

# Socio-Economic Profile

A Socio-Economic Profile of the Fermanagh and Omagh District  
**March 2022**

Co-Authored by:

Alan Mitchell & Claire O'Donnell (FODC) and;  
Eoin Magennis & Ana Desmond (UUEPC)

# Introduction

# Introduction

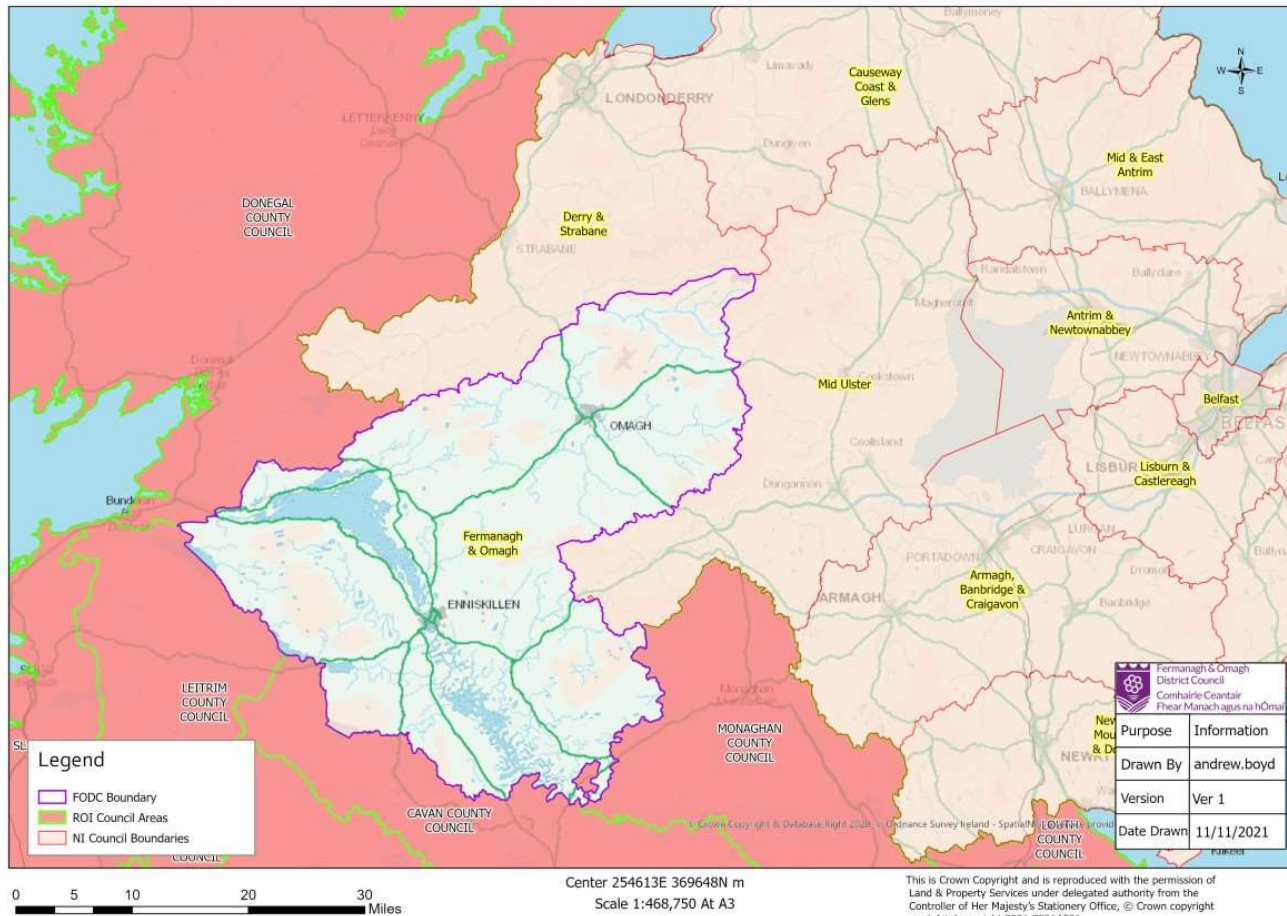


- The Fermanagh and Omagh district spans approximately 3,000 km<sup>2</sup> and is home to 117,300 people. The district is the largest in Northern Ireland in terms of land mass and the smallest in terms of population, with a population density of 41.2 people per square kilometre.
- Fermanagh and Omagh is primarily rural; only 30% of the population live in the two main towns of Enniskillen and Omagh. A further 7% live in the local towns of Carrickmore, Dromore, Fintona, Irvinestown and Lisnaskea. The 48 villages and small settlements account for a further 16% of the population, with 47% of people living in open countryside.
- Lough Erne, the fourth largest lake system in Ireland, is fully encompassed within the district. Part of the Sperrin Area of Outstanding Natural Beauty (AONB) also sits within the district, along with part of the Marble Arch Caves UNESCO Global Geopark.
- Over 1-in-10 businesses in Northern Ireland are located in the Council area. The majority of businesses in the Council area are micro, employing fewer than 5 people and/or with a turnover of less than £50k per annum



# Introduction (2)

## FODC Boundary



# Outline

This report provides an overview of the latest available data across 10 main topics for Fermanagh and Omagh District Council, and also draws comparisons across Northern Ireland and the Republic of Ireland where appropriate.

It is a high level overview of the data, intended to give a picture of the current situation in Fermanagh and Omagh District Council. Priority is given to looking at the trends in Fermanagh and Omagh over time, with reference to the NI average as a comparator. In some instances, Fermanagh and Omagh is set in the context of the 11 LGDs.

Further detailed data is available from the various sources itemized throughout the report.

# Overview

---

[Chapter 1: Population Overview](#)

---

[Chapter 2: Population Wellbeing](#)

---

[Chapter 3: Economic Activity](#)

---

[Chapter 4: Labour Market](#)

---

[Chapter 5: Tourism](#)

---

[Chapter 6: Business and Enterprise](#)

---

[Chapter 7: Trade and the Economy](#)

---

[Chapter 8: Housing](#)

---

[Chapter 9: Deprivation](#)

---

[Chapter 10: Infrastructure](#)

---

[Chapter 11: ROI Comparators](#)

# Chapter 1: Population Overview

# Summary: Population Overview



Fermanagh & Omagh  
District Council  
Comhairle Ceantair  
Fhear Manach agus na hÓmaí

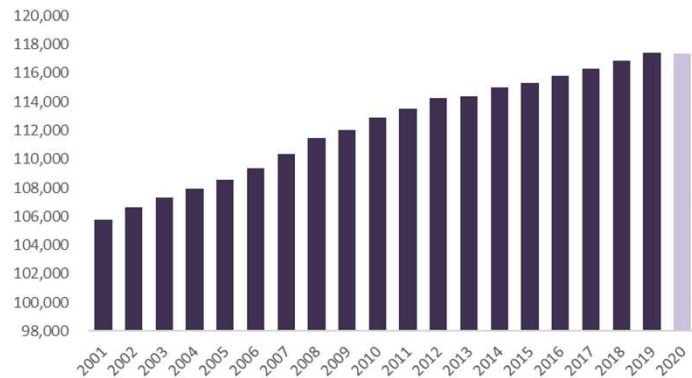
- The population in Fermanagh & Omagh has grown steadily from 105,800 in 2001 to 117,300 in 2020. Looking forward the population is expected to grow to 119,837 by 2030.
- In terms of age demographics Fermanagh & Omagh follows a similar but more pronounced trend than the Northern Ireland average. The number of 16–39 year-olds has declined by 8% since 2001. Whereas the number of 65+’s has increased by 52% over the same period. There has also been a noticeable rise of 27% in the number of 40–64 year-olds. The working age population (16-64 year olds) within the Council is also expected to decrease from 71,000 in 2019 to 70,265 by 2030.





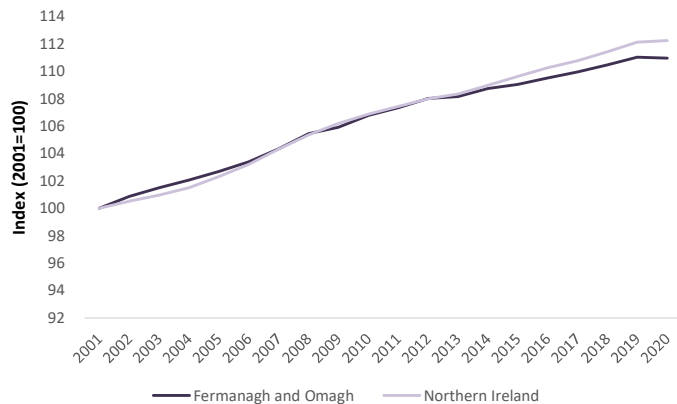
# Total population

**Figure 1.1: Total population, Fermanagh & Omagh, 2001 - 2020**



The 2020 mid year population estimate for Fermanagh & Omagh is 117,337. As shown by Figure 1.1 the population has steadily risen from 105,751 in 2001. This has resulted in a 1% compound annual growth rate over the 19-year time period.

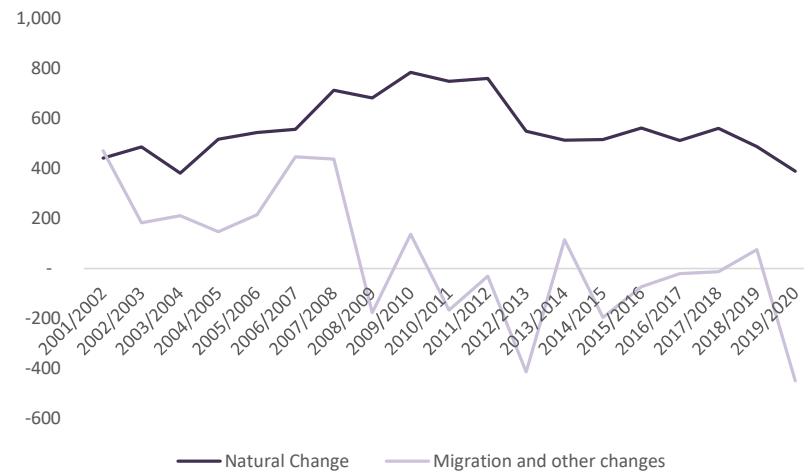
**Figure 1.2: Total population (Index), Fermanagh & Omagh and Northern Ireland, 2001 - 2020**



Total population in Fermanagh and Omagh has risen by 11,586 people since 2001, representing an 11% increase;  
 Total population in Northern Ireland has risen by 206,672 people since 2001, representing a 12% increase.

# Population – FO and NI

**Figure 1.3: Components of population change, Fermanagh and Omagh, 2001-2020**



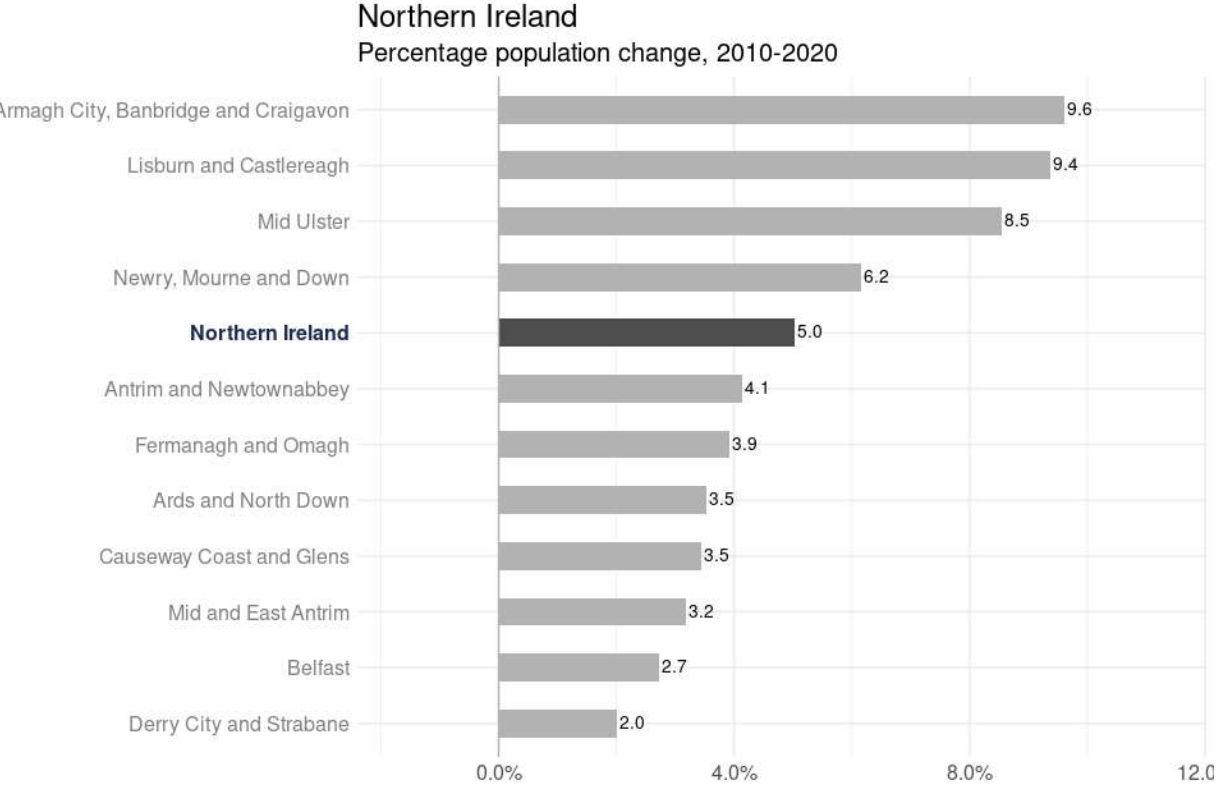
The population in Fermanagh and Omagh has risen by an average of 563 persons per year since 2001/2002.

Net migration averaged at 47 persons per year, although it has been almost net-zero from 2010 onwards after EU expansion in the early 2000's.



# Population – FO and NI (2)

**Figure 1.4: Percentage Population Change in NI Councils (2010-2020)**



At 3.9%, population growth in Fermanagh and Omagh lagged behind the NI average of 5.0% in the period 2010-2020.

Source: NISRA



# Population demographics

Figure 1.5: Population by age band, Fermanagh & Omagh, 2001 - 2020

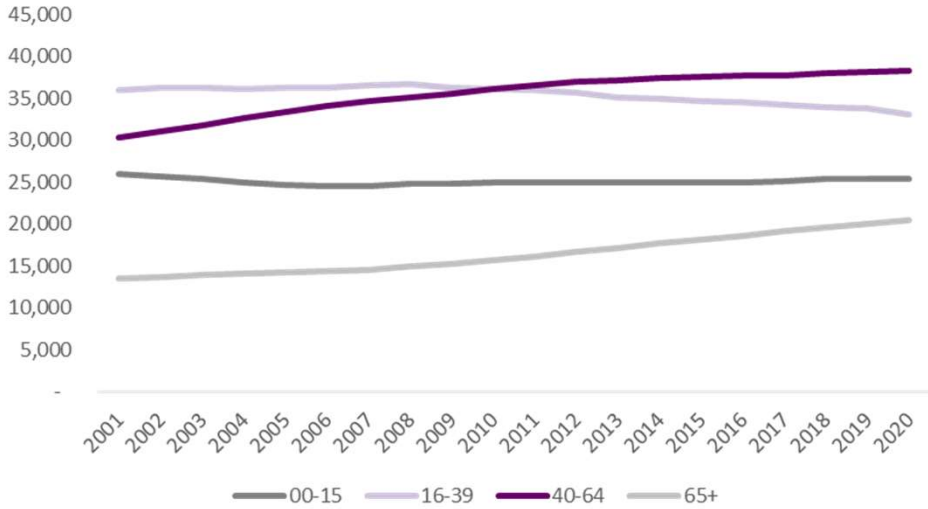
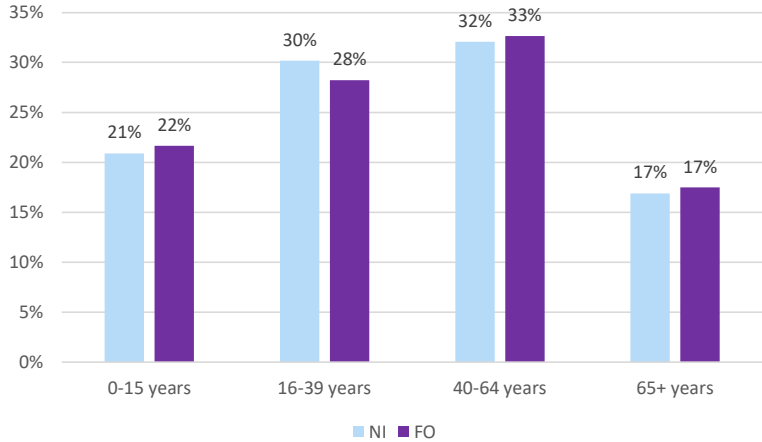


Figure 1.6: 2020 Population by Broad Age Bands (NI vs FO)



The trend in age demographics in Fermanagh and Omagh is one that mirrors the overall change in Northern Ireland, however, the decline in 16–39-year-olds has been more pronounced within the council area.

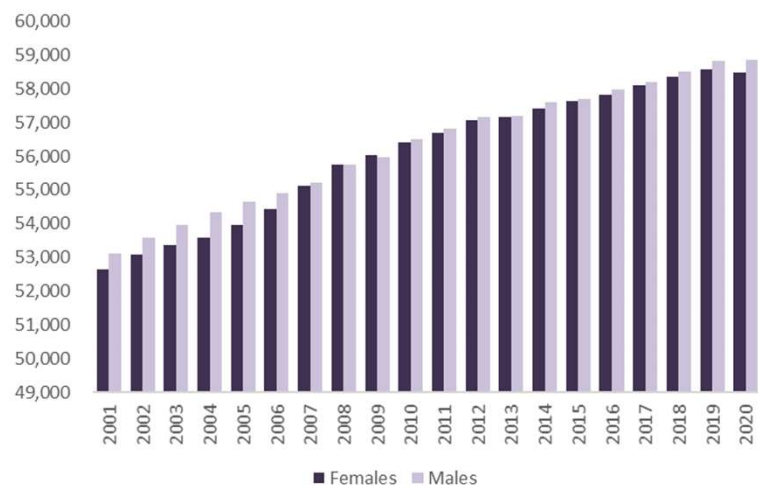
The number of 16–39-year-olds has declined by 8% since 2001. Whereas the number of 65+’s has increased by 52% over the same period. There has also been a noticeable rise of 27% in the number of 40–64-year-old’s.



Source: NISRA

# Population by gender

Figure 1.7: Population by gender, Fermanagh & Omagh, 2001 - 2020

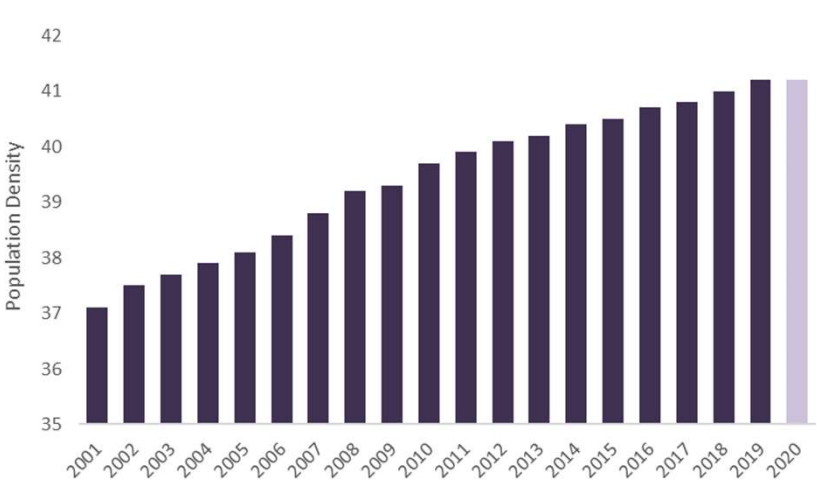


In 2020 there were 58,849 males compared to 58,488 females which when rounded results in a an exact 50:50 even split. The number of males being marginally higher than females is something that is inconsistent with the general trend in Northern Ireland where females account for 51% of the population compared to males which represent 49% .



# Population density

**Figure 1.8: Population density, Fermanagh & Omagh, 2001 - 2020**



**Figure 1.9: Population density by LGD, 2020**

	Population Density
Northern Ireland	139.8
Antrim and Newtownabbey	251.9
Ards and North Down	354.4
Armagh City, Banbridge and Craigavon	161.3
Belfast	2553.1
Causeway Coast and Glens	73.2
Derry City and Strabane	122.1
Fermanagh and Omagh	41.2
Lisburn and Castlereagh	291.3
Mid and East Antrim	133.3
Mid Ulster	81.8
Newry, Mourne and Down	112.2

The population density of Fermanagh & Omagh has followed a similar trend to that of the total population figures.

Population density in Fermanagh and Omagh has risen from 37.1 in 2001 to 41.2 in 2020. Figure 1.9 shows that Fermanagh and Omagh has the lowest population density of any LGD in NI, at around only 30% of the NI average density.



Source: NISRA



# Population projections

Figure 1.10: Population projections, Fermanagh & Omagh, 2019-2030

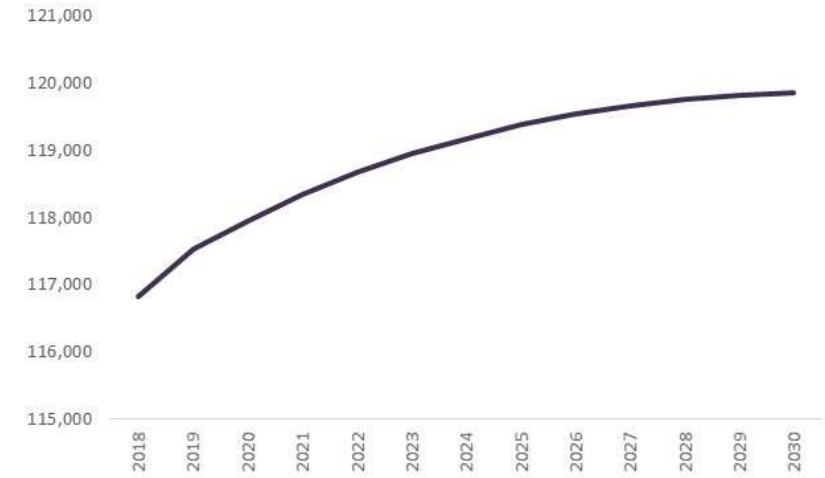
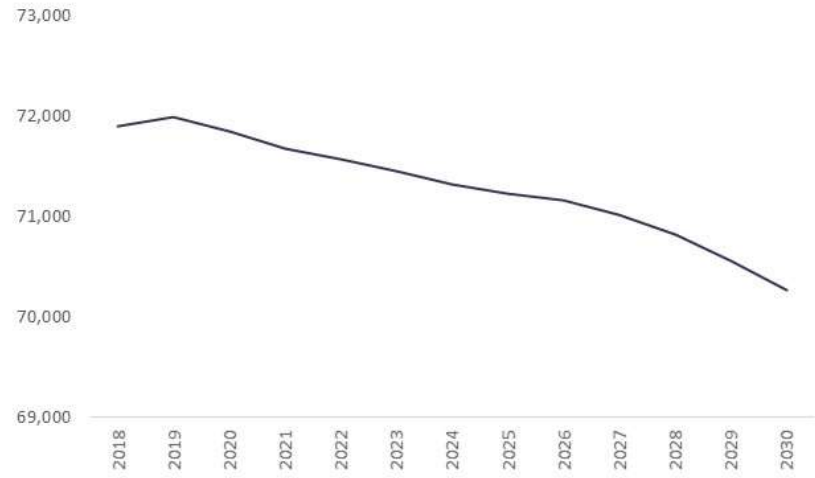


Figure 1.11: Working age population projections, Fermanagh & Omagh, 2019-2030



The population in Fermanagh & Omagh is forecast to grow from 117,400 in 2019 to 119,800 by 2030, an increase of 2,300 people over the 11-year period.

The working age population is expected to fall from 72,000 to 70,200 over the same time period.



Source: NISRA 2018 Sub-National Population Projections



# Population projections – FO and NI

Figure 1.12: Population projections, Fermanagh & Omagh and NI, 2019-2030

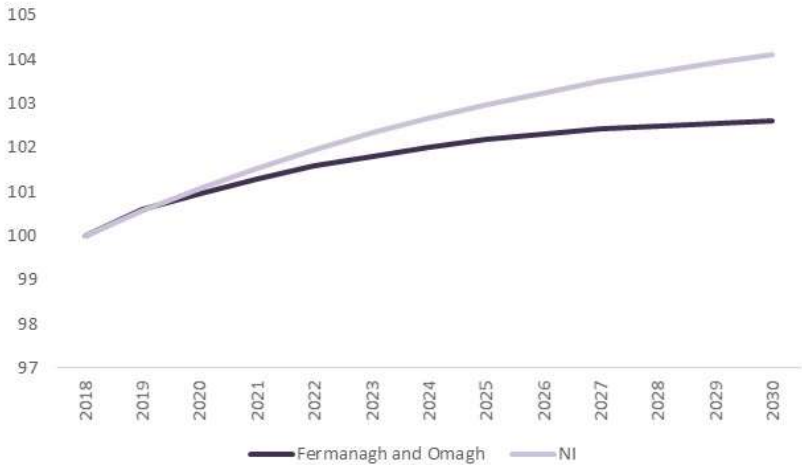
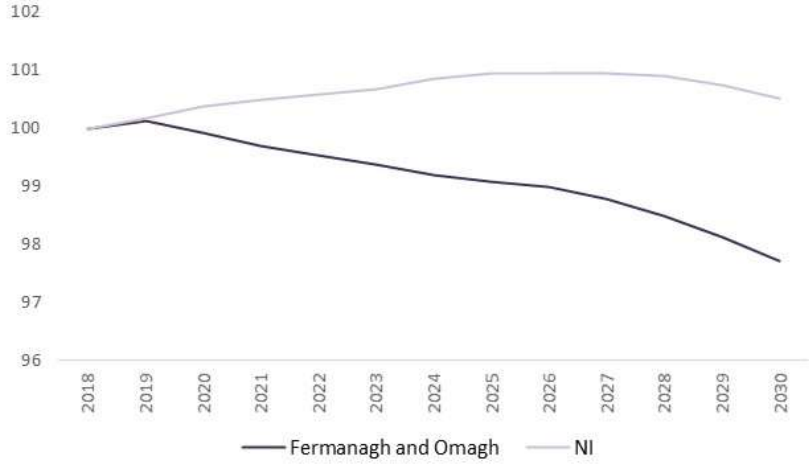


Figure 1.13: Working age population projections, Fermanagh & Omagh and NI, 2019-2030



The population in Fermanagh and Omagh is predicted to rise from 116,835 in 2018 to 119,867 by 2030. This represents a growth rate of 2.5% as compared to the NI average growth rate of 3.9%. Most notably, Fermanagh and Omagh is predicted to experience a sharp decline in those of working age, from 71,902 in 2018 to 70,265 in 2030 (-2.3%).



Source: NISRA 2018 Sub-National Population Projections





# Population projections – Broad Age

Figure 1.14: Population projections, Fermanagh & Omagh, 2020-2030

	2020		2030		2020-2030
	Total people	% of the population	Total people	% of the population	% change
0-15	25,408	22%	23,381	20%	-8%
16-39	33,128	28%	31,836	27%	-4%
40-64	38,292	33%	38,429	32%	0%
65+	20,509	17%	26,221	22%	28%
<b>Total</b>	<b>117,337</b>	<b>100%</b>	<b>119,867</b>	<b>100%</b>	<b>2%</b>

Fermanagh and Omagh is expected to see rise of around 28% in the number of older residents by 2030. Coupled with a decline in those of working age population, this is likely to put a very significant strain on health and social care services locally.



Source: NISRA 2018 Sub-National Population Projections

# Chapter 2: Population Wellbeing

# Summary: Population Wellbeing



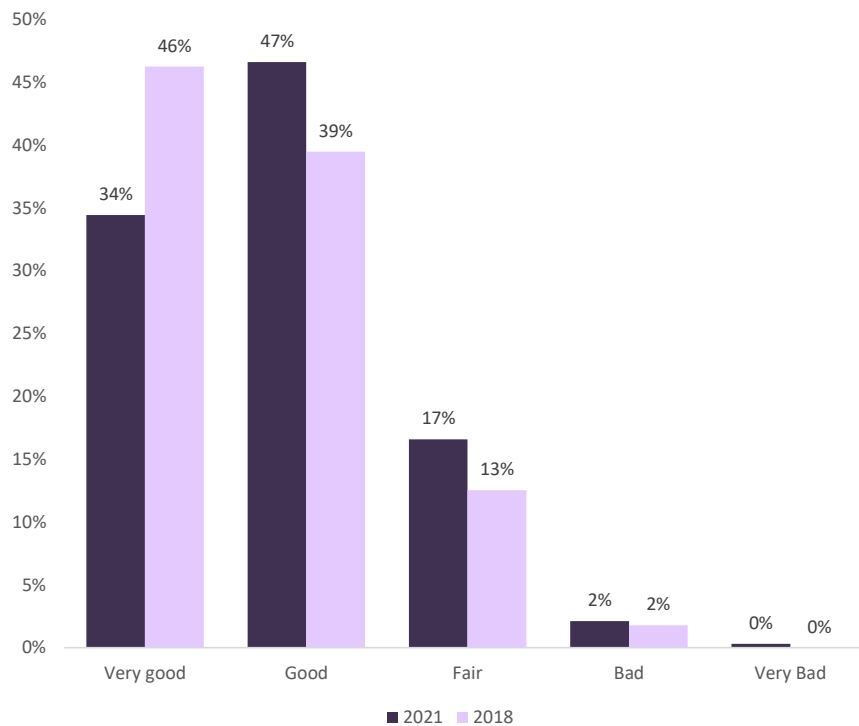
Fermanagh & Omagh  
District Council  
Comhairle Ceantair  
Fhear Manach agus na hÓmaí

- Residents of Fermanagh and Omagh reported generally good health, with 81% self reporting 'good' or 'very good' health. Only 2% self reported 'bad health'
- There are pockets of the district where health outcomes are less favourable, with the 20% most deprived parts of Fermanagh and Omagh having a lower life expectancy, higher admission rates due to alcohol and drugs and a higher prescription rates for drugs relating to mood and anxiety disorders.
- The Covid-19 pandemic and associated lockdowns have had an impact on people's lives, with people feeling less in control of their lives, less able to utilise their time as they would please and reporting lower life satisfaction. They are, however, reporting higher physical activity levels!



# General Health

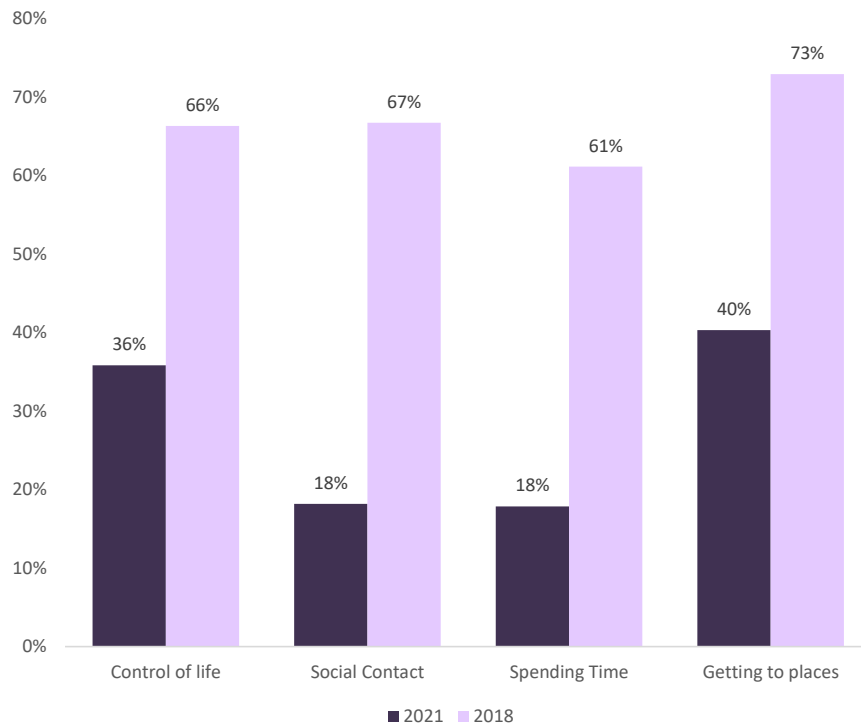
Figure 2.1: Residents' self-reported health status



- 81% of residents self-reported their health as either good or very good in 2021 (as compared to 85% in 2018)
- Only 2% of residents self-report bad health

# ASCOT Social Care Outcomes Toolkit

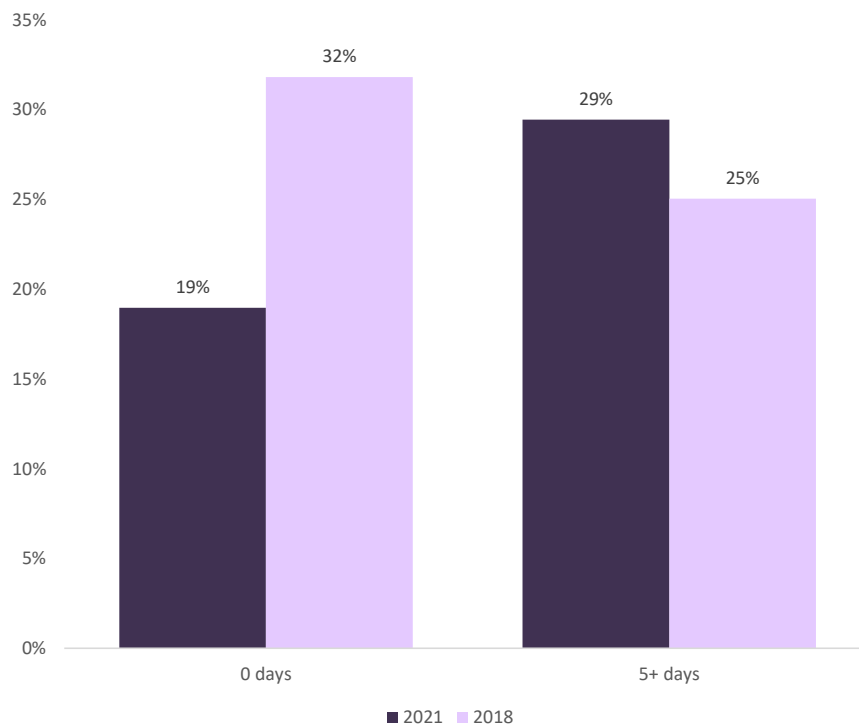
Figure 2.2: ASCOT Social Care Outcomes



All social care outcomes declined significantly between 2018 and 2021 as a result of the COVID-19 pandemic

# Physical Activity

Figure 2.3: Physical Activity Levels

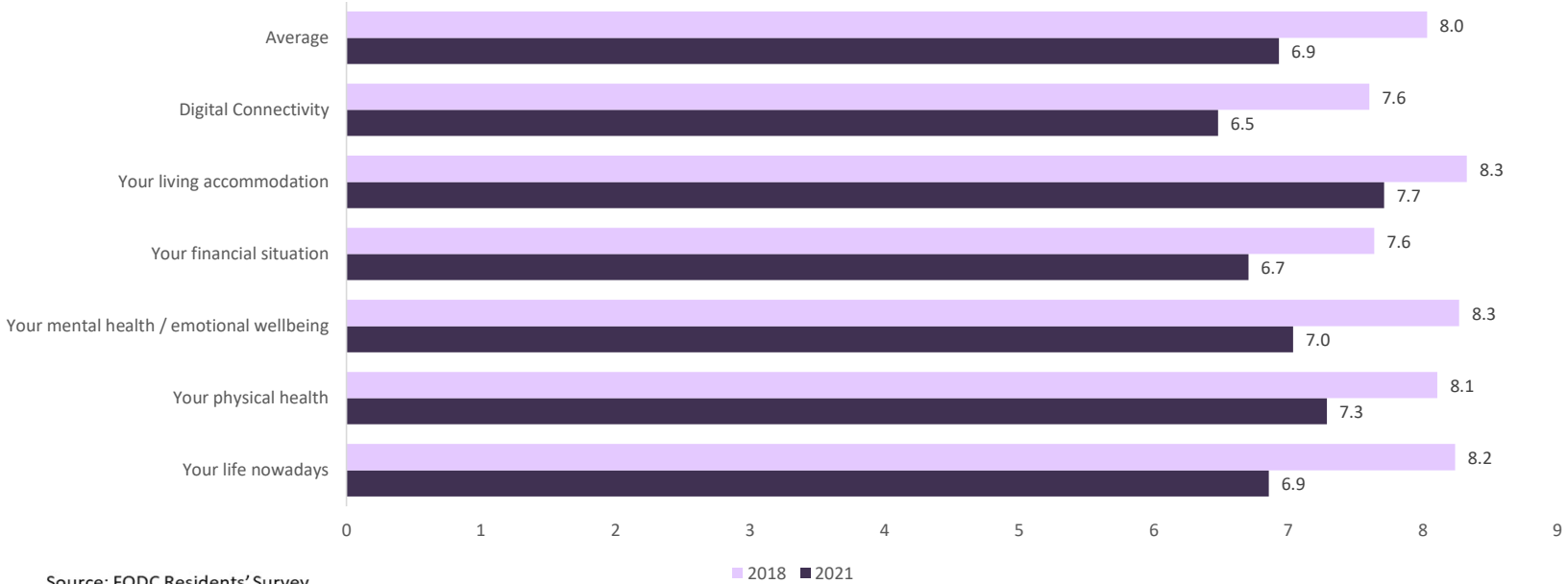


Residents' reported higher levels of physical activity in 2021, again, likely due to the pandemic



# Life Satisfaction

Figure 2.4: Life Satisfaction Levels



Source: FODC Residents' Survey

Levels of life satisfaction fell across all measures from 2018 to 2021, which was likely largely due to the COVID-19 Pandemic and resultant restrictions.



# Warwick Edinburgh Mental Wellbeing Scale

Figure 2.5: Mental Wellbeing Levels

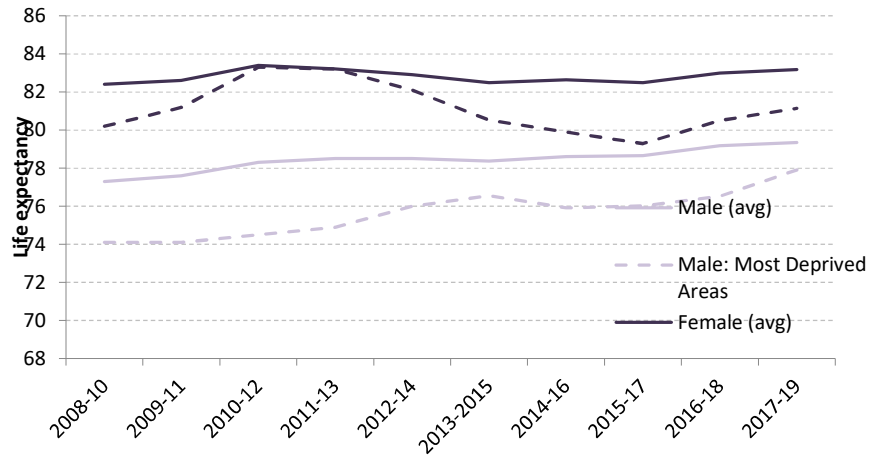


- Residents' in West Tyrone report the highest levels of mental wellbeing
- Residents' in Omagh report the lowest levels of mental wellbeing



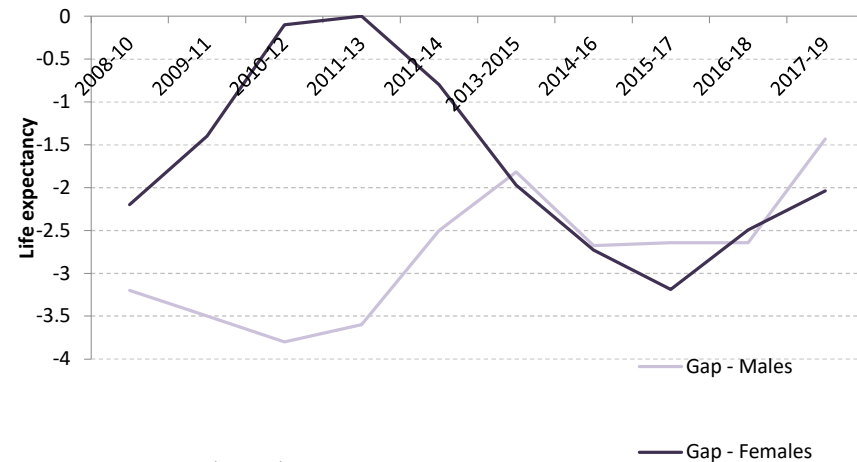
# Gap in Life Expectancy between the Most and Least Deprived Areas

Figure 2.6a: Gap in life expectancy (most and least deprived areas), Fermanagh and Omagh



Source: HCIMS Regional Inequalities

Figure 2.6b: Gap in life expectancy (most and least deprived areas), Fermanagh and Omagh

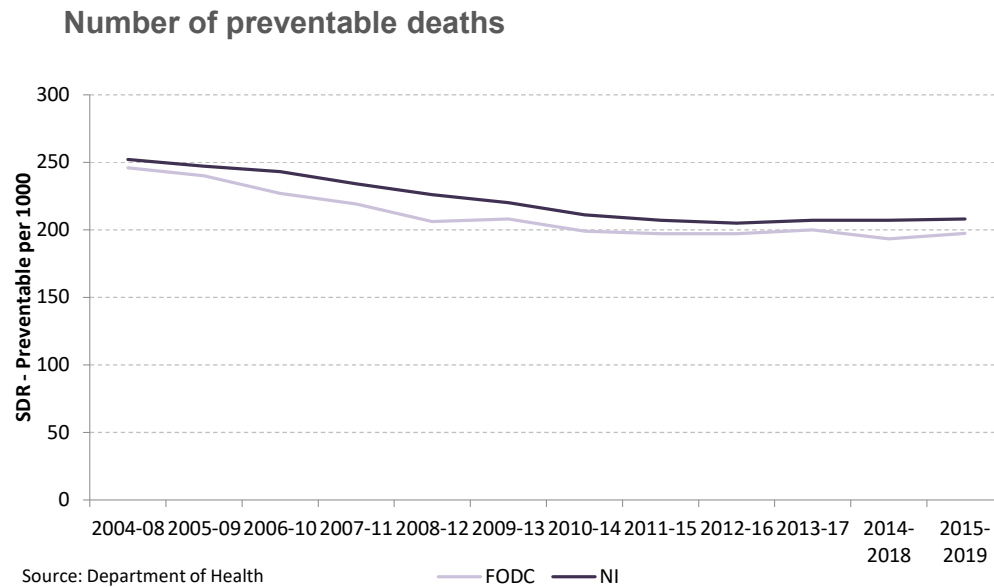


Source: HCIMS Regional Inequalities

- The gap in life expectancy for males is narrowing
- The gap in life expectancy for females is also narrowing but at a slower rate

# The Number of Preventable Deaths

Figure 2.7: Number of Preventable Deaths



While the number of preventable deaths in Fermanagh and Omagh is slightly lower than the NI average, numbers remain stubbornly high.

# Self-Efficacy, Locus of Control & Life Satisfaction

Levels of self-efficacy, locus of control and life satisfaction in Fermanagh and Omagh are generally on a par with NI averages

Figure 2.8: Self-Efficacy, Locus of Control and Life Satisfaction

	2019/20		
	FODC	NI	Significant
Self-Efficacy	19.2	19.3	No
Low Self Efficacy (16+)	16.3%	19.4%	No
Low Self Efficacy (60+)	18.6%	20.8%	No
Locus of Control	16.9	17.1	No
Life Satisfaction	7.9	7.8	No

# Chapter 3: Economic Activity

# Summary: Economic Activity



Fermanagh & Omagh  
District Council  
Comhairle Ceantair  
Fhear Manach agus na hÓmaí

- The economic inactivity rate in Fermanagh and Omagh has averaged 30% of those aged between 16-64 and 41% of those aged 16+ over the past 5 years.
- Fermanagh and Omagh has typically had an above average level of economic inactivity, with levels of long-term sickness typically above the NI trend.
- The skill profile of those who are economically inactive is significantly lower than those who are employed – 35% of the economically inactive have no formal qualifications, compared to 11% of those in employment.
- This is one of the components that makes it challenging for those who are long term economically inactive to get back into the labour market.



# Economic Inactivity

Figure 3.2: Number economically inactive & economic inactivity rate, Fermanagh & Omagh, 2009-2020

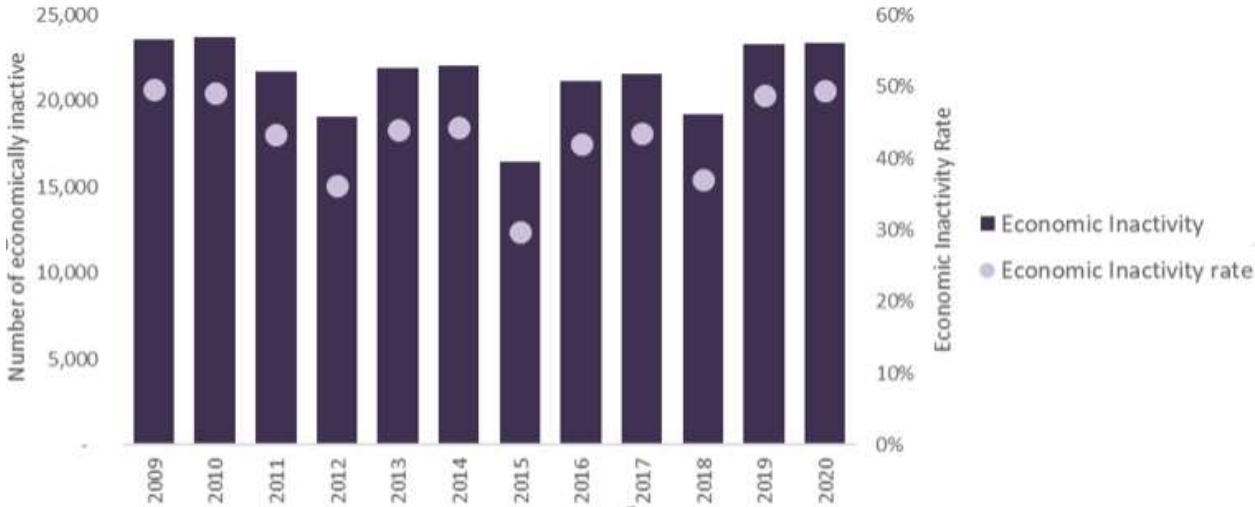


Figure 3.2 illustrates how the number of economically inactive people within Fermanagh & Omagh has fluctuated over the last 11 years. Numbers fell as low as 16,500 in 2015 but have returned to 23,400 in 2020, marginally below the highest recorded figure of 23,700 in 2010.



Source: UUEPC

# Economic Inactivity Rate

Figure 3.3 : Economic Inactivity Rate, Fermanagh & Omagh vs. NI, 2009-2020

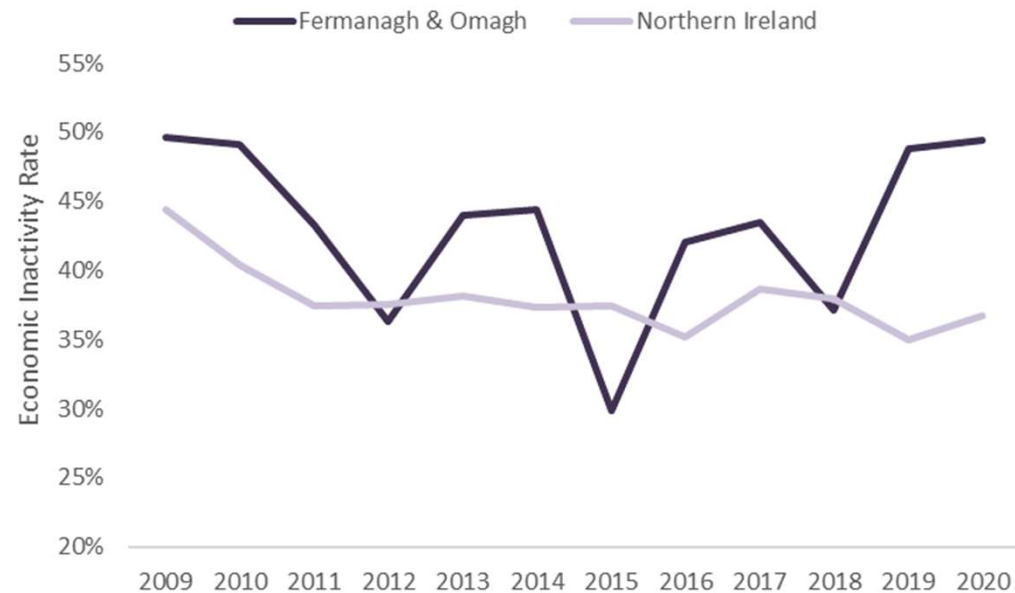


Figure 3.3 compares the Fermanagh & Omagh economic inactivity rate to that of the Northern Ireland average. Typically, Fermanagh & Omagh is much more volatile and generally sits at a higher level than the NI average. In 2020 the economic inactivity gap widened significantly from 49% in Fermanagh & Omagh versus a 37% country-wide average.

## Slide 31

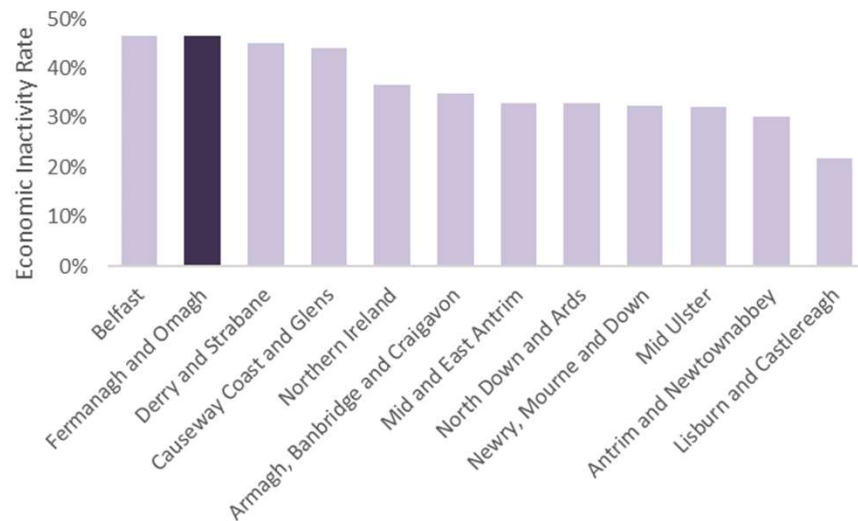
---

0 New slide added  
, 2021-11-02T12:08:34.332



# Economic inactivity

**Figure 11.1: Economic Inactivity Rate, NI LGDs, 2021**

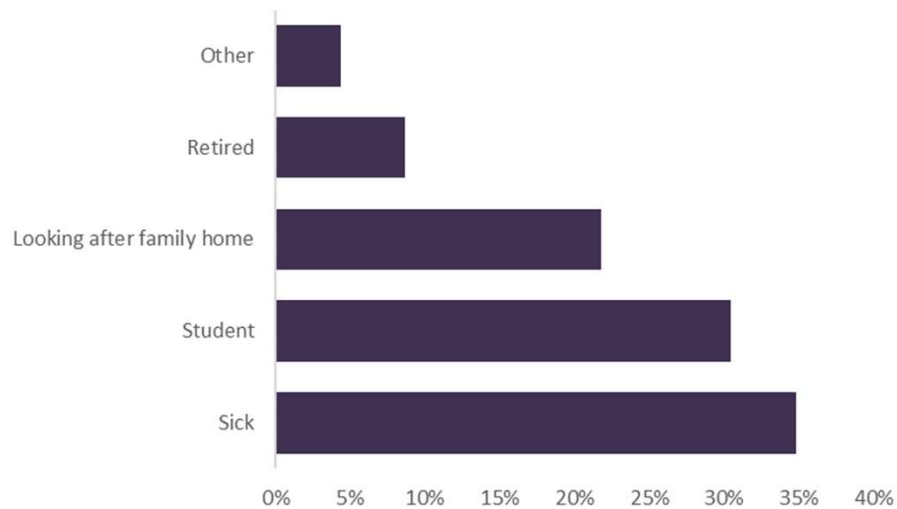


Fermanagh & Omagh has the second highest rate of economic inactivity throughout Northern Ireland. This sits at 25 percentage points higher than Lisburn and Castlereagh (46% vs. 22%).

0 New slide  
, 2021-11-03T14:01:41.469

# Reason for economic inactivity

**Figure 3.4: Reason for economic inactivity, Fermanagh & Omagh, 2019**



35% of those economically inactive in Fermanagh & Omagh are classified as long term sick or disabled. This is significantly higher than the NI average of approximately 26% at the same point in time.

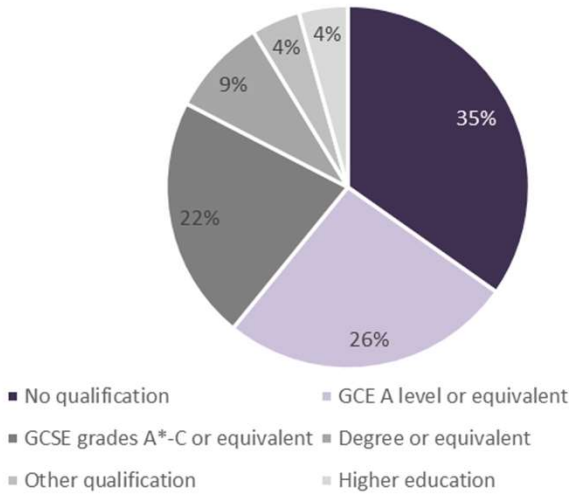
Students account for just under a further third (30%) of those economically inactive, however, a large proportion of this cohort are expected to enter the labour market following their studies.

22% are looking after the family home with the remaining 13% falling into the retired and 'other' category.

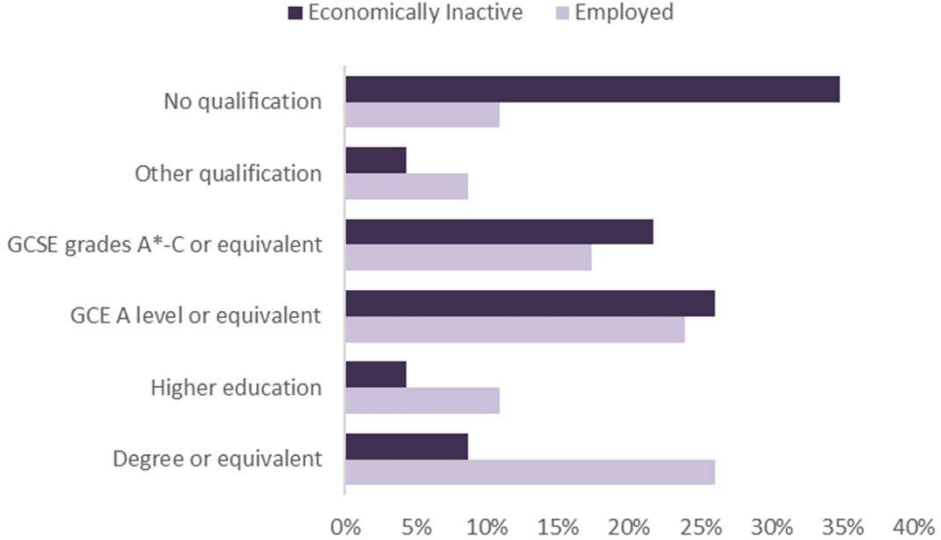


# Skills profile of inactive

**Figure 3.5: Skills profile of the economically inactive , Fermanagh & Omagh, 2019**



**Figure 3.6: Skills profile of the economically inactive vs employed , Fermanagh & Omagh, 2019**



The largest proportion of those economically inactive are those with no qualifications, representing over a third (35%) of the overall total. However, those with no qualifications represent 11% of those that are employed which is on par with those with a higher education qualification in Fermanagh & Omagh. Similarly, A-level qualifications represent the second largest category of both the inactive and the employed.



Source: NISRA

# Chapter 4: Labour Market

# Summary: Labour Market



Fermanagh & Omagh  
District Council  
Comhairle Ceantair  
Fhear Manach agus na hÓmaí

Total employment has fluctuated since 2001 within the council area in line with economic conditions throughout the country. In 2020 total employment was 53,800. This is expected to increase to 54,200 by 2025.

Historically the unemployment rate in Fermanagh & Omagh has been more volatile than that of the Northern Ireland average. In 2020 the unemployment rate was 3.4%, this is expected to rise to during in 2021 and 2022 before falling back to 4.3% by 2025. These trends are mirroring that of the NI average

Four main sectors provide over half (52%) of employment opportunities with the council: retail, health & social work, manufacturing and agriculture. Compared to Northern Ireland as a whole Fermanagh & Omagh has comparatively more employees in the agriculture sector.

Over one quarter of those in employment in Fermanagh and Omagh are educated to degree level of above; this is below the NI average.

Average wage in Fermanagh and Omagh are on average approximately 12-14% lower than the NI average. This is largely driven by the sectoral composition of jobs.



# Employment

Figure 4.1: Total employment, Fermanagh & Omagh, 2001-2020

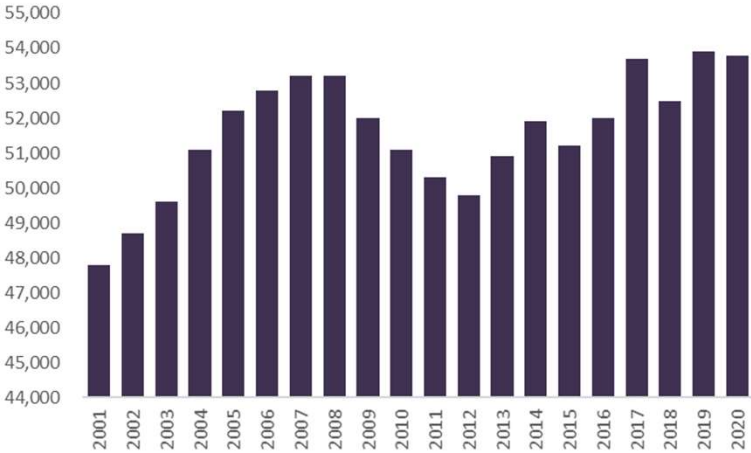


Figure 4.2: Total employment, Fermanagh & Omagh vs. NI, 2001-2020

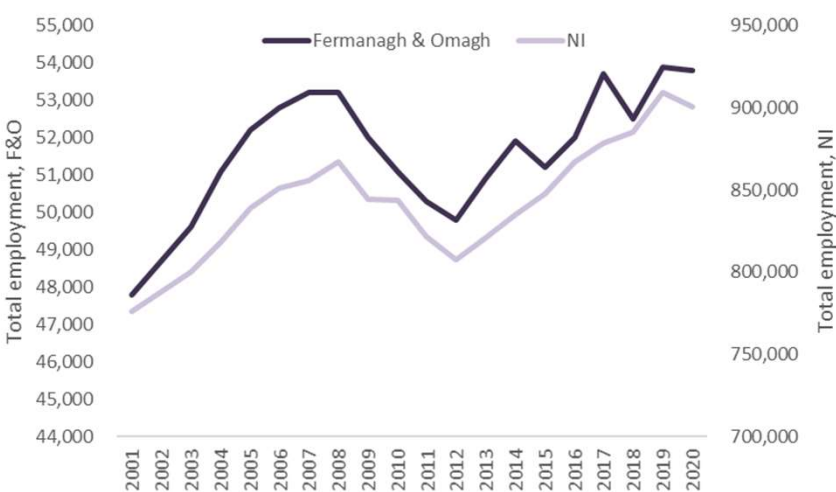


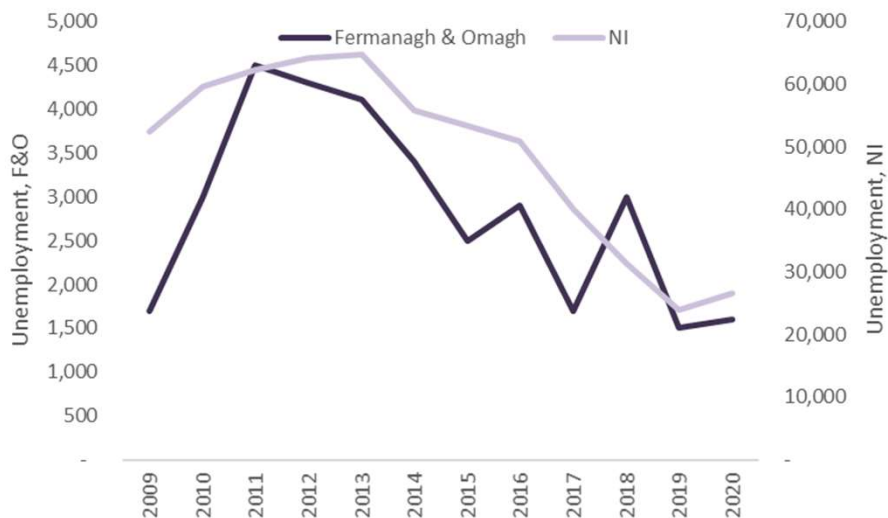
Figure 4.1 shows the cyclical nature of total employment within Fermanagh & Omagh, echoed by that of the slightly smoother but still cyclical nature of total employment in NI in Figure 4.2. Total employment within the council area fell marginally from 53,900 in 2019 to 53,800 in 2020.



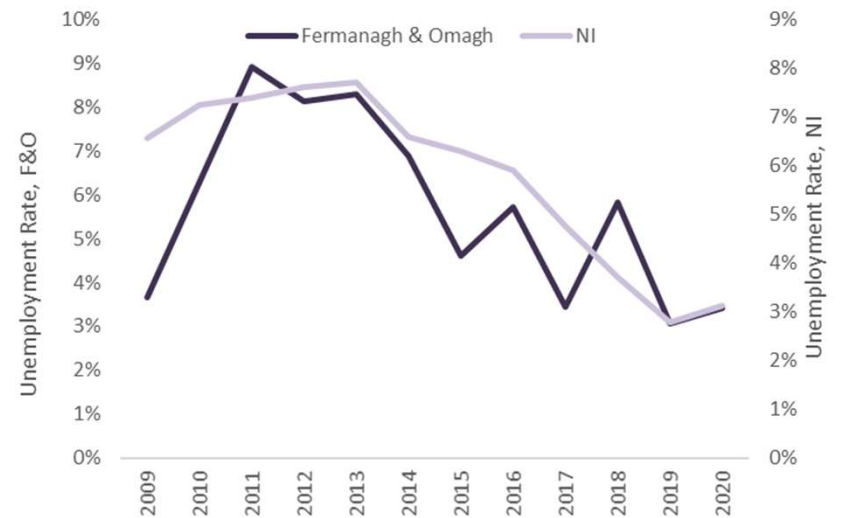
Source: UUEPC

# Unemployment

**Figure 4.3: Unemployment, Fermanagh & Omagh vs. NI, 2009-2020**



**Figure 4.4: Unemployment rate, Fermanagh & Omagh vs. NI, 2009-2020**



Unemployment has been more volatile in Fermanagh & Omagh compared to the NI over the last 11 years however the general trend has been in the downward direction despite a significant rise in 2018.

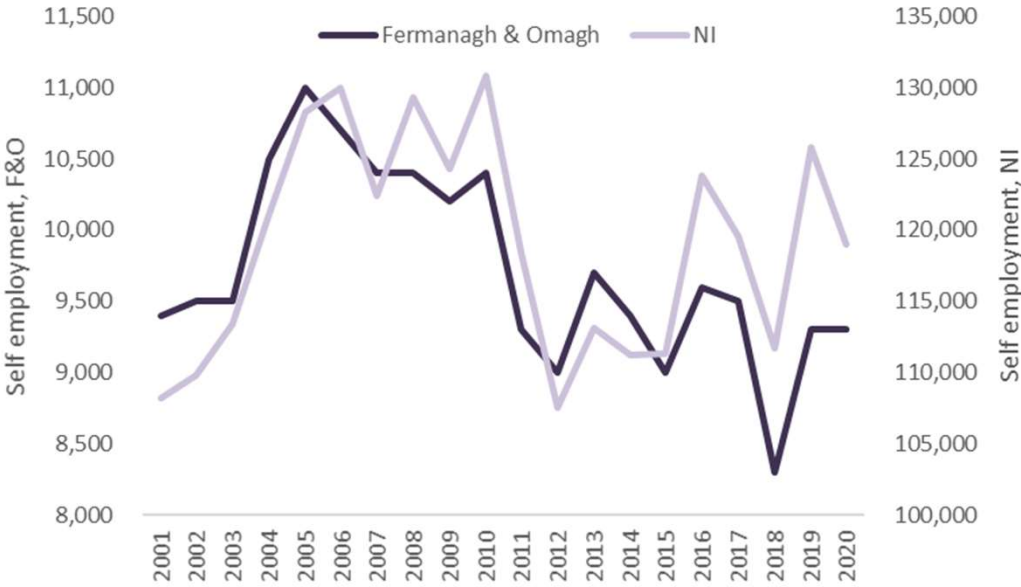
In 2019 and 2020 between 1,500 and 1,600 people remained unemployed (3.4% unemployment in 2020). There is a certain expectation that the furlough scheme may have kept unemployment numbers during 2020 artificially low and we may see these begin to rise in Q4 2021 into 2022.





# Self-employment

Figure 4.5: Self-employment, Fermanagh & Omagh vs. NI, 2001-2020



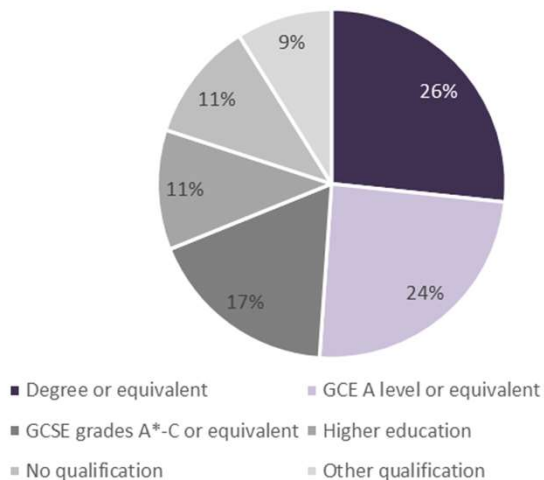
Self employment in both Fermanagh & Omagh and NI have both been volatile. Self-employment had been fluctuating around the 9,000 mark for a number of years before dropping to 8,300 in 2018. The number has now remained steady at 9,300 across both 2019 and 2020 now.



Source: UUEPC

# Skills profile of employed

Figure 4.6: Skills profile of the employed, Fermanagh & Omagh, 2019



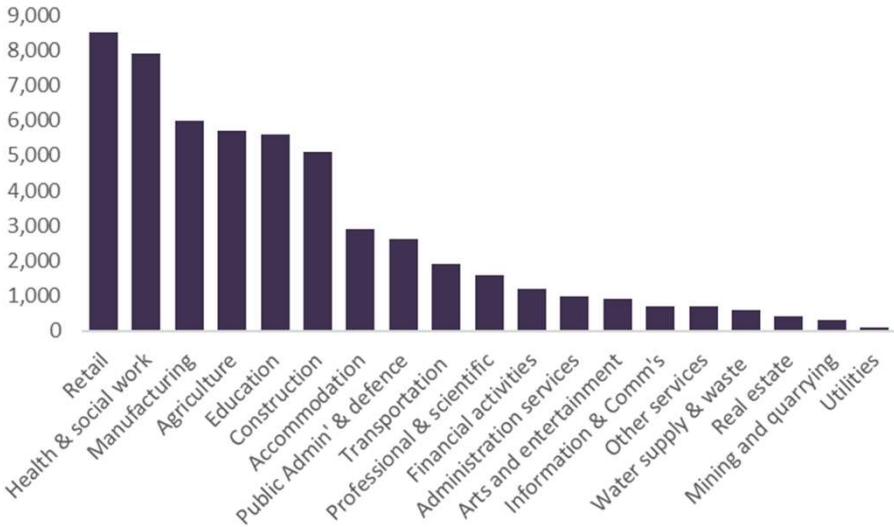
Half of those that are employed within Fermanagh & Omagh hold an A-level qualification or degree level qualification (or equivalent).

Those with GCSE level qualifications make up just under a fifth of the employed (17%). With the remaining third being made up of those with higher education, no qualifications or other qualifications.

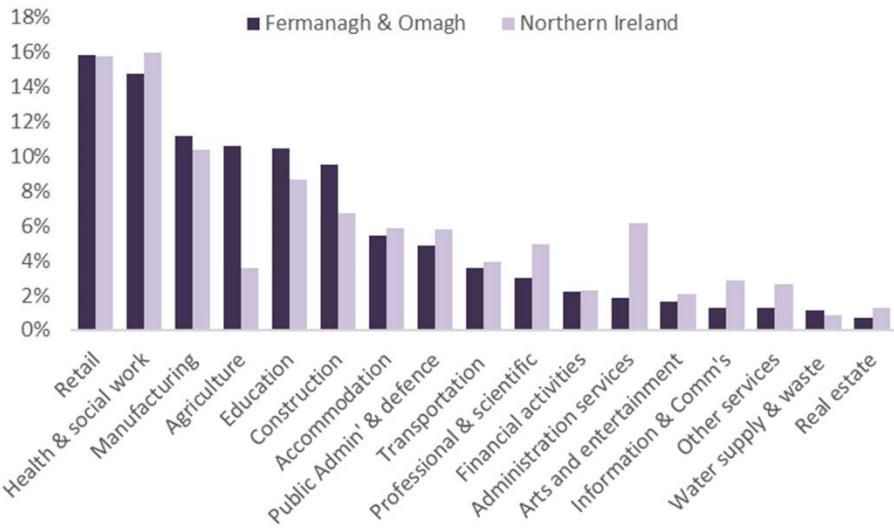


# Sectoral breakdown of employed

**Figure 4.7: Sectoral employment breakdown, Fermanagh & Omagh, 2020**



**Figure 4.8: Sectoral employment breakdown, Fermanagh & Omagh vs. NI, 2020**



Retail and health & social work account 16,400 jobs in Fermanagh & Omagh which translates to just under a third (31%) of all jobs within the council area.

When compared to Northern Ireland the proportion of total jobs that health and retail make up in on par with the NI average. Fermanagh & Omagh has comparatively more people working in agriculture and many less working in administrative services.

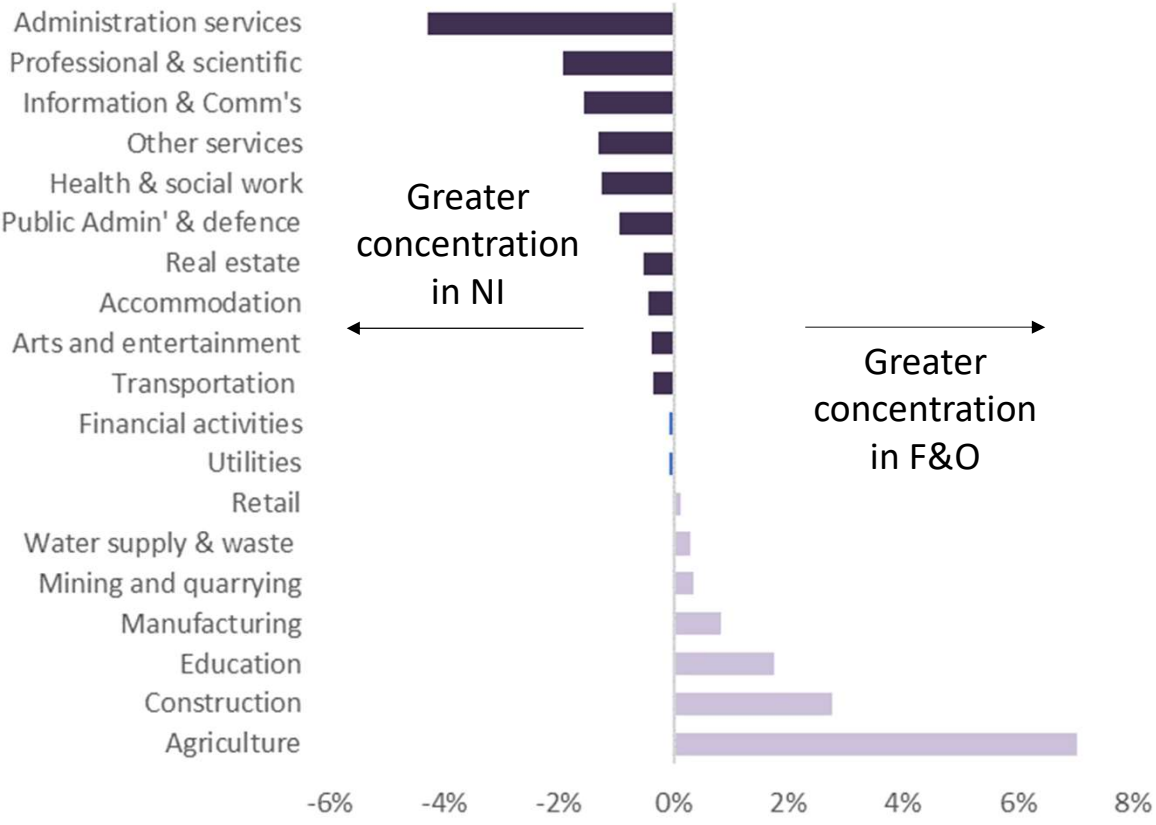


Source: UUEPC



# Relative employment

Figure 4.9: Relative Sectoral Employment, Fermanagh & Omagh vs NI, 2020



Source: UUEPC



# Labour market forecasts

Figure 4.10: Total employment forecasts, Fermanagh & Omagh vs. NI, 2001-2025

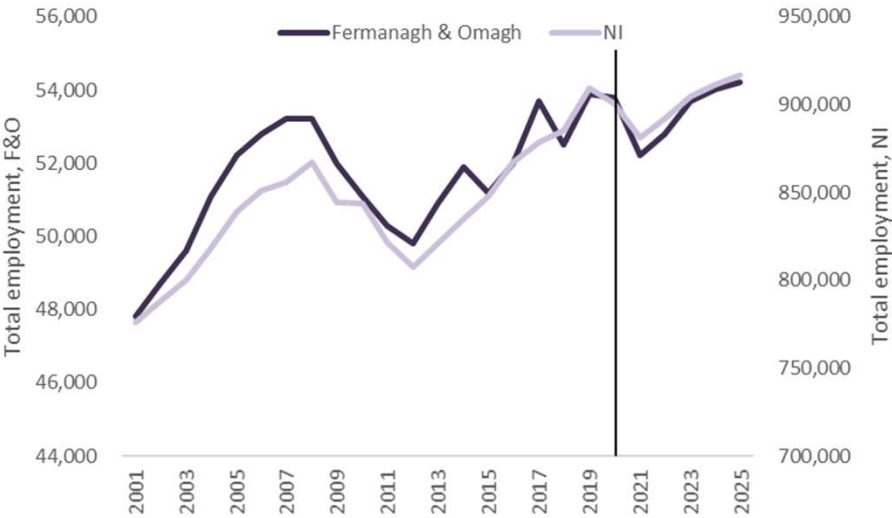
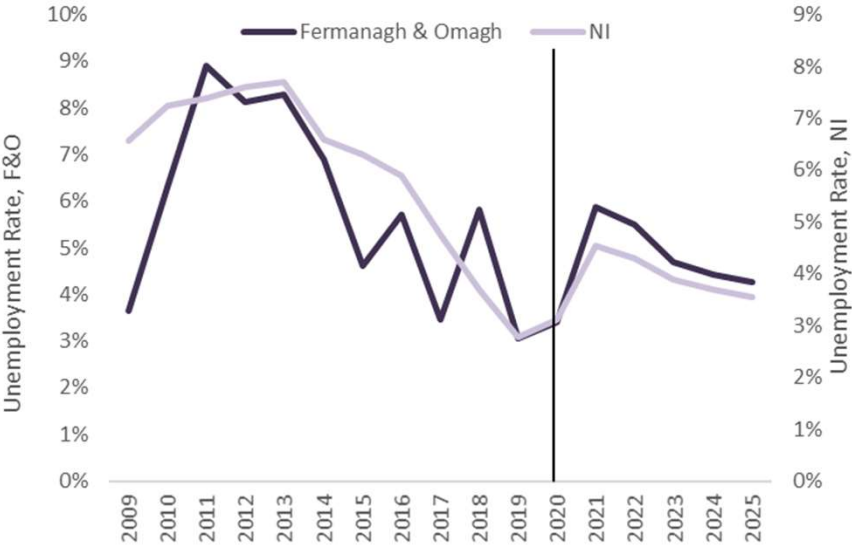


Figure 4.11: Unemployment rate forecasts, Fermanagh & Omagh vs. NI, 2009-2025



Total employment is expected from 53,800 in 2020 to 52,200 in 2021 before steadily increasing back to 54,200 in 2025.

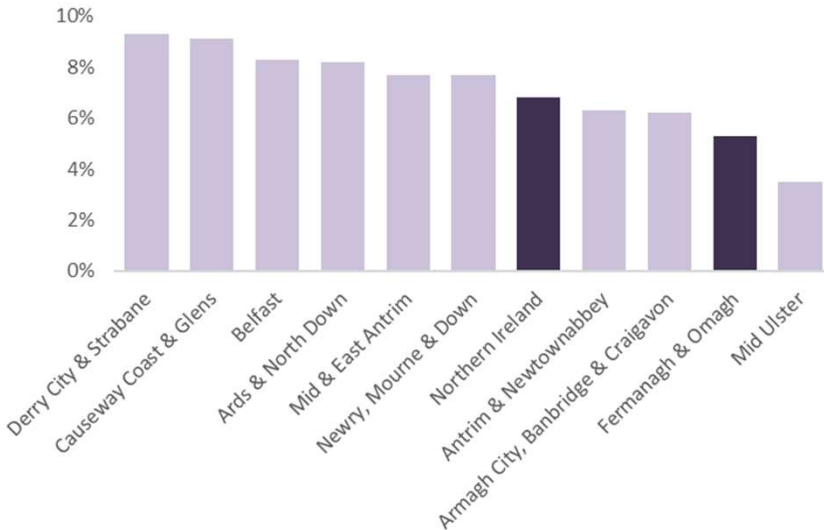
The unemployment rate is expected to rise from 3.4% in 2020 to 5.9% in 2021 before gradually decreasing back to 4.3% by 2025.



Source: UUEPC. Please note this was produced as part of the UUEPC Spring Outlook 2021 and is subject to revision over the coming months

# Underemployment

**Figure 4.12: Rate of underemployment, NI LGD's, 2019**



Underemployment is defined as “employees who would like to work more hours, either by working in an additional job, by working more hours in their current job, or by switching to a replacement job. They must also be available to start working longer hours within two weeks and their current weekly hours must be below 40 hours if they are between 16 and 18 and below 48 hours if they are over 18.”

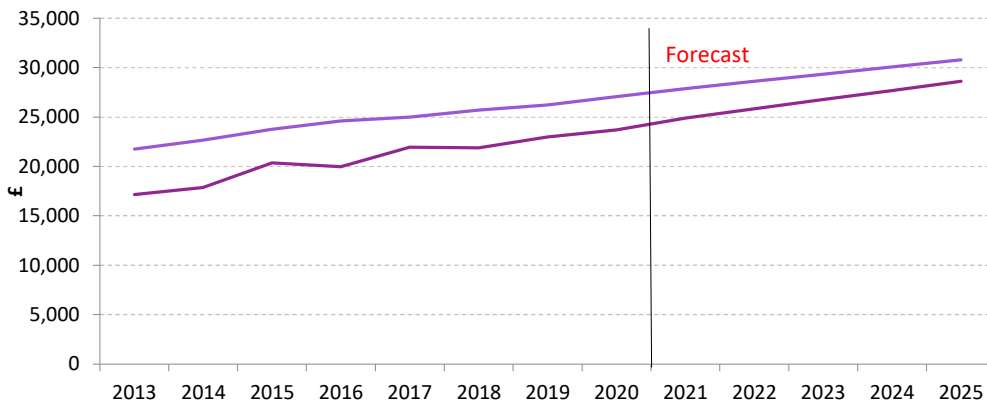
Fermanagh & Omagh has one of the lowest rates of underemployment in Northern Ireland of 5%. This translates to approximately 2,000 individuals.

These figures are significantly lower than the likes of Derry City & Strabane which has an underemployment rate of 9% equating to 5,000 individuals.

Source: NISRA

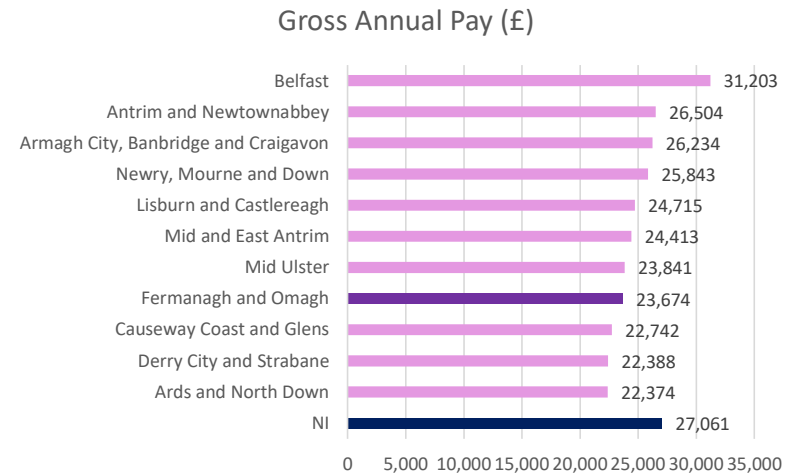
# Wages

**Figure 4.13: Average Annual Wage, Fermanagh & Omagh, 2013-2025**



Source: Annual Survey of Hours and Earnings — Fermanagh and Omagh — NI

**Figure 4.14: Gross Annual Pay, NI LGD's, 2020**



Average annual wage has risen from £17,156 in 2013 to £23,674 in 2020, a 27.5% increase over the 7-year period. In 2020 Fermanagh & Omagh ranked 8<sup>th</sup> out of NI council areas in terms of wages with the highest gross annual pay being recorded in Belfast at £31,203.

# Commuting patterns

Figure 4.15: Commuting flow, Fermanagh & Omagh, 2020

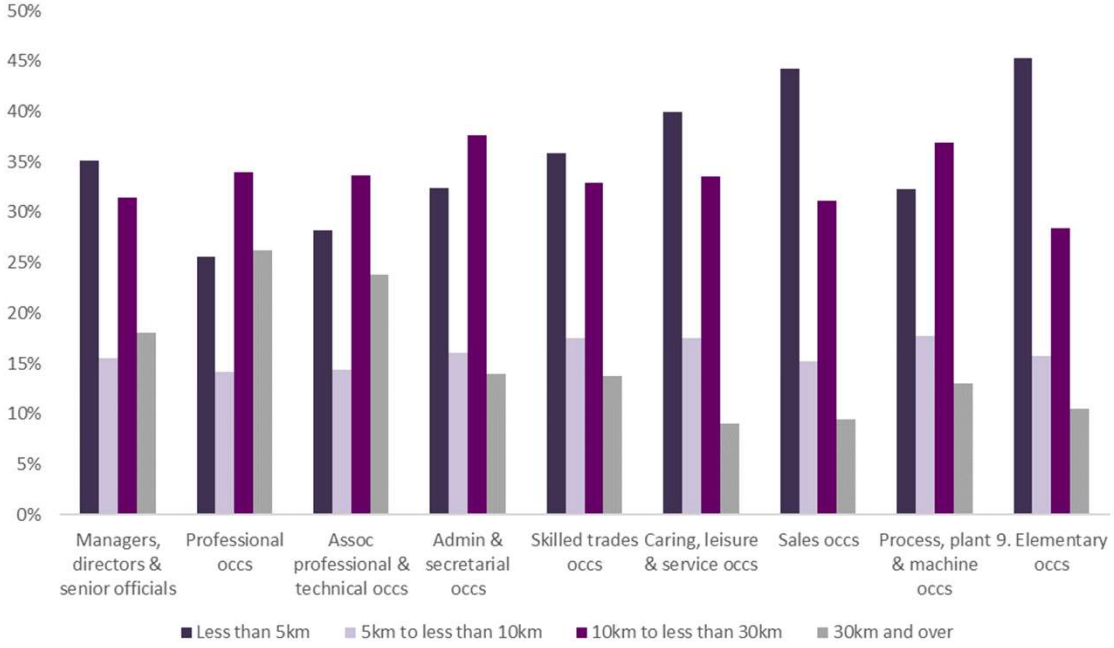
LGD	Inflow	Outflow	Net flow
Antrim and Newtownabbey	200	0	200
Armagh City, Banbridge and Craigavon	600	300	300
Belfast	1,300	100	1,200
Causeway Coast and Glens	600	700	-100
Derry City and Strabane	2,100	4,100	-2,000
Lisburn and Castlereagh	200	100	100
Mid and East Antrim	100	0	100
Mid Ulster	2,900	2,700	200
Newry, Mourne and Down	100	100	0
Ards and North Down	100	0	100

The figures above highlight commuters moving both inwards and outwards from Fermanagh & Omagh. In terms of net commuting patterns Belfast has the highest 1,200 people compared to Derry City & Strabane with the lowest of -2,000



# Commuting patterns

**Figure 4.16: Commuting distances by occupation, Fermanagh & Omagh, 2011**



A large proportion of commuters (residents in Fermanagh & Omagh) travel less than 5km to their workplace. A proportionately higher number of managers, directors, professional occupations and associate professional occupations travel 30km or more to their workplace. These are roles that are associated with a greater pay scale hence indicating that increased wages will encourage people to travel greater distances.

Source: Census 2011 and UUEPC  
Note: Figures exclude those working from home and those with no fixed place of work

## Slide 47

---

0 New slide added  
, 2021-11-02T15:02:07.555

# Sectoral Employment Forecasts

Figure 4.18: Sectoral employment forecasts, 2020-2030

Sector	Number of jobs created	Percentage growth	Number of jobs in 2030
Agriculture	170	3%	5,700
Mining & quarrying	-	0%	300
Manufacturing	-400	-6%	6,400
Utilities	10	10%	100
Water supply & waste	50	9%	600
Construction	1,060	20%	6,400
Retail	- 680	-8%	8,100
Transportation	100	5%	2,000
Accommodation	260	9%	3,300

0 New slide  
, 2021-11-04T10:01:45.153

# Sectoral Employment Forecasts

Figure 4.19: Sectoral employment forecasts, 2020-2030

Sector	Number of jobs created	Percentage growth	Number of jobs in 2030
ICT	40	6%	800
Financial activities	60	5%	1,300
Real estate	20	5%	500
Professional & scientific	360	22%	2,000
Admin services	60	6%	1,200
Public Admin' & defence	130	5%	2,800
Education	150	3%	5,800
Health & social work	420	5%	8,300
Arts & entertainment	100	11%	1,000
Other services	20	3%	800
<b>Total</b>	<b>1,920</b>	<b>3%</b>	<b>57,100</b>

0 New slide  
, 2021-11-04T10:01:54.037

# Chapter 5: Tourism

# Summary: Tourism



Fermanagh & Omagh  
District Council  
Comhairle Ceantair  
Fhear Manach agus na hÓmaí

Both the number of overnight trips to the council areas as well as the associated spend with these trips has increased steadily from 2016-2019. In 2019 427,500 overnight trips were recorded with associated spend of £79.4m. However, these numbers are expected to take a significant fall in 2020 with the ongoing covid-19 pandemic.

Overnight Tourism Expenditure is typically reported on a 3 year moving average basis, with overnight tourism expenditure in Fermanagh and Omagh averaging £69.6m per annum.

Fermanagh and Omagh is more dependent on domestic tourists (those who come from elsewhere in NI), the majority of whom visit for holiday/leisure/pleasure reasons or to visit friends or family.

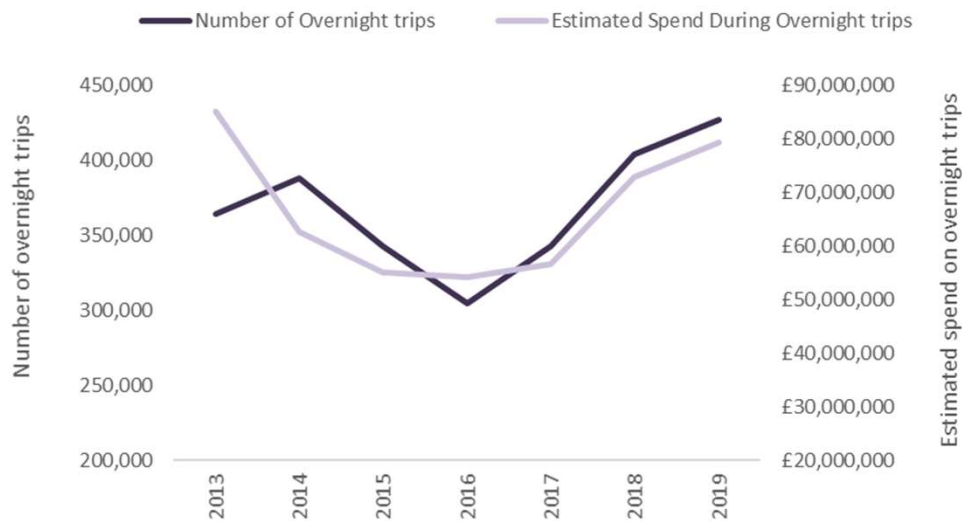
Visitor numbers to tourist attractions in Fermanagh & Omagh have increased over recent years. The Belleek Pottery Visitor Centre and Ulster American Folk Park consistently remain as the two most popular visitor attractions in Fermanagh and Omagh.

The Cuilcagh Boardwalk, which came to prominence in July 2016, experienced a 60% rise in visitor numbers from 2018 to 2019, receiving almost 100,000 visitors in 2019.



# Overnight trips and spend

**Figure 5.1: Number of overnight trips and estimated spend, Fermanagh & Omagh, 2013-2019**



As expected, the number of overnight trips and the estimated associated spend has moved in tandem over the 2013-2019 period.

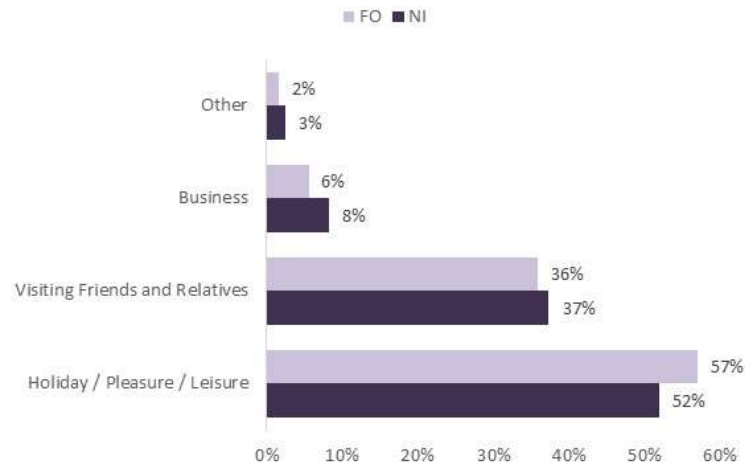
Both hit a low point of 305,000 overnight trips and an estimated spend of £54.1million in 2016 which has since recovered to 427,500 overnight trips with a spend of £79.4m in 2019.

Due to the volatility in the data, Overnight Tourism Expenditure is typically reported as a 3-year moving average. Thus, Overnight Tourism expenditure has averaged £69.6m per annum over the past 3 years.

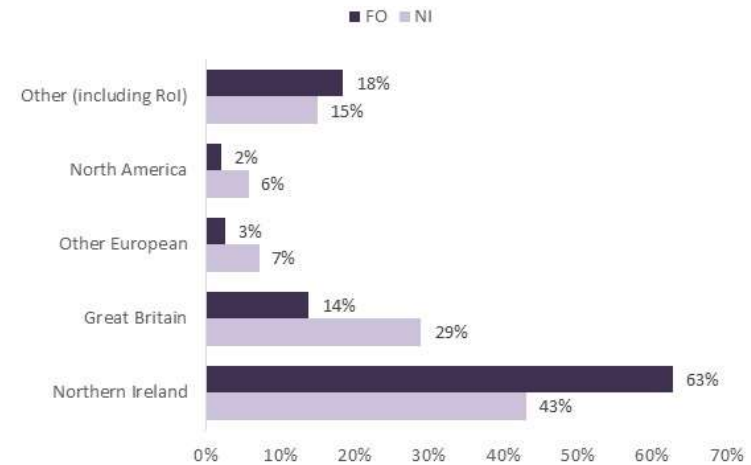
However, these numbers are expected to take a significant fall in 2020 with the ongoing covid-19 pandemic. This has been indicated by the leading NI Tourism Statistics publications.

# Who are the visitors?

**Figure 5.2: Reason for Visit, Fermanagh & Omagh and NI, 2017-19 (avg)**



**Figure 5.3: Visitor Origin, Fermanagh & Omagh and NI, 2017-19 (avg)**

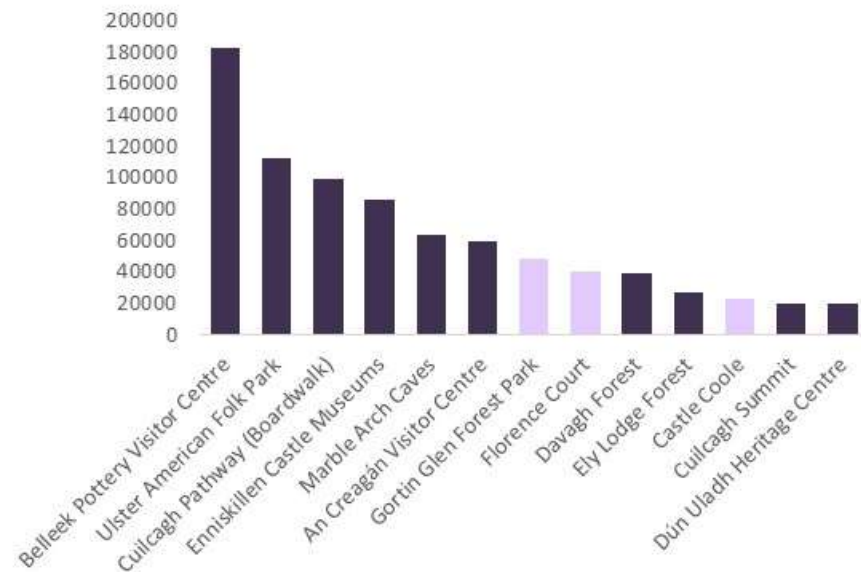


Over half of all overnight trips to the Fermanagh and Omagh District are those visiting primarily for holiday/pleasure/leisure; 36% are visiting friends and relatives. Visitors are less likely to visit Fermanagh and Omagh on business trips than the NI average.

In comparison to the NI average, Fermanagh and Omagh is more dependent on domestic tourism, with 63% of all visitors to the district originating from elsewhere in NI. Conversely, Fermanagh and Omagh gets significantly less visitors from GB, Europe and North America.

# Tourist attractions

Figure 5.4: Visitor Attractions, Fermanagh and Omagh, 2017 & 2019



- In 2019, 26 visitor attractions provided data to the Visitor Attraction Survey.
- Belleek Pottery Visitor Centre remains the most popular attraction in Fermanagh and Omagh, with 182,300 visitors.
- The Ulster American Folk Park (113,000) and the Cuilcagh Boardwalk (99k) are second and third.
- Belleek Pottery and The Ulster American Folk Park have long been the most popular attractions in the district. The Cuilcagh Boardwalk has come to prominence in recent years, due in large part to social media.
- As benchmark, the Gaints Causeway is NI's most popular visitor attraction, averaging over 1 million visitors per annum.
- No visitor attractions in Fermanagh and Omagh are amongst the 10 most popular in NI; the 10<sup>th</sup> most popular in 2019 was Ballronan Marina, with 263,000 visitors.

# Tourist attractions

Figure 5.5: Number of visitors to the Cuilcagh boardwalk, 2019

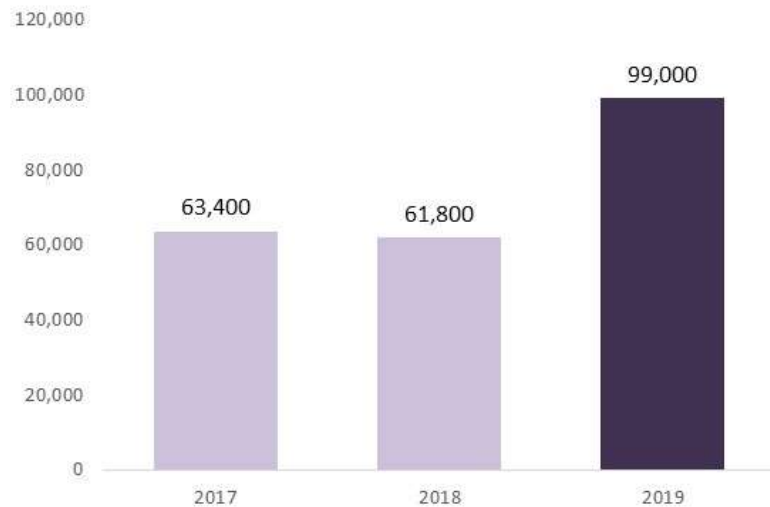
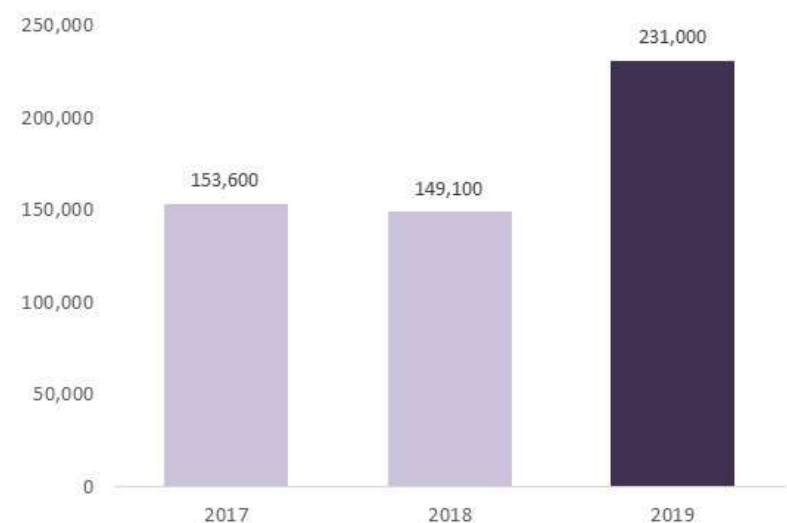


Figure 5.6: Number of visitors to parks and forests in Fermanagh & Omagh, 2019



The Cuilcagh Boardwalk opened in July 2016, and gained significant popularity. In 2019, there were 99,000 visitors to the boardwalk, compared to 63,355 in 2017.

This reflects a wider increase in visitors to the range of parks and forests in Fermanagh and Omagh, which are typically aimed at locals during leisure time as opposed to tourists.

# Chapter 6: Businesses

# Summary: Business



Fermanagh & Omagh  
District Council  
Comhairle Ceantair  
Fhear Manach agus na hÓmaí

The rate of business births (8.8%) and deaths (7.7%) in Fermanagh & Omagh are below that of the NI average, 10.4% and 9.0% respectively. However, the council area does have a higher rate of high growth businesses (4.4%) than NI (3.5%).

The number of VAT and/or PAYE registered businesses has increased by over 1,000 between 2013-2021 and now stands at 8,285. 45% of these are based within the agriculture sector with construction and retailing accounting for a further 20%.

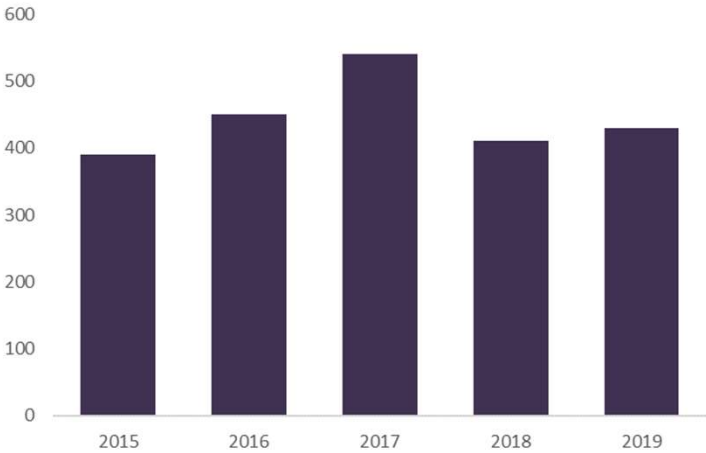
Over half (51%) of businesses formed in Fermanagh and Omagh survive to their 5<sup>th</sup> year; this is broadly in line with the NI average (50%). The latest data show that 92% of businesses established in Fermanagh and Omagh in 2019 survived their first year, compared to an 87% NI average. These trends also hold over a longer time period.

The business base in Fermanagh and Omagh is highly concentrated with micro businesses – 42% of local businesses have a turnover of less than £50k per annum; 94% have less than 9 employees.

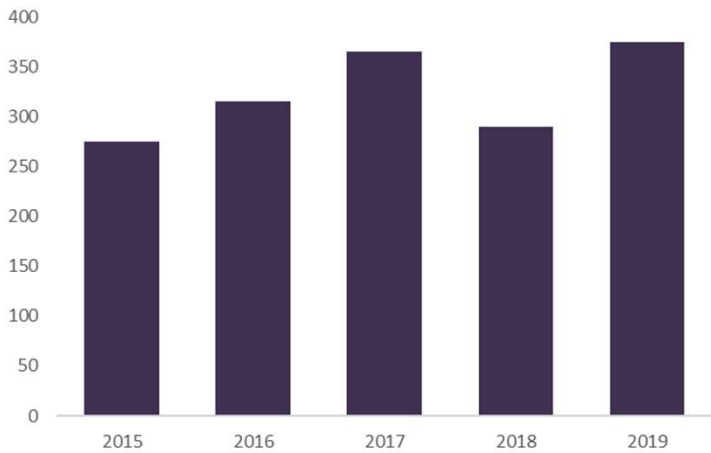


# Business demography

**Figure 6.1: Number of business births, Fermanagh & Omagh, 2015-2019**



**Figure 6.2: Number of business deaths, 2015-2019**



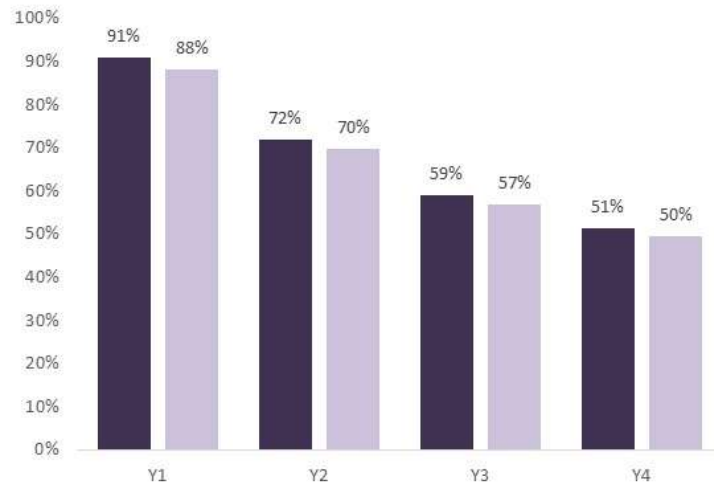
The number of business births and deaths has fluctuated between 2015 and 2019 with 430 births in 2019 and 375 deaths within the council areas. The rate of births (8.8%) and deaths (7.7%) are below that of the NI average, 10.4% and 9.0% respectively. Fermanagh & Omagh also have a higher rate of high growth businesses (4.4%) than NI (3.5%).



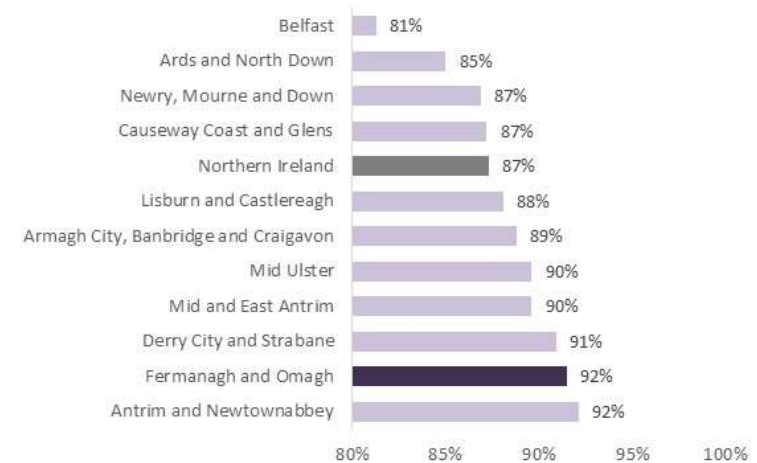
Source: IDBR

# Business Survival Rates

**Figure 6.3: Business Survival Rates, Fermanagh and Omagh & NI, 2015-2019**



**Figure 6.4: Business Survival Rates, Fermanagh and Omagh LGDs, 2018/19**



The attrition rate of start up businesses in Fermanagh and Omagh is marginally better to the NI average, with 51% of business formed in 2015 still active 4 years later. Similarly, 92% of businesses established in Fermanagh and Omagh survived their first year, according to the latest data.



# Number of businesses and sectoral composition

Figure 6.5: Number of VAT and/or PAYE registered businesses, Fermanagh & Omagh, 2013-2021



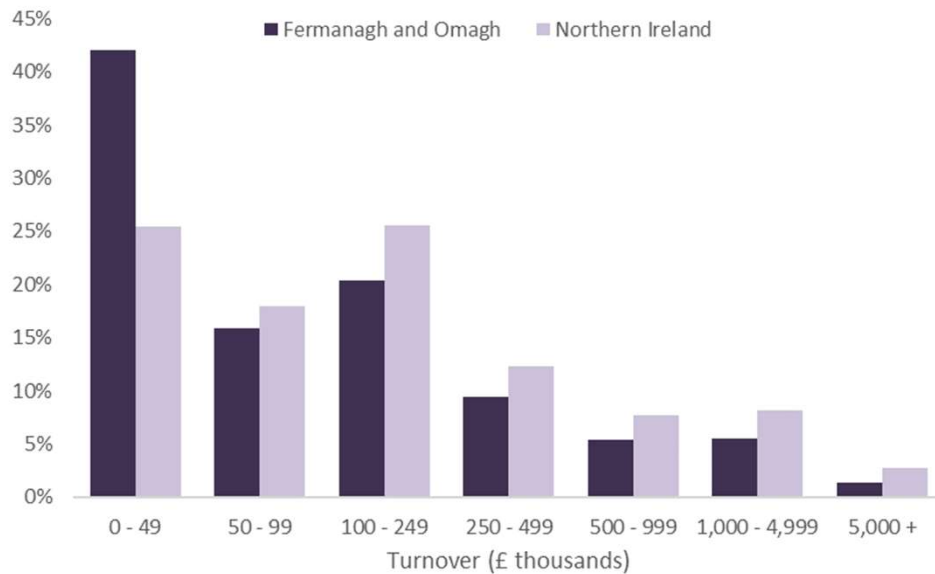
Figure 6.6: Number of businesses by sector, Fermanagh & Omagh vs. NI, 2021



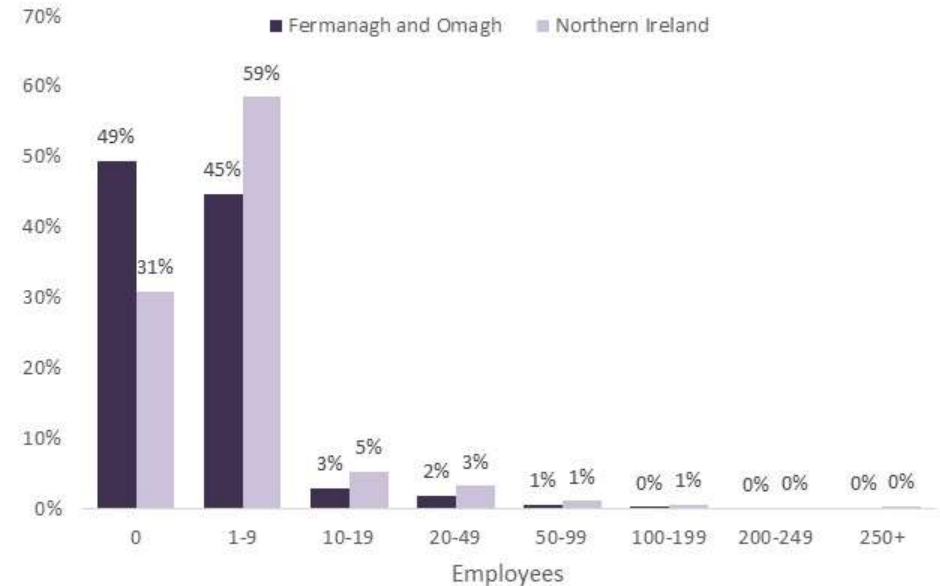
The number of VAT or PAYE registered businesses in Fermanagh & Omagh has increased by over 1,000 in the 2013-2021 period, reflecting an increased of 13%. Nearly half of these (45%) are within the agriculture sector with construction and retail making up a further 20%.

# Businesses by size

**Figure 6.7: Proportion of businesses by turnover, Fermanagh & Omagh vs. NI, 2021**



**Figure 6.8: Proportion of businesses by employee size, Fermanagh & Omagh vs. NI, 2021**



Fermanagh & Omagh has a significantly higher proportion (3,480 businesses, 42%) of businesses in the £0-49k turnover category than the NI average (25%). 1,300 (16%) and 1,700 (20%) businesses in Fermanagh & Omagh fall into the £50-99k and 100-249k category, respectively.

94% of businesses in Fermanagh and Omagh have less than 9 employees, with only 1% having more than 50 employees. This shows that the business base in Fermanagh and Omagh is highly concentrated with micro businesses.

# Chapter 7: Trade and the economy

# Summary: Trade and the Economy



Fermanagh & Omagh  
District Council  
Comhairle Ceantair  
Fhear Manach agus na hÓmaí

GVA per capita within the council area has increased from £16,500 in 2013 to £18,900 in 2019. Retail, manufacturing and real estate made up just under half (47%) of GVA in Fermanagh & Omagh in 2019. These are largely in line with the sectors providing the largest employment opportunities in the area as well.

Productivity within Fermanagh & Omagh has increased from £37,100 in 2013 to £41,200 in 2019. A persistent gap with the NI average has emerged over the 2006-2019 period with NI productivity sitting at £45,300 in 2019.

Exports from the council have increased steadily from £220million in 2015 to £533million in 2019. The Republic of Ireland is the main export destination with nearly three quarters (75%) of exports arriving over the border.

# GVA

Figure 7.1: GVA by sector, Fermanagh & Omagh vs. NI, 2019

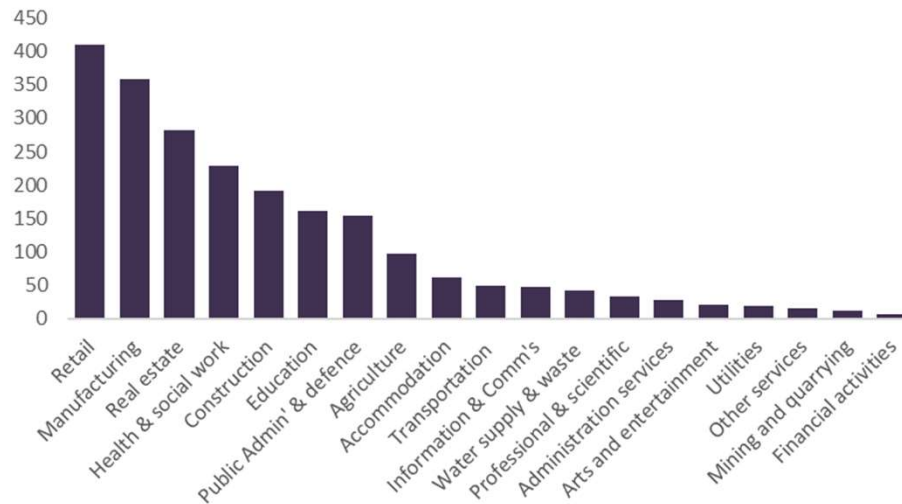
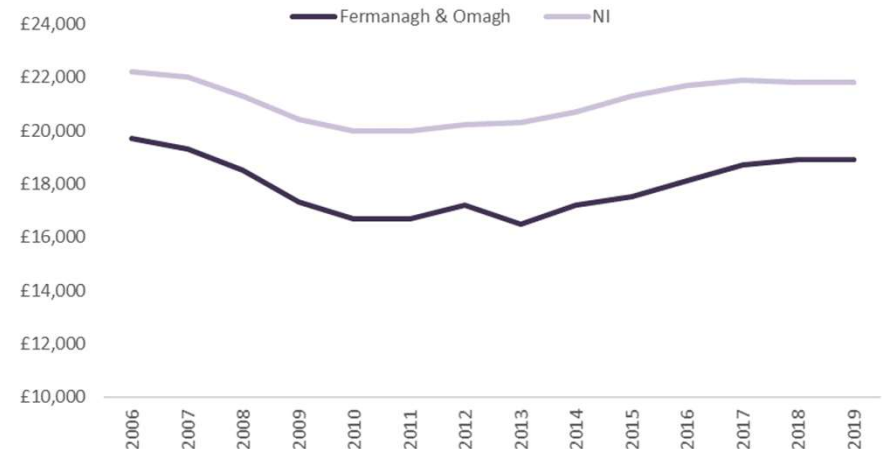


Figure 7.2: GVA per capita, Fermanagh & Omagh vs. NI, 2006- 2019



Retail, Manufacturing and Real Estate made up just under half (47%) of GVA in Fermanagh & Omagh in 2019. GVA per capita has been riding steadily since 2013 from £16,500 to £18,900 in 2019.

# GVA Forecast

**Figure 7.3: GVA Forecasts, Fermanagh & Omagh vs. NI\***



\* Figures from 2020 onwards are forecasts and are subject to revision

In 2019, the Fermanagh and Omagh economy was calculated to have a Gross Value Added (GVA) of £2,219million.

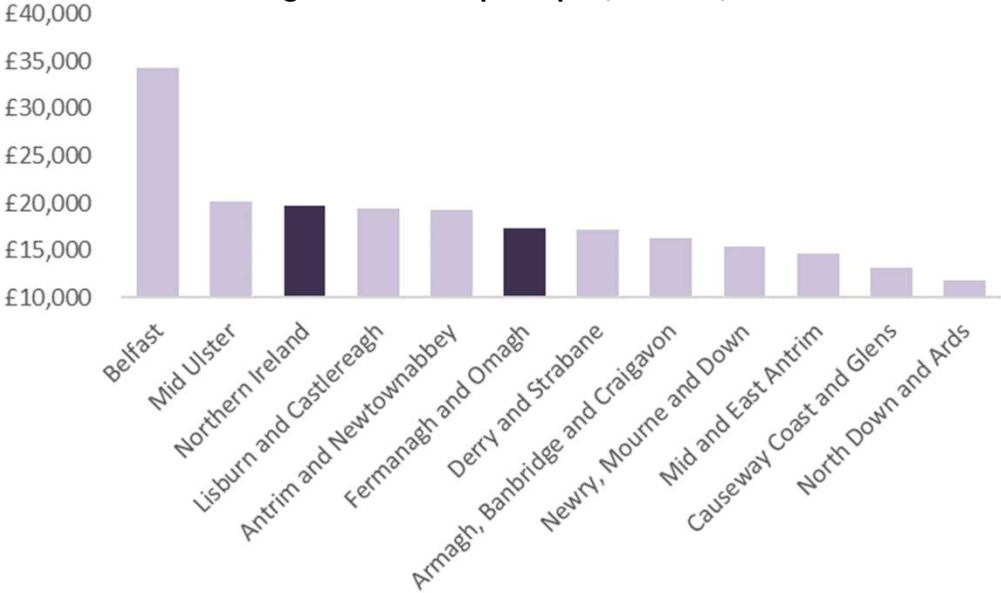
GVA growth in Fermanagh and Omagh is expected to contract by over 2% in 2020. This continues to be driven by Covid-19 lockdown restrictions in place throughout 2020.

The economy is expected to rebound strongly with growth of over 6% forecast locally in 2021.

In the medium term, GVA growth is forecast to return to normalised levels of approximately 2% per annum.

# GVA per Capita

Figure 11.2: GVA per capita, NI LGDs, 2021



GVA per capita is a measure used globally to compare the wealth of different areas.

Fermanagh and Omagh has a GVA per capita of £18,200. This is 13% below the NI average and ranks 5<sup>th</sup> / 11 across local government districts in NI.

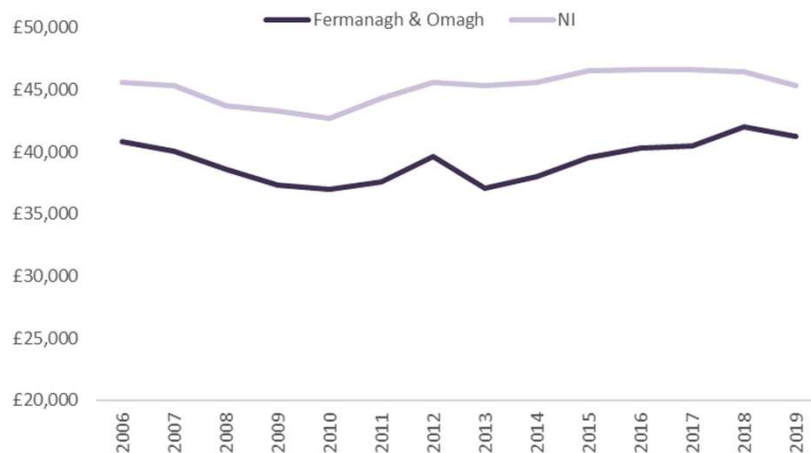
Belfast has the highest GVA per capita and North Down and Ards the lowest. This is skewed by commuting trends, with a significant proportion of residents in Ards and North Down likely to commute into Belfast to work.

0 New slide  
, 2021-11-03T14:01:47.785



# Productivity

Figure 7.4: Productivity, Fermanagh & Omagh vs. NI, 2006-2019



Productivity in Fermanagh & Omagh follows a very similar trend to that of GVA per capita. Productivity has increased from £37,100 in 2013 to £41,200 in 2019.

The persistent gap with the NI average narrowed slightly in 2018 and 2019, with NI productivity sitting at £45,300 in 2019.



# Household income

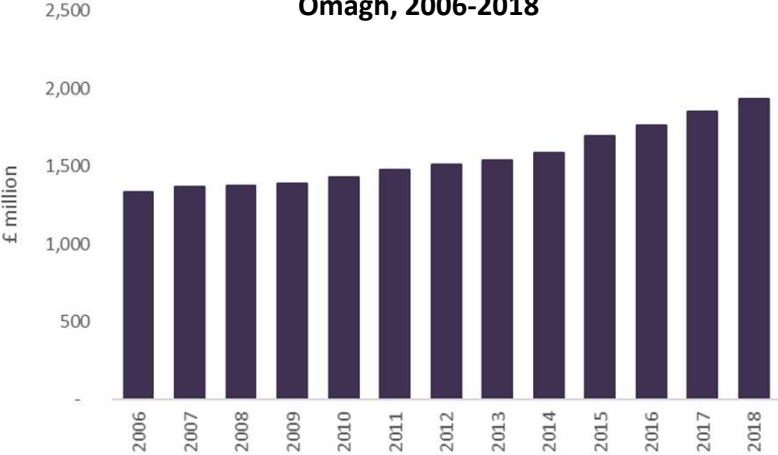
Gross household disposable income has increased steadily from 2006-2018 rising from £1,335million to £1,936 million over the 12006-2018 period.

Gross household disposable income per captia has also followed the same trend rising from £12,210 to £16,569 over the time period.

GDHI fluctuates as a result of changes to wages and/or changes to the general price level (inflation) within the economy. If wages increase and whilst inflation remains constant the amount of disposable income individuals have will increase, as a result a mixture of expenditure and savings will be induced. If however both wages and inflation increase, although individuals may feel better off this increase in wages will be offset by the rise in the general cost of living i.e. food prices etc.



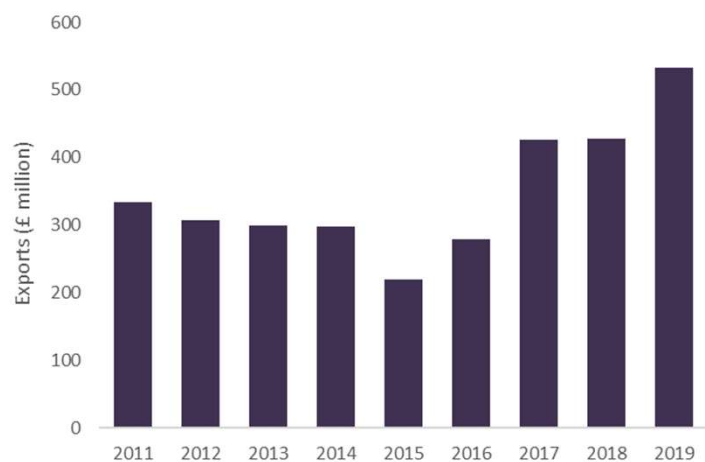
**Figure 7.5: Gross household disposable income, Fermanagh & Omagh, 2006-2018**



Source: ONS

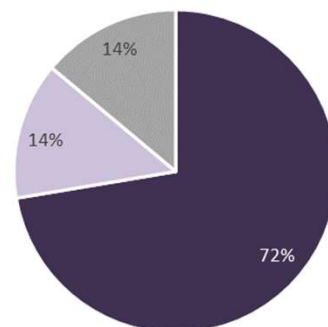
# Exports and Sales

**Figure 7.6: Total exports (£millions), Fermanagh & Omagh, 2011-2019**



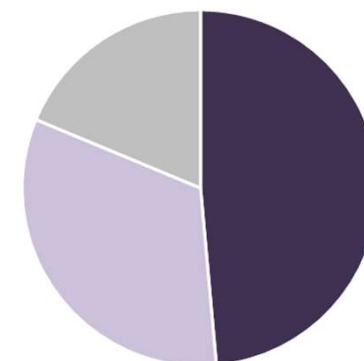
**Figure 7.7: Export destinations, Fermanagh & Omagh, 2019**

■ Ireland ■ Rest of EU ■ Rest of World



**Figure 7.8: External Sales, Fermanagh & Omagh, 2019**

■ NI Sales ■ External Sales ■ GB Sales



Despite a sharp fall between 2014-15 exports have recovered strongly from £220million in 2015 to £533million in 2019. Ireland was the most popular destination for exports from NI (72%) in 2019 with the rest of the EU and rest of world making up the remaining 28%. Sales include £1,853m in NI, £1,247m External sales and £714m GB sales.

0 Updated to include sales  
, 2021-11-04T10:42:12.081

# Chapter 8: Housing

# Summary: Housing



Fermanagh & Omagh  
District Council  
Comhairle Ceantair  
Fhear Manach agus na hÓmaí

Following the financial crisis of 2008/09 standardised house prices in Fermanagh & Omagh have increased steadily from £92,400 in Q1 2014 to £136,165 in Q1 2021. The stock of housing has increased from 44,904 in 2008 to 48,440 in 2018, this has consistently made up 6% of NI's total housing stock.

Average monthly rental costs have increased from £470 in H1 2017 to £499 in H2 2020. Fermanagh & Omagh remains the most affordable place to rent in NI out of all other council areas.

# New dwelling starts & completions

**Figure 8.1: Number of dwelling starts in Fermanagh & Omagh and % of total new starts in NI, Q1 2015 – Q1 2021**



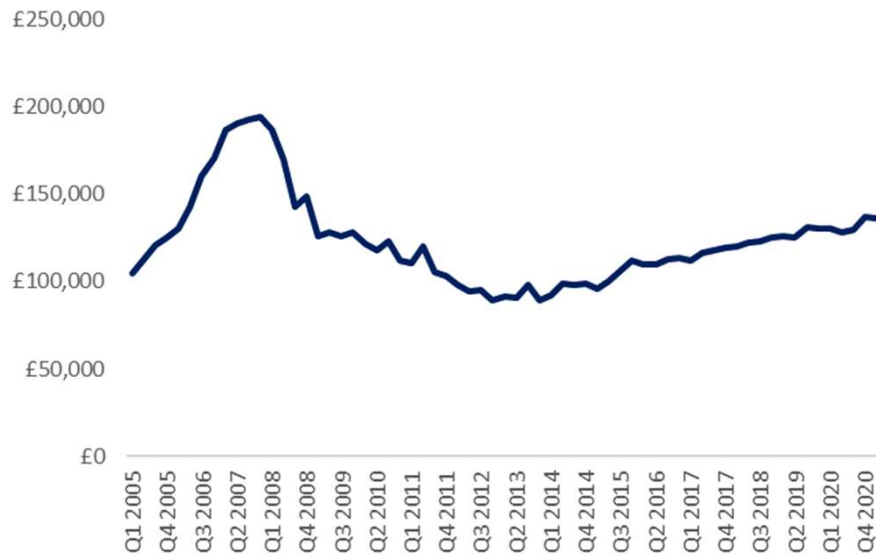
**Figure 8.2: Number of dwelling completions in Fermanagh & Omagh and % of total new completions in NI, Q1 2015 – Q1 2021**



With quarterly data the number of new dwelling starts and completions can be seasonally volatile, however, with Covid-19 and inflationary pressures on building prices both the number of starts and completions fell away at least at some point in 2020 and/or 2021. The number of new dwelling starts came back notably strong in Q1 2021.

# Housing profile

**Figure 8.3: Standardised house prices, Fermanagh & Omagh, Q1 2005 – Q1 2021**



Following the financial crisis of 2008/09 standardised house prices in Fermanagh & Omagh have increased steadily from 2013/14 up to 2021.

In Q1 2021 the average standardised house price was £136,165



# Property sales

Figure 8.4: Verified property sales, Fermanagh & Omagh, 2005 – 2020

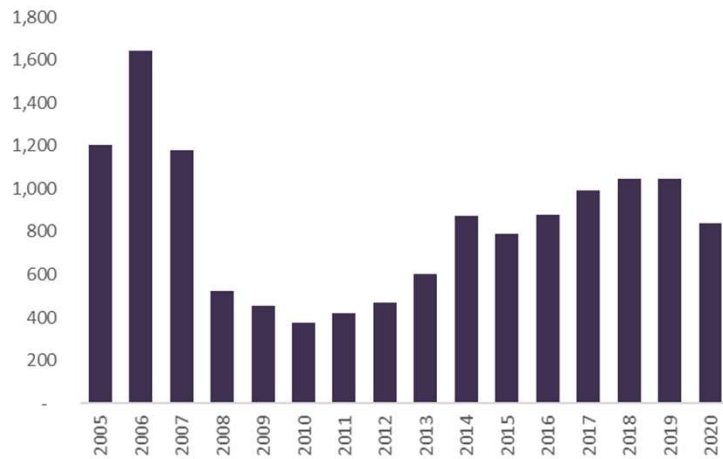
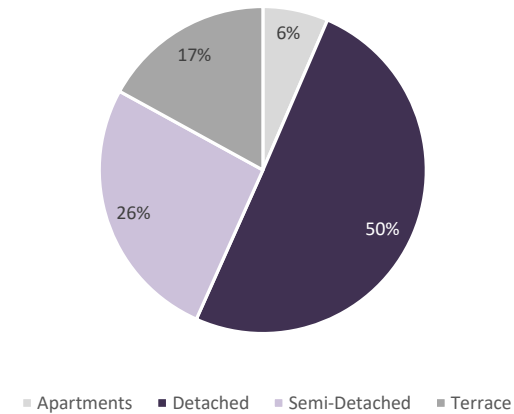


Figure 8.5: Verified property sales by type of property, Fermanagh & Omagh, Q1 2021

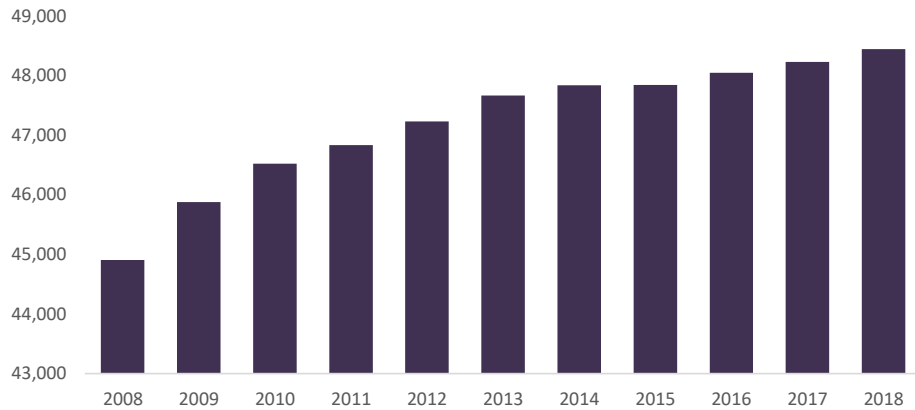


The number of verified property sales had been slowly rising since 2010 before dipping slightly in 2020 most likely due to the covid-19 pandemic.

Detached houses accounted for 50% of all property sales in Q1 2021 with the second most popular type of housing sale being a semi-detached accounting for just over a further quarter (26%).

# Housing Profile

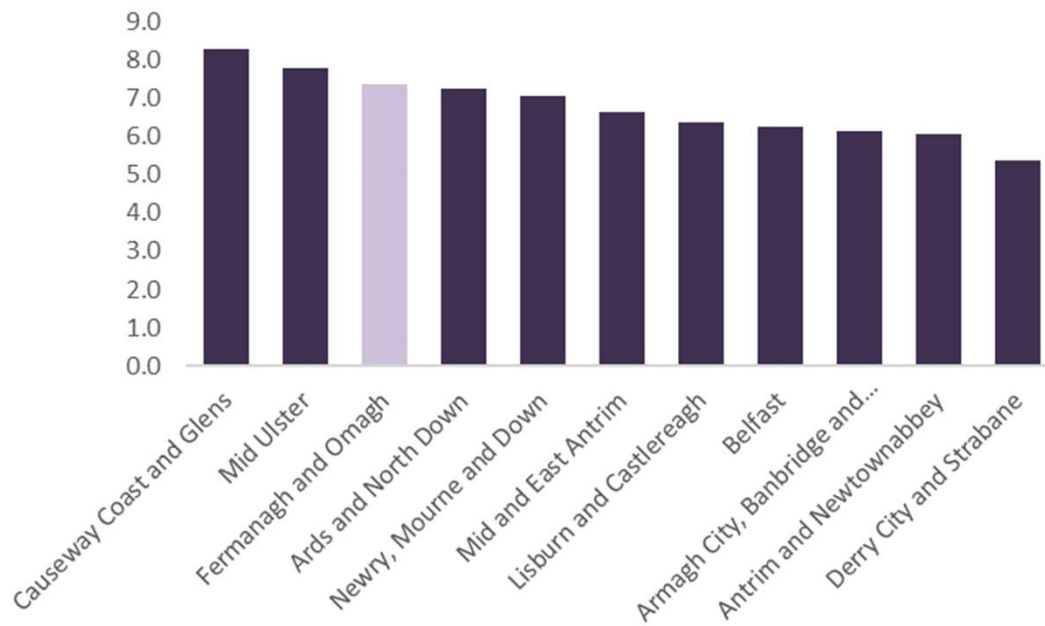
**Figure 8.6: Total housing stock, Fermanagh & Omagh, 2008 - 2018**



Over this 10-year period the total housing stock has continued to rise during this period, from 44,904 in 2008 to 48,440 in 2018. This has consistently stayed at 6% of the NI total.

# House Price to wage ratio

Figure 8.7: House Price to Wage Ratio



With an average wage of £24,376 and average house price of £179,046 Fermanagh has a wage to house price ratio of 7.35. This is one of the highest in NI just below Causeway Coast & Glens and Mid Ulster.

0 New slide  
, 2021-11-10T11:21:44.257



# Property sales

Figure 8.8: Verified property sales, Fermanagh & Omagh, 2005 – 2020

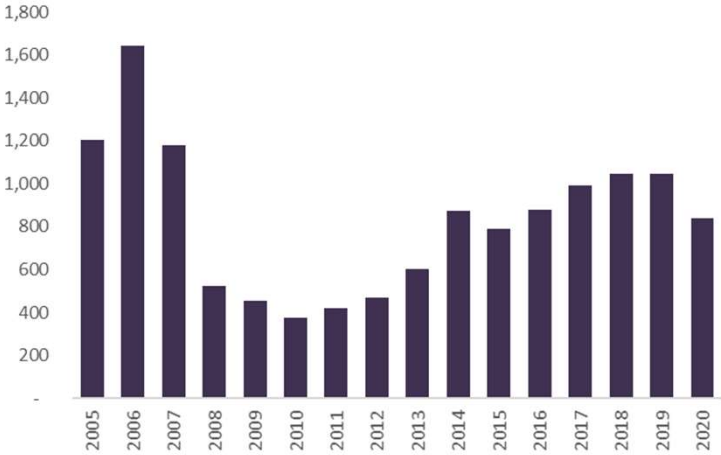
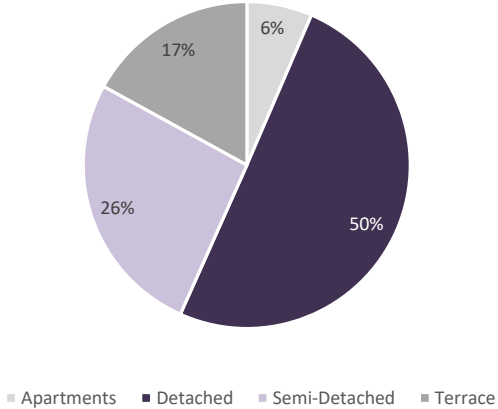


Figure 8.9: Verified property sales by type of property, Fermanagh & Omagh, Q1 2021



The number of verified property sales had been slowly rising since 2010 before dipping slightly in 2020 most likely due to the covid-19 pandemic.

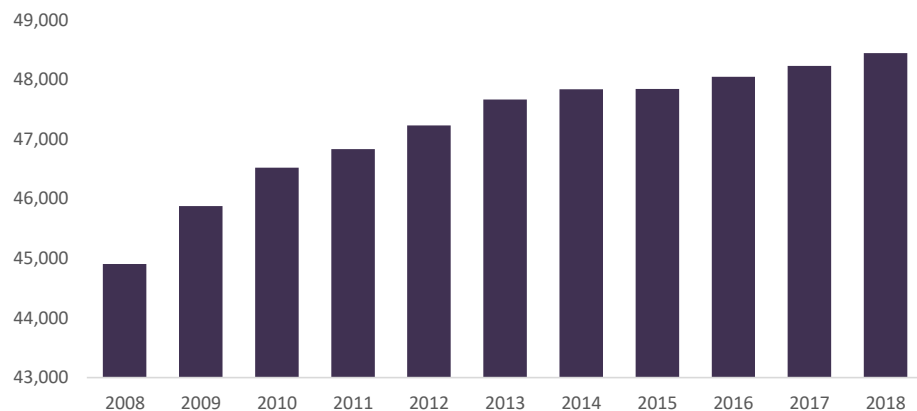
Detached houses accounted for 50% of all property sales in Q1 2021 with the second most popular type of housing sale being a semi-detached accounting for just over a further quarter (26%).



Source: NISRA

# Housing Profile

**Figure 8.10: Total housing stock, Fermanagh & Omagh, 2008 - 2018**

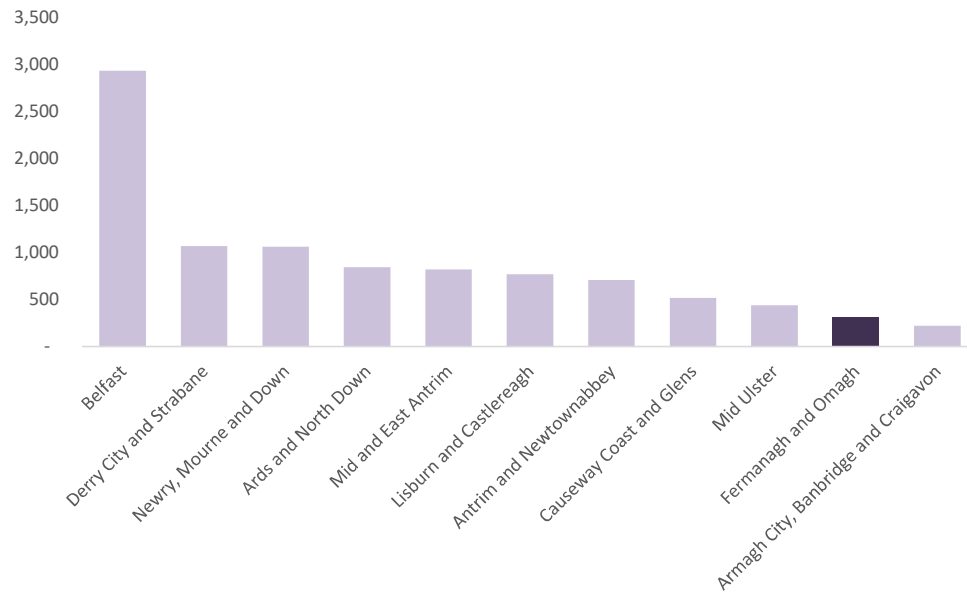


Over this 10-year period the total housing stock has continued to rise during this period, from 44,904 in 2008 to 48,440 in 2018. This has consistently stayed at 6% of the NI total.

Source: DfC, Northern Ireland Housing Statistics

# Homelessness

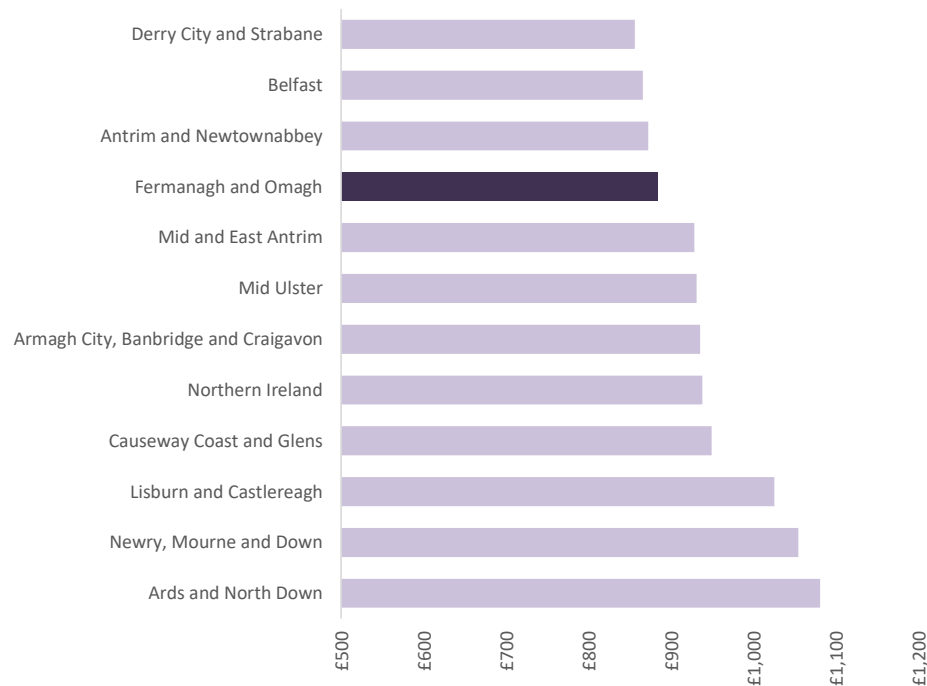
**Figure 8.11: Number of homeless, NI LGD's, 2018/19**



The Number of homeless people in Fermanagh & Omagh is the second lowest in NI, with 316 people homeless as of 2018/19, compared to 2,929 in Belfast.

# Annual Rates

Figure 8.12: Annual Rates Bill, NI LGD's, 2017/18



The annual rates bill is £884, this is £52 less than the NI average. Whilst Ards and North Down has an annual rates bill of £1,081.





# Rental Prices

Figure 8.13: Median rent (£), Fermanagh & Omagh vs. NI average, H2 2017 - H1 2020

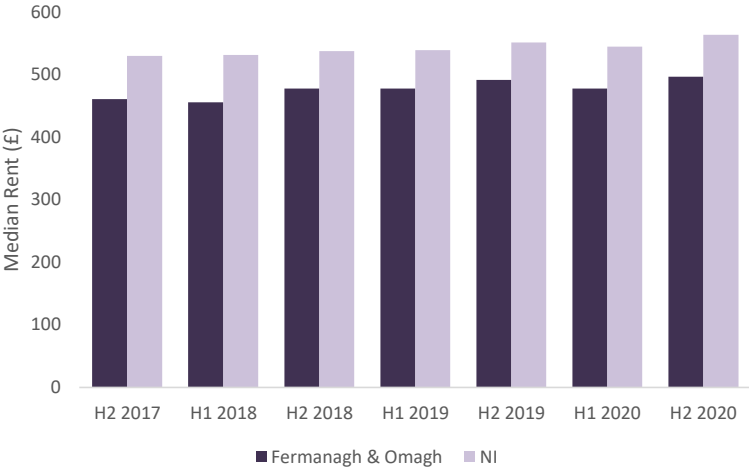


Figure 8.14: Average rent (£), NI LGD's, H2 2020



Median rent in Fermanagh & Omagh and the NI average has increased steadily from 2017-2020, rent in Fermanagh & Omagh has increased at a marginally faster rate but from a lower base. Whilst average rent in Fermanagh & Omagh was the lowest in Northern Ireland in 2020 at £499per month as seen in figure 7.10, this is £259 per month cheaper than the most expensive council Belfast.



Source: NI Housing Executive

# Chapter 9: Deprivation

# Summary: Deprivation



Fermanagh & Omagh  
District Council  
Comhairle Ceantair  
Fhear Manach agus na hÓmaí

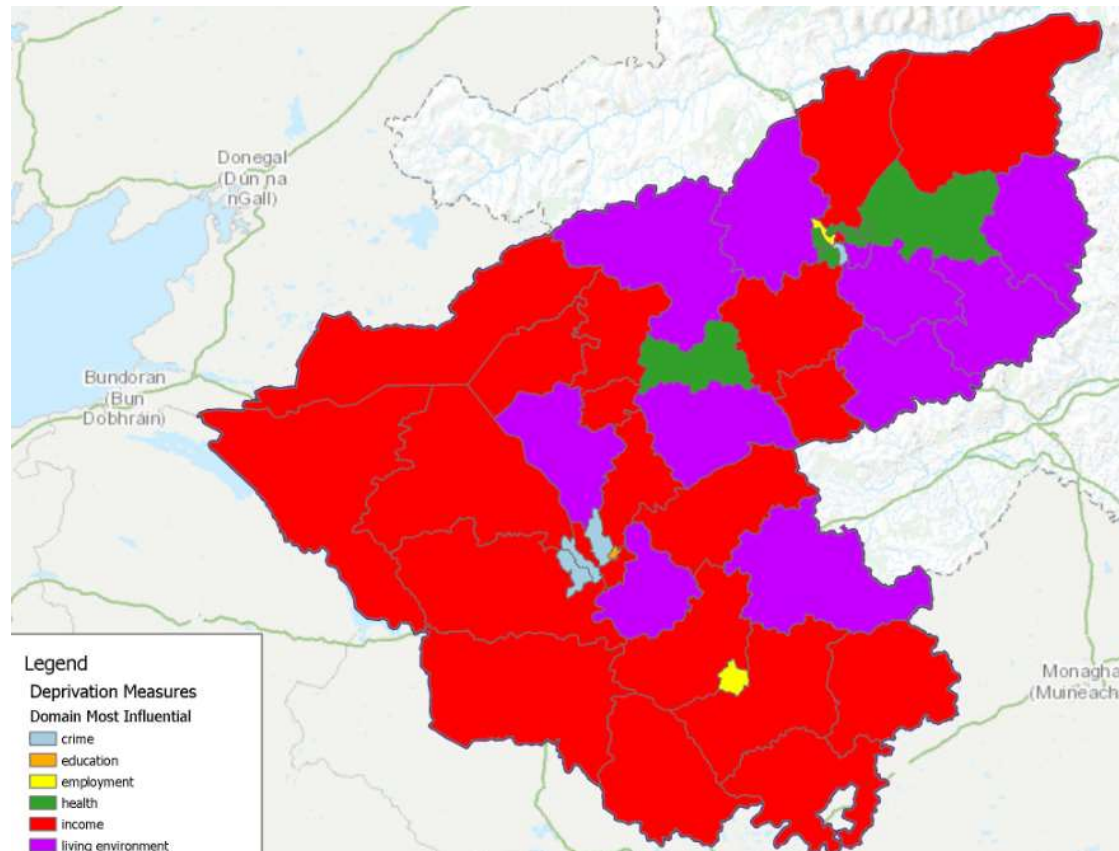
21% of working age adults are employment deprived within the area, this is in line with the NI average. Fermanagh & Omagh does however have a marginally higher number of people living on below 60% of NI median income (15% vs NI average of 13%).

Primary and post-primary school absenteeism is lower in Fermanagh & Omagh than the most of NI at 4% and 6% respectively. Fermanagh & Omagh have the lowest level of school leavers not in education, employment or training (2%). The area also has the second lowest proportion (30%) of school leavers not achieving 5 GCSES A\*-C

Fermanagh & Omagh has the highest proportion of domestic dwellings that are unfit for use at 4.5%. The council area also has a marginally higher-than-average rate of over household crowding (4.2% vs. NI average of 3.9%).

# Deprivation

Figure 9.1: NIMDM Measures in Fermanagh Omagh



Income deprivation is widespread (particularly in South / West Fermanagh)

Living environment deprivation is also a concern (particularly in North/East Tyrone)

A cluster of health deprivation can be found around Omagh

There is also a cluster of crime in Enniskillen

# Income Deprivation

Figure 9.2: Income Deprivation in Fermanagh Omagh

## What do we know about income?

It's not the same for everyone

	Income Domain	% households below median income		Income Domain	% households below median income
Rosslea	14	22%	Strule	258	15%
Lisanelly_1	21	21%	Drumquin	303	14%
Devenish	28	21%	Derrygonnelly	307	14%
Newtownbutler	31	20%	Erne	330	14%
Belleek and Boa	37	20%	Drumnakilly	355	14%
Lisanelly_2	61	19%	Gortrush_2	367	14%
Donagh	69	19%	Dergmoney	373	14%
Irvinestown	74	18%	Trillick	369	14%
Fintona	99	18%	Clanabogan	392	13%
Portora	114	17%	Sixmilecross	387	13%
Florence Court and Kinawley	125	17%	Ballinamallard	408	13%
Belcoo and Garrison	128	17%	Rossorry	410	13%
Kesh Ederney and Lack_1	134	17%	Beragh	423	13%
Tempo	153	16%	Camowen	426	13%
Derrylin	159	16%	Gortin	466	13%
Lisnaskea	166	16%	Killyclogher_2	478	12%
Owenkillew	179	16%	Castlecoole_1	496	12%
Maguiresbridge	210	16%	Coolnagard	524	12%
Kesh Ederney and Lack_2	213	16%	Fairy Water	525	12%
Castlecoole_2	224	15%	Lisbellaw	560	12%
Boho Cleenish and Letterbreen	230	15%	Drumragh	568	12%
Lisnarrick	239	15%	Newtownsaville	569	11%
Killyclogher_1	247	15%	Dromore	642	11%
Termon	253	15%	Gortrush_1	705	10%
Brookeborough	262	15%			

Source: NIMDM2017/FODC

## Pensioner Poverty

17% of pensioners live in poverty in Rosslea (ranked 4<sup>th</sup> out of 890 SOA's in NI).

16% of pensioners live in poverty in Kesh, Ederney and Lack (5<sup>th</sup> out of 890)

## Children in Poverty

At 46%, Lisanelly\_1 has the second highest rate of children living in poverty of any SOA in NI. Other areas in Fermanagh and Omagh where child poverty levels are high include Devenish (29%), Belleek and Boa (28%), Lisnarrick (26%) and Camowen (26%).

# Deprivation (Living Environment) Most Deprived SOA's in FODC

Figure 9.3: Living Environment Deprivation in Fermanagh Omagh



**LIVING ENVIRONMENT**

Rank	SOA
88	Trillick
115	Drumragh
119	Devenish
124	Sixmilecross
138	Lisanelly 1
149	Lisnarrick
153	Brookeborough
172	Beragh
182	Belcoo and Garrison
193	Termon

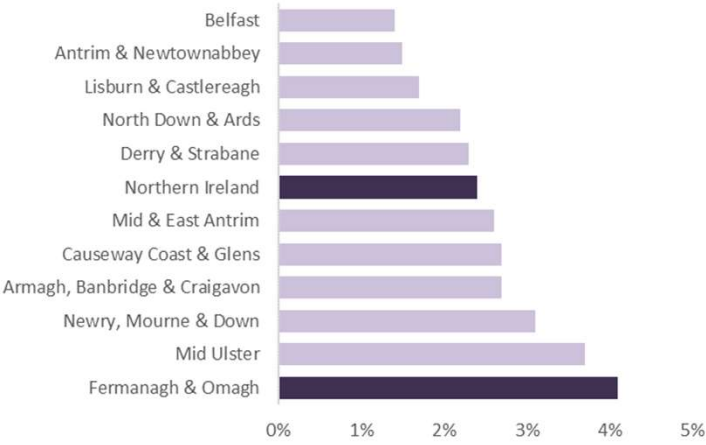
The table, taken from the NIMDM2017 reports, shows the ten SOA's in Fermanagh Omagh which are ranked in the top 20% of most deprived SOA's in Northern Ireland.

This is examined in a little more detail on the following page.

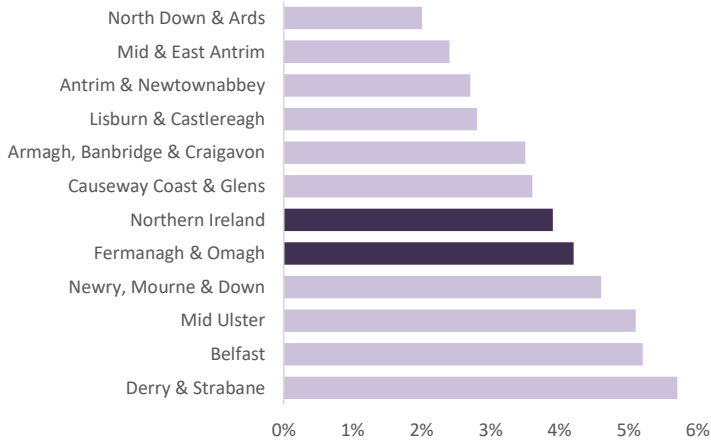


# Living Environment

**Figure 9.4: Proportion of domestic dwellings that are unfit for use, NI LGDs, 2017**



**Figure 9.5: Rate of household overcrowding, NI LGDs, 2017**



As shown in Figure 9.4, Fermanagh & Omagh has the highest proportion of domestic dwellings that are unfit for use at 4.5%.

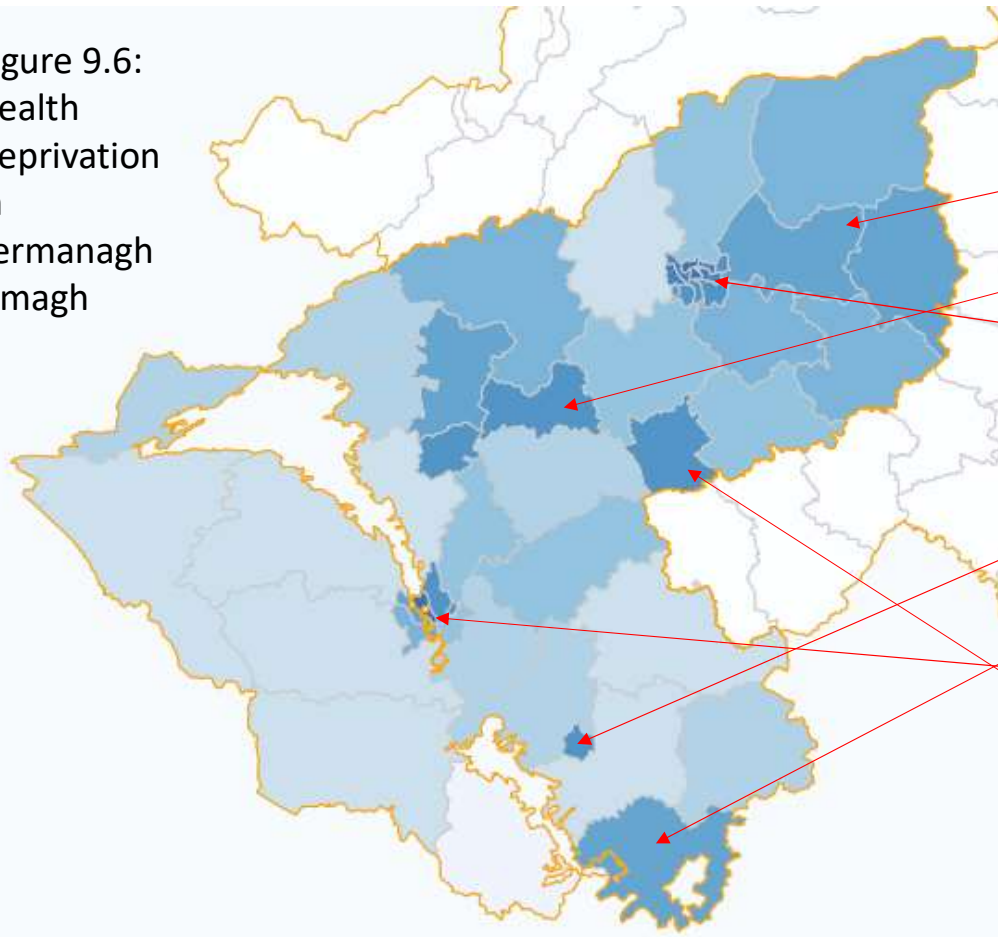
Fermanagh & Omagh also have a higher-than-average rate of over crowding this is particularly significant given the lowest population density within the council area.



Source: NIMDM2017

# Health Deprivation

Figure 9.6:  
Health  
Deprivation  
in  
Fermanagh  
Omagh



Drumnakilly

Dromore

Omagh cluster

Lisnaskea

Newtownbutler

Enniskillen cluster

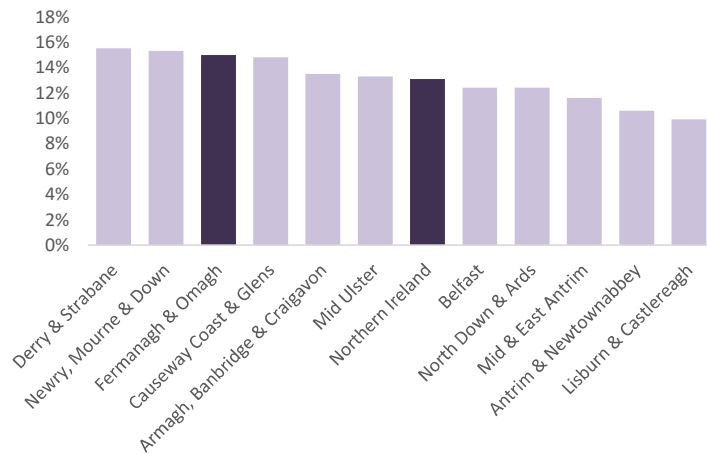
Fintona and Irvinestown

Figure 9.6 shows clusters of SOA's classified by NISRA as suffering health deprivation within Fermanagh and Omagh.

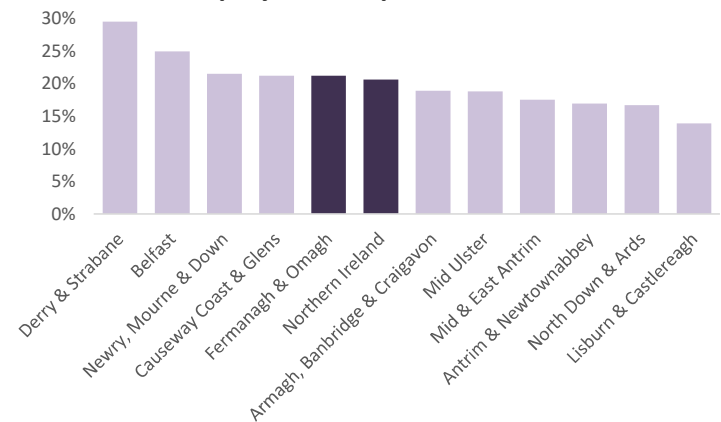


# NIMDM – Income and Employment

**Figure 9.7: % of households living on income that is below 60% of NI median, NI LGDs, 2017**



**Figure 9.8: % of working age population that are employment deprived, NI LGDs, 2017**



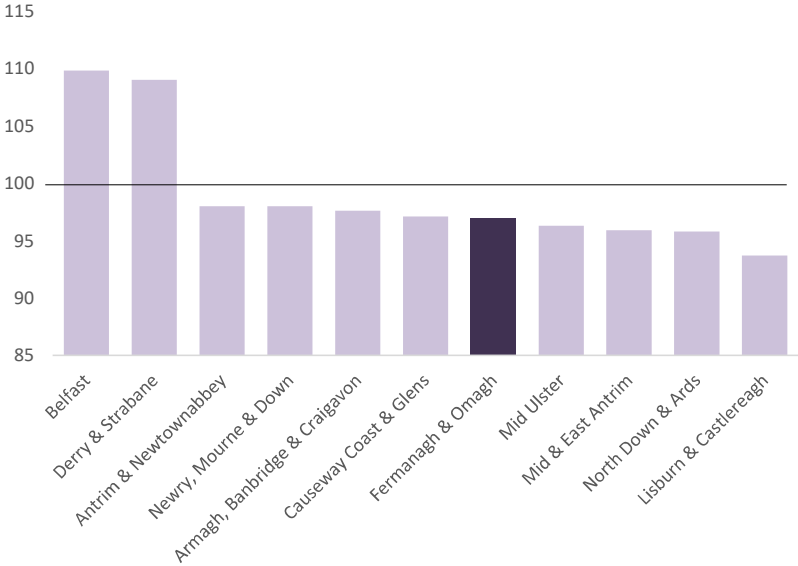
Fermanagh & Omagh has one of the highest percentages (15%) of households living on income that is below 60% of the median in NI. However, this is somewhat offset by the lower cost of living in the area.

21% of the working age population are employment deprived which is on par with the NI average.



# Health and Disability

**Figure 9.9: Standardised ratio of people with disabilities or long term health problems, NI LGDs, 2017 (NI=100)**



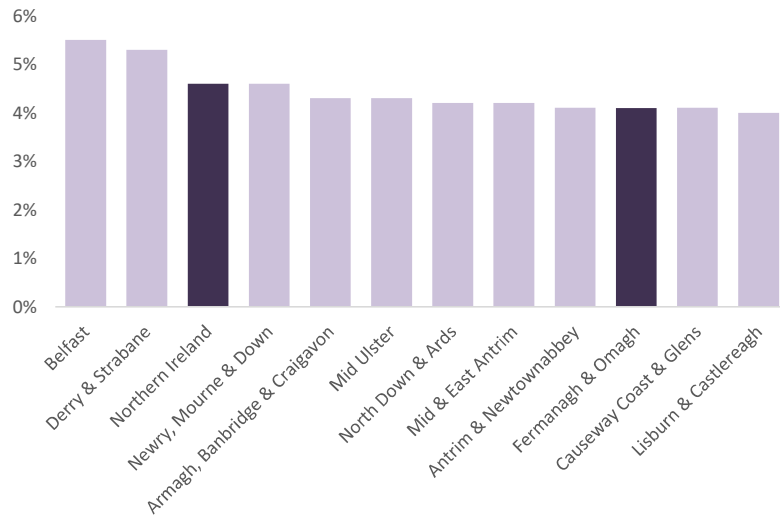
Fermanagh & Omagh have a 97:100 ratio of people with disabilities or long-term health problems compared to the NI average. Notably Belfast and Derry & Strabane are the only districts that are higher than the average at 110 and 103.4 respectively.



Source: NIMDM

# Absenteeism Rate in Schools

**Figure 9.10: Primary school absenteeism rate, NI LGDs, 2017**



**Figure 9.11: Post-primary school absenteeism rate, NI LGDs, 2017**

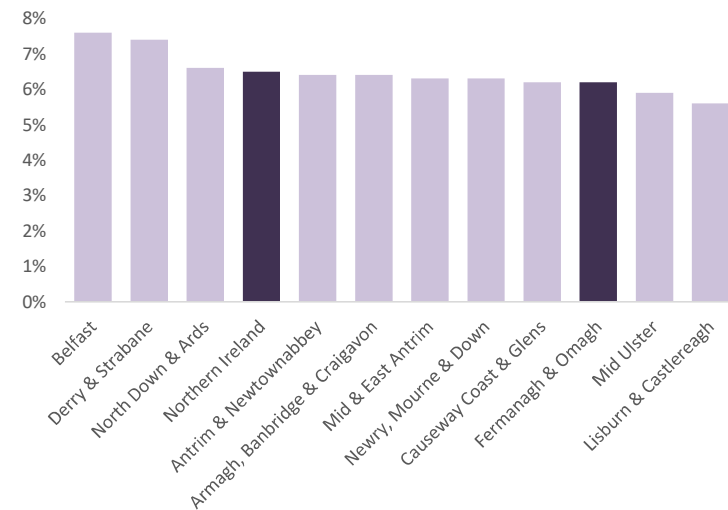
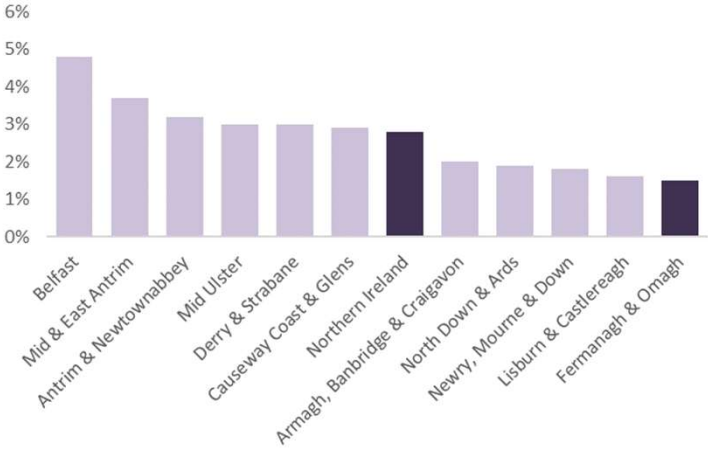


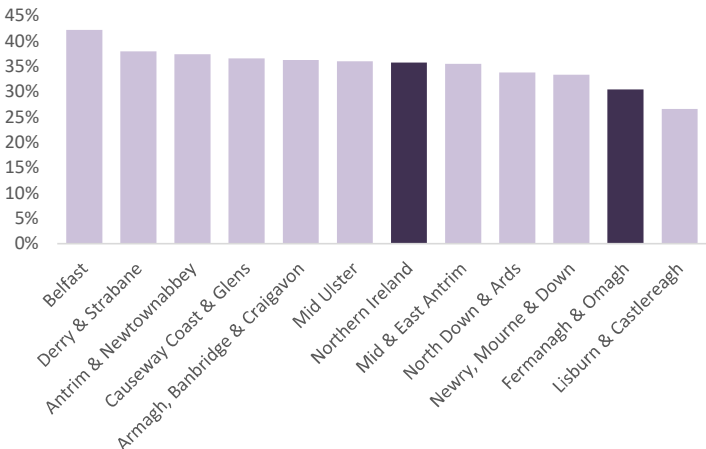
Figure 9.10 and Figure 9.11 show a low rate of school absenteeism within Fermanagh & Omagh. With rates of 4% and 6% absenteeism are primary and post primary school respectively this is below the associated NI averages of 5% and 7%.

# Education and Skills

**Figure 9.12: Proportion of 16-18 year old school leavers not in education, employment or training, NI LGDs, 2017**



**Figure 9.13: Proportion of school leavers not achieving 5 GCSEs A\*-C, NI LGDs, 2017**



Fermanagh & Omagh have the lowest level of school leavers not in education, employment or training at 2%.

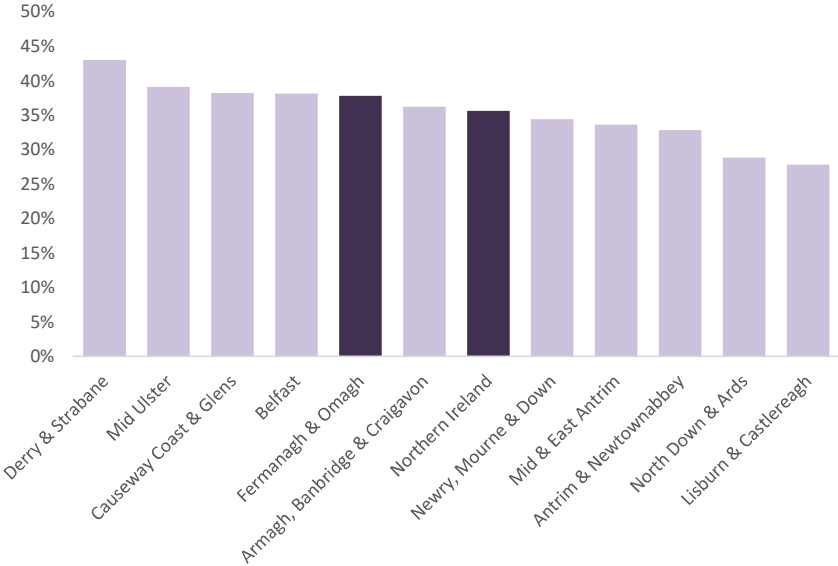
As shown in figure 9.13, it has the second lowest proportion (30%) of school leavers not achieving 5 GCSEs A\*-C, this is 6% lower than the Northern Ireland average.





# Level of Qualifications

**Figure 9.14: Proportion of working age adults (25-64) with no or low levels of qualification, NI LGDs, 2017**



The proportion of working age adults with no or low qualifications in Fermanagh & Omagh is 38%. This is 2% higher than the NI average of 36%.



Source: NIMDM

# Chapter 10: Infrastructure

# Summary: Infrastructure



Fermanagh & Omagh  
District Council  
Comhairle Ceantair  
Fhear Manach agus na hÓmaí

There is widely considered to be an infrastructure gap in Fermanagh and Omagh vis-à-vis other areas in NI.

For example, there are no recognisable motorways or dual carriageways in the district, no rail services and lower levels of broadband availability. The bus network is considered inconsistent, with a wide route network masking infrequent service provision.

These challenges will only be overcome by the delivery of large scale public interventions in the medium to long term.



Fermanagh & Omagh  
District Council

Comhairle Ceantair  
Fhear Manach agus na hÓmaí



# Road Network

**Figure 10.1: Length of road by classifications, Fermanagh Omagh, 2015-2020**

	2015	2016	2017	2018	2019	2020
Motorway and Dual Carriageway Length (km)	0.0	0.6	0.6	0.6	0.6	0.6
A Roads (Single Carriageway)	318	320	319	321	321	319
B Roads	447	446	446	446	446	455
C Roads	884	884	884	884	884	879
Unclassified	2322	2327	2330	2333	2334	2336
All Road Types	3970	3977	3980	3985	3986	3989

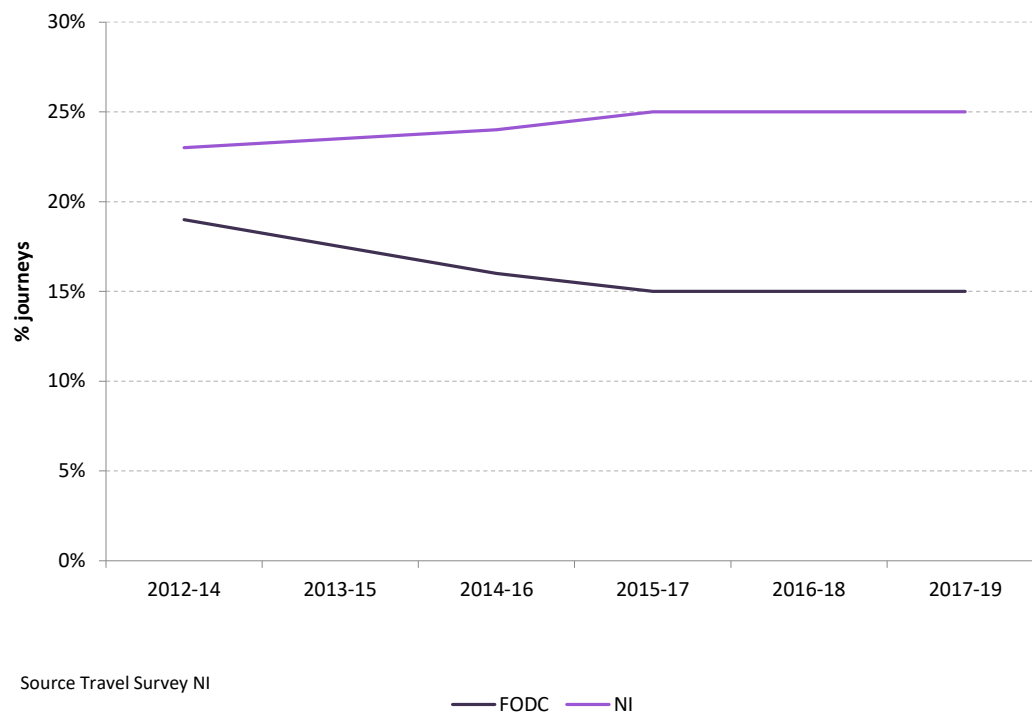
The road network has remained largely unchanged for a number of years. The increase of 0.6km in Motorway and Dual Carriage way in 2016 was due to the opening of the Cherrymount Link Road in Enniskillen, and is defined as a dual carriageway but is unlikely to be recognised as such by lay users.

Any increases to the road network will only be driven by the delivery of large scale investment schemes, such as project, the A4 Enniskillen bypass and/or the A32 upgrade.

## Mode of transport – public transport

**Figure 10.2: Percentage of journeys made on public transport, walking and cycling**

% journeys made on public transport and active travel



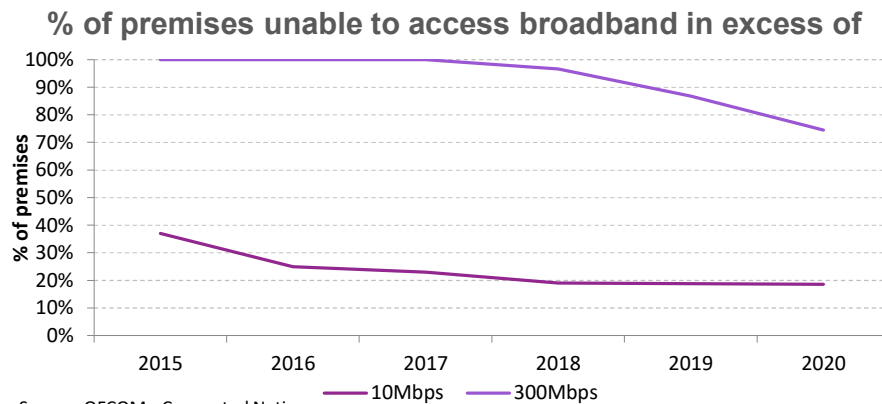
Source Travel Survey NI

— FODC — NI

- Approximately 15% of all journeys take in Fermanagh and Omagh are taken on public transport, walking or cycling. This is below the NI average of 25%. Both of these trends have plateaued over recent years.
- Public transport, walking and cycling are more prominent in urban areas; for example, over 40% of journeys in Belfast are taken on public transport and active travel.
- Evidence suggests a lack of frequency is the main barrier to the use of public transport; weather is cited as the main barrier to walking or cycling.

## Broadband availability

**Figure 10.3: Percentage of premises unable to access broadband in excess of 10Mbps and 300Mbps**

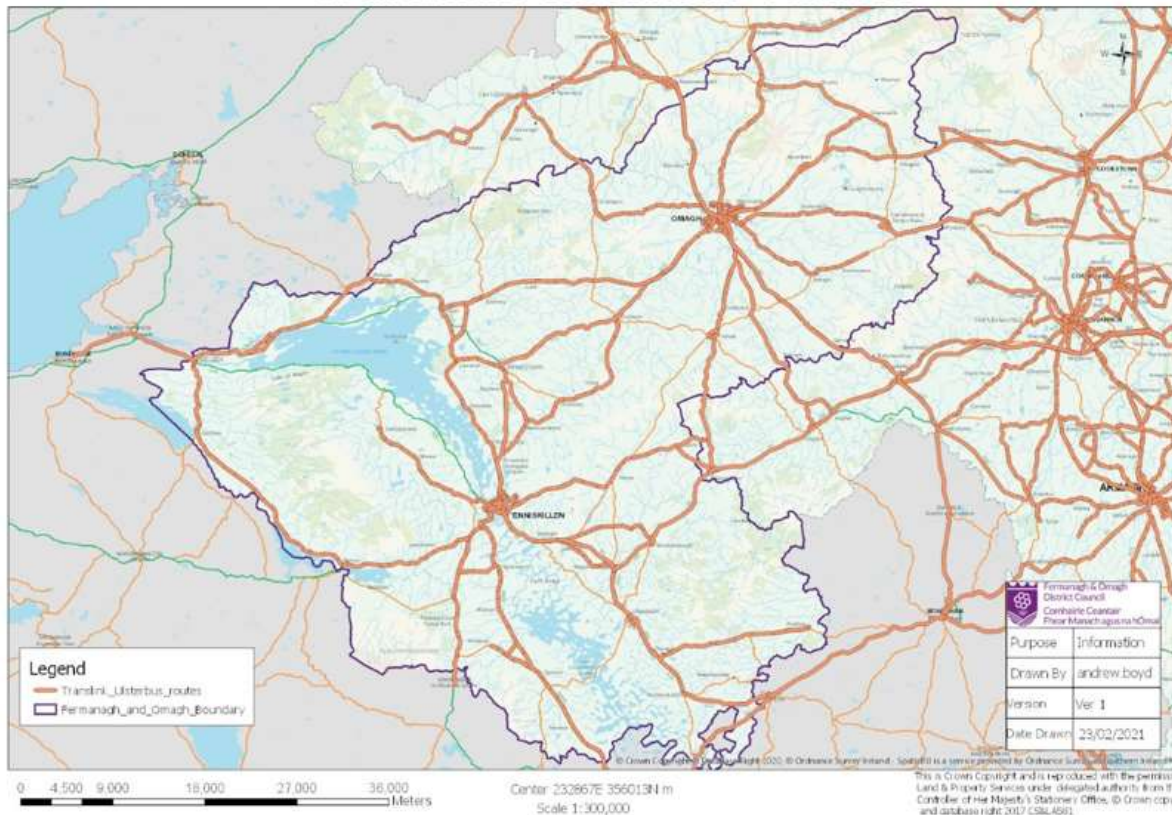


- 29.4% of premises in Fermanagh and Omagh unable to receive broadband speeds in excess of 30Mbps, the highest proportion of the 11 local government districts in NI;
- 8.4% of premises in Fermanagh and Omagh unable to receive broadband speeds in excess of 2Mbps, the highest proportion of the 11 local government districts in NI and the highest of 379 local and unitary authorities in the United Kingdom
- Only 25% of premises are able to access ultrafast broadband, with speeds in excess of 300Mbps.

# Bus Routes

Figure 10.5: Translink Ulsterbus Routes (Fermanagh Omagh)

## Translink Ulsterbus Routes



- The map demonstrates the Ulsterbus network across Fermanagh and Omagh. This shows an extensive network closely correlated with the main road networks.
- However, this does not indicate the frequency of services on these routes, which anecdotally is considered inconsistent, thus making it difficult to fully utilise public transport in Fermanagh and Omagh.

# Chapter 11: Comparisons (ROI)

# Summary: Comparisons ROI



Fermanagh & Omagh  
District Council  
Comhairle Ceantair  
Fhear Manach agus na hÓmaí

Fermanagh and Omagh shares many characteristics with neighbouring counties in the Republic of Ireland.

The Central Border Region, as it is collectively known, is a large rural area, typically has a higher proportion of older people and is more dependent on agriculture and primary industry.

Fermanagh and Omagh has a higher proportion of people in employment and a higher level of people who are unemployed. This suggests a below average proportion of economic inactivity.

In terms of agriculture, the trend would suggest a larger number of smaller farms in Fermanagh and Omagh than the Southern counties (not including Donegal).



# Fermanagh and Omagh in All-Island Context



- This section aims to place Fermanagh and Omagh in an All-Island context by looking at the characteristics and trends between Fermanagh and Omagh and neighbouring counties in the Republic of Ireland.
- For the purposes of analysis, we have used the Central Border Area Region.
- This section is limited due to data complexities, with published statistics in Northern Ireland differing in definition from those in the Republic of Ireland. In essence, we are limited to comparing the 2011 Census figures, where the statistics authorities have worked collaboratively to publish comparable statistics.
- We remain committed to improving the statistical knowledge of the Central Border Region, and will do so by updating this section when the 2021 Census information becomes available.



# Employed and Unemployed

Figure 11.1: % Employed, NI & ROI Comparisons, 2011

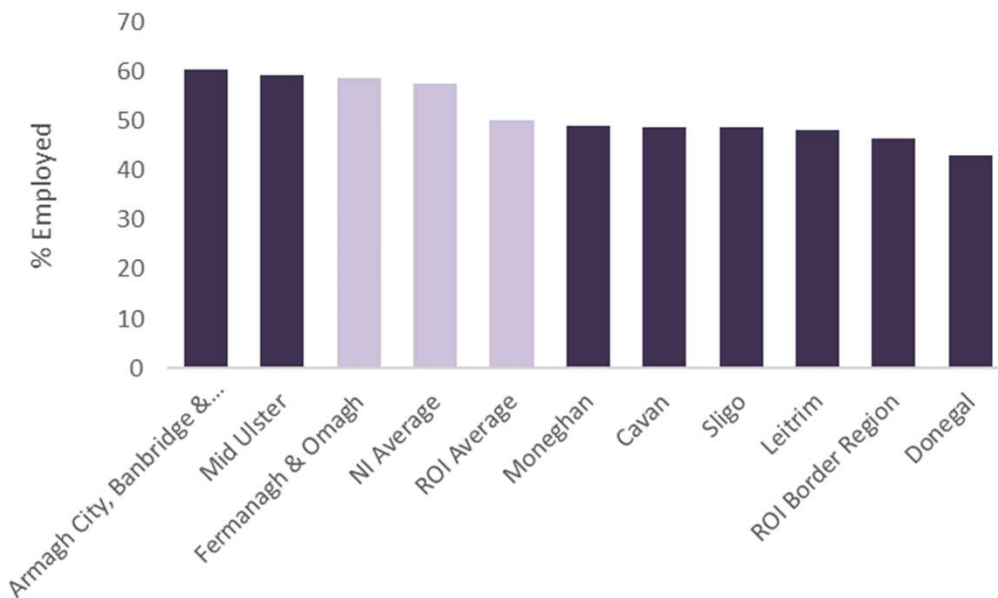
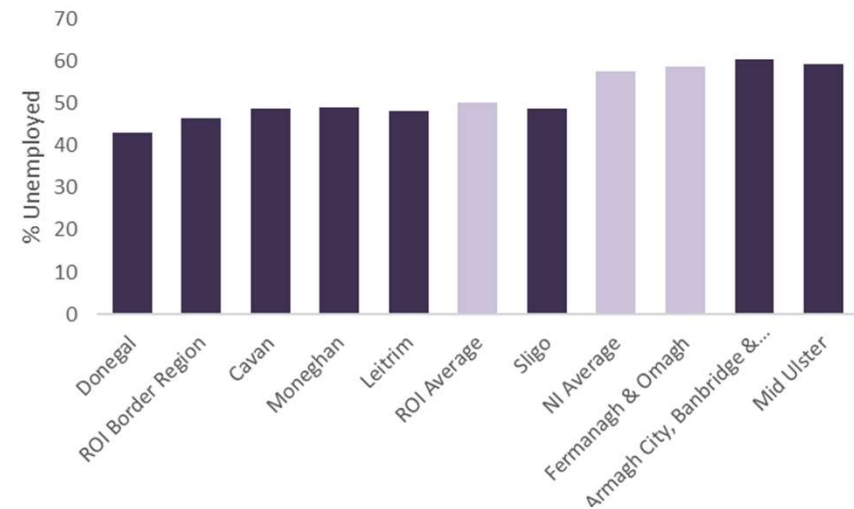


Figure 11.2: % Unemployed, NI & ROI Comparisons, 2011



Based on 2011 Census data:

- NI and ROI had broadly similar levels of employment/unemployment
- Fermanagh and Omagh had marginally higher levels of employment than the average for both, but also marginally higher levels of unemployment.





# Number of businesses

Figure 11.3: Number of VAT Registered businesses, NI & ROI Comparisons, 2011

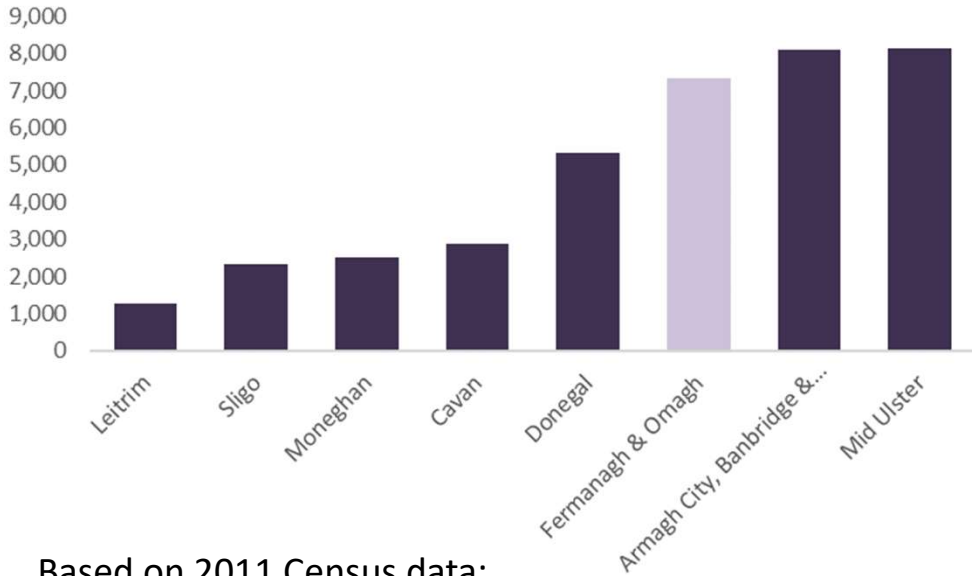
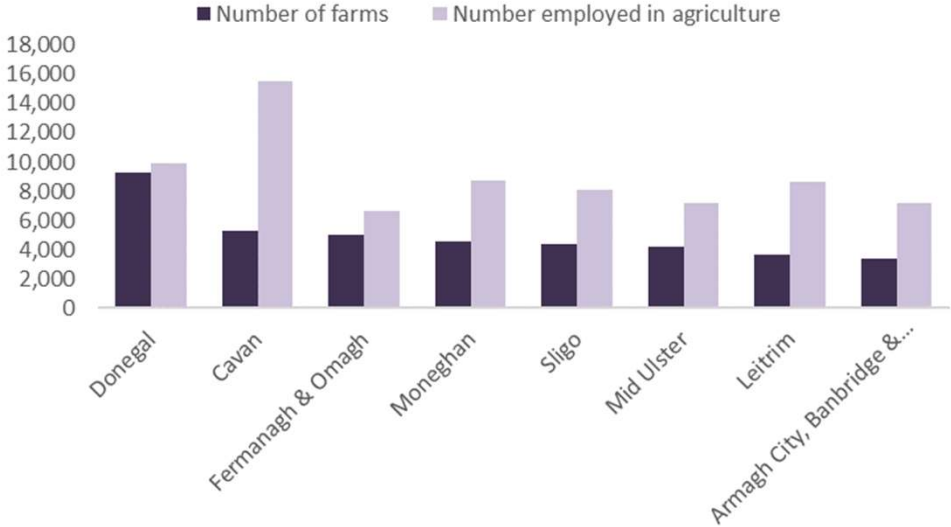


Figure 11.4: Number of farms and employees in agriculture, NI & ROI Comparisons, 2011



Based on 2011 Census data:

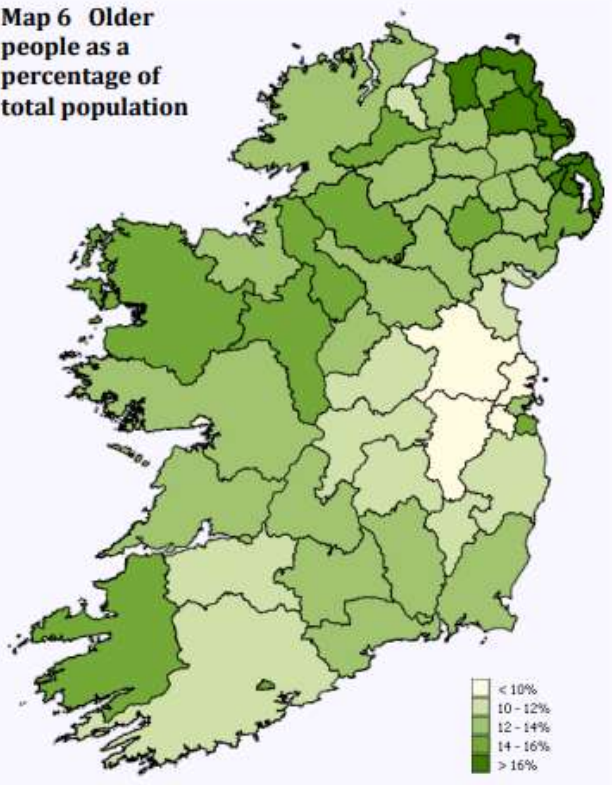
- Northern counties had a higher concentration of VAT registered businesses than their southern counterparts
- Southern counties had a higher concentration of employees in agriculture, although (with the exception of Donegal) the number of farms is broadly similar suggesting larger farm holdings in the south



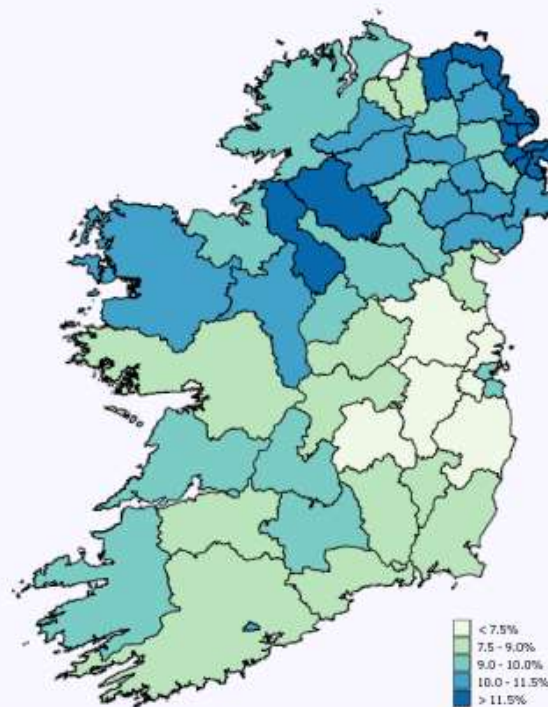
Source: ICBAN

# Older People

Map 6 Older people as a percentage of total population



Map 9 Proportion of one-person households comprising people aged 65 and over

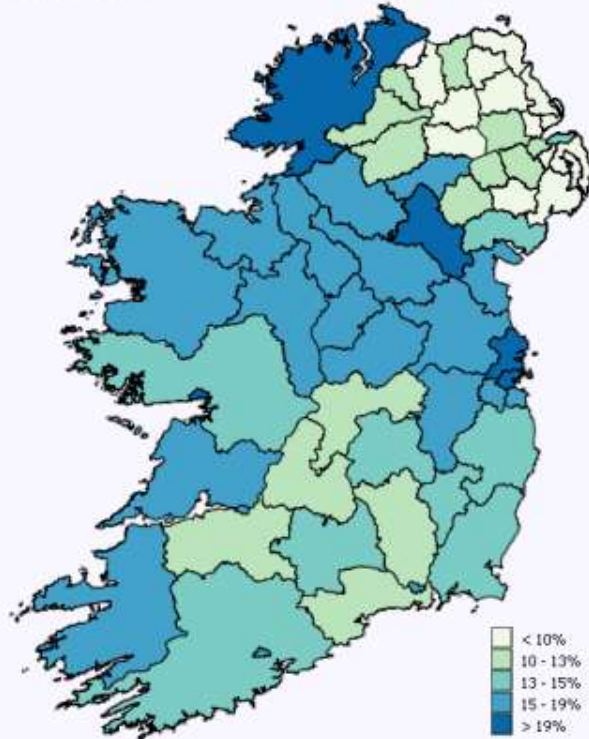


Based on 2011 Census data:

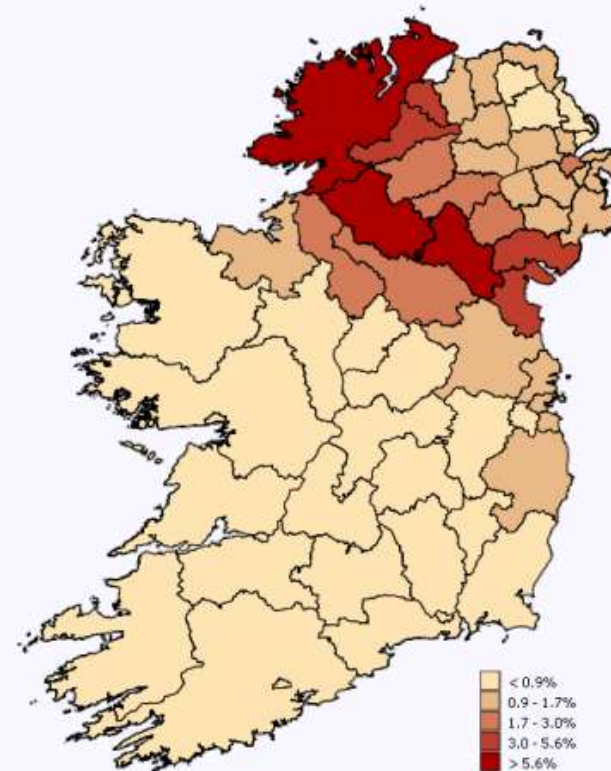
- There was a higher concentration of older people in Northern Ireland
- The proportion of one-person households comprising people aged 65+ was also higher in Northern Ireland

# Immigration and Migration

Map 13 Born outside country of usual residence



Map 14 Born in the neighbouring jurisdiction

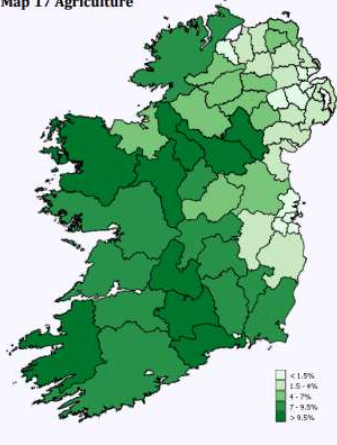


Based on 2011 Census data:

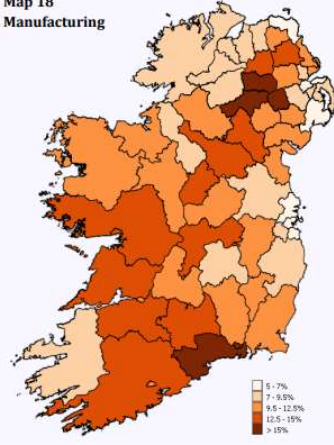
- ROI had a higher proportion of residents born elsewhere
- Migration between North and South was concentrated in the border counties

## Employment among persons (16-74) in various industries

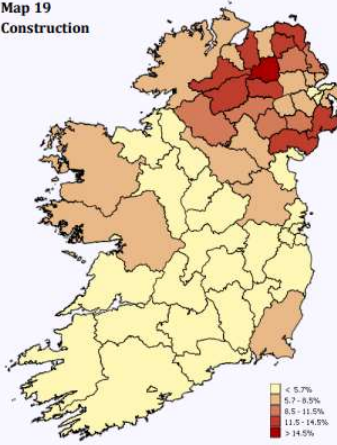
Map 17 Agriculture



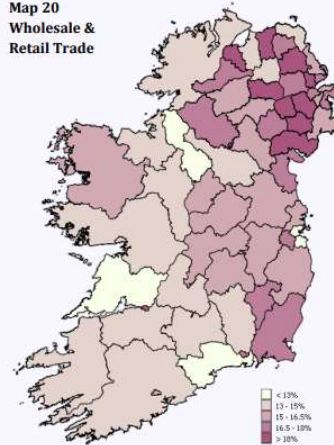
Map 18 Manufacturing



Map 19 Construction



Map 20 Wholesale & Retail Trade



Based on 2011 Census data:

- Agriculture and manufacturing occupations were more prominent in RoI, while construction and wholesale & retail trade occupations were more prominent in NI.
- Professional occupations formed the largest occupational group in both jurisdictions
- In NI, there were proportionately more workers in the administrative, sales and caring and leisure occupations groups, while RoI had proportionately more workers in the associate professional group.