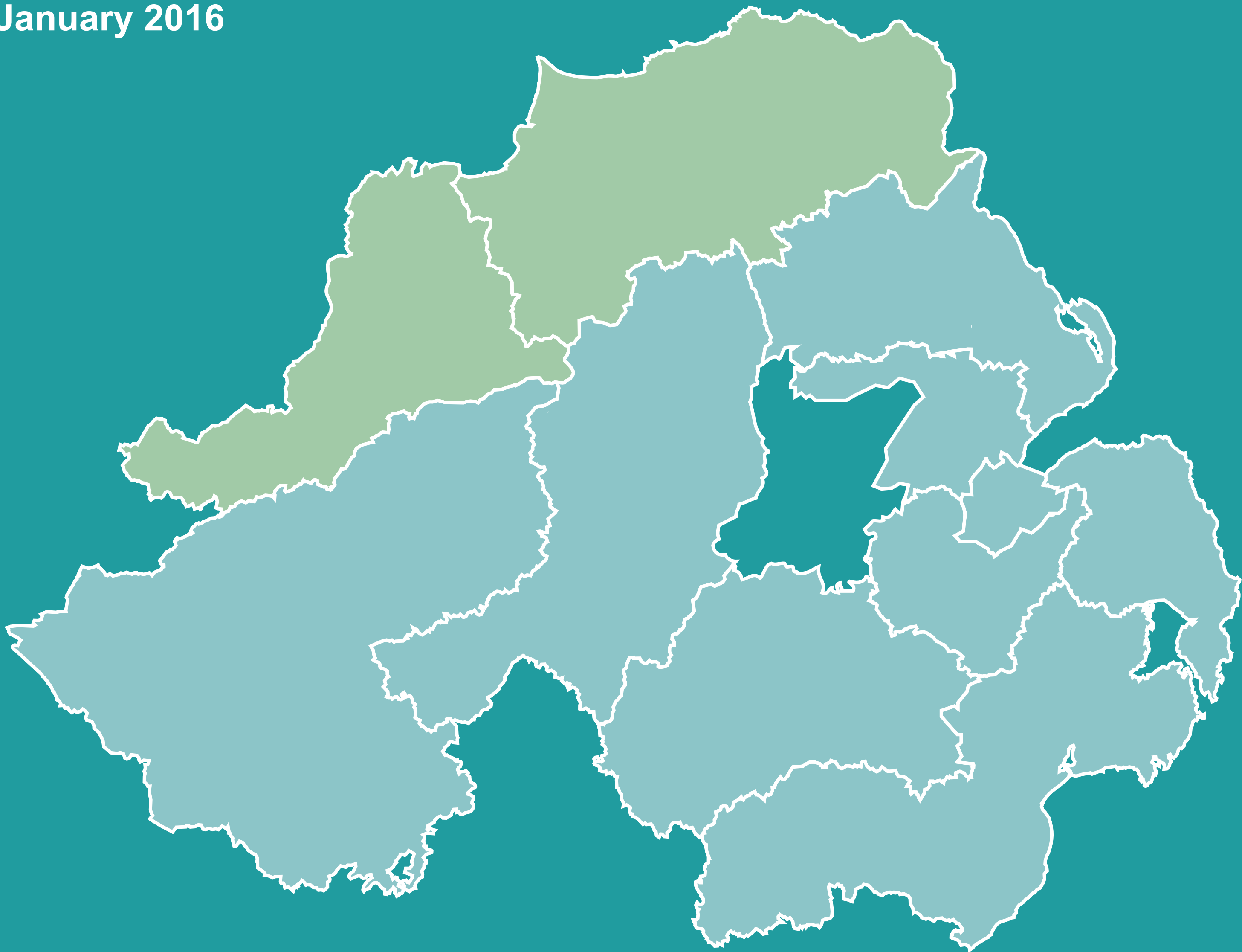
Invest Northern Ireland

North West Regional Briefing:

Causeway Coast & Glens and Derry & Strabane

January 2016



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corporate information

Background

Invest NI has produced sub-regional profiles based on groupings of Local Government District (LGD2014) administrative geographies (with the exception of the Belfast Regional Briefing which is based on Belfast LGD2014 only) to align with its regional office areas. These have been developed to inform and support the development of council-led community plans and sub-regional economic development strategies.

The profiles provide a concise overview of key metrics from a range of data sources including official statistics, published accounts, locational analysis, Invest NI corporate intelligence and localised understanding of economic assets. Areas covered include:

- demographic and labour market structure;
- business base, productivity, jobs, skills and earnings;
- commuting patterns, tourism impact and property availability;
- support and investment data;
- performance indicators and sectoral trends for Invest NI supported businesses; and
- regional assets, economic development partners and local supported businesses.

The information contained in this briefing has been compiled from a range of sources and as such there may be some differences in the numbers relating to similar metrics.

The profiles will be updated on an annual basis and can be used as a baseline to assess change over time. An interactive database resource will also be made available to allow easy access to the underlying data and enable trend and comparative analysis. For further information please contact:

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Contents

Section A - Statistical Context
Population 2
Labour Market 2
Claimant Count 2
Business Base - Overview 3
Business Base - Locational Analysis 4
Productivity 4
Entrepreneurship 5
Jobs 5
Earnings 6
Travel to Work 6
Skills 6

Section B - Invest NI Data
Support and Investment Data 7
Total Inward Investment 8
Support for Jobs 9
Jobs by Business Size 9
Key Performance Indicators 10

Section C - Regional Assets
Overview 12

Annexes
Northern Ireland Councils: Economic Development Functions 15
North West Economic Development Partners 16
Key Invest NI Businesses in the Region 17
Jobs - Detailed Analysis 18
Travel to Work Detailed Breakdown 19
Sector Information for all Invest NI Businesses 20
Council Level Comparative Data 21
UK Regional Comparisons 23
North West Tourism Factsheets 24
Invest NI Property Availabililty 26
Data Sources 27

Section A - Statistical Context

The **North West (NW)** region is based on the following administrative geographies: **Causeway Coast & Glens (CC&G)** and **Derry & Strabane (D&S)**. These align with the following local government areas: **Causeway Coast & Glens Borough Council** and **Derry City & Strabane District Council**.

Population (2014)

The **North West** region accounts for **16%** of the total Northern Ireland population.

Population by Age Band

	Age Band 0-15	Age Band 16-39	Age Band 40-64	Age Band 65+	All (% NI Population)
NW	61,185 (21%)	90,932 (31%)	95,256 (33%)	44,128 (15%)	291,501 (16%)
- CC&G	28,419 (20%)	42,667 (30%)	47,434 (33%)	23,783 (17%)	142,303 (8%)
- D&S	32,766 (22%)	48,265 (32%)	47,822 (32%)	20,345 (14%)	149,198 (8%)
NI	383,783 (21%)	582,615 (32%)	588,184 (32%)	285,916 (16%)	1,840,498

Labour Market (2014)

The Labour Force Survey provides information on the labour market structure for the **North West**.

Labour Market Structure (16-64 Population)

	Economically Inactive (%)	Economically Active (%)	Employment (%)
NW*	58,000 (31%)	132,000 (71%)	116,000 (62%)
- CC&G	25,000 (27%)	66,000 (73%)	60,000 (66%)
- D&S	33,000 (33%)	66,000 (67%)	56,000 (57%)
NI	320,000 (28%)	844,000 (72%)	789,000 (68%)

North West totals are based on rounded sub-totals.

†Sample size too small for a reliable estimate.

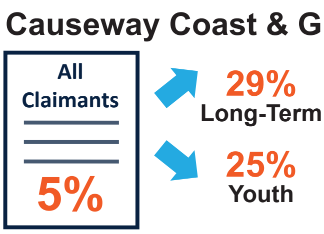
Claimant Count (2014)

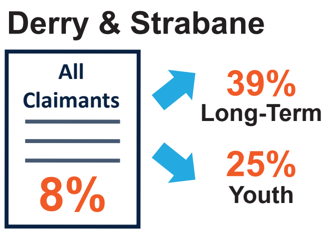
Claimant count annual averages measure those claiming unemployment-related benefits (Job Seekers Allowance).

Claimant Count by Age Band and Duration (16-64 Population)

	Number*	Annual Change	18-24**	25-49**	50+**	Over 6 Months**	Over Year**
NW	11,797 (6%)	-10%	2,890 (24%)	6,520 (55%)	2,100 (18%)	6,715 (57%)	4,115 (35%)
- CC&G	4,110 (5%)	-18%	1,035 (25%)	2,275 (56%)	775 (19%)	2,145 (53%)	1,200 (29%)
- D&S	7,687 (8%)	-4%	1,855 (25%)	4,245 (57%)	1,325 (18%)	4,570 (62%)	2,915 (39%)
NI	54,101 (5%)	-14%	13,270 (25%)	29,345 (55%)	10,425 (20%)	29,385 (55%)	18,135 (34%)

**Overall number includes clerical claimants (< 2% of total) which cannot be processed centrally and are excluded from sub-categories.*
***Sub-categories are based on rounded data.*





Business Base - Overview (2014)

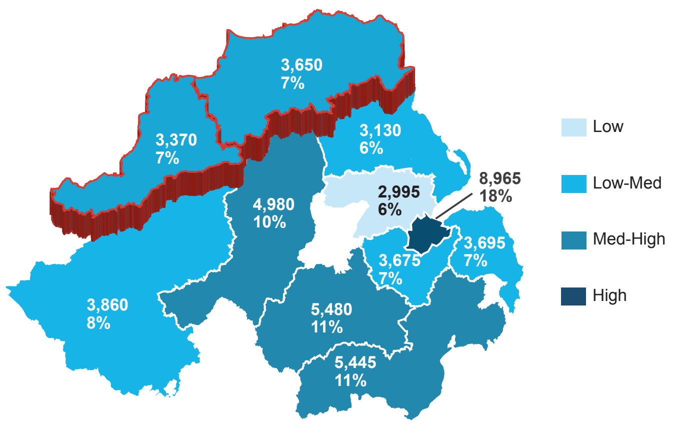
Business population is defined here by the Inter-Departmental Business Register (IDBR): this excludes smaller businesses/self-employed which fall below the VAT registered/PAYE scheme thresholds. There were **10,015** businesses in the **North West** which represents **15%** of the total business population.

Number of Businesses by Broad Industry Group

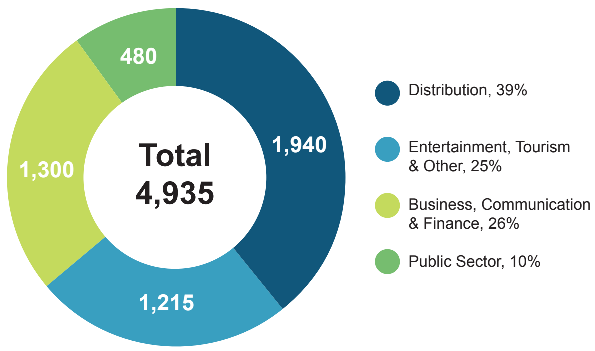
	Agriculture	Production including Manufacturing	Construction	Distribution Services†	Other Services‡	All	Per Head
NW*	2,995 (30%)	575 (6%)	1,500 (15%)	1,940 (19%)	2,995 (30%)	10,015	0.034
- CC&G**	1,840 (34%)	295 (5%)	840 (15%)	1,030 (19%)	1,485 (27%)	5,490	0.039
- D&S**	1,155 (26%)	280 (6%)	660 (15%)	910 (20%)	1,510 (33%)	4,525	0.030
NI	16,955 (25%)	4,310 (6%)	9,170 (14%)	14,045 (21%)	23,220 (34%)	67,710	0.037

**North West totals are based on rounded sub-totals.*
***Sector sub-totals may not sum to totals due to rounding.*
†Distribution Services includes Motor Trades, Wholesale, Retail, Transport & Storage.
‡Other Services includes Health, Education, Entertainment, Tourism & Finance.

Number of Businesses by Council Area (excluding Agriculture)



Number of Businesses within the Service Industry - North West

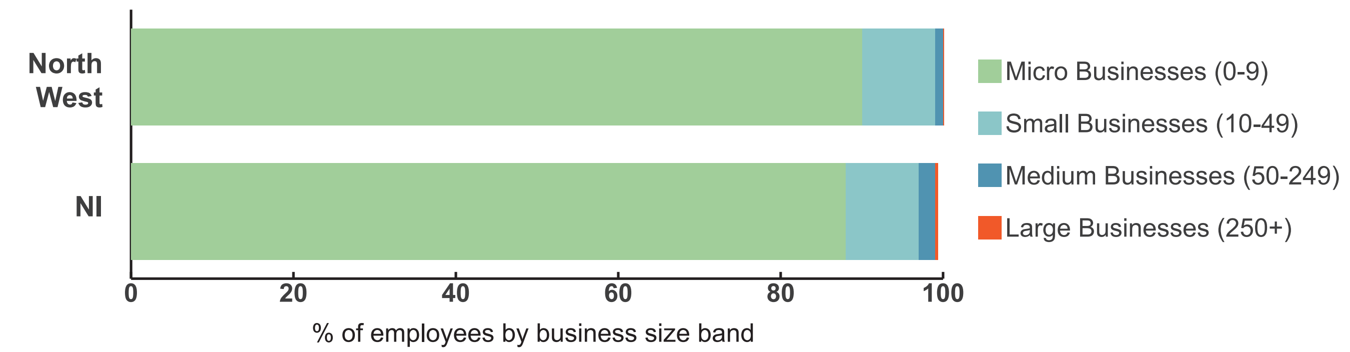


Number of Businesses by Size

	Micro (0-9)	Small (10-49)	Medium (50-249)	Large (250+)	All
NW*	9,015 (90%)	865 (9%)	115 (1%)	15 (0.1%)	10,015
- CC&G**	4,990 (91%)	435 (8%)	60 (1%)	5 (0.1%)	5,490
- D&S**	4,025 (89%)	430 (10%)	55 (1%)	10 (0.2%)	4,525
NI	59,835 (88%)	6,375 (9%)	1,210 (2%)	290 (0.4%)	67,710

**North West totals are based on rounded sub-totals.*
***Size band sub-totals may not sum to totals due to rounding.*

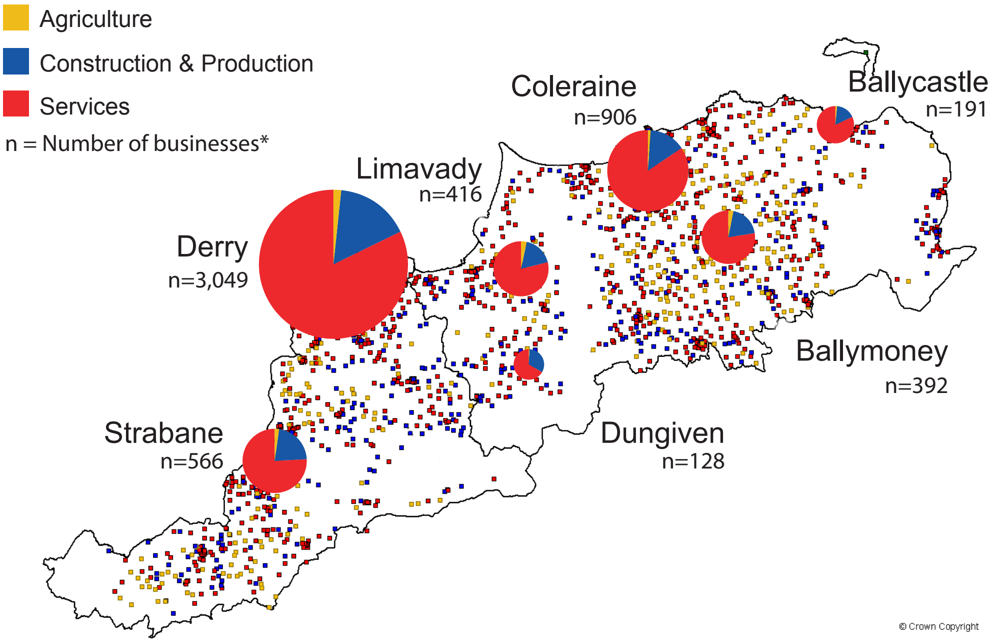
Employment by Business Size Band



Business Base - Locational Analysis (2014)

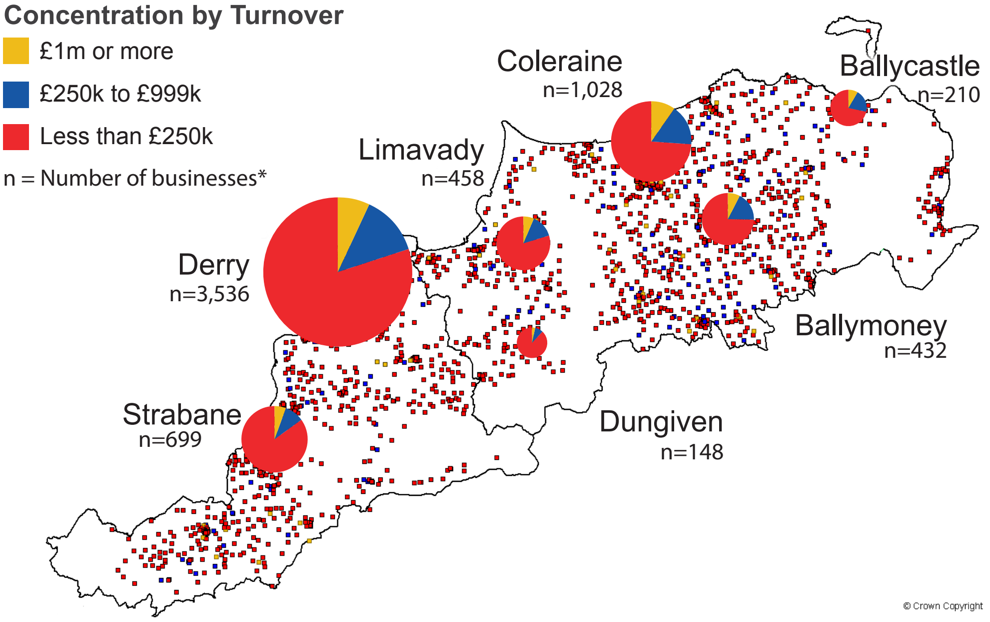
Business population is defined here by all businesses registered at Companies House; this excludes smaller businesses/self-employed not required to publish accounts. Data is available at postcode level and the map below is based on c. **10,600** businesses assigned within the **North West**. Businesses without industrial classifications are also included within the total population.

Business Concentration by Sector



The pie-charts are based on a sub-set of businesses based within major population centres.

Business Concentration by Turnover



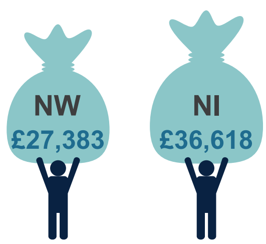
**Difference in overall totals are due to non-assignment of some business to specific sectors.*

Productivity (2013)

Business population is defined here by the Annual Business Inquiry which only covers the non-financial business economy and excludes Financial/Public Services sectors. Productivity is based on Gross Value Added approximate (GVAa) at basic prices.

GVA Per Head (Work-Place Based)

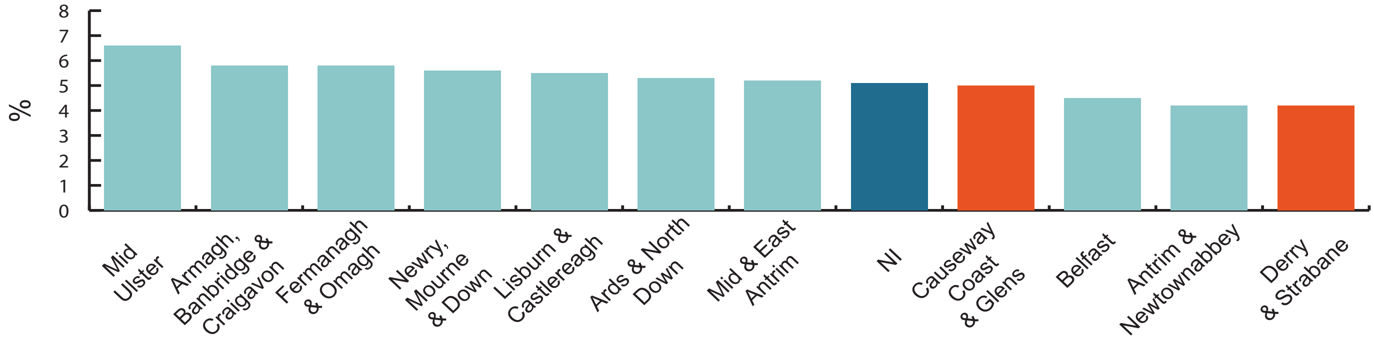
	GVA Per Head
NW	£27,383
- CC&G	£25,206
- D&S	£29,099
NI	£36,618



Entrepreneurship (2014)

The Global Entrepreneurship Monitor measures entrepreneurial activity, attitudes and aspirations. Total Entrepreneurial Activity (TEA) includes those people in the process of business formation and those who have recently started a business. Average TEA rates across Northern Ireland are based on grouped data from **2003-2014** (due to small sample size).

TEA Rates 2003-2014 (18-64 Population)



Jobs (2013)

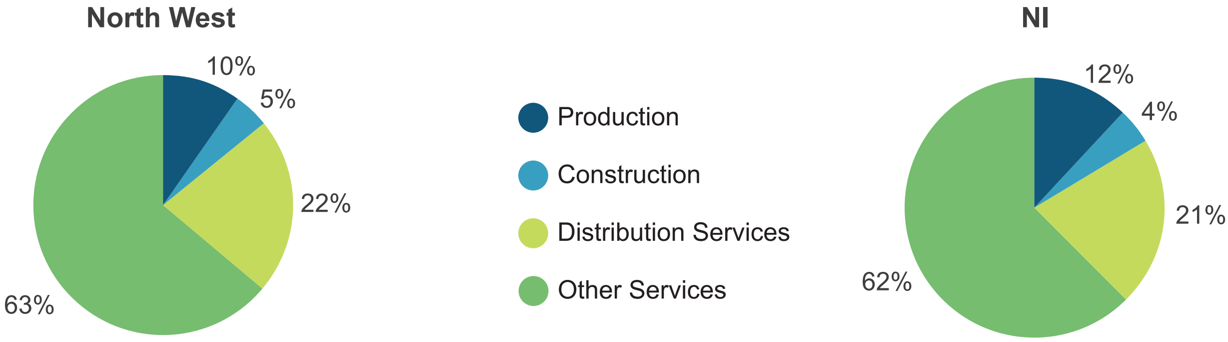
The Census of Employment measures the number of actual jobs rather than number of persons with jobs and excludes the self-employed. Sub-NI analysis does not report on agricultural labour.

Employee Jobs by Sector

	Production including Manufacturing		Construction		Distribution Services**		Other Services†		Other‡		All
NW*	8,826	(10%)	4,047	(5%)	19,634	(22%)	56,853	(63%)	62	(0.1%)	89,586
- CC&G*	3,804	(10%)	2,150	(5%)	9,101	(23%)	24,189	(61%)	0*	(0%)	39,333
- D&S*	5,022	(10%)	1,897	(4%)	10,533	(21%)	32,664	(65%)	62	(0.1%)	50,253
NI	83,915	(12%)	29,382	(4%)	146,924	(21%)	430,465	(62%)	815	(0.1%)	691,501

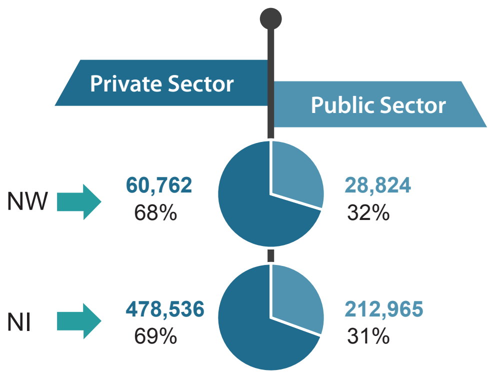
**Sector groupings include supressed cells.*
***Distribution Services includes Motor Trades, Wholesale, Retail, Transport & Storage.*
†Other Services includes Health, Education, Entertainment, Tourism & Finance.
‡Other excludes Agriculture but includes Animal Husbandry Service Activities, Hunting, Trapping and Game Propagation.

Employee Jobs by Sector (excluding 'Other')



Public/Private Sector Employment

	Private		Public		All
NW	60,762	(68%)	28,824	(32%)	89,586
- CC&G	27,364	(70%)	11,969	(30%)	39,333
- D&S	33,398	(66%)	16,855	(34%)	50,253
NI	478,536	(69%)	212,965	(31%)	691,501

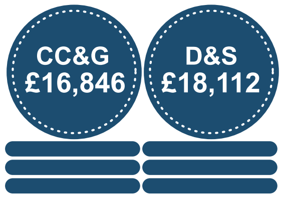


Earnings (2014)

The Annual Survey of Hours and Earnings measures earnings for employees covered by PAYE schemes. The table below shows the difference in earnings by place of work and place of residence. Median gross earnings include basic pay, overtime pay, commissions, shift premium pay, bonus or incentive pay and allowances.

Earnings by Work and Residence (Full-Time, Private Sector)

	Median Gross Weekly Earnings (Place of Work)	Median Gross Weekly Earnings (Place of Residence)	Median Gross Annual Earnings (Place of Work)	Median Gross Annual Earnings (Place of Residence)
NW*				
- CC&G	£329.8	£377.6	£16,846	£19,690
- D&S	£329.4	£329.4	£18,112	£17,407
NI	£405.1	£405.1	£21,345	£21,345

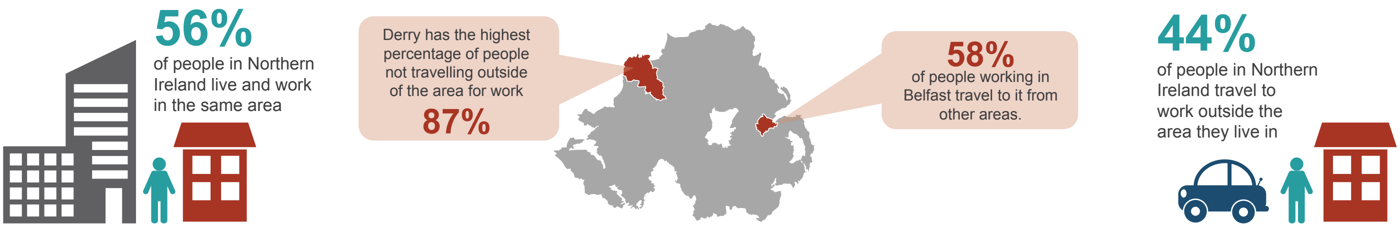


Median Annual Earnings (Place of Work)

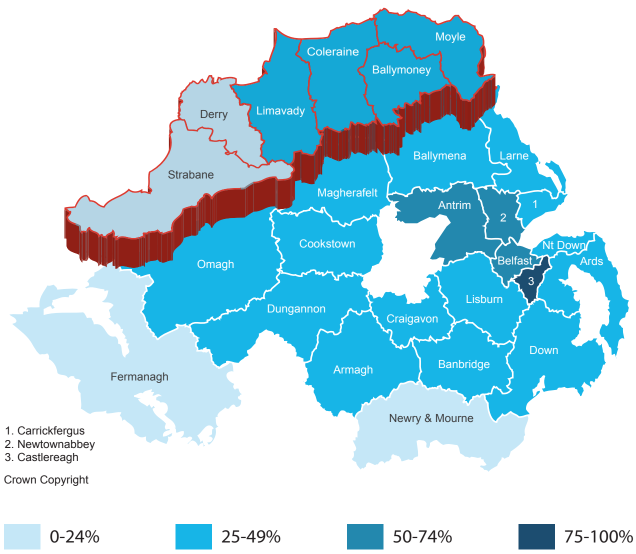
Data not available aggregated to regional totals.
Weekly and annual figures are based on different samples and time periods (annual earnings are from the 2013/14 tax year and weekly from the paid period which includes 22nd April 2014).

Travel to Work (2011)

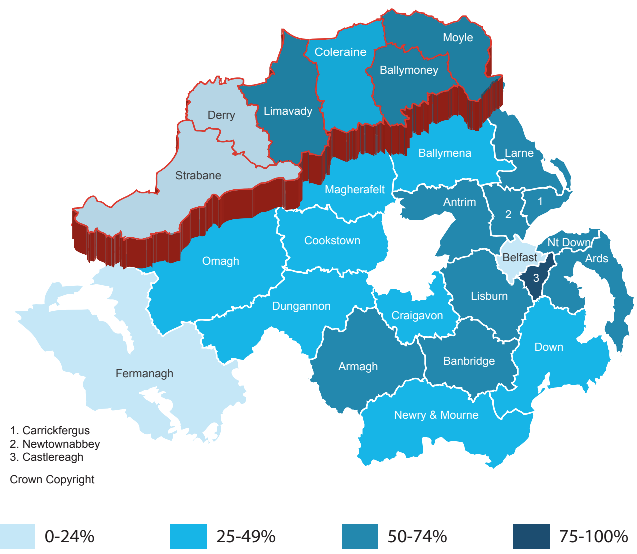
The Census 2011 provides Travel to Work data - this is currently only available at the pre-LGD14 council boundaries.



% of people who work in an area but live elsewhere



% of people who live in an area but work elsewhere



Skills (2014)

The Labour Force Survey measures qualifications ranging from none to NVQ L4 (degree level and above).

Qualification Levels (16-64 Population)

	No Qualifications	Below NVQ L4	Above NVQ L4	All
NW*	39,000 (21%)	107,000 (57%)	42,000 (22%)	189,000
- CC&G**	18,000 (20%)	52,000 (58%)	20,000 (22%)	91,000
- D&S**	21,000 (22%)	55,000 (56%)	22,000 (22%)	98,000
NI	199,000 (17%)	606,000 (53%)	339,000 (30%)	1,144,000

**North West totals are based on rounded sub-totals.*
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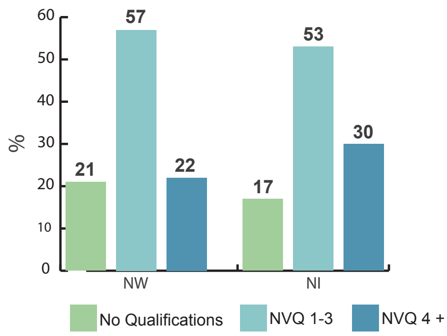
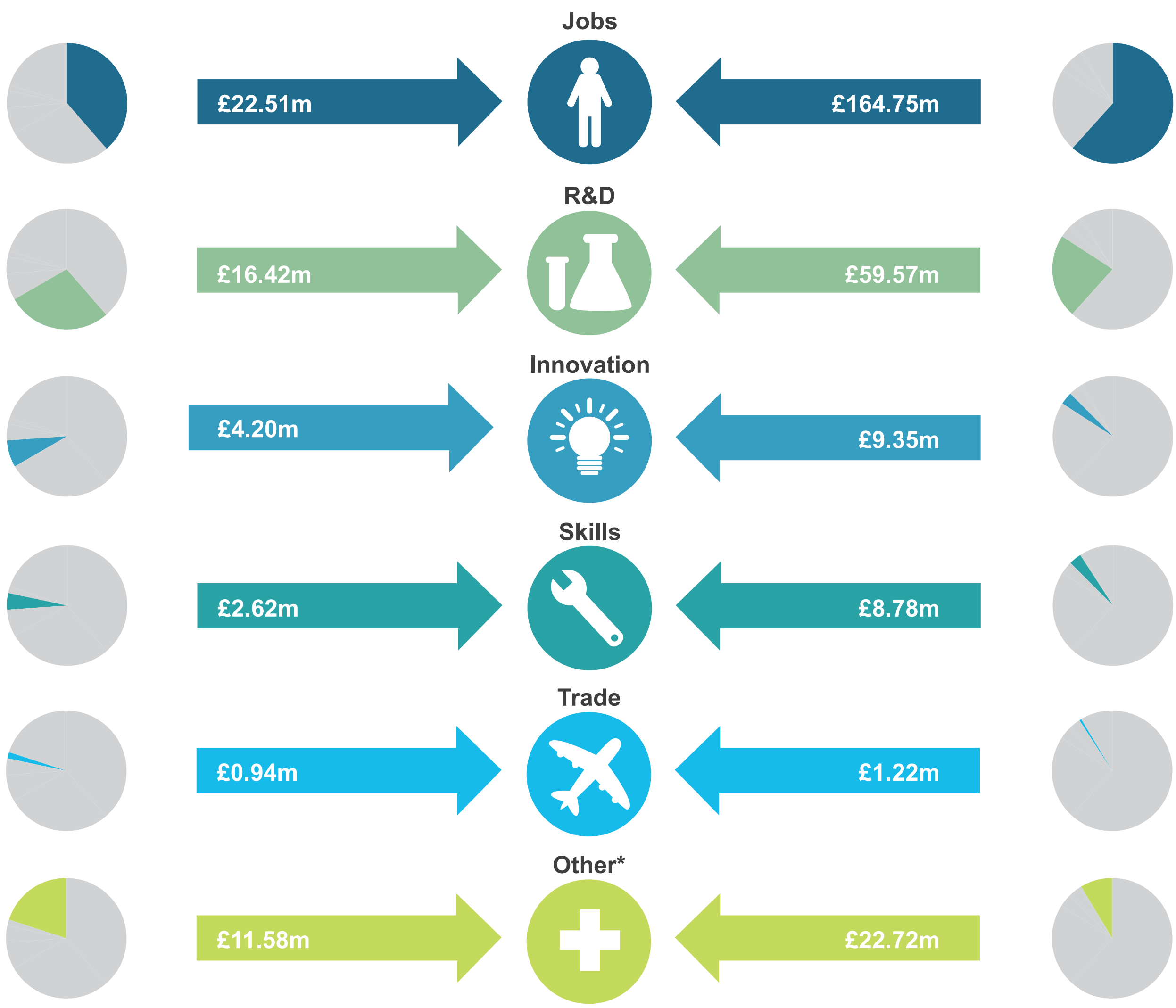


Section B - Invest NI Data

Support and Investment Data (2010-11 to 2014-15)

Invest NI has made **2,935** offers of support to the **North West** region, this support is valued at **£58.26m** and has contributed towards **£266.39m** of investment secured for the area.



**Other contains projects that involve a varied range of economic development activities not accurately reflected by the categories above.*

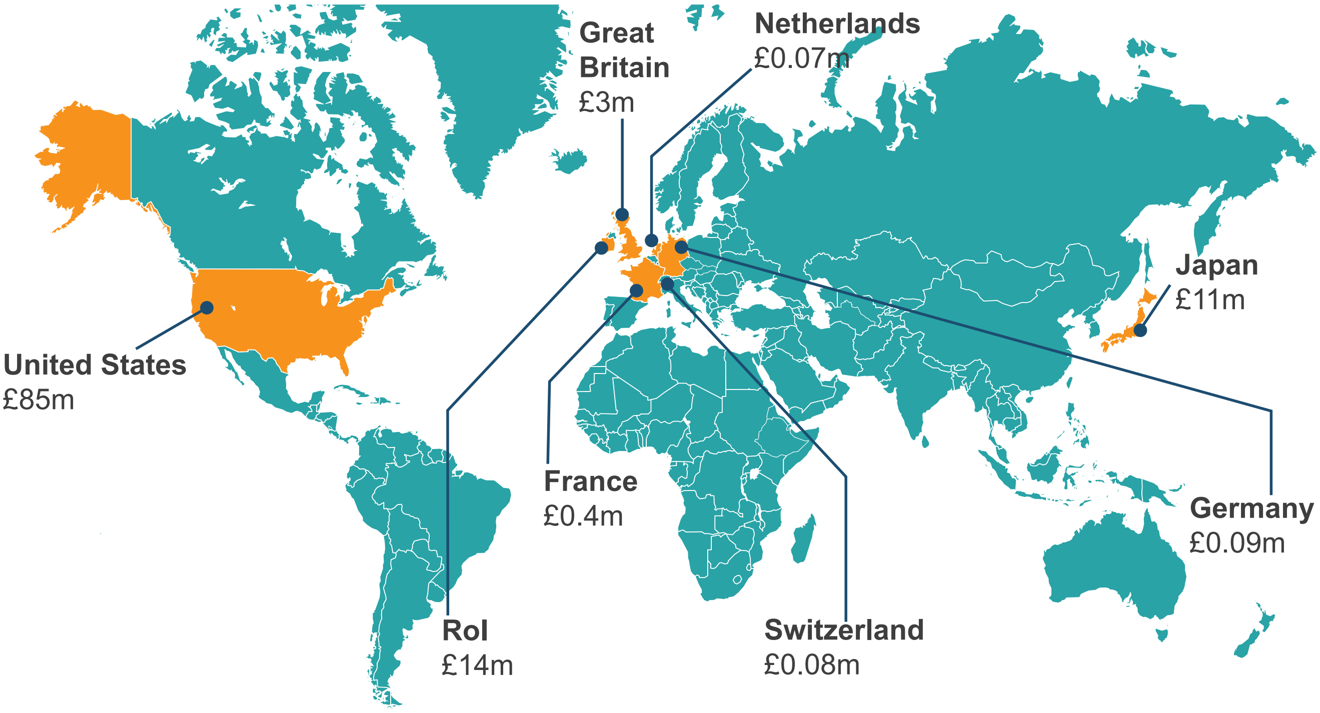
This support includes assistance offered to External Delivery Organisations and/or Universities totalling **£12.39m** assistance, **£16.46m** total investment and **6** new promoted jobs, the beneficiaries of which will not be restricted to the area in which they are located.

Total Inward Investment (2010-11 to 2014-15)

Inward investment is defined as investment into the Northern Ireland economy by externally owned businesses i.e. where at least **50%** of the ownership is based outside Northern Ireland.

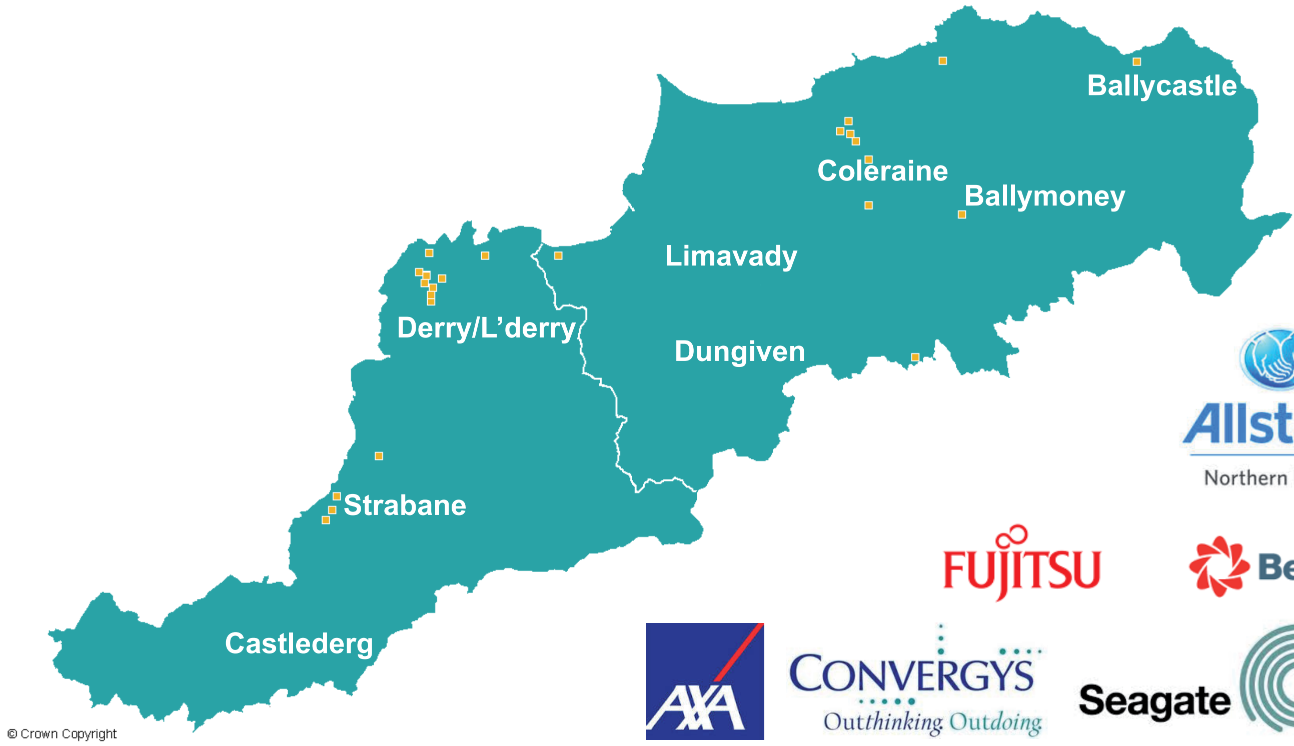
The map below shows where total inward investment of **£113.50m** secured by Invest NI for the **North West** region originated from over the past **5** years.

Total Investment - Origin Data



The map below shows the locations across the **North West** region at which inward investment projects secured by Invest NI were established. Examples of businesses undertaking these projects are represented by their logos.

Total Investment - Destination Data

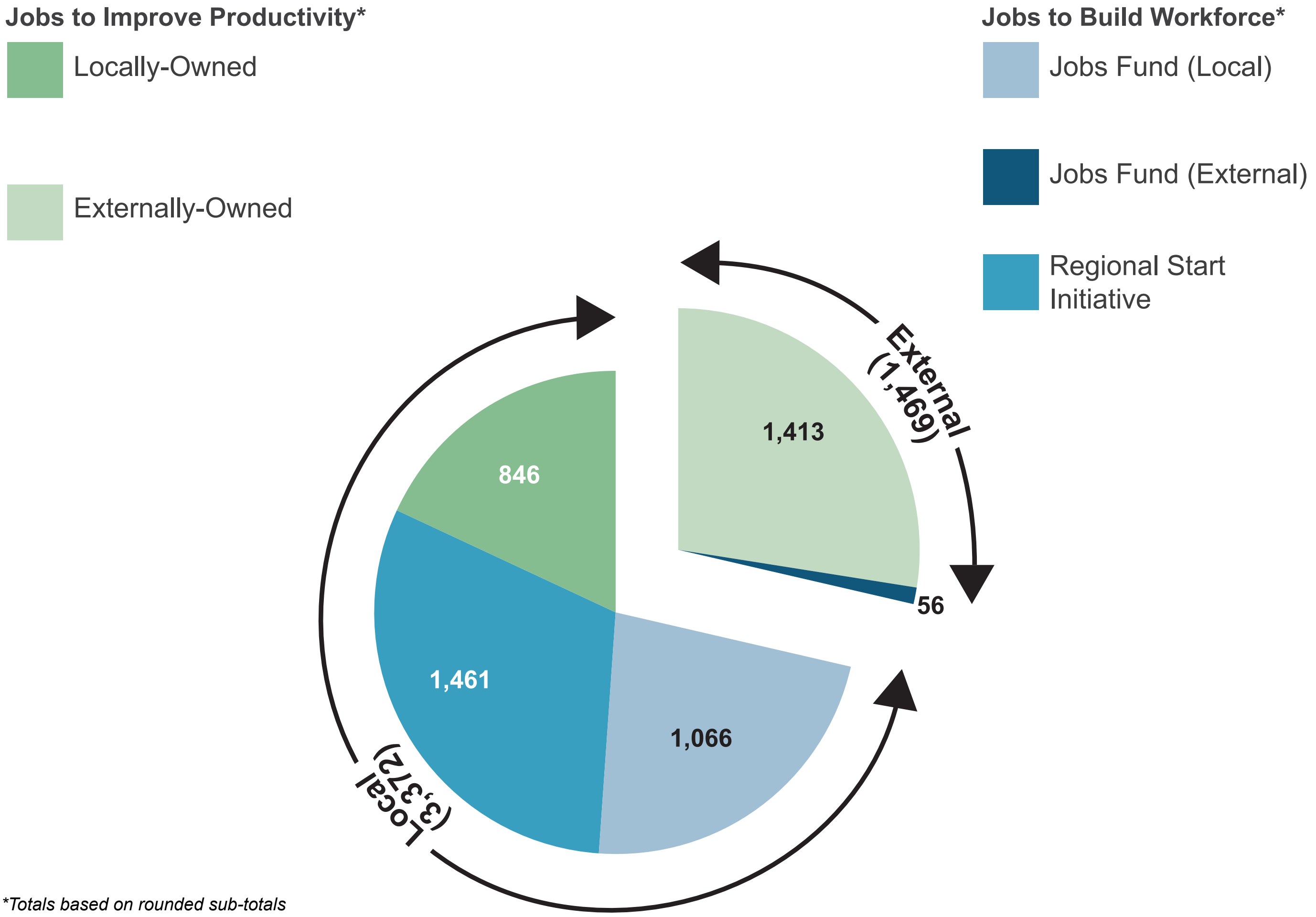


Allstate Northern Ireland
FUJITSU
Bemis
AXA
CONVERGYS Outthinking Outdoing
Seagate

Support for Jobs (2010-11 to 2014-15)

Invest NI's support secured **4,841** new jobs for the **North West**; **3,372** by local businesses and **1,469** by external businesses.

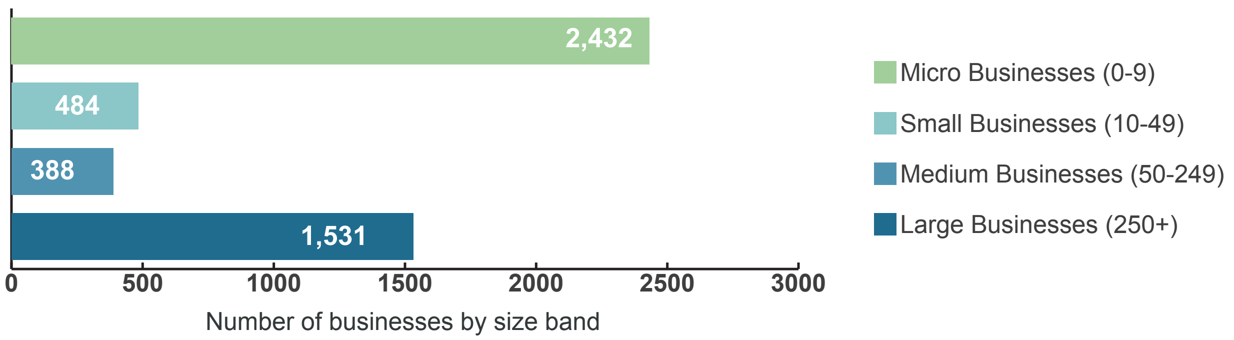
Jobs to improve productivity are generally associated with higher salaries. **Jobs to build workforce** will generate employment opportunities across the region, whilst attracting salaries towards the lower end of the wages spectrum.



**Totals based on rounded sub-totals*

Jobs by Business Size (2010-11 to 2014-15)

The chart below excludes the **6** new jobs promoted by External Delivery Organisations.



Key Performance Indicators (2014)

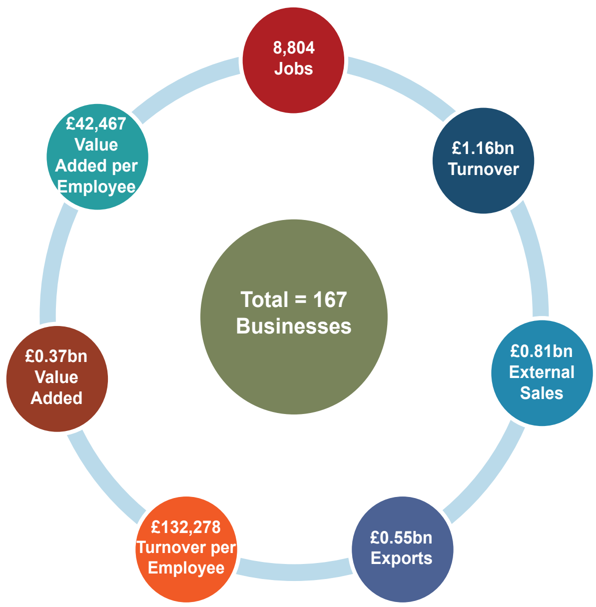
Key Performance Indicators (KPIs) are collected from Invest NI supported businesses to measure performance, destination of sales and to enable sectoral analysis for the **North West**. KPIs are assigned to an area based on the business' HQ location. ***All data is subject to further revision.***

Overview

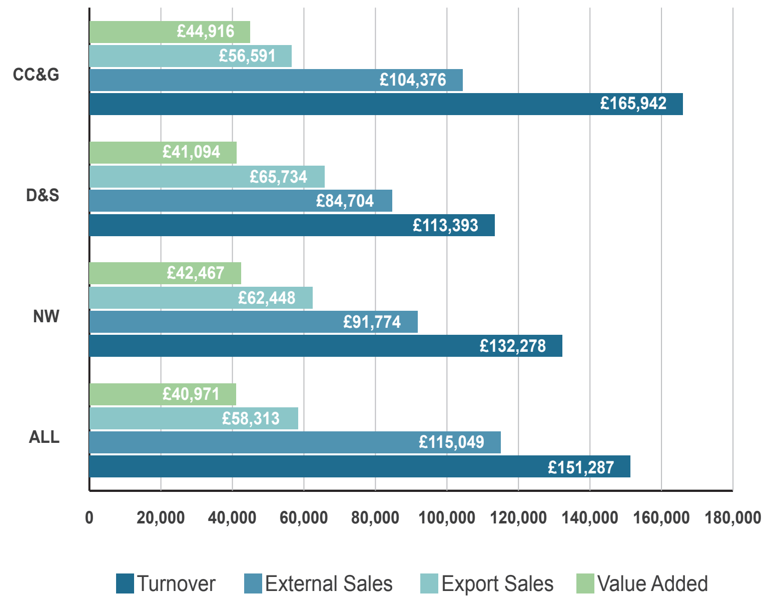
	Total Businesses	Turnover (£bn)	External Sales (£bn)*	Export Sales (£bn)**	Jobs	Value Added (£bn)†	Turnover per Employee	Value Added per Employee
NW	167	1.16	0.81	0.55	8,804	0.37	132,278	42,467
- CC&G	73	0.53	0.33	0.18	3,164	0.14	165,942	44,916
- D&S	94	0.64	0.48	0.37	5,640	0.23	113,393	41,094
All Businesses	1,505	15.72	11.95	6.06	103,905	4.26	151,287	40,971

**External Sales = All sales outside NI*
***Exports = All sales ouside UK*
†Value Added =- Employment Costs and EBITDA

North West Key Metrics

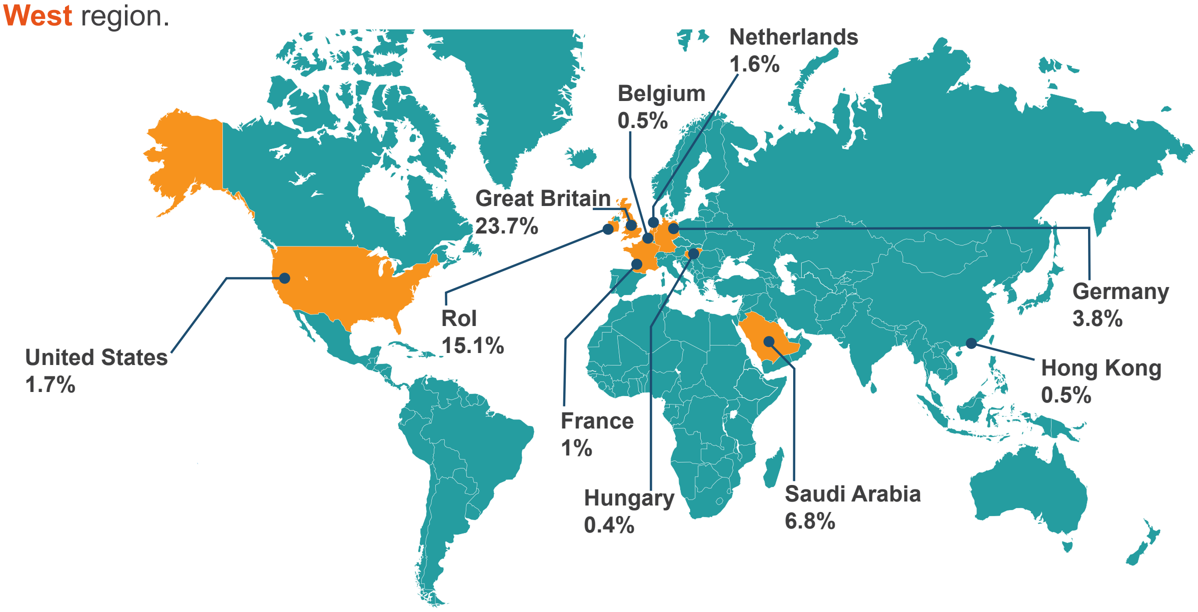


Per Employee Ratios



Destination of External Sales*

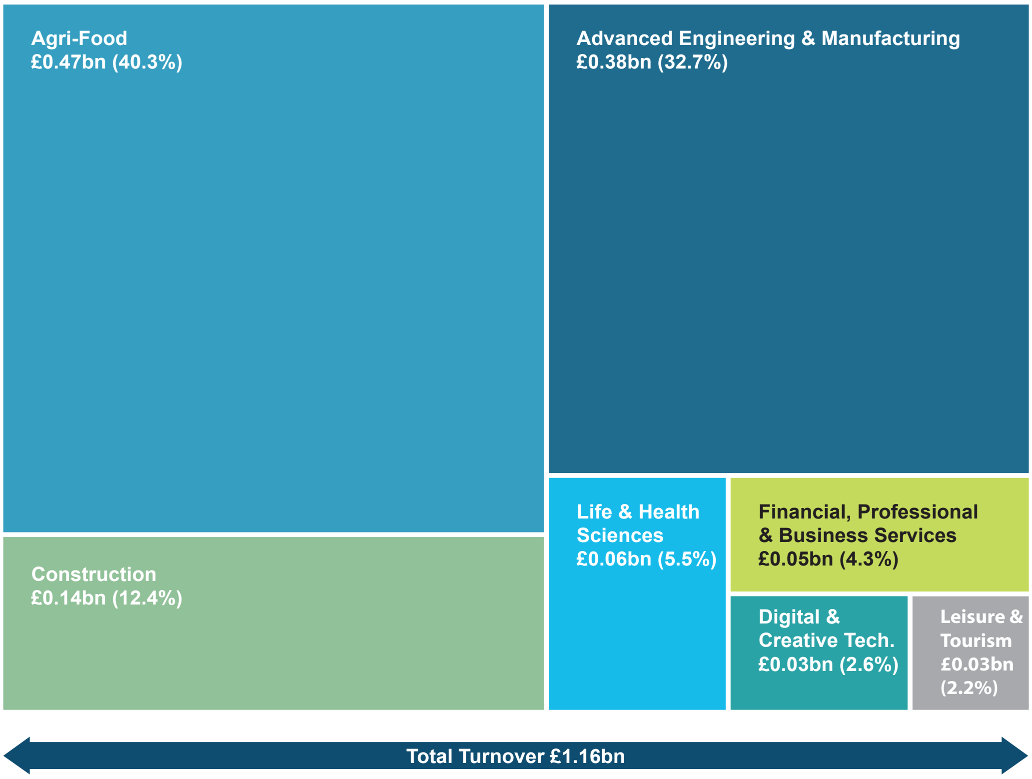
The map below shows the top ten countries for external sales (based on businesses' estimates) in the **North West** region.



**Combined countries, such as 'Other Western Europe' have been excluded from this analysis.*

Sector Breakdown

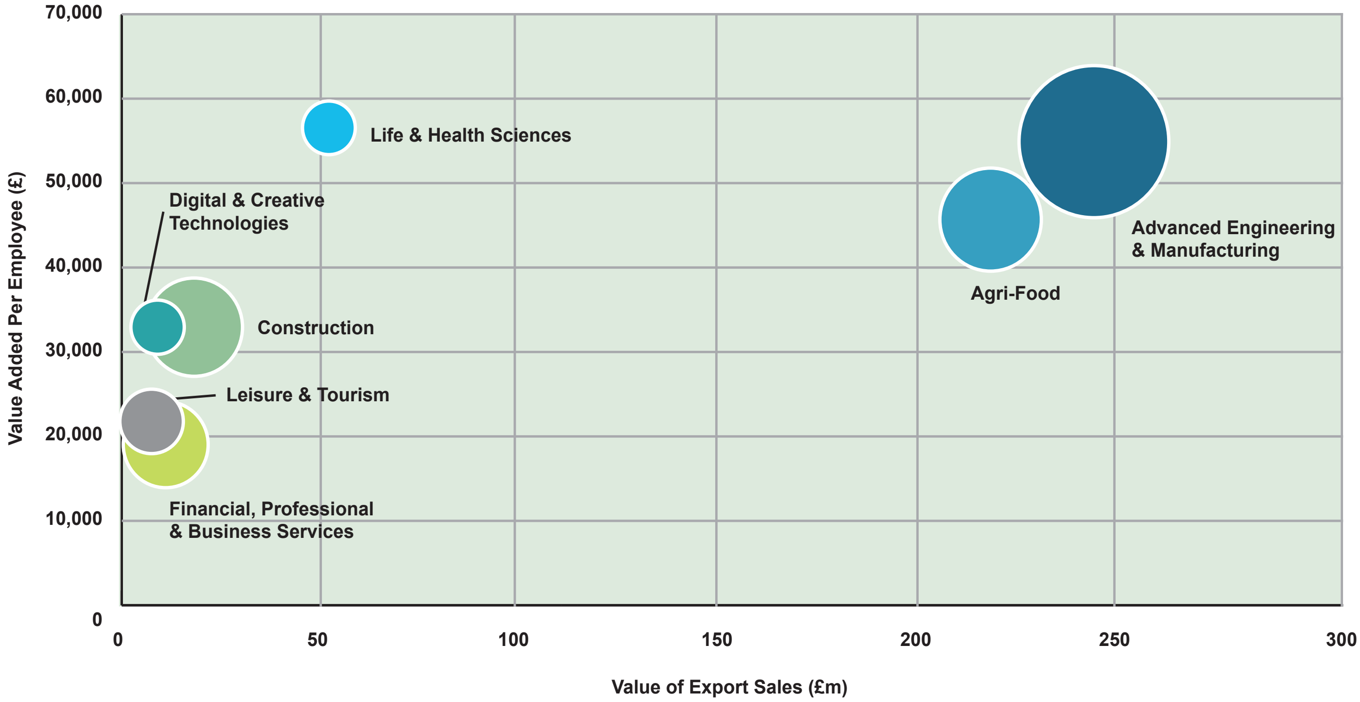
The treemap below represents key sectors (by turnover) within the **North West** region based on 2014 KPIs for Invest NI supported businesses.



Agri-Food includes Food, Drink, Animal Feeds and Horticulture.
Advanced Engineering & Manufacturing includes Advanced Materials, Aerospace, Automotive, Materials Handling, Electrical & Electronic Engineering, Consumer Goods and General Manufacturing.
Life & Health Sciences includes Health & Wellbeing, Medical Devices & Products and Pharma & Biotech.
Digital & Creative Technologies includes ICT Hardware, Mobile/Telecoms, Software and TV, Film & Digital Content.

The bubble chart below represents the relationship between productivity (value added per employee), export sales (outside of the UK) and employment by key sectors - the size of the bubble relates to the size of the sector in terms of employment.

Relationship between Productivity, Exports and Employment - North West Region



Section C - Regional Assets

Priority Sectors

Life & Health Sciences

- Home to £14m Centre for Stratified Medicine - 15 world class clinical researchers.
- Connected health combined expertise at ISRC and C-TRIC.
- Expertise in Point of Care Diagnostics based at C-TRIC.
- C-TRIC - £2m facililty providing 9,400 sq ft of research and business workspace.

Advanced Manufacturing & Engineering

- Track Record since 1958.
- Invista manufacture lycra elastine fibre.
- Du Pont UK manufacture Kevlar fibre.
- Seagate - World's leading provider of storage devices (1,346 full time employees).
- AVX (Coleraine) - A leading manufacturer and supplier of electronic components.

Creative & Digital

- City of Culture 2013, Turner Prize, Music City 2014.
- UU School of Creative Arts & Technologies (SoCat).
- Culture TECH.
- NWRC & LYIT Digital Media/Design departments. 1,500 students engaged in digitally related studies.
- KELVIN: city-to-city communications from NW to East Coast US.

INTELLIGENT SYSTEMS RESEARCH CENTRE

Business Services

- Service based Financial Services cluster.
- Available 'A' Grade Property: £8-12 per sq ft.
- Cost Effective Solutions.
- Strong Track Record.
- ISRC - Capital Markets research/ Collaborative Network.

Culture & Tourism

- The Causeway Coast attracts over 2m visitors per year, spending in excess of £37m.
- Derry's Walls attracted 411,000 visitors in 2013.
- Derry~Londonderry was placed by the Lonely Planet as the 4th best city to visit in 2013.
- NW 200 is Ireland's largest outdoor sporting event.
- Royal Portrush Golf Club is regularly rated in the world's top twenty golf courses.

2013 Derry~Londonderry cityofculture2013.com

Education Provision

- **Ulster University**
(Magee & Coleraine Campuses)
Over 9,000 students with specialisms including Bio-Medical Science, Business, Computing & Engineering and Creative Arts.

- **North West Regional College**
A leading provider of Further and Higher Education and skills training. The college's three main campuses in Derry~Londonderry, Limavady and Strabane boast modern and industry-standard learning environments for c. 24,000 students.

- **Northern Regional College**
The Northern Regional College was established in 2007 following the merger of the previous legacy colleges. The college has six campuses, including one in Ballymoney and one in Coleraine.

Business Property Availability

- See Invest NI Property Availability for an overview of available private business provision in the Annexes.

Transport Hubs

- A network of airports are available in the **North West** region including the City of Derry Airport and Belfast International and City Airports.

- The Ports of Belfast and Larne are both within one hours drive and offer regular services to the rest of the United Kingdom.

- Derry~Londonderry port is a deepwater port capable of dealing with a full range of requirements including handling bulk cargo.

Facilities and Initiatives

European Entrepreneurial Region (EER) Award

● European Entrepreneurial Region (EER) Award is a project run by the Committee of the Regions (COR) which identifies and rewards up to 3 EU regions which show an outstanding and innovative entrepreneurial policy strategy, irrespective of their size, wealth and competences. The regions with the most credible, forward-thinking and promising vision plans are granted the label EER for a specific year. Northern Ireland is one of only 3 winners for 2015 (along with Lisbon and Valencia).

Ebrington

● Ebrington is a 26-acre site with 19 remaining buildings, 14 of which are listed. The site features a 19th century star fort, connected to the historic walled city by the iconic Peace Bridge, an Ilex project which was opened to the public in June 2011.

● Ebrington Square has been transformed as a new public realm, a multi-purpose event space and a development platform for new investment.

Enterprise Zones

● The Enterprise Zone in the **North West** offers a number of incentives including business rate discounts, simplified planning, superfast broadband and enhanced capital allowances (for a small number of Enterprise Zones within assisted areas).

C-TRIC

● The Clinical Translational Research and Innovation Centre (C-TRIC) is a unique facility promoting and facilitating translational and clinical research. Its primary objective is to reduce both the time to market and the costs associated with research and development of innovative health technologies, medical devices and therapeutics.

● C-TRIC's unique infrastructure and key support staff facilitate clinical research and innovation. This enables the streamlining of developments from the laboratory to the market place through a focused 'bench-to-point-of-care' approach. This focused activity creates commercial opportunities to develop and exploit partnerships between academic researchers, clinical practitioners and the industry.

Altnagelvin Hospital Research Facilities

● The Western Trust Research and Development Department is part of the Medical Directorate. It is based in the Clinical Translational Research and Innovation Centre (C-TRIC), located on the Altnagelvin Hospital site.

● The department's role is to support and facilitate researchers to undertake high quality research and to provide research governance. This ensures the interests of participants, researchers and the Trust are protected through adherence to the local and national regularity framework for research & development activity.

Science Park

● The North West Science Park provides 50,000 square foot of flexible workspace on the banks of the Foyle, on the site of a former army barracks. It houses specialists in software, telecoms, digital media, health and bioscience, clean tech and television production, amongst many others.

● The Innovation Centre at Fort George is an important lynchpin in a wider cross-border project in partnership with the North West Region Cross Border Group (NWRCBG) and Letterkenny Institute of Technology (LYIT).

Project Kelvin Transatlantic Fibre

● This project established a direct international link between the **North West** and North America.

● This direct international link is attractive to global companies, such as leading financial houses, exchange markets and service and media companies, who require fast, low latency bandwidth that avoids traditionally congested routes, such as around the New York and London waterways.

● The project will inspire local people to creatively embrace the new economic, technological, sociological and academic opportunities it now provides. In addition it now makes the **North West** a highly desirable location for major corporations to locate new remote operations, safe in the knowledge that the power of these sophisticated communications will serve to eliminate many of the geographic challenges in efficiently and effectively managing such an outpost.

Annexes

Northern Ireland Councils: Economic Development Functions

North West Economic Development Partners

Key Invest NI Businesses in the Region

Jobs - Detailed Analysis

Travel to Work Detailed Breakdown

Sector Information for all Invest NI Businesses

Council Level Comparative Data

UK Regional Comparisons

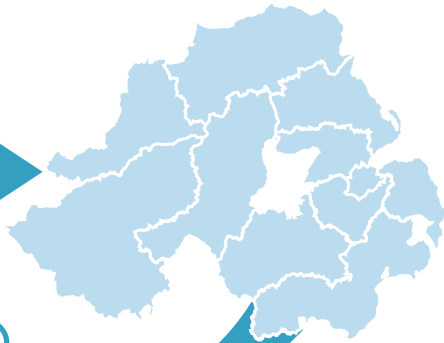
North West Tourism Factsheets

Invest NI Property Availability

Data Sources

Northern Ireland Councils: Economic Development Functions

On 1 April 2015, the number of councils in Northern Ireland reduced from 26 to 11 as part of the reform of local government. The new councils will be stronger, more efficient and deliver more effective services.



Councils will lead the community planning process and work with a wide range of partners to develop a long-term plan to improve social, economic and environmental wellbeing.

Benefits

- ✓ Regrouping a number of key functions such as planning, urban regeneration, local economic development and local tourism, will give councils some powerful tools with which to shape their areas and communities.

- ✓ The integration of these functions, combined with councils' existing functions will allow local people to influence and make decisions on local business development, infrastructure provision, job creation and economic competitiveness.

- ✓ The transfer of local economic development functions in particular offers the opportunity for councils, the private sector and the third sectors to work together to improve the local economy.

- ✓ The new Community Planning process, which councils are leading and of which Invest NI is a statutory partner, requires stakeholders to work in partnership to ensure that the local investment climate fits the needs of local businesses; offers support to small and medium size enterprises; encourages the formation of new businesses; and creates an environment which attracts external investment and more generally supports the growth of businesses in each council's local area.

North West Economic Development Partners

nibusinessinfo.co.uk a free service offered by Invest NI, is the official online channel for business advice and guidance in Northern Ireland.

Enterprise Agencies work with hundreds of 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.

Shell LiveWIRE programme offers free online business advice and funding to young entrepreneurs in the UK.

Invest NI
As the regional business development agency, Invest NI's role is to grow the local economy. We do this by helping new and existing businesses to compete internationally, and by attracting new investment to Northern Ireland.
Invest NI offers the Northern Ireland business community a single organisation providing high-quality services, programmes, support and expert advice.

Department for Employment and Learning
aims to promote learning skills, to prepare people for work and to support the economy. Through their Assured Skills Programme they provide support to existing businesses wishing to grow and to new inward investors looking to locate in the region.

The Prince's Trust supports young people who are unemployed. The Trust's programmes give practical and financial support and three in four participants supported by the Prince's Trust move into work, education or training.

Councils
now provide a continuum of support for entrepreneurs and SMEs from pre-start through to start-up delivery and onwards to support for social enterprises and local SMEs with job creation potential.

InterTradeIreland is a cross-border body supporting businesses and taking advantage of North/South co-operative opportunities to improve capability, drive competitiveness, growth and jobs.

Business in the Community encourages companies to use their skills and resources for the benefit of society and the environment by working together through collective business action. Their 'Connections Plus' programme encourages established businesses to share their experience and expertise with the smaller businesses to facilitate growth.

Chambers of Commerce provide business support to enable members to grow both locally and internationally as well as access to national finance schemes, 40,000 chamber contacts across the globe and various networking opportunities.

NORIBIC helps companies bring their good ideas to fruition, improve aspects of their business, and set them on the road to reach their full potential.

Key Invest NI Businesses in the Region

- **Allstate**
  www.allstate.com
- **Convergys**
  www.convergys.com
- **AVX**
  www.avx.com
- **Seagate Technology (Ireland)**
  www.seagate.com
- **O'Neills**
  www.oneillsuk.com
- **Firstsource**
  www.firstsource.com
- **Du Pont**
  www.dupont.co.uk
- **Kerry Group**
  www.kerrygroup.com
- **INVISTA**
  www.invista.com

Jobs - Detailed Analysis

Antrim & Newtownabbey

Workforce: 55,079

The council area has the province's largest employment share for health and social work (22%), accounting for 11,978 jobs. Manufacturing is also a major sector, employing 6,407 people (12%), including Randox and Schrader. It has the largest transportation and storage hub (4,973 jobs), mainly based around Belfast International Airport.

Ards & North Down

Workforce: 37,044

Wholesale and retail is the leading sector (22%) for Ards and North Down, which includes Bangor and Newtownards and several smaller towns. The area also boasts a relatively large share (9%) in accommodation and food service: 3,470. As with many other parts of the Belfast commuter belt, a large number of residents travel into the city for work.

Armagh, Banbridge & Craigavon

Workforce: 68,004

Northern Ireland's second largest manufacturing workforce (10,749) is mainly based in the Craigavon area, with Almac and Moy Park being the main anchors. This accounts for 16% of total employment in Armagh, Banbridge and Craigavon. A strong wholesale and retail sector is based on the area's multiple town centres and out-of-town shopping facilities.

Belfast

Workforce: 210,424

30% of Northern Ireland's workforce works in Belfast and almost a quarter of these jobs are in administration. The wholesale and retail sector is proportionally below average (13%) but still accounts for 26,802 jobs. The city's manufacturing workforce employs 9,890 people but accounts for just 5% of the workforce.

Causeway Coast & Glens

Workforce: 39,333

Accommodation and food service account for 3,666 jobs in Causeway Coast and Glens, not surprisingly due to its many tourist attractions. The council also has 3,519 jobs in manufacturing; both sectors make up 9% shares of employment. Employment in education is above average, explained by the Ulster University campus at Coleraine and a large number of rural schools.

Derry & Strabane

Workforce: 50,253

Almost 1 in 5 of Derry and Strabane's employees work in health and social work: 9,894 jobs. A similarly-sized workforce (9,291) is employed in wholesale and retail. Manufacturing accounts for 9% of employees (4,616). In other sectors, the council is close to the regional average although it is keen to increase educational employment at Ulster University's Magee campus.

Fermanagh & Omagh

Workforce: 38,444

Despite its largely rural character Fermanagh and Omagh has a large number of manufacturing jobs: 4,463 (12%). Well-known employers include Belleek Pottery, Balcas and Quinn Group, recently renamed Aventas. It also has a small but locally significant numbers employed in mining and quarrying (272) and in primary industries other than agriculture (150), which include animal husbandry.

Lisburn & Castlereagh

Workforce: 51,483

The district has a broadly similar employment structure to that of its neighbours in the Belfast commuter belt. It also has particularly large workforces in health and social work (11,295 jobs; 22%) and public administration (5,013; 10%). Lisburn and Castlereagh has the smallest proportion of jobs in education (6%) perhaps reflecting a different pattern of school or college provision and an older than average population.

Mid & East Antrim

Workforce: 42,402

A strong presence by Wrightbus, Caterpillar and other factory operators helps to explain why manufacturing accounts for 21% of employees in Mid and East Antrim. This makes it the largest sector - with 8,875 jobs - and suppresses the proportion employed in health and social work (13%). The district also has a strong wholesale and retail sector (19%), which compares well with the regional average.

Mid Ulster

Workforce: 47,858

Large workforces at Moy Park and in Mid Ulster's strong light engineering sector give it the province's highest proportion of employees in manufacturing: 28%. This accounts for 13,165 jobs. Employment levels in Mid Ulster's other sectors are similar to those recorded in Mid and East Antrim. It also has the largest mining and quarrying sector (410 jobs) and the largest construction sector outside Belfast (3,808 jobs).

Newry, Mourne & Down

Workforce: 51,178

Wholesale and retail is the dominant sector in Newry Mourne and Down, accounting for 21% of employee jobs (10,786). It also has a large manufacturing sector, making up 12% of jobs, including Norbrook and Kilkeel's fish processing plants. The district also has the largest number outside Belfast working in water and waste sector (867 jobs) - partly explained by the reservoir and pipeline infastructure in the Mourne area.

Travel to Work Detailed Breakdown

Usual residence \ Area of work	Antrim	Ards	Armagh	Ballymena	Ballymoney	Banbridge	Belfast	Carrickfergus	Castlereagh	Coleraine	Cookstown	Craigavon	Derry
Antrim	9,465	107	42	1,485	35	18	4,538	139	282	108	73	171	42
Ards	271	9,384	71	83	6	33	8,492	80	2,875	19	10	138	23
Armagh	125	100	9,169	116	13	397	1,212	8	104	26	72	3,954	12
Ballymena	2,801	28	62	13,920	419	77	2,418	92	160	399	80	123	69
Ballymoney	352	8	12	1,692	3,273	4	537	6	32	2,352	64	15	143
Banbridge	188	68	448	79	5	5,583	2,799	78	291	18	27	2,098	10
Belfast	1,414	801	128	386	29	126	75,031	493	5,580	147	74	749	150
Carrickfergus	491	47	20	182	8	25	5,325	4,305	326	23	6	97	17
Castlereagh	320	751	28	82	6	42	15,377	120	5,885	21	8	217	49
Coleraine	294	16	26	929	1,115	17	824	17	62	12,496	124	51	746
Cookstown	227	4	134	169	43	9	521	6	29	219	5,871	239	264
Craigavon	444	53	1,747	118	6	1,062	3,780	98	347	27	102	19,915	14
Derry	80	6	31	100	35	6	619	5	41	376	155	36	26,710
Down	145	568	73	43	2	202	5,249	48	1,383	16	13	320	11
Dungannon	92	13	1,147	34	17	40	963	10	76	68	929	1,079	338
Fermanagh	48	7	89	29	8	13	423	1	28	77	68	62	162
Larne	492	26	16	680	10	5	2,263	858	128	39	5	42	12
Limavady	108	5	14	111	49	5	337	6	25	916	37	12	2,657
Lisburn	1,292	227	177	138	4	433	17,480	121	1,571	64	39	1,455	46
Magherafelt	1,009	8	41	820	136	7	1,229	18	44	628	997	54	419
Moyle	94	4	2	483	354	2	357	9	26	766	22	12	67
Newry & Mourne	126	151	901	70	2	756	1,969	67	135	15	25	762	25
Newtownabbey	1,639	167	48	687	24	27	14,463	985	847	75	30	166	48
North Down	287	2,404	30	78	4	45	10,729	135	1,778	26	4	142	22
Omagh	54	3	65	30	17	16	425	2	30	87	285	119	399
Strabane	23	3	16	13	6	1	169	2	10	68	71	18	1,861

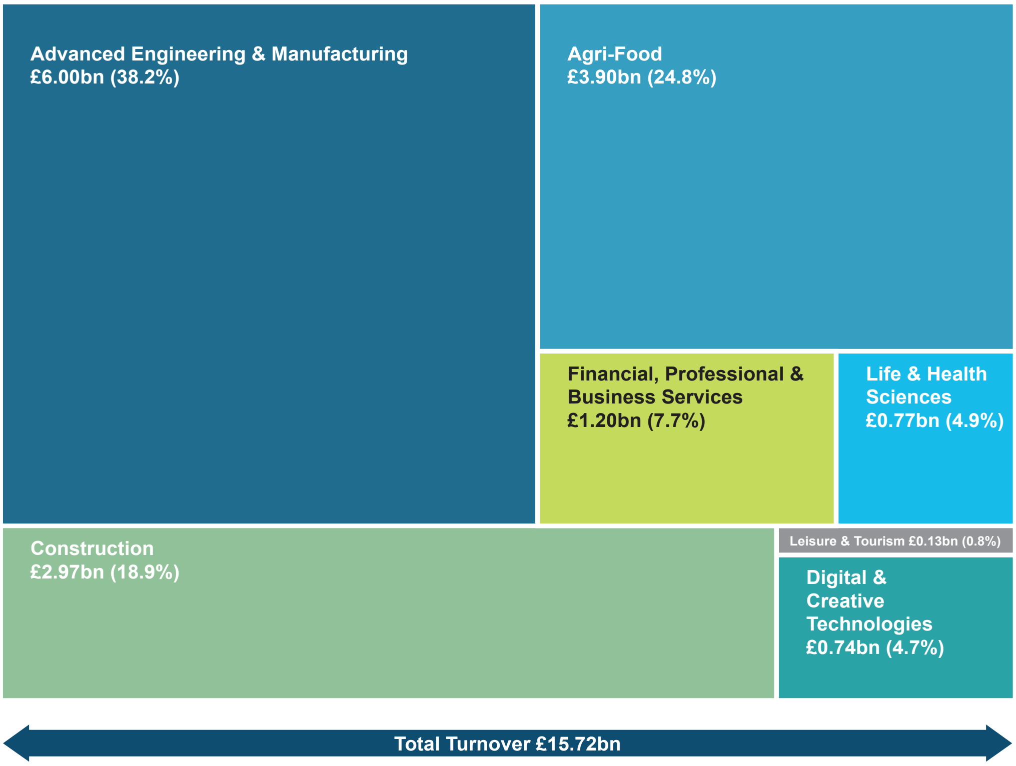
Usual residence \ Area of work	Down	Dungannon	Fermanagh	Larne	Limavady	Lisburn	Magherafelt	Moyle	Newry & Mourne	Newtownabbey	North Down	Omagh	Strabane
Antrim	33	39	8	187	15	669	407	14	68	1,442	142	4	2
Ards	526	35	10	36	4	562	14	1	93	550	3,572	5	2
Armagh	44	1,275	40	9	5	313	24	0	1,223	142	66	60	4
Ballymena	35	31	6	429	35	189	380	85	76	787	65	13	1
Ballymoney	3	44	23	70	129	39	161	339	4	141	10	7	6
Banbridge	558	127	9	32	1	2,155	5	1	1,548	215	87	14	2
Belfast	448	133	82	317	19	3,710	88	15	258	4,506	1,578	64	7
Carrickfergus	33	14	3	754	4	252	11	4	66	2,497	158	5	0
Castlereagh	392	42	16	79	1	1,130	14	2	63	788	678	8	2
Coleraine	15	75	53	42	626	103	404	402	9	150	33	65	29
Cookstown	14	1,490	44	16	48	62	1,143	4	22	84	10	278	30
Craigavon	247	875	33	41	7	2,272	16	2	651	379	101	43	5
Derry	11	208	163	7	1,003	47	160	8	15	67	13	240	438
Down	11,346	35	6	72	2	1,149	16	2	796	257	233	3	0
Dungannon	22	10,796	560	8	25	158	146	5	104	94	18	651	38
Fermanagh	14	576	14,986	9	107	43	71	27	23	39	17	835	93
Larne	58	2	3	5,091	2	127	16	28	73	1,352	73	2	0
Limavady	3	43	146	13	4,033	32	337	26	2	49	14	44	65
Lisburn	550	196	24	94	9	17,213	34	4	229	1,030	355	22	2
Magherafelt	7	196	81	54	198	69	7,072	68	14	211	24	117	36
Moyle	4	34	34	112	40	24	93	1,804	5	43	3	109	7
Newry & Mourne	774	112	20	105	0	378	16	3	20,462	338	102	20	2
Newtownabbey	93	42	11	617	9	630	51	8	176	11,241	367	12	2
North Down	163	23	8	67	2	491	15	3	121	704	11,673	6	1
Omagh	12	782	1,017	7	34	58	110	43	24	46	16	10,118	708
Strabane	5	70	221	3	66	26	43	15	7	27	9	1,639	5,343

Colour coded to show the percentages of people who live and work in the same area:

0-19% 20-39% 40-59% 60-79% 80-100%

Sector Information for all Invest NI Businesses

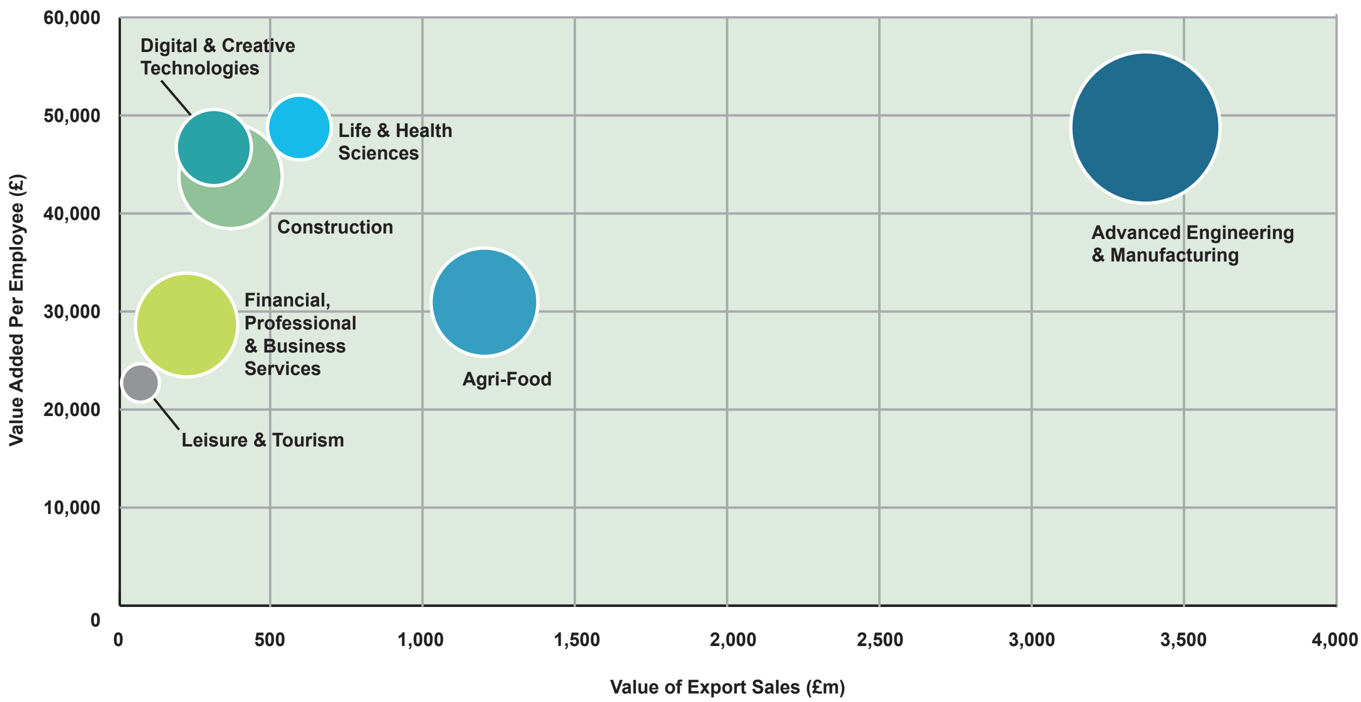
The treemap below represents key sectors (by turnover) for all Invest NI supported businesses based on 2014 KPIs. ***All data is subject to further revision.***



Agri-Food includes Food, Drink, Animal Feeds and Horticulture.
Advanced Engineering & Manufacturing includes Advanced Materials, Aerospace, Automotive, Materials Handling, Electrical & Electronic Engineering, Consumer Goods and General Manufacturing.
Life & Health Sciences includes Health & Wellbeing, Medical Devices & Products and Pharma & Biotech.
Digital & Creative Technologies includes ICT Hardware, Mobile/Telecoms, Software and TV, Film & Digital Content.

The bubble chart below represents the relationship between productivity (value added per employee), export sales (outside of the UK) and employment by key sectors - the size of the bubble relates to the size of the sector in terms of employment.

Relationship between Productivity, Exports and Employment - All Businesses



Council Level Comparative Data

Population

Council	Total Population 2014	16-64 Working Age Population 2014	Total as % of NI Population 2014	Economically Active Rate 2014	Employment Total 2014	Employment Rate 2014	Self-Employed Rate 2014
Antrim & Newtownabbey	139,966	88,527	8%	74%	60,000	72%	14%
Ards & North Down	157,931	97,225	9%	76%	66,000	74%	14%
Armagh, Banbridge & Craigavon	205,711	129,787	11%	75%	90,000	71%	14%
Belfast	336,830	221,482	18%	69%	145,000	64%	10%
Causeway Coast & Glens	142,303	90,101	8%	73%	60,000	66%	17%
Derry & Strabane	149,198	96,087	8%	67%	56,000	57%	15%
Fermanagh & Omagh	114,992	72,404	6%	69%	48,000	64%	20%
Lisburn & Castlereagh	138,627	87,791	8%	75%	63,000	71%	12%
Mid & East Antrim	136,642	85,998	7%	73%	57,000	69%	12%
Mid Ulster	142,895	90,787	8%	75%	66,000	69%	17%
Newry, Mourne & Down	175,403	110,610	10%	75%	77,000	72%	19%
NI	1,840,498	1,170,799	100%	72%	789,000	68%	14%

Population

Council	Unemployed (Claimant Count) Total 2014	Unemployed (Claimant Count) Rate 2014	Youth Unemployment (Claimant Count) Rate 2014	Long-Term Unemployment (Claimant Count) Rate 2014	Private Sector Median Annual Gross Earnings (Place of Work) 2014	Private Sector Median Annual Gross Earnings (Place of Residence) 2014	Above NVQ Level 4 Qualifications Rate 2014	No Qualifications Rate 2014
Antrim & Newtownabbey	2,920	3%	27%	28%	£21,823	£21,345	27%	16%
Ards & North Down	3,533	4%	26%	34%	£22,000	£22,997	34%	15%
Armagh, Banbridge & Craigavon	5,159	4%	25%	33%	£19,000	£20,289	27%	17%
Belfast	13,866	6%	25%	37%	£25,650	£22,560	34%	19%
Causeway Coast & Glens	4,110	5%	25%	29%	£16,846	£19,690	22%	20%
Derry & Strabane	7,687	8%	25%	39%	£18,112	£17,407	22%	22%
Fermanagh & Omagh	3,164	4%	22%	34%	£17,537	£18,592	25%	19%
Lisburn & Castlereagh	2,376	3%	27%	28%	£20,048	£22,805	42%	10%
Mid & East Antrim	3,159	4%	26%	29%	£23,224	£22,871	24%	10%
Mid Ulster	3,078	3%	25%	28%	£20,648	£19,425	26%	22%
Newry, Mourne & Down	5,050	5%	23%	37%	£20,000	£20,578	35%	17%
NI	54,101	5%	25%	34%	£21,345	£21,345	30%	17%

Notes:
Youth unemployment = 18-24
Long-term unemployment = one year+
NVQ Level 4 = degree level+

Business Base

Council	Total Businesses (IDBR) 2014	Total Businesses (IDBR) Production Rate 2014	Total Businesses (IDBR) Construction Rate 2014	Total Businesses (IDBR) Distribution Services Rate 2014	Total Businesses (IDBR) Other Services Rate 2014	Total Businesses (IDBR) Micro/Small Rate 2014	Total Businesses (IDBR) Medium/Large Rate 2014
Antrim & Newtownabbey	3,660	7%	14%	26%	35%	97.7%	2.3%
Ards & North Down	4,285	6%	13%	22%	45%	98.6%	1.2%
Armagh, Banbridge & Craigavon	7,720	7%	14%	24%	27%	98.3%	1.7%
Belfast	9,005	5%	9%	21%	65%	95.8%	4.1%
Causeway Coast & Glens	5,490	5%	15%	19%	27%	98.8%	1.2%
Derry & Strabane	4,525	6%	15%	20%	33%	98.5%	1.4%
Fermanagh & Omagh	7,175	5%	12%	16%	20%	98.9%	1.0%
Lisburn & Castlereagh	4,300	7%	15%	23%	40%	98.0%	1.9%
Mid & East Antrim	4,465	7%	13%	20%	30%	98.7%	1.2%
Mid Ulster	7,915	9%	17%	18%	20%	98.6%	1.4%
Newry, Mourne & Down	7,500	7%	17%	21%	28%	98.9%	1.1%
NI	67,710	6%	14%	21%	34%	97.8%	2.2%

Notes:
Production = includes manufacturing.
Distribution services = includes motor trades, wholesale, retail, transport & storage.
Other Services = includes health, education, entertainment, tourism and finance.
Micro/Small = 0-49 employees.
Medium/Large =50-250+ employees.

Business Base

Council	GVA Per Head Work Place Based 2013	Total Entrepreneurship Activity Rate 2003 - 2014	Total Employee Jobs (% Within Private Sector) 2013	Total Employee Jobs Production Rate 2013	Total Employee Jobs Construction Rate 2013	Total Employee Jobs Distribution Services Rate 2013	Total Employee Jobs Other Services Rate 2013
Antrim & Newtownabbey	£39,109	4.2%	55,079 (70%)	13%	5%	28%	54%
Ards & North Down	£25,057	5.3%	37,044 (73%)	7%	3%	24%	65%
Armagh, Banbridge & Craigavon	£34,599	5.8%	68,004 (71%)	17%	4%	24%	54%
Belfast	£41,535	4.5%	210,424 (66%)	6%	2%	16%	76%
Causeway Coast & Glens	£25,206	5.0%	39,333 (70%)	10%	5%	23%	61%
Derry & Strabane	£29,099	4.2%	50,253 (66%)	10%	4%	21%	65%
Fermanagh & Omagh	£29,540	5.8%	38,444 (67%)	13%	6%	23%	57%
Lisburn & Castlereagh	£32,184	5.5%	51,483 (67%)	10%	5%	23%	62%
Mid & East Antrim	£63,024	5.2%	42,402 (75%)	24%	4%	24%	48%
Mid Ulster	£34,930	6.6%	47,858 (78%)	29%	8%	22%	41%
Newry, Mourne & Down	£30,408	5.6%	51,178 (72%)	14%	6%	24%	56%
NI	£36,618	5.1%	691,501 (69%)	12%	4%	21%	62%

Notes:
Total Entrepreneurship Activity= those in the process of business formation and those who have recently started a business.

UK Regional Comparisons

	Northern Ireland	Scotland	Wales	London	South East	South West	East Midlands	West Midlands	East	Yorkshire & The Humber	North East	North West	UK
GVA per Head Index (2012)	75.7	94.0	72.3	174.8	109.0	89.3	81.9	81.8	92.3	82.4	75.6	86.6	100
Labour Market Employment Rate (Feb-Apr 2014)	68.1	73.4	70.1	72.3	76.4	76.1	73.8	70.2	75.9	72.0	69.5	70.0	
Gross Domestic Household Income per Head £ (2012)	13,902	16,267	14,623	21,446	19,126	16,914	15,206	14,744	17,630	14,575	14,393	14,939	
Gross Median Full-Time Weekly Pay, Residence Based (2013)	462.60	508.00	476.90	613.30	559.70	485.10	483.40	483.00	542.70	479.10	472.30	483.20	
Business Expenditure on R&D as a % of GVA (2012)	1.4	0.7	0.6	0.5	2.0	1.3	1.5	1.5	3.0	0.6	0.7	1.4	
Businesses per 10,000 Head of Population (2012)	308	298	286	529	436	386	342	332	404	312	245	328	
Manufacturing Exports per Capita £000's (2013)	3264.8	3870.9	4796.3	3876.1	4756.4	2539.9	4667.0	4755.5	4512.0	3263.7	4434.8	3892.3	
Skills - % with NVQ level 4 & Above (2013)	28.1	39.4	31.4	49.1	38.3	34.1	30.1	28.4	33.2	30.0	28.1	31.0	

Causeway Coast & Glens LGD Fact Card

tourism northernireland

TRIPS, NIGHTS & SPEND	2012	2013	2014	2014 v 2013	2014 % of NI
Trips	774,608	704,716	756,564	+7%	16%
Nights	2,553,712	2,347,447	2,703,920	+15%	18%
Spend	£123.7m	£110.1m	£133.3m	+21%	18%
Average length of stay	3.3	3.3	3.6		
Average spend per trip	£160	£156	£176		
Average spend per night	£48	£47	£49		

The Giant's Causeway was NI's most popular visitor attraction in 2014 (excluding country parks/parks/forests)

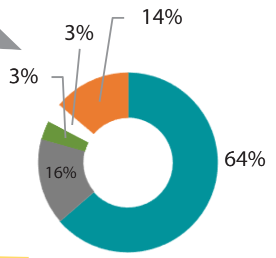
4,751 tourism jobs in Causeway Coast & Glens (CC&G) LGD in 2013 - 12% of total employee jobs (the same proportion as North Down & Ards LGD and higher than any of the other LGDs

1.8m visits to visitor attractions in Causeway Coast & Glens LGD in 2014

ORIGIN OF VISITORS 2012 - 2014 (3 year rolling average)

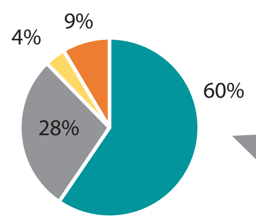
Almost two thirds of overnight trips can be attributed to the domestic market, the third highest of all the LGDs

CC&G LGD attracted the second highest proportion of ROI and other overnight trips but the second lowest proportion of European overnight trips of all of the LGDs



REASON FOR VISIT 2012 - 2014 (3 year rolling average)

The CC&G LGD has the highest proportion of overnight holiday trips and the lowest proportion of overnight VFR trips of all the LGDs



ACCOMMODATION STATISTICS 2014

	STOCK			OCCUPANCY	
	Number	Rooms	Beds	Room	Bed-space
Hotels	20	724	1,944	59%	39%
GH/GA/B&B*	193	813	1,902	33%	26%
	Units	Rooms	Beds	Annual	Peak (April-Sep)
Self-catering	975	2,966	5,570	28%	41%

*Guesthouse/guest accommodation /bed & breakfast

46% of the available 12,055 self-catering bed - spaces in NI are in the CC&G LGD (the largest proportion of any LGD by far). Annual self - catering occupancy rates in this LGD are the same as those in Armagh City, Banbridge & Craigavon and Ards & North Down LGDs

CC&G LGD also has the largest number of GH/GA/B&B bed - spaces and the second largest number of hotel beds of all the LGDs

Fact Card is based on data published by the Northern Ireland Statistics and Research Agency (NISRA).

Tourism performance estimates presented above are based on overnight trips made by Northern Ireland residents and visitors from outside Northern Ireland. Estimates relate to overnight trips only, i.e. exclude day trips.

Derry City & Strabane LGD Fact Card

tourism northernireland

TRIPS, NIGHTS & SPEND	2012	2013	2014	2014 v 2013	2014 % of NI
Trips	164,264	254,314	230,961	-9%	5%
Nights	704,041	936,198	810,462	-13%	5%
Spend	£26.7m	£46.8m	£39.7m	-15%	5%
Average length of stay	4.3	3.7	3.5		
Average spend per trip	£163	£184	£172		
Average spend per night	£38	£50	£49		

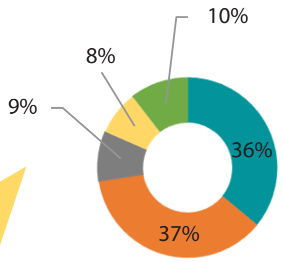
4,227 tourism jobs in this LGD in 2013 - 8% of total employee jobs

The Peace Bridge, Derry's Walls and the Guildhall were the most popular visitor attractions in Derry City and Strabane LGD in 2014

2.2m visits to visitor attractions in Derry City & Strabane LGD in 2014

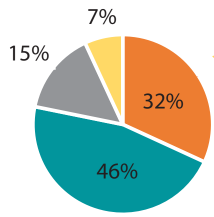
ORIGIN OF VISITORS 2012 - 2014 (3 year rolling average)

This LGD attracts the third highest proportion of GB, European and North American overnight trips and the third lowest proportion of domestic overnight trips



REASON FOR VISIT 2012 - 2014 (3 year rolling average)

Derry City & Strabane LGD has the second highest proportion of overnight business visitors (just behind Belfast LGD)



Two other LGDs attracted lower proportions of overnight holiday trips

ACCOMMODATION STATISTICS 2014

	STOCK			OCCUPANCY	
	Number	Rooms	Beds	Room	Bed-space
Hotels	11	659	1,597	60%	46%
GH/GA/B&B*	64	231	543	28%	21%
	Units	Rooms	Beds	Annual	Peak (April-Sep)
Self-catering	112	272	549	36%	50%

*Guesthouse/guest accommodation /bed & breakfast

Derry City & Strabane LGD has the third largest number of hotel bed-spaces (after Belfast and the Causeway Coast & Glens) and the fourth highest hotel bed-space occupancy of all the LGDs

5 cruise ships (with 4,044 passengers on board) docked in Derry~Londonderry in 2014, up on 2013 figures

Fact Card is based on data published by the Northern Ireland Statistics and Research Agency (NISRA).

Tourism performance estimates presented above are based on overnight trips made by Northern Ireland residents and visitors from outside Northern Ireland. Estimates relate to overnight trips only, i.e. exclude day trips.

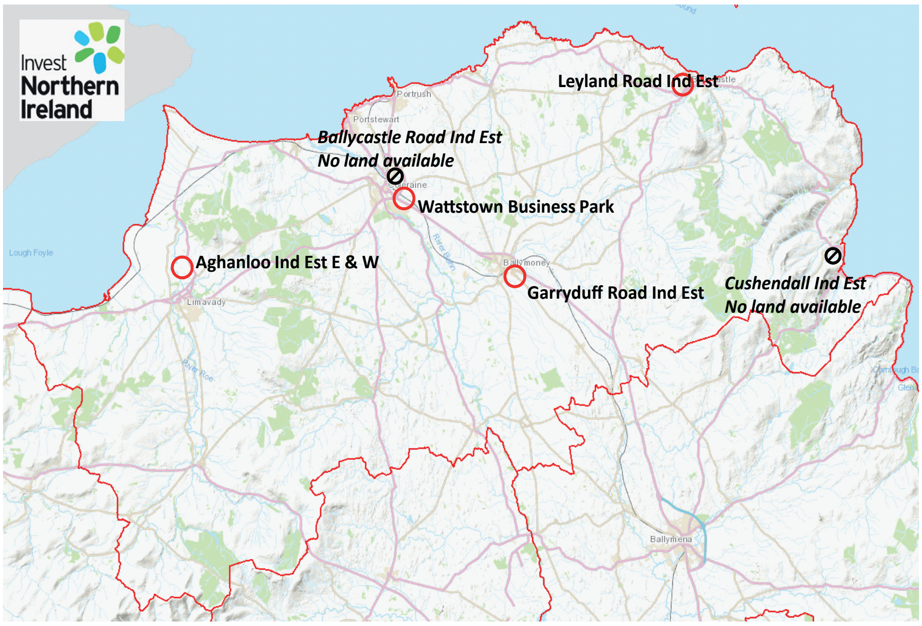
Invest NI Property Availability

Property by Landholding and Available Land

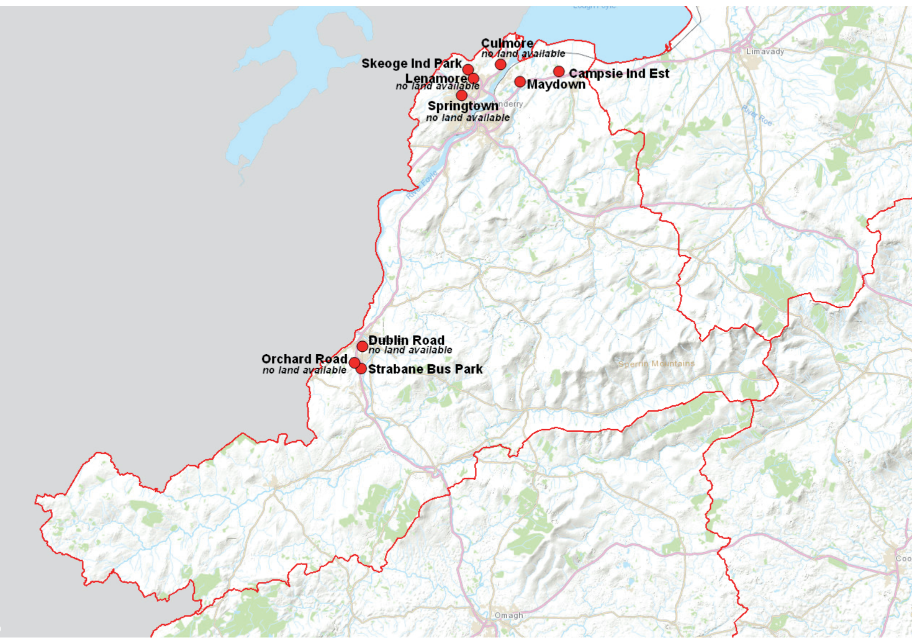
Industrial Estate	LGD 2014	Post Code	Landholding (acres)	Available land (acres)	*Landholding (ha)**	*Available land (ha)**
Wattstown BP	Causeway Coast and Glens	BT52 1BS	74.2	47.7	30.0	19.3
Aghanloo West	Causeway Coast and Glens	BT49 0HR	51.3	13.3	20.8	5.4
Aghanloo East	Causeway Coast and Glens	BT49 0HE		3.2		1.3
Garryduff Road	Causeway Coast and Glens	BT53 7LH	12.8	4.5	5.2	1.8
Leyland Road	Causeway Coast and Glens	BT54 6EZ	4.9	2.0	2.0	0.8
Campsie IE	Derry and Strabane	BT47 3XX	244.5	59.3	99.0	24.0
Skeoge IP	Derry and Strabane	BT48 8SE	75.2	31.7	30.4	12.8
Strabane B Park	Derry and Strabane	BT82 9GU	43.1	15.8	17.4	6.4
Maydown	Derry and Strabane	BT47 6UQ	66.3	11.2	26.8	4.5
			572.3	188.7	231.6	76.4

*Hectare figures = acres/2.471

Invest NI Business Parks in Causeway Coast & Glens



Invest NI Business Parks in Derry & Strabane



Data Sources

Population: Mid Year Estimates, 2014 (NISRA)

Labour Market: Labour Force Survey - Local Area Database, 2014 (NISRA)

Claimant Count: Claimant Count Statistics - Annual Averages, 2014 (NISRA)

Business Base - Overview: Inter Departmental Business Register, 2014 (NISRA)

Business Base - Locational Analysis: Companies House Database, 2014 (Companies House)

Productivity: Annual Business Inquiry, 2013 (NISRA)

Entrepreneurship: Global Entrepreneurship Monitor - Northern Ireland Report, 2014 (GEM)

Jobs: Census of Employment, 2013 (NISRA)

Earnings: Annual Survey of Hours and Earnings, 2014 (NISRA)

Travel to Work: Census, 2011 (NISRA)

Skills: Labour Force Survey - Local Area Database, 2014 (NISRA)

Jobs Detailed Analysis: Northern Ireland at Work, Aug-Sept 2015 (Agenda NI)

UK Regional Comparisons: Regional Economic Indicators, 2014 (ONS)

Tourism Factsheets: LGD Fact Cards, 2014 (NITB)