local Area Database, 2015 (NISRA)

Business Base: Inter Departmental Business Register, 2015 (NISRA)

Productivity: Northern Ireland Annual Business Inquiry, 2014 (NISRA)

Tourism: LGD Tourism Statistics, 2015 (NISRA)

If you would like further information
regarding this report please contact:

Corporate Information Team

E-Mail: CIT@investni.com

investni.com

corporate information