CREATIVELY CONNECTED

Welcome and Agenda - Paul Clarke, Compere

9.30-9.40am  Mayoral Welcome
9.40-9.50am  Chief Executive, ANDBC, Stephen Reid
9.50-10.15am  Director, The Paul Hogarth Company, James Hennessey
              Director of Regeneration, Development & Planning, Susie McCullough
10.15- 10.45am  Associate Director, Oxford Economics, Neil McCullough

BREAK

11.00-11.30am  Chief Executive, Tourism NI, John McGrillen
11.30-12noon  Chief Executive, Centre for Local Economic Strategies, Neil McInroy
12noon-12.30pm  Director, Work and Wellbeing, Department of Communities, Sharon Russell
12.30pm-1.00pm  Interactive Panel

LUNCH

INTEGRATED STRATEGY FOR
TOURISM  |  REGENERATION  |  ECONOMIC DEVELOPMENT
Ards and North Down 2018–2030
Agenda Afternoon Session – Department for Communities

- 1:45pm – 2:00pm – Arrival/Tea/Coffee
- 2:00pm – 2:10pm – Sharron Russell Director, Work and Wellbeing, Department for Communities
- 2:10pm – 2:30pm – Overview of Labour Market Issues in NI & AND
- 2:30pm - 3:30pm – Group Discussion Exercise
- 3:30pm - 4:00pm – Next Steps

CLOSE
Mayor
Ards and North Down Borough Council
Cllr Robert Adair

Welcome
Chief Executive
Ards and North Down Borough Council
Stephen Reid

Background and Context of the Integrated Tourism, Regeneration and Economic Development Strategy
Strategic Context:

• Draft Programme for Government
• Community Plan
• Corporate Plan
• Integrated Tourism, Regeneration and Development Plan
Corporate Plan

**People**
Ensuring we engage with, and support, all local communities to deliver real social benefits.

**Place**
Ensuring we make the very best of the natural, cultural and environmental assets in our borough.

**Prosperity**
Ensuring the borough’s towns and rural localities are prosperous, vibrant and attractive.

**Performance:** Ensuring we take time to understand our customer’s need and manage our people, money and assets effectively so we can deliver on our objectives for the borough.
The purpose of the Integrated Tourism, Regeneration and Economic Development Strategy:

- Maximise return on Investment
- Priorities for Economic Growth
- Influence the Local Development Plan
- ‘USPs’ in an innovative and sustainable space
- Maximise opportunities to deliver on wider strategies
- Stakeholder Participation and Agreement
TOURISM INTEGRATION ECONOMIC DEVELOPMENT

INTEGRATION

TOURISM

REGENERATION

ECONOMIC DEVELOPMENT
Outcomes and targets

By 2030...

**ECONOMIC**
To grow the number of jobs and business productivity within the Borough

**7,500 JOBS CREATED** **GVA**
Achieve min. average

Key Markets
- Arts and Entertainment
- Professional, Scientific and Technical
- Information and Communication Technologies

*Gross Value Added

**TOURISM**
To grow visitor spend and overnight stay within the Borough

**INCREASE SHARE OF OVERNIGHT NI TRIPS TO 10%** **£82m VISITOR EXPENDITURE**

Key Markets
- The Domestic Market
- Non-Domestic Markets
- The Republic of Ireland Market
Director of The Paul Hogarth Company James Hennessey

Blue : Green Creatively Connected Process
INTEGRATED STRATEGY FOR
TOURISM | REGENERATION | ECONOMIC DEVELOPMENT
Ards and North Down 2018–2030
BLUE:GREEN CREATIVELY CONNECTED

INTEGRATED STRATEGY FOR
TOURISM | REGENERATION | ECONOMIC DEVELOPMENT
Ards and North Down 2018–2030
TOURISM INTEGRATION ECONOMIC DEVELOPMENT

INTEGRATION

TOURISM

REGENERATION

ECONOMIC DEVELOPMENT

INTEGRATED STRATEGY FOR
TOURISM | REGENERATION | ECONOMIC DEVELOPMENT
Ards and North Down 2018–2030
Baseline Analysis: Key Data

### Environment
- 3/4 of all NI Marine Species in Strangford Lough

### Skills
- 2nd Ranked 2nd among NI LGDs re % of population with higher level skills
- 89% Businesses with less than 10 employees
- 63% Of the NI Average GVA (Gross Value Added)

### Creativity
- 8 Of NI's top 30 Manufacturers
- 52% Travel to work outside Borough

### Proximities
- 10 Miles To City Airport & Docks from Bangor & N'Ards
- 5.3% Of NI's Overnight Trips

### Productivity
- 6% Employee jobs increased by (+1,924) over the period of 2012 - 16

### Visitors
- 2 Of NI's top 30 Manufacturers
- 30% employed in low growth sectors
- 9% employed in high growth sectors
- 5.3% employee jobs increased by (+1,924) over the period of 2012 - 16

### Sectoral Composition
- 30% employed in low growth sectors
- 9% employed in high growth sectors
1. Trails, Tours, Walks
2. Built Heritage
3. Schools, Child, Youth
4. Invest, Incent, Fund
5. Inclusion, Access
6. Dereliction, Vacancy
7. Infra, Trans, Parking, Cycling
8. Public Art, Realm
9. Events, Festivals
10. Visitor Accom
11. Regs, Policy, Processes
12. Collab, Link
13. Marketing, Promo, Comms
14. Skills, Train, Volunteer
15. Jobs, Employment
Blue:Green Creatively Connected
Blue:Green Creatively Connected
Blue: Green Creatively Connected
Blue; Green
Creatively Connected
Director of Regeneration, Development & Planning
Susie McCullough

Strategy Actions and Targets
<table>
<thead>
<tr>
<th>KEY SECTOR DEVELOPMENT REQUIREMENTS</th>
<th>PRIORITY SECTORS</th>
<th>RELEVANT ACTIONS</th>
</tr>
</thead>
</table>
| ATTRACT/ESTABLISH INCREASED NUMBERS OF HIGH ADDED VALUE AND HIGH GROWTH BUSINESSES | • ICT  
• Professional, Scientific and Technical  
• Financial/Insurance  
• Administration/Support sectors | **Investment promotion**  
• Marketing and Communications Strategy  
• Inward Investment and Diaspora Programme |
|                                | **Business support**  
• General and targeted enterprise promotion  
• Pre-enterprise support  
• Start-up and business growth support | **Infrastructure development**  
• Development of Investment Zone*  
• Development of flexible workspace of towns and villages  
• Digital network development |
|                                | **Private sector engagement/partnership development**  
• Establishment of EDF to support effective engagement with private sector | |
| SUPPORT EXISTING SECTORS OF STRENGTH THAT PROVIDE OPPORTUNITIES FOR EXPORT/NEW PRODUCT DEVELOPMENT AND HIGH PRODUCTIVITY | • Manufacturing  
• Agri-food | **Business Support**  
• Development of sector collaborative networks  
• Skills, apprenticeship and volunteering programme  
• Horizon Scanning and Research Network to support RDI activity |
|                                | **Infrastructure development**  
• General and targeted enterprise promotion  
• Pre-enterprise support  
• Start-up and business growth support | **Private sector engagement/partnership development**  
• EDF providing effective engagement on private sector support needs |
| INCREASE BUSINESS START-UP AND GROWTH OF LOCAL BUSINESSES SUPPORTING ENHANCED TOURISM PERFORMANCE | • Arts, Entertainment and Recreation  
• Accommodation/Food | **As above (except *) and development of Queen’s Parade**
Outcomes and targets

In order to realise the vision set by this strategy, a series of outcomes and targets have been identified. Effective delivery against the identified targets will require focussed and collaborative effort by all relevant stakeholders and delivery organisations. More detailed targets are likely to be identified against the implementation of specific actions and agreed with partners.

By 2030...

**ECONOMIC**

To grow the number of jobs and business productivity within the Borough

7,500 JOBS CREATED  |  GVA* ACHIEVE MIN NI AVERAGE

Key Markets
- Arts and Entertainment
- Professional, Scientific and Technical
- Information and Communication Technologies

*Gross Value Added

TOURISM

To grow visitor spend and overnight stay within the Borough

INCREASE SHARE OF OVERNIGHT NI TRIPS TO 10%  |  £82m VISITOR EXPENDITURE

Key Markets
- The Domestic Market
- Non-Domestic Markets
- The Republic of Ireland Market
PROMOTE TO INVEST

BOROUGH MARKETING & COMMUNICATIONS STRATEGY

INWARD INVESTMENT & DIASPORA PROGRAMME

ENTERPRISE PROMOTION & SUPPORT

BOROUGH EVENTS STRATEGY
EQUIP WITH SKILLS & SPACES

- BLUE GREEN ACCOMMODATION DEVELOPMENT
- SKILLS, APPRENTICESHIP & VOLUNTEER PROGRAMME
- QUEEN'S PARADE & INVESTMENT ZONES
- TOWN & VILLAGE FLEXI SPACES
EXCEL IN QUALITY & VALUE

BLUE GREEN VISITOR EXPERIENCE DEVELOPMENT
TOWN AND VILLAGE PUBLIC REALM & PLACEMAKING
NURTURE OUR ASSETS

BLUE GREEN ACTION INITIATIVE
CARBON REDUCTION STRATEGY
BUILT HERITAGE PROGRAMME
UNDERSTAND OUR PROGRESS & POTENTIAL
Integrated Actions - Steps to Delivery

1. Identify and agree partners and stakeholders.
2. Establish project specific baseline data.
3. Develop detailed strategic approach.
4. Agree, prioritise, resource and deliver sub actions.
5. Monitor progress against baseline.
Associate Director
Oxford Economics
Neil McCullough

Overview of Global Macro-Economic Trends, Threats and Opportunities
OVERVIEW OF GLOBAL MACRO-ECONOMIC TRENDS, THREATS AND OPPORTUNITIES

Neil McCullough
Associate director of cities and regions at Oxford Economics
• Global trends
• Brexit and UK trends
• Northern Ireland
• Ireland
• Steady GDP growth forecast.
• Though lower than pre-2007 levels for most advanced nations
• Global equilibrium is restored
• Government balances improve
## World GDP Growth

### % Change on Previous Year

<table>
<thead>
<tr>
<th>Region</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
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<td>2.3</td>
<td>2.9</td>
<td>2.5</td>
<td>1.6</td>
<td>1.5</td>
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<tr>
<td>Japan</td>
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<td>1.7</td>
<td>1.6</td>
<td>0.9</td>
<td>0</td>
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<td>2.4</td>
<td>1.8</td>
<td>1.3</td>
<td>0.9</td>
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<tr>
<td>France</td>
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<td>1.5</td>
<td>2.1</td>
<td>1.9</td>
<td>1.8</td>
<td>1.7</td>
</tr>
<tr>
<td>Italy</td>
<td>1</td>
<td>1.5</td>
<td>1.5</td>
<td>1.1</td>
<td>0.9</td>
<td>0.8</td>
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<tr>
<td><strong>UK</strong></td>
<td>1.9</td>
<td>1.7</td>
<td>1.8</td>
<td>1.6</td>
<td>1.9</td>
<td>1.9</td>
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<td>Ireland</td>
<td>5.1</td>
<td>7.8</td>
<td>4.7</td>
<td>2.2</td>
<td>2.2</td>
<td>2.2</td>
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<tr>
<td>China</td>
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<td>6.9</td>
<td>6.4</td>
<td>6</td>
<td>5.7</td>
<td>5.4</td>
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<td>India</td>
<td>7.9</td>
<td>6.4</td>
<td>7.5</td>
<td>7</td>
<td>6.8</td>
<td>6.6</td>
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<tr>
<td>Other Asia</td>
<td>4.4</td>
<td>4.3</td>
<td>4.3</td>
<td>4.2</td>
<td>4.1</td>
<td>4.1</td>
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<tr>
<td>Mexico</td>
<td>2.7</td>
<td>2.3</td>
<td>2.2</td>
<td>2.4</td>
<td>2.4</td>
<td>2.4</td>
</tr>
<tr>
<td>Brazil</td>
<td>-3.5</td>
<td>-1</td>
<td>2.2</td>
<td>3.3</td>
<td>3.2</td>
<td>2.7</td>
</tr>
<tr>
<td>Other Latin</td>
<td>-0.3</td>
<td>-0.8</td>
<td>1.9</td>
<td>3</td>
<td>3.2</td>
<td>3.1</td>
</tr>
<tr>
<td>America Eastern</td>
<td>1.4</td>
<td>3.1</td>
<td>3</td>
<td>2.4</td>
<td>2.2</td>
<td>2.2</td>
</tr>
<tr>
<td>Mena</td>
<td>2.8</td>
<td>2.8</td>
<td>3.2</td>
<td>3.5</td>
<td>3.7</td>
<td>3.7</td>
</tr>
<tr>
<td>World (PPP)</td>
<td>3.2</td>
<td>3.7</td>
<td>3.9</td>
<td>3.7</td>
<td>3.5</td>
<td>3.4</td>
</tr>
</tbody>
</table>
Cyclical recovery in world trade (20%)
The pickup in world trade gathers pace, fuelled by near-term resilience in China and the US
Optimism increases globally, prompting a sustained rise in import-intensive investment and EM capital inflows
Rapid growth ensues in the open economies of Asia and Europe and policy tightening is brought forward

US fiscal stimulus (8%)
US business and consumer spending surges as the fiscal package provides a greater-than-expected stimulus to the US economy
Fed policy normalisation is brought forward, resulting in a further rise in bond yields and broad-based dollar appreciation
More buoyant US activity spills over internationally, fuelling further robust global growth in the near term
But the stronger dollar and higher rates weigh on more vulnerable EMs

US protectionism (12%)
The US ends NAFTA participation and raises tariffs on China, S.Korea and Taiwan
The US is hit by retaliatory tariff hikes
Business and household confidence drop globally, while equities fall sharply amid deteriorating market sentiment
Growth falters in the US and globally

Market turmoil (10%)
The market sell-off intensifies amid rising US inflation and more rapid Fed tightening
Emerging markets bear the brunt of the shock as the dollar strengthens and the sell-off broadens

Tighter policies in China (10%)
Chinese authorities scale back growth targets, supported by structural reforms
Weaker Chinese growth weighs further on EM activity, but a hard landing is avoided
BREXIT AND UK TRENDS
The impact of Brexit on the UK and NI will depend on:
- what deals the UK government strikes with the EU and with other countries
- the post-Brexit policies of the UK government
- whether Brexit causes UK businesses to ‘up-their-game’ – most obviously by focusing more on the growing markets of Asia and elsewhere, and less on slower-growing EU markets.

<table>
<thead>
<tr>
<th></th>
<th>Keep EU regulations</th>
<th>Open EU migration</th>
<th>Contribute to EU budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>European Economic Area</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Customs Union</td>
<td>Yes</td>
<td>Probably</td>
<td>Probably not</td>
</tr>
<tr>
<td>Free Trade</td>
<td>Some</td>
<td>Maybe</td>
<td>No</td>
</tr>
<tr>
<td>Bilateral deals</td>
<td>Some</td>
<td>Probably not</td>
<td>No</td>
</tr>
<tr>
<td>Most Favoured Nation</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>
• UK leaves the EU in early 2019, there will be a transitional period to the end of 2020:
  • which is similar to the status quo
  • ultimately giving way to a free trade agreement.

• Assume government takes a ‘populist’ approach to policy, particularly in terms of reducing immigration.

### Impact on GDP by 2030

<table>
<thead>
<tr>
<th></th>
<th>UK</th>
<th>Ireland</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Best case</td>
<td>Worst case</td>
</tr>
<tr>
<td>FTA</td>
<td>-0.8%</td>
<td>-3.1%</td>
</tr>
<tr>
<td>WTO</td>
<td>-1.5%</td>
<td>-3.9%</td>
</tr>
<tr>
<td>EEA</td>
<td>-0.1%</td>
<td>-1.8%</td>
</tr>
</tbody>
</table>

Source: Oxford Economics
IMPACT OF A FREE TRADE AGREEMENT

GDP GROWTH, 2019-2030 (%)

Source: Oxford Economics

Current account balance, 2019-2030 (% of GDP)

Source: Oxford Economics

CPI Inflation, 2019-2030 (%)

Source: Oxford Economics

ILO unemployment rate (%), 2019-2030

Source: Oxford Economics
BASELINE: SUBDUED GROWTH EXPECTED

- Recent data indicate a robust jobs market
- However, we expect economic growth and jobs growth to slow
- Rising inflation and slow wage growth to restrict consumer spending
- Businesses wary of investing
- Fiscal austerity

UK annual GVA growth, 2000-2030 (%)

Sterling exchange rate 2004-2020

Source: Oxford Economics
• UK exporters have fared particularly well since the referendum
• Benefitting from the combination of a weaker pound and a pick-up in world trade.
• We expect this to continue to boost GDP growth in the early part of 2018 but the support is then likely to fade, with sterling continuing to rally, eroding some of the recent gains in competitiveness.
• Population will continue to grow

• However, the share that is working age will fall
• Net inflows from non-EU countries relatively stable over past decade
• A significant increase from the EU

• The bulk are of working age - 2011 census - half of those who had migrated in previous year were under 25
• LFS suggests employment rate is substantially higher than domestic born population

• Increase in inward migration helped offset the impact of an ageing indigenous population
• Also supported growth in labour supply - making a sizeable contribution to potential output growth
NORTHERN IRELAND
• A standstill transition deal on Brexit:
  • existing trading arrangements in place until end-2020
  • rights of citizens who migrate during the transition
  • period to negotiate future relationship, not to implement it
  • UK ability to sign trade deals with others during transition, albeit without EU agreement they would not come into force until 2021.

• Transition deal part of wider withdrawal agreement but need agreement on a ‘backstop’ solution for the Irish border.

  “nothing is agreed until everything is agreed”

• There is no solution to this problem in sight, unless the UK drops one of its red lines.
UK will come under increasing pressure to accept the border cannot be soft if:
- it insists on being outside of the single market
- not being part of a customs union and
- not allowing NI to remain inside the single market or a customs union

The specific impact on NI will additionally depend on:
- sectoral structure
- propensity to export
- reliance on the EU as an export market and as a source of inputs into the local supply chain
- its dependence on inward migration to fill jobs
- on how companies respond to the challenges and opportunities presented by the vote to leave.
**2018-2028 regional growth, (annual %)**

<table>
<thead>
<tr>
<th></th>
<th>Employment</th>
<th>GVA</th>
<th>Population</th>
</tr>
</thead>
<tbody>
<tr>
<td>London</td>
<td>1.0</td>
<td>2.5</td>
<td>0.9</td>
</tr>
<tr>
<td>East</td>
<td>0.5</td>
<td>1.8</td>
<td>0.6</td>
</tr>
<tr>
<td>South East</td>
<td>0.5</td>
<td>2.0</td>
<td>0.5</td>
</tr>
<tr>
<td>East Midlands</td>
<td>0.4</td>
<td>1.7</td>
<td>0.4</td>
</tr>
<tr>
<td>North West</td>
<td>0.3</td>
<td>1.7</td>
<td>0.2</td>
</tr>
<tr>
<td>South West</td>
<td>0.3</td>
<td>1.7</td>
<td>0.4</td>
</tr>
<tr>
<td>West Midlands</td>
<td>0.2</td>
<td>1.6</td>
<td>0.3</td>
</tr>
<tr>
<td>Scotland</td>
<td>0.2</td>
<td>1.6</td>
<td>0.1</td>
</tr>
<tr>
<td>Yorkshire &amp; the Humber</td>
<td>0.2</td>
<td>1.5</td>
<td>0.2</td>
</tr>
<tr>
<td>Wales</td>
<td>0.2</td>
<td>1.5</td>
<td>0.2</td>
</tr>
<tr>
<td>Northern Ireland</td>
<td>0.1</td>
<td>1.4</td>
<td>0.1</td>
</tr>
<tr>
<td>North East</td>
<td>0.0</td>
<td>1.4</td>
<td>0.1</td>
</tr>
<tr>
<td><strong>UK</strong></td>
<td><strong>0.4</strong></td>
<td><strong>1.9</strong></td>
<td><strong>0.4</strong></td>
</tr>
</tbody>
</table>

Source: Oxford Economics

**UK:**
- Population growth – 2,712,200
- GVA increase - £363.3bn

**NI:**
- Population growth – 20,620
- GVA increase - £5.5bn
SECTORAL STRUCTURE PLAYS A KEY ROLE

Difference in sectoral employment shares (NI – UK), 2018

- Manufacturing
- Health
- Agriculture
- Public sector
- Retail
- Mining
- Water
- Education
- Other
- Electricity
- Construction
- Accommodation
- The arts
- Finance
- Real estate
- Transport
- IT
- Admin
- Prof services

Source: Oxford Economics

Average productivity (£000), 2000-2030

NI – UK productivity per worker, 2018 (£000)

Difference in sectoral employment shares (NI – UK), 2018

Annual GVA growth NI and UK, 2000-2030, (%)

Forecast

£7,000 less

Forecast

Source: Oxford Economics

Annual GVA growth NI and UK, 2000-2030, (%)

Source: Oxford Economics

Forecast

Source: Oxford Economics
LABOUR MARKET OUTLOOK

Employment growth, 2000-2030 (%)

Resident employment rate, 2000-2030 (%)

ILO unemployment rate, 2000-2030, (%)

Working age / total population, 2000-2030, (%)
IRELAND’S TOURISM OUTLOOK

- Irish outlook is solid
- Growth is forecast for visitor numbers, nights stayed and revenues
### Origin of visitors to NI

<table>
<thead>
<tr>
<th>Origin of Visitors to NI</th>
<th>2018 Share</th>
<th>2030 Share</th>
<th>Change in Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Great Britain</td>
<td>62.5%</td>
<td>57.1%</td>
<td>-5.5%</td>
</tr>
<tr>
<td>Mainland Europe</td>
<td>17.7%</td>
<td>20.3%</td>
<td>2.6%</td>
</tr>
<tr>
<td>North America</td>
<td>12.5%</td>
<td>12.2%</td>
<td>-0.2%</td>
</tr>
<tr>
<td>Other Areas</td>
<td>7.3%</td>
<td>9.1%</td>
<td>1.8%</td>
</tr>
</tbody>
</table>

Source: Oxford Economics

### Overseas visitors to NI 2018

<table>
<thead>
<tr>
<th>Destination</th>
<th>Average Nights Stayed</th>
<th>Average Spend (£)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spain</td>
<td>9.4</td>
<td>288.7</td>
</tr>
<tr>
<td>Australia</td>
<td>8.4</td>
<td>358.5</td>
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<tr>
<td>Canada</td>
<td>8.4</td>
<td>474.9</td>
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<td>Other Areas</td>
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<tr>
<td>Nordics</td>
<td>2.1</td>
<td>285.4</td>
</tr>
</tbody>
</table>

Source: Oxford Economics
IRELAND
• Ireland’s Q4 2017 GDP delivered a storming performance, with a 3.2% quarterly rise giving full-year growth of 7.8%

• But as has long been the case, the headline numbers present a distorted picture.

• Growth in consumer spending slowed to a three-year low of 2.1% in 2017, down from 3.1% in 2016 and half the 2015 rate).

• 2017 GDP growth almost entirely a net trade story, driven by a very unusual 6.2% drop in imports (largest since records began in 1995).

• Both the services and manufacturing PMIs point to some loss of momentum in February, though they remain historically strong.

• The jobless rate dipped further to 6.1% in the same month, while retail sales volumes started 2018 on a strong note, rising 1.2% m/m in January.
• GDP growth expected to average 3% p.a. in 2018-20, after growing by over 7% p.a. over the period 2011-16
• The latter figure was heavily inflated by the 26% surge in 2015

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Ireland</td>
<td>5.1%</td>
<td>6.0%</td>
<td>3.1%</td>
<td>2.4%</td>
<td>2.2%</td>
<td>2.2%</td>
</tr>
<tr>
<td>UK</td>
<td>1.9%</td>
<td>1.7%</td>
<td>1.8%</td>
<td>1.6%</td>
<td>1.9%</td>
<td>1.9%</td>
</tr>
<tr>
<td>EU</td>
<td>1.9%</td>
<td>2.5%</td>
<td>2.3%</td>
<td>1.9%</td>
<td>1.7%</td>
<td>1.5%</td>
</tr>
</tbody>
</table>
Prospects will be significantly affected by Brexit negotiations.

Other key drivers of the forecast:

- Household debt-to-income ratio has fallen from nearly 230% to around 140%, which should provide consumers with more scope to spend.
- Reduced fiscal restraint over long term should mean less of a headwind for the economy.
- The working-age population is set to expand strongly due to natural increases and inward migration.

Risk warnings:

<table>
<thead>
<tr>
<th>Risk Factor</th>
<th>Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>GDP growth</td>
<td>Ireland should enjoy decent growth</td>
</tr>
<tr>
<td>CPI inflation</td>
<td>Sterling weakness is tempering price pressures</td>
</tr>
<tr>
<td>Current account balance</td>
<td>Irish current account balance should remain in surplus</td>
</tr>
<tr>
<td>Government balance</td>
<td>Deficit on track to fall</td>
</tr>
<tr>
<td>Government debt</td>
<td>Debt levels on a downward trajectory but remain high</td>
</tr>
<tr>
<td>External debt</td>
<td>External debt has fallen but remains high</td>
</tr>
</tbody>
</table>

Source: Oxford Economics
All data shown in tables and charts are Oxford Economics’ own data and are copyright © Oxford Economics Ltd except where otherwise stated and cited in footnotes.

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The modeling and results presented here are based on information provided by third parties, upon which Oxford Economics has relied in producing its report and forecasts in good faith. Any subsequent revision or update of those data will affect the assessments and projections shown.

To discuss the presentation further please contact:
Neil McCullough: nmccullough@oxfordeconomics.com
Chief Executive
Tourism NI
John McGrillen

Strategic Overview of Tourism Trends
Tourism 2030

Goal: Double the value of NI Tourism by 2030 and create 20,000 new jobs

An internationally compelling Proposition of Scale built upon our Landscape, Heritage & Culture, renowned for World Class 3-5 day breaks

Core markets:
- NI
- RoI
- GB
- France
- Germany
- North America
- Australia
- China

Focusing on these segments:
- Culturally Curious
- Social Energisers
- Great Escapers
- Golf
- Screen Tourism
- Cruises
- Conferences & Incentives

Consisting of:
- World class products
- Visitor experiences & events
- Driving Regional dispersion
- Year round business

Delivered by:
- An internationally competitive industry
- An available, skilled labour pool

Enabled by:
- Timely consumer insight/market intelligence
- Tourism Growth Fund
- Quality transport, accommodation & digital infrastructure
- Increased access to NI & easier access from Dublin/RoI
- Agency/Industry/Government/Local Authority collaboration
- Travel Trade
- Supportive policy environment

Underpinned by: SUSTAINABILITY
The Goal

x2 by 2030

Double the value of NI Tourism to £1.7bn by 2030 and create 20,000 new jobs
The domestic market (£237m - 28% of revenue) will continue to make a significant contribution - key for regional and seasonal dispersal - average spend per trip £120 in 2016

£942m market, NI share in 2016 – 3% of IoI holiday trips and 4% holiday spend – huge potential – RoI Taskforce target of £140m by 2025 – strong for regional dispersal – av. £154 per trip in 2016

Our single largest market – 51% revenue in 2016 (15% growth on 2015) – imperative that GB is a core focus – 29% of visitors to IoI come to NI - av. £227 per trip in 2016

NI attracted 12% of French visitors to IoI spending £14.2m (6%) in 2016 – av. £228 per trip in 2016

11% of IoI’s visitors came to NI spending £15.3m (6%), an increase of 28% on 2015 – av. £221 per trip in 2016

14% US visitors to IoI come to NI – visitors from NA grew by +10% in last 2 years – high spenders – av. £336 per trip in 2016

£18.3m revenue in 2016 – 30% growth on 2015 – av. £360 per trip in 2016

World’s largest outbound market & the fastest growing - <10% population have a passport – high spenders – 65,000 visitors to IoI in 2016, estimated 2/3 coming to NI
Target

£140m by 2025

Doubling value to NI from this market by 2025 increasing to £155 million by 2030
**Tourism 2030**

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- RoI
- GB
- France
- Germany
- North America
- Australia
- China

**Focusing on these segments:**
- Culturally Curious
- Social Energisers
- Great Escapers
- Golf
- Screen Tourism
- Cruises
- Conferences & Incentives

**Consisting of:**
World class products, visitor experiences & events driving Regional dispersion Year round business

**Delivered by:**
An internationally competitive industry with access to An available, skilled labour pool

**Enabled by:**
- Timely consumer insight/market intelligence
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- Travel Trade
- Supportive policy environment

**Sustainability**
Would you consider taking any of the following types of holiday or short-break in Ireland in the next three years? – Ireland Holiday Behaviour Survey

<table>
<thead>
<tr>
<th>Type of Holiday</th>
<th>%</th>
<th>Type of Holiday</th>
<th>%</th>
<th>Type of Holiday</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>A city break to two or more cities on a single trip</td>
<td>90</td>
<td>A city break to a single city destination</td>
<td>87</td>
<td>A city break to two or more cities on a single trip</td>
<td>87</td>
</tr>
<tr>
<td>A touring holiday</td>
<td>85</td>
<td>A city break to a single city destination</td>
<td>86</td>
<td>A touring holiday</td>
<td>83</td>
</tr>
<tr>
<td>A holiday in a rural destination</td>
<td>84</td>
<td>A touring holiday</td>
<td>83</td>
<td>Celebrate a special occasion</td>
<td>81</td>
</tr>
<tr>
<td>A walking/hiking holiday</td>
<td>73</td>
<td>A holiday in a rural destination</td>
<td>81</td>
<td>An adventure or activity holiday</td>
<td>73</td>
</tr>
<tr>
<td>A city break to two or more cities on a single trip</td>
<td>92</td>
<td>A city break to a single city destination</td>
<td>90</td>
<td>A city break to two or more cities on a single trip</td>
<td>92</td>
</tr>
<tr>
<td>A touring holiday</td>
<td>90</td>
<td>A touring holiday</td>
<td>83</td>
<td>Celebrate a special occasion</td>
<td>76</td>
</tr>
<tr>
<td>A city break to two or more cities on a single trip</td>
<td>83</td>
<td>A touring holiday</td>
<td>86</td>
<td>An adventure or activity holiday</td>
<td>75</td>
</tr>
</tbody>
</table>

Source: Tourism Ireland GTI Survey and Ireland Holiday Behaviour Survey 2016
Market Segments

Golf Tourism

The Economic Impact of golf tourism for Northern Ireland in 2016 remaining in Northern Ireland is:

- 2016 = £35,600,000
- 2015 = £32,100,000
- 2014 = £33,200,000
- 2013 = £27,000,000

The number of golfing visitors to Northern Ireland is:

- 2016 = 122,200
- 2015 = 139,300
- 2014 = 139,300
- 2013 = 134,300

On track to achieve target to achieve £50 million per annum by 2020.

Assume inflationary growth beyond that due to capacity.

Image courtesy of Royal Belfast
Market Segments

Golf Tourism

TOTAL EXPENDITURE 2016 – OVERNIGHT VISITORS

<table>
<thead>
<tr>
<th>Region</th>
<th>Total Expenditure (£)</th>
<th>Number of Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>NI</td>
<td>1,387,000</td>
<td>7,200</td>
</tr>
<tr>
<td>RCI</td>
<td>2,832,000</td>
<td>5,500</td>
</tr>
<tr>
<td>Rest of UK</td>
<td>3,958,000</td>
<td>5,400</td>
</tr>
<tr>
<td>Europe</td>
<td>4,533,000</td>
<td>2,800</td>
</tr>
<tr>
<td>North America</td>
<td>14,894,000</td>
<td>7,500</td>
</tr>
<tr>
<td>Rest of World</td>
<td>975,000</td>
<td>300</td>
</tr>
</tbody>
</table>

- Total Expenditure
- Number of visitors

Legend:
- Total Expenditure
- Number of visitors
Market Segments

Screen Tourism

In NI, current core screen tourism is valued at approx. £18 million – with potential to grow to £33 million if:

• There is development of activities and merchandise that will provide additional value

• A legacy project is created to provide additional value

Case Study
New Zealand - data for the year ending June 2015 show that 12% of all visitors and 17% of holiday visitors said the *Hobbit* series had been a factor that influenced their initial interest in New Zealand. Moreover, 19% of total visitors and 26% of holiday visitors visited a film location in New Zealand
Market Segments

Cruise Tourism

• Economic value of Passenger & Crew spending to the Island of Ireland in 2015: € 23.1 million
• Visitor & Crew spend for NI in 2016: approx. £7 million
• Belfast rated third most attractive port in UK & Ireland
• Key source markets USA, GB and Germany
• 76% likely to return for General Holiday (67% on another cruise)
• Cruise Ireland targeting 11% growth per annum for next 5 years
Market Segments

Business Tourism – Conferencing & Incentive Travel

- Conferences
  - Approx. 100,000 bed nights per annum
  - Economic impact of approx. £50m per annum

- Create a corporate meetings and incentive sector worth £10 million per annum

- Provide a Market Access Fund for NI industry to attend platforms overseas

- Provide a Support fund for site inspections and marketing support with DMC’s
Tourism 2030

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An internationally compelling Proposition of Scale built upon our Landscape, Heritage & Culture, renowned for World Class 3-5 day breaks

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- France
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- Australia
- China

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- Social Energisers
- Great Escapers
- Golf
- Screen Tourism
- Cruises
- Conferences & Incentives

Consisting of:
- World class products, visitor experiences & events

Delivered by:
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- Travel Trade
- Supportive policy environment

Underpinned by:
- Sustainability
The NI Experience Brand

- Northern Ireland needs to compete with the Wild Atlantic Way, Dublin and Ireland’s Ancient East
- Northern Ireland has a compelling natural landscape, culture and heritage and a warm welcome
- Northern Ireland has much to be proud of
- However, knowledge relatively limited in the international marketplace
- The visitor offer needs to get stronger, be presented in a more coherent and connected manner
- A catalyst in driving the next phase of growth across all of Northern Ireland
World Class Visitor Experiences

- **International Market Research**
  - International market screening of product concepts to identify stars, supporting acts and niche offers

- **Experience Development framework**
  - Overarching framework (themes, signature, supporting & wraparound experience)
  - Visitor experience plans (geographic and thematic)

- **Animating landscape, culture and heritage**
  - Culture and Heritage (C&H) Strategic Framework
  - Activity Development Framework
  - A vibrant cultural calendar and evening economy

- **Strategic partnerships**
  - Cross sectoral partnerships – C&H Leadership Group, Causeway Coastal Route Forum, Food, Activity.
  - Other – National Trust, TFL, NMNI, .......
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- Events

**Driving:**
- Regional dispersion
- Year round business

**Delivered by:**
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**Sustainability**
World Class Visitor Experiences

Consideration index vs. main reason to visit

**Niche**
- Holiday/Attraction/Activity with Niche Appeal.
- Amongst those that are interested these concepts are primary drivers for visits. Not a candidate for mass media and will not be a drive mass tourism. If you can target media/communication to those engaged these could be a good return on investment.

**Star**
- Products drawing broad scale appeal in terms of attraction to consider a holiday in Ireland coupled with the fact that this is a primary driver to visit.

**Caution**
- Ideas that relative to all other concepts do not resonate with consumers, as written. Even amongst those they did engage they did not drive consideration.

**Supporting Act**
- Has broad appeal but not the primary driver. Not catalyst for consideration. Attractive in a supplementary role.

*All Benchmarks*
World Class Visitor Experiences

All Concepts – Overseas (94 concepts)
Experience Development - Switching on the latent power of our offer

Market Led Developmental themes

- Belfast+ and Derry/Londonderry+
- Titanic/Maritime
- Industrial Heritage
- Giant’s Causeway
- Causeway Coastal Route
- The Walled City
- Contested histories/People, place, politics
- Identity and belonging (Diaspora, American Connections, Ulster Scots)
- Literature/Northern Literary Lands
- Game of Thrones
- Castles, Houses and Gardens
- Saints and Scholars

Consumer themes
World Class Events & Festivals

• Annual programme of ‘Distinctly Northern Ireland Festivals’ that will focus on attracting 25-30% out of state visitors per event

• Attraction of major events with the capacity to deliver high numbers of overnight international visitors, increasing bed nights and spend

• More sustainable Events/Festival Industry demonstrated through higher levels of private income/investment/support

• Significantly increased levels of return on investment
Dispersion

Regional Dispersion & Year
Round Business

- Develop experiences in regions that do not currently have high visitor numbers or spend to address capacity and promote dispersal

- Themed visitor experience plans, clusters and itineraries connect otherwise isolated, remote or unidentified product to wider NI offering and leading attractions

- Identification of a number of strategic hubs to support faster growth of the visitor economy outside Belfast

- Support visitor experience development (day and night) across regions and seasons including developing the evening economy across key strategic hubs.
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- Supportive policy environment

Sustainability
The Industry

An internationally competitive industry

Priority Actions

• Apply a three tier client approach to business support
• 1 to 1 support – high growth businesses
• 1 to many – cluster and sectoral support
• Online Hub - all tourism businesses – customer service team
• Develop a Business Growth Programme
• Develop a Tourism Leadership Programme
• Encourage alternative business models

Business Growth Programme

Key aspects to include:

- Sales & Marketing, including B2C, B2B and channel management capability; market access programme
- Digital Capability – Sales, Service and Operational
- Revenue & Cost Management
- People Management including recruitment, retention and talent management
- Service Excellence
- Business of Tourism
Labour Pool

An available, motivated & skilled labour pool

Five key development themes are identified as critical to success. These are:

1. Maximising the promotion of sector
2. Ensuring those entering the tourism sector have the relevant skills
3. Maximising the competence and performance of the existing workforce
4. Increasing business capacity and performance
5. Equipping the non-tourism workforce with essential tourism-related knowledge and skills

Deliver a Skills Action Plan to:

- develop career pathways
- address shortages and skills gaps
- attract talented people into the industry
- maximise the productivity and competitiveness of the industry
Enabling Environment

**Timely Consumer Insight/Market Intelligence**
- Establishment of an Insights and Intelligence Service for the industry, stakeholders and Government
- Real time data optimising digital technologies
- Data analytics approach
- IoT consumer CRM system

**Quality Transport, Accommodation and Digital Infrastructure**
- Belfast Rapid Transit, A5, A6, Belfast Transport Hub
- BRT extension to GBBCA
- Hourly Rail Service Dublin – Belfast – Derry/L’derry
- Sustainable Transport Management along CCR
- Develop and Promote Hotel Investment Prospectus with Local Authorities
- Fibre to the premises for all tourism related businesses

**Improved Air and Sea Access to NI/from Dublin Airport**
- Competitive Air Route Development Fund
- Rail Link from Dublin Airport to Belfast – Dublin Railway Line
- Cruise Terminal Facilities which meet customer expectations
- Work with Airports and Airlines to support existing direct routes and support potential new routes
Enabling Environment

Agency/Industry/Government and Local Authority Collaboration

- Bi-monthly meetings with Tourism Ireland and Failte Ireland SMT’s
- Create Tourism CEO Deliver Forum to include NITA, TI, NMNI, NT, HED, Invest NI, Forestry Service, NI Water, Translink, BHC, GBBCA, BIA
- Bi-monthly Meetings between 11 Council Directors and TNI SMT

Tourism Friendly Policy Environment

- Tourism Friendly, Fit –for –Purpose Licencing Legislation
- Tourism VAT reduced to compete with RoI and other non UK destinations
- Retention of the joint UK/RoI Visa Scheme
- UK remaining part of Open Skies Agreement
- Commitment by EU/UK Govt to Open Border on Island of Ireland
- Visa Scheme to support the retention and recruitment of labour
- Develop the Case for the Abolition of Air Passenger Duty
- Registration, Certification and Classification Schemes which support the needs of Industry and the Visitor
- Develop a One-Stop –Shop Approach to DfE support and advisory services to Tourism Businesses
- City Deals for Belfast & Derry/ Londonderry city regions
Chief Executive, Centre for Local Economic Strategies

Neil McInroy

The Future of Local Economic Development
Building Local Wealth and Knowledge
The Future of Local Economic Development: Building Local Wealth

Neil Mcinroy
Chief Executive
@nmcinroy
Leading independent member and research organisation, realising **progressive economics for people and place**.

32 years old.

Our aim is to achieve social justice, good local economies and effective public services for everyone, everywhere.
We have an economic problem!
‘Inclusive growth’

● Emerged from World Bank, OECD, IMF

● Part driven by post Global Financial Crisis, and a new ‘questioning of economics,

.....the economics profession (has) downplayed inequality for too long. Now all of us have a better understanding that a more equal distribution of income allows for more economic stability, more sustained economic growth and healthier societies with stronger bonds of cohesion and trust. [.....] What is less clear is how we achieve more inclusive growth in practice’.

Christine Lagarde, Director, IMF 23rd Jan 2013.
Background to ‘Inclusive growth’ as a term/concept

- Comes from notion that there are different types of growth.
  - Inclusive growth where benefits are shared evenly across society

- In short - Need to join social with the economic

- Scottish Government
  - Comprehensive. Multi dimensional.

‘Growth that combines increased prosperity with greater equity; that creates opportunities for all and distributes the dividends if increased prosperity fairly’
So what does IG entail/not entail?

- **Traditional growth** (sectors, investment, innovation, internationalisation, competitiveness, labour markets, employment).

- **Total factors of production** (labour, Capital, Place)
  - Labour - mostly people into jobs – problem?
  - Weak on ownership of capital – capital increasing extracted?
  - Weak on place and specificities of local context
There are 3 economies

- Commercial Economy
- Social Economy
- Public Economy
A new economics

Who owns wealth, who influences it, who benefits from it – defining features of all economies.

The aim is to create an economy where wealth is broadly held, with local roots, so income is recirculated.

Economic and social life are two sides of same coin.
A new economic ecosystem

- Economic strategy

- Economic system and networks

- Economic policy
A new paradigm: welfare state past its prime?

Making wealth stick

Creating Good City Economies in the UK

Struggling Neighbourhoods and communities

Thriving local places

Image adapted from illustration by Rory Seaford of The Creative Element,
www.pluggingthecracks.org/resources/plm_ptl_images.htm
We have worked with dozens of Local Councils and there are currently a number places where CLES are working:

- Manchester
- Preston
- Birmingham
- Oldham
- Calderdale
- Salford
- LB Islington
- Southampton
- Bury
- Barcelona
- 10 European Cities
- And growing....
4 Elements to Local Wealth building

1. The spend of public, private or social anchors
   - Get wider social and local economic value from procurement, commissioning

2. Employment activity of anchors and suppliers
   - Deliver on local employees, real living wage, decent work

3. Ensure land value, property and investments benefit local economy
   - Democratic capture of financial return and land and property appreciation. Not extractive.

4. Develop diverse economy with more local ownership
Preston 2012-
A 6 year journey.....
Preston’s Local Wealth Building: A new economic ecosystem

- Growing local businesses (5 years in)
- Lancashire Bank (in development)
- Use of local pension funds for local investment (in development)
- Local food networks (established)
- Platform cooperative (established)
- Local energy company (in development)
The local matters!

- More value is being placed on local services, local products.
- Small local firms generate 58% more benefit for local economies than large local firms.
WHEN YOU BUY FROM A SMALL BUSINESS, YOU'RE NOT HELPING A CEO BUY A 3RD HOLIDAY HOME.
YOU'RE HELPING A LITTLE GIRL GET DANCE LESSONS, A LITTLE BOY HIS TEAM JERSEY, MAMS & DADS PUT FOOD ON THE TABLE.
SHOP LOCAL.
Anchor Institutions: Sticky Capital! Play a significant and role in a locality - Size & scale – Purchaser/procurer, employer with land, property and assets

- Housing providers
- Voluntary and community sector
- Private Businesses
- Education providers
- Hospitals
- Local government
- Police
BOROUGH OF SOUTH SHIELDS.

THE WATCH COMMITTEE ARE READY TO RECEIVE

TENDERS

For the Supply of the Borough Police Constables with

14 TOP COATS, of dark blue Pilot Cloth;
14 PAIRS OF TROUSERS,

Of dark blue Pilot or Police Cloth, and
14 HATS.

Patterns of the Cloth and Hats, together with Sealed Tenders, addressed to the Town Clerk, and endorsed “Tender for Police Clothing” to be sent in to Superintendent Riggass at the Police Station, on or before Thursday next, the 10th instant.

The lowest Tenders will not necessarily be accepted.

By order of the Watch Committee,

THOMAS SALMON,
TOWN CLERK.

Town Clerk's Office, 5th November, 1852.
Preston: Starting point

£750m

5% of spend within the Preston City Council boundary

39% of spend within the Lancashire economy
The change: Preston and Lancashire county

- £616m total spend of all 6 anchors 16/17
- 80% of spend within the Lancashire economy
- 18% of spend within the Preston City Council boundary
Final Thoughts

Strategy into action.

Role of strategy is about creating contexts for good things to happen

‘The essence of strategy is choosing what not to do’

Michael Porter, Economist.
Our Role in Delivering Social & Economic Outcomes through Good Work

Sharron Russell

Director, Work & Wellbeing
Department for Communities
Northern Ireland Labour Market – quick glance

- Unemployed: 3.2%
- Employed: 69.8%
- Economic inactivity: 27.8%
Northern Ireland Labour Market Challenges

- Employment Rate: 75.3% (UK) vs 69.8% (NI)
- Unemployment Rate: 4.3% (UK) vs 3.2% (NI)
- Economic Inactivity Rate: 21.2% (UK) vs 27.8% (NI)
- Youth Unemployment Rate: 10% (UK) vs 8.9% (NI)
- Long-Term Unemployment Rate: 25.8% (UK) vs 46.6% (NI)

Source: Labour Force Survey Nov-Jan 2018
Employment Rates in Northern Ireland


Antrim & Newtownabbey  
85.1% Highest employment rate

Ards & North Down  
71.4%

Newry, Mourne And Down  
59.1% Lowest employment rate
Disability Employment Gap: Northern Ireland

Employment rate for people:

With a disability: 35.1%

Without a disability: 77%

NI Disability Employment gap: 42.1%

Source: Quarterly Supplement to the Labour Market Report July – September 2017
Economic Inactivity in Northern Ireland (Age 16-64); Labour Force Survey, Oct-Dec 2017

333,000 People in Northern Ireland Economically Inactive (Age 16-64)
- 110,000 Long Term Sick
- 90,000 Students
- 80,000 Family/Caring Commitments
- 37,000 Retired
- 16,000 Other

*Calculated from LFS percentages

Icons are creative Commons, labelled for reuse.
Percentages may not sum to 100% due to rounding.
What We Know

• Work is good for our health (particularly our mental health) – needs to be the right work.

• Work remains the best route out of poverty.

• 30,000 (approx.) people claim sickness benefits for the first time each year - between 45 and 50% come directly from a job.

• Low unemployment v high economic inactivity - a limited future labour supply (economic and social costs)

• Link between worklessness, poor health outcomes, poverty and disability.
Draft Programme for Government

Outcomes

1. We have a MORE EQUAL SOCIETY
2. We have more people working in better jobs
3. WE CARE FOR OTHERS AND WE HELP THOSE IN NEED

Indicators - Performance Measures

• **Indicator 17**, Economic inactivity rate excluding students;

• **Indicator 19**, % population living in absolute and relative poverty (before housing costs);

• **Indicator 32**, Employment rate of 16-64 year olds by deprivation quintile;

• **Indicator 33**, % of people working part-time who would like to work more hours.
Draft PfG Commitments

- Earlier Engagement
- Local Works!
- Improved Support
- Health and Work
- Making Work Pay
New Policy Commitments

• **Work & Wellbeing Service including Health & Work Conversation:** engaging in first weeks of claim to Employment Support Allowance

• **Work-focused rehabilitation:** extend Condition Management Programme to GPs (social prescribing)

• **Public awareness campaign** - health and wellbeing benefits of work: “Work Works!”

• **Local Works!** - Employability Forum in each council area to better match supply and demand, creating pipeline / pathways

• **Improving in-work support and formal mentoring** (in and out of work)

• **Policy & Programme Review** (reporting in late 2018)
Local Works!

Community Planning

Employability Forum, Ring Fencing Local Job Opportunities – Buy Social

Developing Employability Pathways

Hospitality & Tourism, Health & Social Care & Retail

Bringing together our collective funding, re-shaping existing policies, programmes and services, addressing gaps
Factors Impacting Employability

- Recruitment & selection procedures
- Identification & articulation of skills needs
- Specific nature of skills required
- Training & development strategies
- Employer Attitude & behaviours
- Benefit & tax credit levels
- Real & perceived wage levels
- Infrastructure
- Childcare
- Variable working patterns
Improving Lives – The Future of Work, Health and Disability

Improving and joining up across the three key settings:

- the welfare system;
- the workplace; and
- the healthcare system
Reducing economic inactivity is important for Northern Ireland. Starting from where people are now, culture change is critical. Local Works!
Interactive Panel
Thank You
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Delivering Social and Economic Outcomes

Pre-Consultation Workshop on Employability Programmes and Services by the Department for Communities