

# Socio-Economic Profile of the Fermanagh & Omagh District

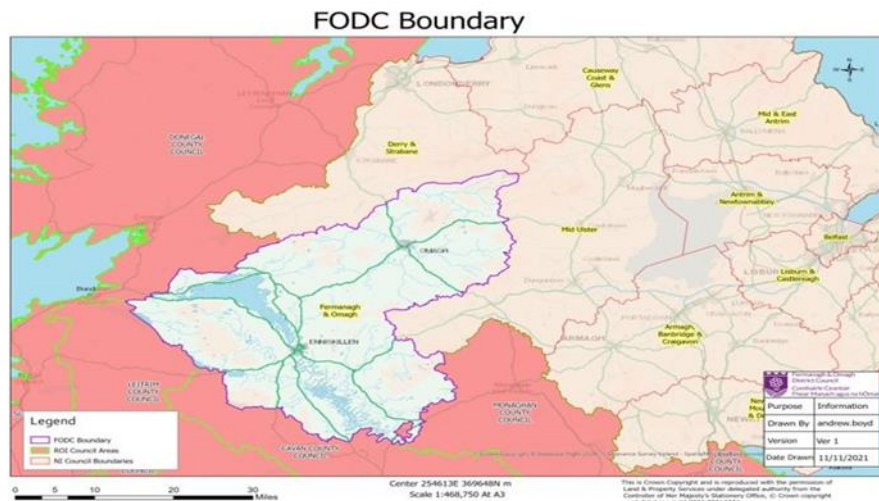
## INTRODUCTION

The Fermanagh & Omagh district is the largest in Northern Ireland (NI) by land mass and the smallest in terms of population. It is home to 117,000 people, 70% of whom live outside the two main towns. It is an area of great natural beauty and the location of 10% of all NI's businesses, the vast majority of these being micro-enterprises. This landscape and sparse population provide challenges in terms of service provision.

This socio-economic profile of the district aims to provide an overview of the latest available data across several topic areas – from population and well-being to housing and employment. The profile draws comparisons across NI and the Republic of Ireland where possible to give a better sense of where Fermanagh & Omagh currently finds itself.

This summary document is a high-level overview of the data, intended to give a pointer to what can be found in the more detailed profile. We have summarised a range of indicators under the three headings of People, Place and Economy as detailed in the table below.

| PEOPLE                      | PLACE          | ECONOMY       |
|-----------------------------|----------------|---------------|
| Population and its patterns | Housing        | Employment    |
| Wellbeing                   | Deprivation    | Business base |
| Skills and qualifications   | Infrastructure | Trade         |
| Economic activity           |                | Tourism       |



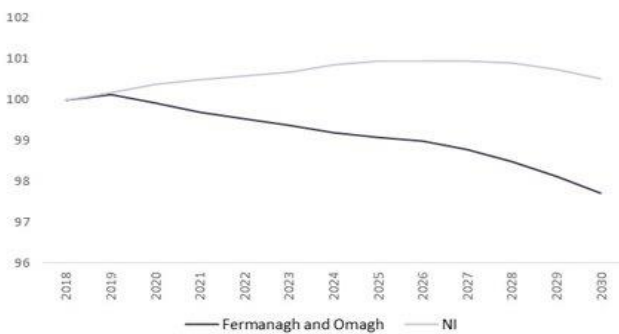
# PEOPLE

## Population

The population of Fermanagh & Omagh (F&O) has grown by 11% since 2001. It is expected to continue growing, increasing to 120,300 by 2030, driven by strong growth in the over 40s. The growth comes from a natural increase, rather than net migration which has remained around zero since 2010. Another cause for concern is the decrease since 2011 in the numbers of 16-39 year olds residing in the district since 2011. This trend is passing through to a forecasted decline in the overall working age population (16-64 year olds), something which may have already begun in 2019.

The number of people aged 65+ has increased by 52% in Fermanagh & Omagh since 2001. This is a trend that is expected to increase steadily as the working age population declines.

**Working age population projections, F&O and NI, 2018-2030**



## Wellbeing

People in F&O are generally content with life, the indicators of personal well-being being on a par with NI more generally. This can be seen in scores for life satisfaction and self-efficacy. There has been a COVID-19 affect here, however. The 2021 residents' survey in the district found that people reported feeling much less in control of their lives and much less able to maintain social contact, although they did feel they were more active than in the period survey in 2018.

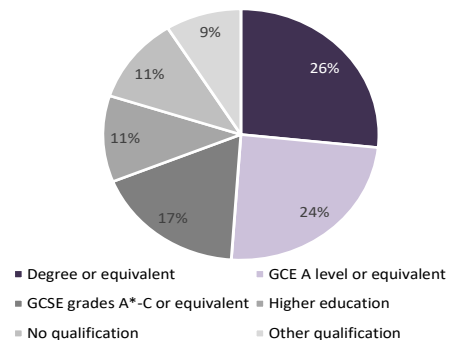
## Economic activity & skills

Activity in the economy can be crucial to feelings of satisfaction and taking control. Monitoring levels of economic activity are thus important for the profile. In F&O the rates of inactivity have fluctuated and the most recent data for 2020 points to a sharp rise again to levels last seen a decade ago and a rate of 49%.

Half of those employed within the district have an A-Level, degree or equivalent, which is below the NI average and raises the pressure to have good in-working training and skills programmes.

The size of the challenge facing those in economic inactivity can be seen in the differing skills profiles between themselves and those in employment. Three times as many of the inactive (35%) have no qualifications when compared to those in employment (11%).

**Skills profile of the employed, F&O, 2019**

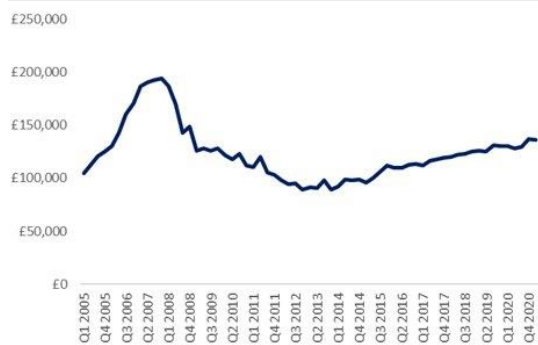


# PLACE

## Housing

The owner-occupied housing market in Fermanagh & Omagh has been in a mode of steady recovery since 2014, as measured by increases in the level of house prices, the numbers of houses in the district (6% of total NI stock) and the actual numbers of transactions.

**Standardised house prices, F&O, 2005 – 2021**



Housing affordability is an important indicator in terms of renting or buying a home. House price to wage ratios in the district are among the highest among council areas, while the average rent is the lowest in NI, but has been increasing in recent years since 2017.

Relative to the rest of Northern Ireland Fermanagh and Omagh has a higher rate of home ownership and a smaller private rental market.

## Deprivation

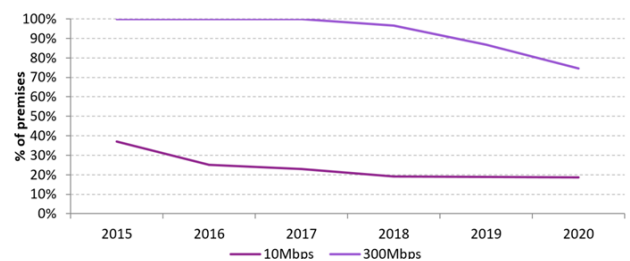
Fermanagh & Omagh has its pockets of deprivation like other council areas. These are well known and covered in other publications. The district's overall indicators are similar to the NI average. In Education F&O is one of the better areas for absenteeism rates and performs very well in terms of school-leavers leaving with 5 or more GCSEs and with leavers entering education, employment or training.

In other indicators F&O has ground to make up, in particular the share of houses unfit for purpose (4.5% of the total stock) and the numbers of people living on below average incomes (15% compared to 13% for NI).

## Infrastructure

This is considered to be the key issue for Fermanagh & Omagh – infrastructure or its lack. The gap in infrastructure can be seen in the largely unchanged road network, which awaits significant upgrades such as the A5 Western Corridor, the Enniskillen by-pass or the improvements to the A32. Levels of use of public transport, walking or cycling options have all remained unchanged recently, also mirroring the need for longer-term investments.

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



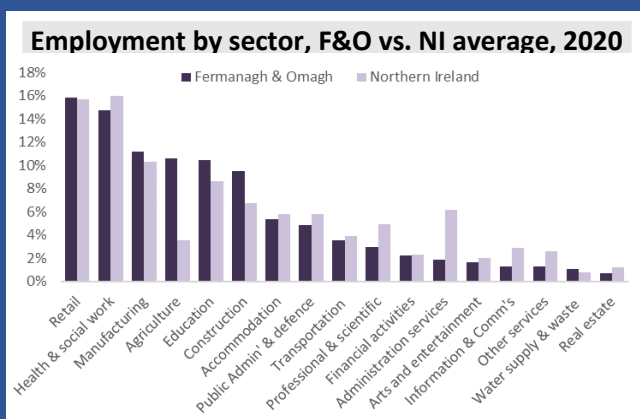
Access to all speeds of broadband is poor in Fermanagh & Omagh, a situation which the chart shows is changing only very slowly. Since 2018 the number of premises with speeds higher than 300Mb per second has grown to 25% of the total while 8% of premises still have speeds less than 2Mb per second, which makes the district the lowest performer across NI and the wider UK. The importance of this infrastructure in the context of the adoption of eCommerce and online public services cannot be understated.

70.6% of premises have access to 30Mbps broadband however this is the lowest proportion of all NI council areas.

# ECONOMY

## Employment

From a labour market perspective Fermanagh and Omagh has followed the same cyclical path as the NI, which reflects changes in the business cycle and the wider economy. Since 2011 employment has increased from 50,300 to 53,800 in 2020 albeit with fluctuations in between. Retail and health & social work are the two largest sectors within the council providing just under a third of total employment opportunities. The figure below compares the sectoral breakdown within the area to the NI average.



When compared with the NI average in the chart above Fermanagh & Omagh offers significantly more employment in agriculture and construction than the rest of NI however it lacks opportunities in ICT and professional services.

GVA per capita has risen steadily since 2013 within the local economy now at £18,900 per head in 2019. GVA mirrors the employment picture with the largest two contributing sectors being retail and manufacturing.

## Business Demography

Although the number of business births is lower in Fermanagh and Omagh compared to NI (8.8% vs. 10.4%) the rate of business deaths is also lower (7.7% vs. 9.0%) meaning that a higher proportion

of businesses are continuing to trade in 2019. These businesses were primarily concentrated within the agriculture and construction sectors. Fermanagh & Omagh has a higher proportion of microbusinesses (94%) and businesses with under £50k turnover (45%) than NI (89% and 25% respectively).

## Exports

Total exports in Fermanagh and Omagh have grown significantly since 2015 from £220million to £533 million in 2019. Simultaneously, the share of NI total exports has increased from 3.7% to 4.6%. As shown below ROI is the destination of almost three quarters of exports within the council. Sales to GB have also increased steadily from £1,360m in 2011 to £1,850 in 2019. These figures however do not fully encompass the effects of EU exit.



## Tourism

Tourism within the local economy has also continued to flourish over recent years before Covid-19. When looking at the 2014-2019 period the number of overnight stays in Fermanagh increased by 10% with the associated spend increasing by 26% to £79.4million in 2019.

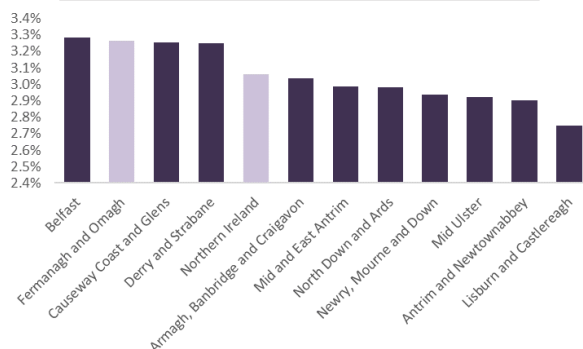
93% of visitors are visiting for holiday & leisure or visiting friends & family. Over 60% of visitors are from other parts of NI with GB visitors make up a further 14%.

# BENCHMARKING F&O

It is important to consider Fermanagh and Omagh in the context with the rest of Northern Ireland and also the neighbouring Republic of Ireland. Although the number of indicators it is possible to use in this context are limited, they provide an insight into where the council area sits in a wider picture.

Using census data from 2011 we can see that Fermanagh and Omagh has a higher employment rate than the ROI average and “Irish Central Border Region” which encompasses neighbouring counties such as Monaghan, Cavan, Sligo, Leitrim and Donegal as well as Armagh City, Banbridge & Craigavon and Mid-Ulster in the North. In 2020 a 5-percentage point difference was recorded between the F&O resident employment rate (66%) vs the NI average of 71%. This was the lowest rate out of the 11 NI council areas. On an all-island basis F&O showed particularly concentrated employment in the construction and wholesale and retail sectors. Despite having strong agricultural employment in comparison to NI the number of farms and number employed in agriculture in 2011 were significantly higher in other border counties.

**Unemployment rate, NI LGD's, 2020**



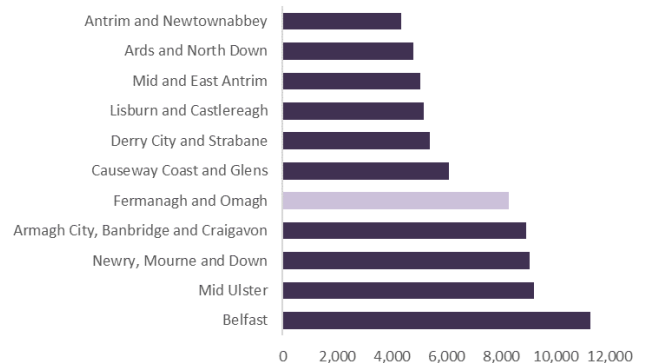
Fermanagh and Omagh has a higher unemployment rate than the NI average, ROI average and the ROI border region in 2011.

In 2020, see below, the unemployment rate in Fermanagh & Omagh remained high relative to the rest of Northern Ireland however it is important to observe that between highest ranking area, Belfast, and lowest ranking council Lisburn & Castlereagh there is only 0.6 percentage points of a difference.

## Business Demography

Records of business demography show that Fermanagh & Omagh had a much higher number of VAT registered businesses compared to neighbouring border counties in 2011. In more recent years, Fermanagh & Omagh ranks 5th of the range in terms of the number of VAT registered businesses in NI.

**Number of VAT registered businesses, NI LGD's, 2020**



## Wider Demographics

When considering migration Fermanagh and Omagh had a smaller number of people born from an external country of residence, indicating lower inward external migration.

F&O, County Leitrim and the east coast of NI have a larger proportion of their population in the 65+ category compared to the rest of Ireland.

Fermanagh & Omagh has similar characteristics in terms of rurality and infrastructure compared to neighbouring councils and counties both north and south of the border.