



Labour Market Profile

South Eastern Workforce Development Forum

KEY FIGURES

- **Table 1** shows the working age employment rate in the South Eastern WDF was 68.5%, 2.7 percentage points higher than Northern Ireland as a whole.
- The working age economic activity rate (**Table 1**) in the South Eastern WDF was 72.0%, 1.1 percentage points higher than Northern Ireland as a whole.
- **Table 1** shows the working age economic inactivity rate in the South Eastern WDF was 28.0%, 1.1 percentage points lower than Northern Ireland as a whole.
- **Table 2** shows the claimant count rate for 2011 in the South Eastern WDF was 4.1%, 1 percentage point lower than Northern Ireland as a whole.

Table 1. Economic activity, inactivity and employment of the working age population for the South Eastern WDF, 2010

	South Eastern WDF		Northern Ireland
	Number	%	%
Employment	149,000	68.5	65.8
Economic Activity	156,000	72.0	70.9
Economic Inactivity	61,000	28.0	29.1

Source: Labour Force Survey Local Area Database 2010, DFP

Working Age=16-64

As the LFS is a sample survey, all data is subject to sampling error

Table 2. Claimant count as a proportion of the resident working age population for the South Eastern WDF, 2011

	South Eastern WDF		Northern Ireland
	Number	%	%
Claimant Count	9,187	4.1	5.1

Source: Claimant Count, DFP

OVERVIEW OF THE WORKFORCE IN THE SOUTH EASTERN WDF

This report provides a labour market profile for the South Eastern WDF in Northern Ireland. Similar profiles have been developed for the five remaining WDFs as well as an overall report for Northern Ireland. South Eastern WDF comprises Lisburn City Council, North Down Borough Council, Ards Borough Council and Down District Council. The content is based on official information sources.

POPULATION

- The population of the South Eastern WDF in 2010 was 346,794, with 49.1% being males (170,153) and 50.9% being females (176,641).
- Between 2000 and 2010 the population of the South Eastern WDF increased by 25,542 (8.0%).
- The working age population in the South Eastern WDF was 211,117 in 2010.
- The working age population increased by 14,527 (7.4%) between 2000 and 2010.
- The number of young people in the South Eastern WDF (aged 16-24) increased by 3,123 between 2000 and 2010. This is an increase of 8.5%.
- The number of 25-49 year olds in the South Eastern WDF increased by 4,478 between 2000 and 2010. This is an increase of 3.9%.
- The number of people aged 50-59/64 increased by 6,926 between 2000 and 2010. This is an increase of 15.1%.

WORKFORCE EMPLOYMENT

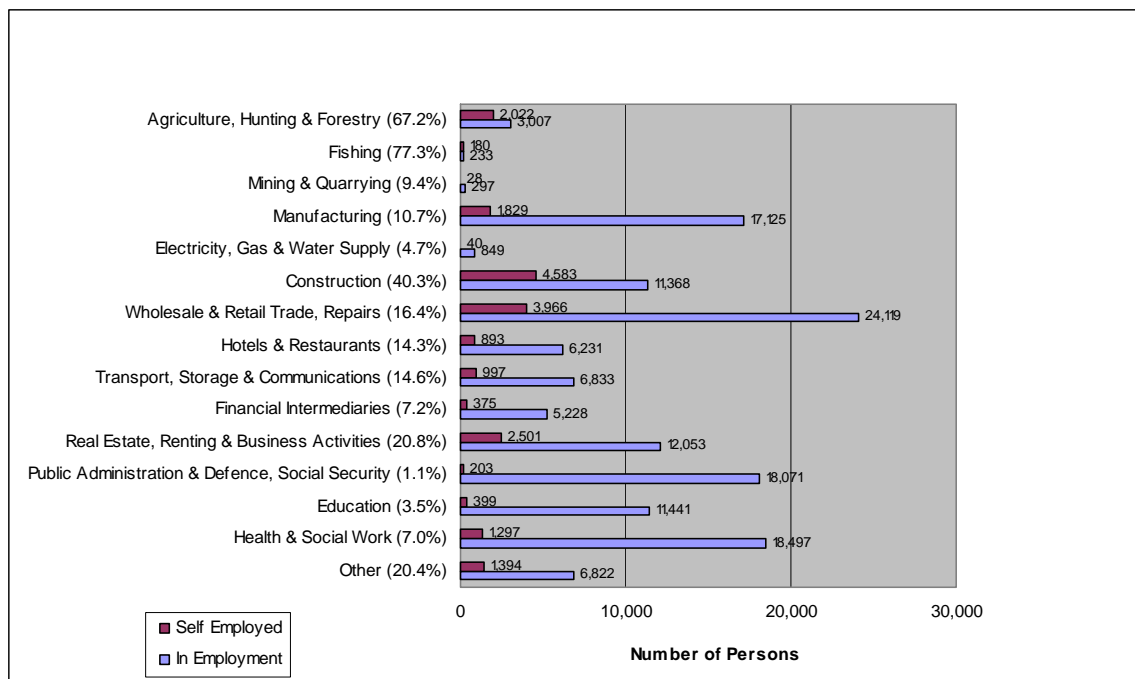
There were 95,891 employee jobs in the South Eastern WDF in 2009. This represented a decrease of 2,151 (2.2%) since 2007.

- Females made up 54.4% of all employees in the South Eastern WDF in 2009. The number of female jobs decreased by 0.1% between 2007 and 2009. Male employment in the South Eastern WDF decreased by 4.6% in the same period.
- Almost two thirds (60.3%) of jobs were full-time in 2009. Full-time jobs decreased by 6.0% between 2007 and 2009 while part-time jobs increased by 4.2%.

SELF EMPLOYED

- **Figure 1** shows that in 2001, 77.3% of those persons aged between 16 and 74 in Fishing in the South Eastern WDF were self-employed.
- In 2001, 67.2% of persons in Agriculture, Hunting & Forestry in the South Eastern WDF were self-employed as were 40.3% of persons in Construction (**Figure 1**).
- **Figure 1** shows that 3.5% of persons aged between 16 and 74 in Education in the South Eastern WDF were self-employed, as were 1.1% of persons in Public Administration & Defence, Social Security.

Figure 1. All persons aged 16-74 in employment the week before the Census 2001 for the South Eastern WDF



(%) = % Self Employed

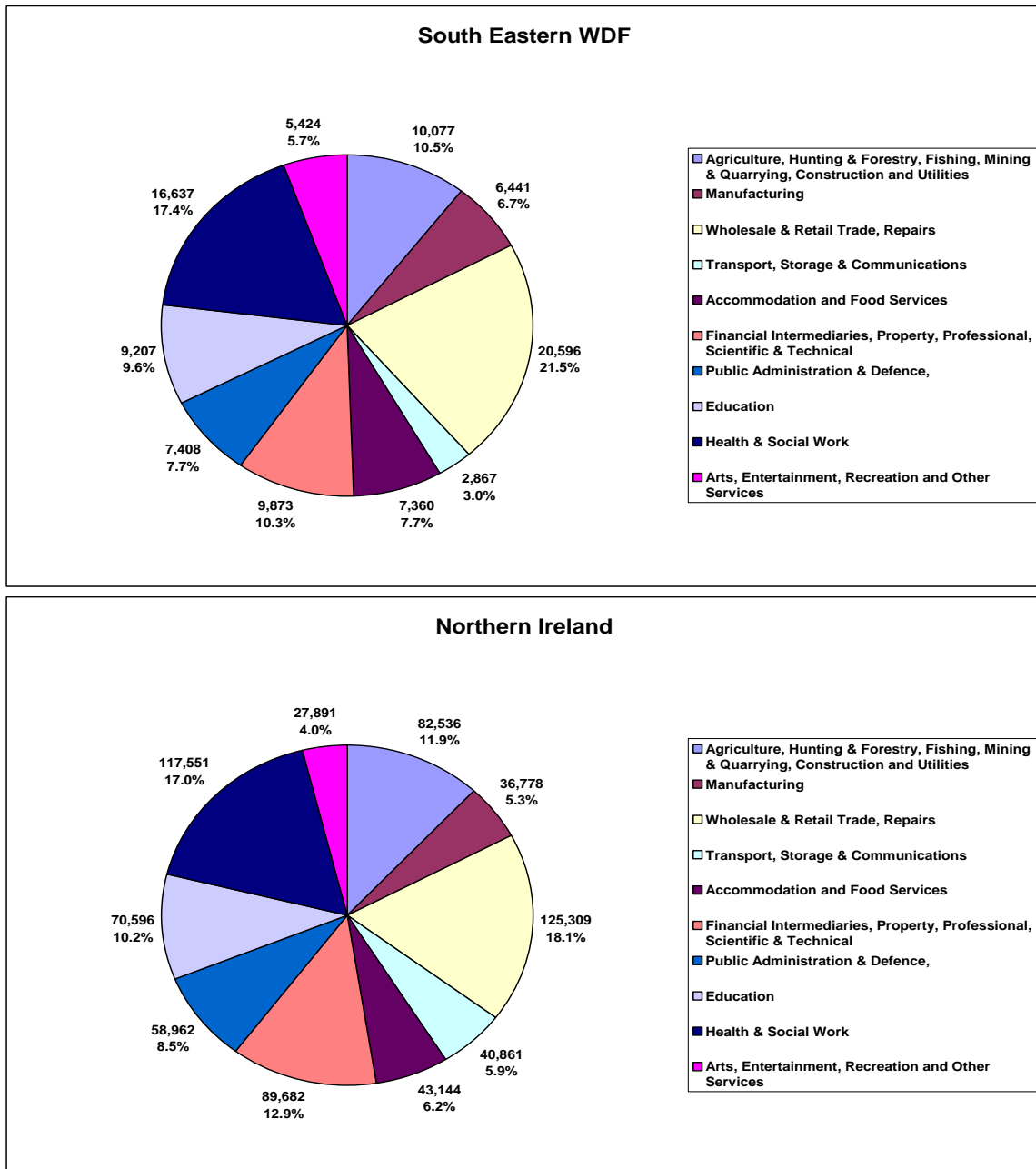
Source: Census 2001

Note: Percentages may not sum to 100 due to rounding.

INDUSTRIAL STRUCTURE

- **Figure 2** shows that over one fifth of jobs were in Wholesale & Retail Trade, Repairs (21.5%) followed by 17.4% of jobs in Health & Social Work.
- In 2009, Transport, Storage & Communications accounted for only 2,867 jobs (**Figure 2**) in the South Eastern WDF (3%).

Figure 2. Employee jobs by industrial sector for the South Eastern WDF and Northern Ireland, 2009



Source: Census of Employment 2009, DFP

Note: Percentages may not sum to 100 due to rounding.

Table 3 shows:

- In the South Eastern WDF there was a decline in Employee Jobs of -2.2% (2,151), lower than Northern Ireland as a whole (-2.5%).
- Agriculture, Hunting & Forestry, Fishing, Mining & Quarrying, Construction and Utilities decreased by -16.8% (1692 jobs) between 2007 and 2009, followed by Manufacturing which decreased by -9.6%.
- Between 2007 and 2009 Health & Social Work increased by 5.5% which equates to a gain of 908 jobs in the South Eastern WDF.
- Arts, Entertainment, Recreation and Other Services increased by 192 jobs (3.5%) between 2007 and 2009.

Table 3. Change in Employee Jobs by industrial sector for the South Eastern WDF, September 2007 to September 2009

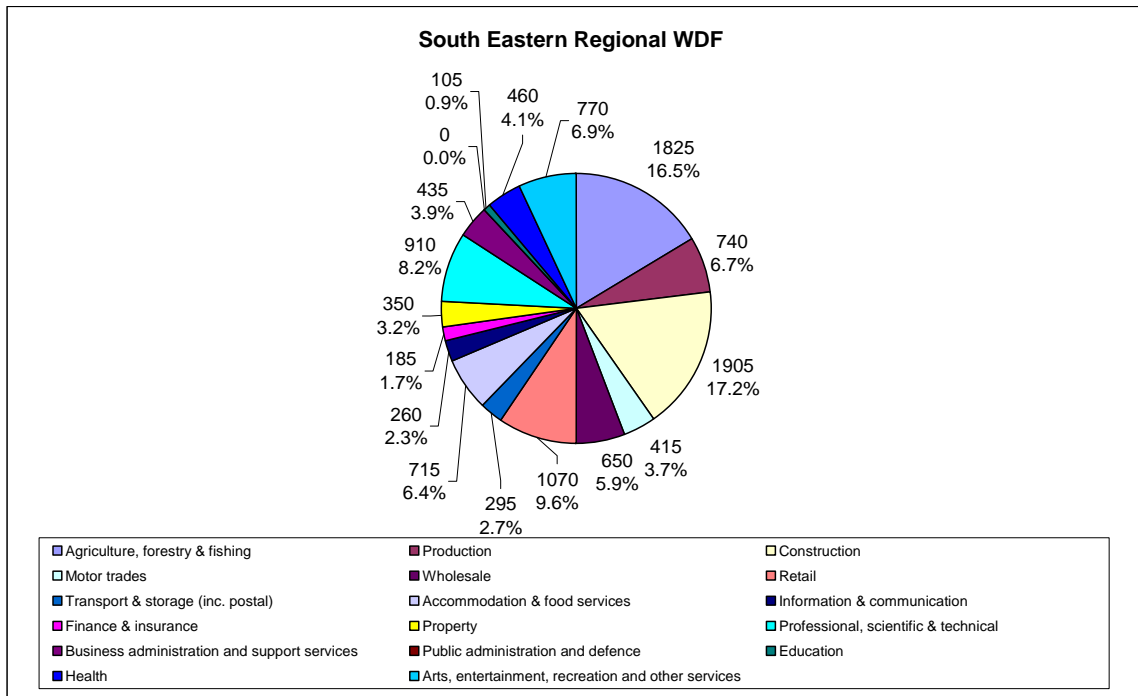
	Absolute change in the South Eastern WDF	% Change in the South Eastern WDF	% Change in Northern Ireland
Agriculture, Hunting & Forestry, Fishing, Mining & Quarrying, Construction and Utilities	-1,692	-16.8	-13.8
Manufacturing	-616	-9.6	-23.2
Wholesale & Retail Trade, Repairs	-850	-4.1	-0.1
Transport, Storage & Communications	-70	-2.4	-3.0
Accommodation and Food Services	-117	-1.6	-0.6
Financial Intermediaries, Property, Professional, Scientific & Technical	+154	+1.6	-1.7
Public Administration & Defence	-281	-3.8	+1.2
Education	+220	+2.4	+2.0
Health & Social Work	+908	+5.5	+2.6
Arts, Entertainment, Recreation and Other Services	+192	+3.5	+2.0

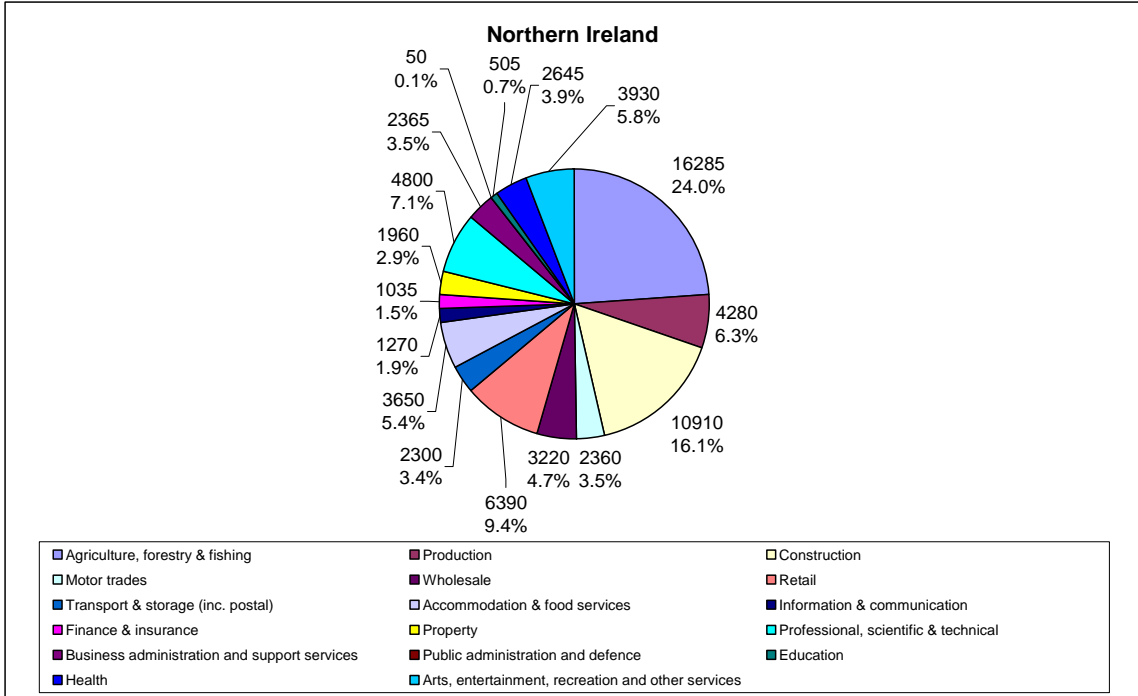
Source: Census of Employment 2009, DFP

VAT REGISTERED ENTERPRISES

- **Figure 3** shows that in 2011 there were a total of 11,090 VAT registered businesses in the South Eastern WDF. Of these under a fifth were in Construction (17.2%). This was followed by 16.5% in Agriculture.
- Between 2010 and 2011, the number of VAT registered businesses decreased by 1.3% in the South Eastern WDF. This was greater than for Northern Ireland as a whole (0.8%).

Figure 3. Number of VAT registered businesses by industrial sector for the South Eastern WDF and Northern Ireland, 2011





Source: UK Business: Activity, Size and Location 2011

Notes:

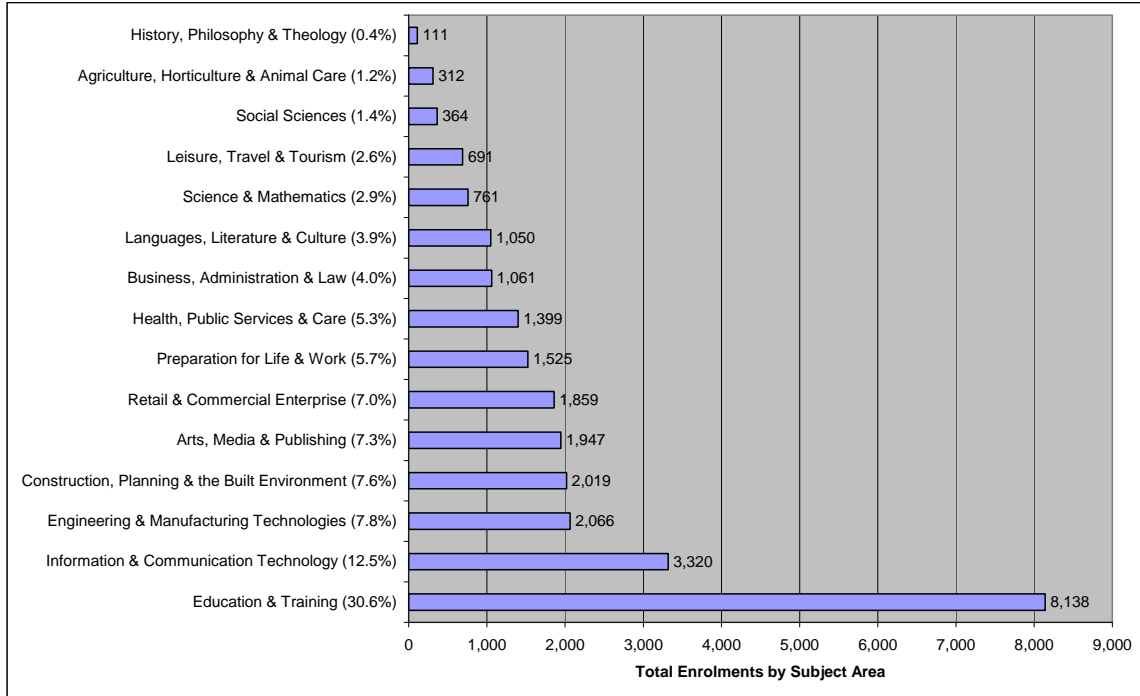
1. Figures have been rounded to the nearest 5 and thus may not add to totals
2. Analysis now includes VAT and/or PAYE registered businesses instead of just VAT registered businesses as in the past.
3. For further information please visit: <http://www.ons.gov.uk/ons/rel/bus-register/uk-business/2011/index.html>

Definition: "The enterprise is the smallest combination of legal units that has an organisational unit producing goods or services, which benefits from a certain degree of autonomy in decision-making, especially for the allocation of its current resources. An enterprise carries out one or more activities at one or more locations. An enterprise may be a sole legal unit."

FURTHER EDUCATION

- **Figure 4** shows that 30.6% of enrolments in 2010/11 were in Education and Training courses whilst 12.5% of enrolments were in Information & Communication Technology courses.
- Agriculture, Horticulture & Animal Care accounted for 1.2% of enrolments. Only 0.4% of enrolments were in History, Philosophy & Theology courses. (**Figure 4**).

Figure 4. Enrolments in South Eastern Regional College by subject area, 2010/2011



(%) = % enrolments by subject area

Source: FESR

Note: Percentages may not sum to 100 due to rounding.

QUALIFICATIONS

- **Table 4** shows that in 2001, 36.4% of the South Eastern WDF working age population had no qualifications. This compares to 41.6% of the Northern Ireland working age population who also had no qualifications.
- In 2001, 46.1% of the South Eastern WDF working age population had qualification Levels 1, 2 or 3 (A-level or less). This compares to 42.6% of the Northern Ireland working age population who had the same level of qualifications (**Table 4**).
- **Table 4** also shows that in 2001, 17.5% of the South Eastern WDF working age population had qualification Levels 4 and 5 (First degree and higher). This compares to 15.8% of the Northern Ireland working age population who had the same level of qualifications.

Table 4. Qualification levels of the working age population in the South Eastern WDF

		All persons	No qualifications	Level 1	Level 2	Level 3	Level 4	Level 5
South Eastern WDF	No.	228,483	83,272	42,611	41,533	21,158	28,097	11,812
	%	100.0	36.4	18.6	18.2	9.3	12.3	5.2
Northern Ireland	%	100.0	41.6	17.2	16.4	9.0	10.9	4.9

Source: Census 2001

Notes:

1. Percentages may not sum to 100 due to rounding.

2. Qualification NVQ Levels

No qualifications: No qualifications

Level 1: GCSE (grades D-G), CSE (grades 2-5), 1-4 CSEs (grade 1), 1-4 GCSEs (grades A-C), 1-4 'O' level passes, NVQ Level 1, GNVQ Foundation or equivalents

Level 2: 5+ CSEs (grade 1), 5+ GCSEs (grades A-C), 5+ 'O' level passes, Senior Certificate, 1 'A' level, 1-3 AS levels, Advanced Senior Certificate, NVQ Level 2, GNVQ Intermediate or equivalents

Level 3: 2+ 'A' levels, 4+ AS levels, NVQ Level 3, GNVQ Advanced or equivalents

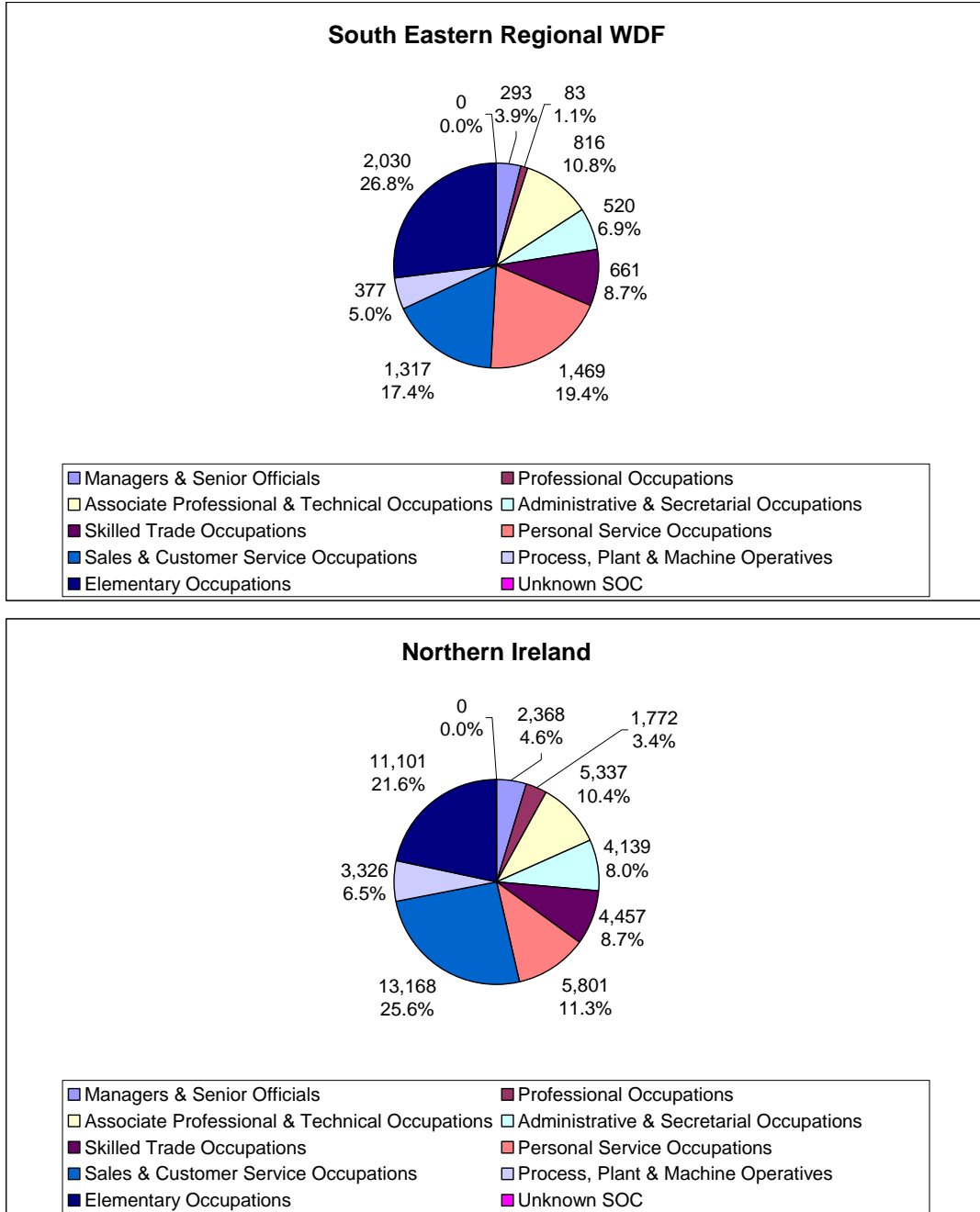
Level 4: First Degree, NVQ Level 4, HNC, HND or equivalents

Level 5: Higher Degree, NVQ Level 5 or equivalents

VACANCIES

- **Figure 5** shows that over a quarter notified vacancies in 2010 in the South Eastern WDF were in Elementary Occupations (26.8%). This was followed by 19.4% in Personal Service Occupations.
- In 2010, the smallest number of vacancies were in Professional Occupations accounting for 1.1% of all vacancies (**Figure 5**).

Figure 5. Notified vacancies for the South Eastern WDF and Northern Ireland, 2010



Source: Client Management System, DEL

Notes:

- (1) All statistics are derived from data extracted from the Department for Employment and Learning Client Management System (CMS) on 3rd June 2011
- (2) Vacancies notified are all vacancy positions notified and added to JobCentres / Jobs and Benefits Offices of the Department for Employment and Learning.
- (3) Workforce Development Forum (WDF) areas are assigned to vacancies based on the postcode of the employers account. When a valid employer's account postcode is not available, the postcode of the vacancy is used. When both employer and vacancy postcode are incorrect/incomplete/outside of Northern Ireland, the WDF of the vacancy is recorded as unknown.
- (4) Percentages may not sum to 100 due to rounding.
- (5) Occupations are taken from the Standard Occupational Classification 2000.

REDUNDANCIES

- **Table 5** shows that in 2011 there were 101 confirmed redundancies in the South Eastern WDF. This equates to 5.6% of the total number of redundancies in Northern Ireland in 2011.
- Over the period 2010 to 2011, the number of confirmed redundancies in the South Eastern WDF decreased by 47.7% (**Table 5**).

Table 5. Confirmed Redundancies for the South Eastern WDF, 2006 to 2011

	2006	2007	2008	2009	2010	2011
South Eastern WDF	215	566	70	328	193	101
Northern Ireland	3143	1912	2782	4596	2096	1804
Redundancies in the South Eastern WDF as a % of Northern Ireland total	6.8	29.6	2.5	7.1	9.2	5.6

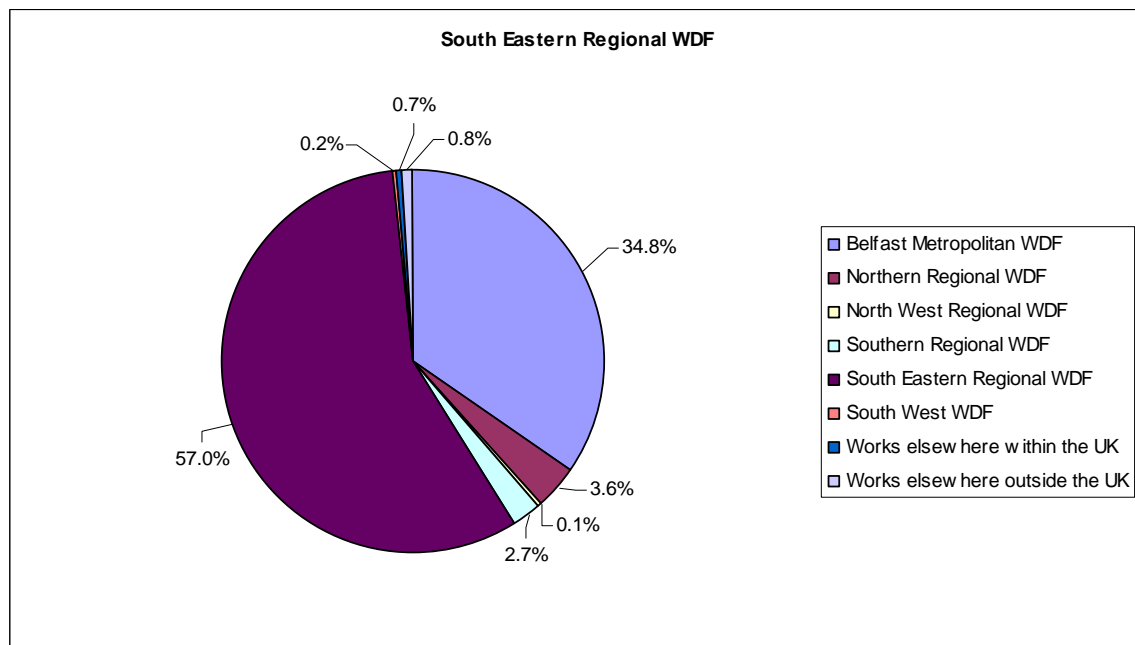
Source: Redundancies, DFP

Note: Under the Employment Rights (Northern Ireland) Order 1996 (Amended 8 October 2006) companies are only legally required to notify the Department of impending redundancies of 20 or more employees, hence these figures underestimate the total number of losses. The above figures represent the number of people confirmed to the Department as subsequently being made redundant.

TRAVEL TO WORK

- **Figure 6** shows that in 2001, 98.5% of the persons living in the South Eastern WDF who were in employment worked in Northern Ireland. 0.7% worked elsewhere within the UK and 0.8% worked elsewhere outside the UK, (0.5% in Republic of Ireland, 0.3% Other).
- In 2001, 18.3% of persons living in the South Eastern WDF who were in employment worked in Lisburn, whilst the figures for North Down, Ards and Down were 14.4%, 12.4% and 11.8% respectively.
- **Figure 6** shows that 57.0% of persons living in the South Eastern WDF work within this WDF, whilst 41.5% of persons living in the South Eastern WDF work in other WDFs, 0.7% worked elsewhere within the UK and 0.8% worked elsewhere outside the UK, (0.5% in Republic of Ireland, 0.3% Other).

Figure 6. Travel to work patterns of residents from the South Eastern WDF



Source: Census 2001

Note: Percentages may not sum to 100 due to rounding.

Tomorrow's Economy and Labour Market

In 2010 DEL published reports for all of the Workforce Development Forum areas on future skill needs based on work carried out by Oxford Economics¹. The forecasts are based on two scenarios about the NI (and hence WDF) economy: a **baseline scenario**, which details the central estimates assuming no step change to the economy; and an **aspirational scenario**, based on NI achieving the productivity targets laid out in the Executive's Programme for Government².

Like all forecasts, the data shown below represent the central estimates at the time the analysis was carried out (Summer 2009) and will be subject to a margin of uncertainty.

The results for the South East WDF area are contained in **Table 6**.

Table 6. Sectoral Employment Forecasts to 2020

	WDF Change (000s)			
	1998-2008	2008-2010	2010-2020 baseline	2010-2020 aspirational
Agriculture, forestry & fishing	-2.5	-0.1	-0.1	0.1
Mining & quarrying	-0.1	0.0	0.0	0.0
Manufacturing	-3.3	-1.2	-1.7	-1.4
Utilities	-0.1	0.0	0.0	0.0
Construction	3.9	-2.3	2.2	2.7
Retail & distribution	5.9	-1.0	2.5	3.1
Hotels & restaurants	-0.1	-0.4	1.6	2.4
Transport & communications	-0.5	-0.2	0.4	0.7
Financial services	0.5	-0.2	0.3	0.5
Business services	5.8	-0.7	4.2	5.8
Public administration & defence	-0.9	-0.2	0.0	0.0
Land forces	-3.1	0.0	0.0	0.0
Education	1.7	0.1	0.7	0.7
Health & social work	4.2	0.4	2.5	2.6
Other personal services	2.0	-0.3	0.8	1.3
Government training schemes	-1.6	0.0	0.1	0.1
Total employment (job-based)	11.7	-6.0	13.4	18.6
Total employment (jobs per annum)	1.2	-3.0	1.3	1.9
Total employment (people-based)	11.0	-5.7	11.4	16.0

Source: Oxford Economics

Note: People-based excludes Government training schemes

¹ Oxford Economics (2010) Workforce Future Skill Needs Analysis: South East Workforce Development Forum Report www.delni.gov.uk/south_east_workforce_analysis_final_report_feb_2010.pdf These reports are based in Oxford Economics's NI Policy Simulation model and forecasts were produced in the summer of 2009. It should be noted that all forecasts are workplace-based, not residence based – it thus takes no account of commuting patterns

² Available at www.pfgbudgetni.gov.uk/finalpfg.pdf

Key Points:

- **The Downturn:** The South East economy's recent period of strong growth is forecast to have come to an abrupt end during the recession. Oxford Economics's central outlook for the South East economy is for **6,000 net job losses between 2008 and 2010** (mid-year figures), equivalent to 5% of total jobs. Losses are forecast across a number of sectors, although three quarters are in construction, manufacturing and retail & distribution.
- **Baseline Scenario:** Looking beyond the recession, the central prediction is for **net job growth of 1,300 per annum** (pa), the same level of net expansion of the past decade. This similar level of growth to the past is explained by an initial period of 'bounce back' (when growth is above its long-term sustainable rate) and the fact that previous levels of growth were by no means spectacular relative to other WDF economies.
- **Future sectoral growth is predicted to be driven by exporting service sectors** – business services and tourism – and health, provided health spending is 'ring-fenced' from the pending squeeze in public finances. Relative to the NI average employment structure, the South East workplace economy is less heavily represented in business services and to a lesser degree health, but more heavily represented in hotels & restaurants (which includes direct elements of the tourism sector).
- **Aspirational Scenario** – This suggests that employment in the South East WDF area could grow by nearly 2,000 jobs per year (around 16,000 over the period to 2020). Given the nature of the scenario and the sectoral pattern of employment uplift, a high proportion of the additional scenario jobs (hi-tech manufacturing and 'potential' service exporting sectors) will be 'urban-friendly'.

USEFUL SOURCES OF LABOUR MARKET INFORMATION

Expert Group on Future Skills Needs – Republic of Ireland

www.skillsireland.ie

DETI – Northern Ireland District Council Briefing, Redundancies, Census of Employment, Labour Force Survey, Annual Survey of Hours and Earnings

www.detini.gov.uk/cgi-bin/gethome

UK Labour Market Trends

www.statistics.gov.uk/statbase/Product.asp?vlnk=550&More=N

Office for National Statistics

www.statistics.gov.uk/default.asp

Careers Service Northern Ireland

<http://www.nidirect.gov.uk/careers>

EXPLANATORY NOTES

- Some of the information in the labour market profile is taken from sample surveys and so results are subject to sampling error. The nature of sampling variability is that the smaller the group whose size is being estimated the (proportionately) less precise that estimate is.
- Figures for people in employment include those aged 16 and over, who have completed at least one hours paid work in the reference week (either employed or self-employed).
- Figures for employee jobs do not include those who are self-employed.