



# DUNGANNON SOCIO-ECONOMIC PROFILE



European Union  
Structural Funds

Whilst every effort has been made to ensure the accuracy of all information contained within this Document, Dungannon & South Tyrone Borough Council and TEDI Ltd accept no responsibility for errors or omissions.

<b>TABLE OF CONTENTS</b>	<b>PAGE</b>
<b>Introduction</b>	1
<b>Executive Summary</b>	2
<b>1.0 Population</b>	
1.1 Population Change	9
1.2 Population Age Profile	10
1.3 Distribution of Population Figures by Key Towns	13
1.4 Population by Religion	14
<b>2.0 Education and Training</b>	
2.1 Education	15
2.1.1 General Overview	15
2.1.2 School Performance Levels	17
2.1.3 Destination of School Leavers	18
2.1.4 Pupil Teacher Ratio	19
2.2 Training	20
2.2.1 New Deal	20
2.2.2 Jobskills Programme	22
2.2.3 Worktrack	26
2.2.4 Enterprise Ulster	28
2.2.5 Support for Future Managers	30
<b>3.0 Labour Markets</b>	
3.1 Employees in Employment	32
3.1.1 Employment Trends	32
3.1.2 Employment by Sector	34
3.1.3 Employment Profile by Gender	35
3.2 Unemployment in Dungannon	37
3.2.1 Unemployment Trends	37
3.2.2 Unemployment by Duration	38
3.2.3 Unemployment by Age	39
3.2.4 Unemployment by Usual Occupation	39

	<b>PAGE</b>
<b>4.0 Enterprise</b>	
4.1 VAT Registered Businesses	41
4.2 New Businesses Registering for VAT	42
4.3 Invest Northern Ireland	43
4.3.1 Invest NI Clients by Sector	43
4.3.2 Employment	45
4.3.3 Exporting	47
4.3.4 Invest NI Led Investment Visits	49
4.3.5 Financial Assistance Provided by Invest NI	49
4.3.6 Invest NI Industrial Land Holdings	51
<b>5.0 Earnings</b>	52
<b>6.0 Transport and Telecommunications</b>	
6.1 Transport	55
6.2 Dungannon Broadband Access	57
<b>7.0 Housing</b>	
7.1 Housing in Dungannon by Tenure	58
7.2 Housing in Dungannon by House Type	60
7.3 Housing Market	62
7.3.1 House Prices	62
7.3.2 Rates	64
7.3.3 House Building	65
7.4 Social Housing	66
<b>8.0 Tourism</b>	
8.1 Introduction	68
8.2 Tourist Trips	69
8.3 Overnight Stays	70
8.4 Tourism Spend	71
<b>9.0 Agriculture</b>	72

	<b>PAGE</b>
<b>10.0 Deprivation</b>	
10.1 Domain Deprivation Measures	75
10.1.1 Ward Level Data	77
10.1.2 District Council Level Data	79
10.2 New Targeting Social Need (TSN)	81
10.2.1 Introduction to New TSN	81

<b>LIST OF TABLES</b>	<b>PAGE</b>
<b>1.0 Population</b>	
Table 1.1	Population Change 1991-2001 9
Table 1.2	Population Age Profile by District Council Area – 2001 10
Table 1.3	Population Age Profile (in percentages) by District Council Area – 2001 11
Table 1.4	Percentage Change in Population by Age per District Council – 1991-2001 11
Table 1.5	Main Towns in each District Council with a Population of 1000 or more 13
Table 1.6	Population Breakdown by Religion 14
<b>2.0 Education and Training</b>	
Table 2.1	Numbers attending Post-Primary Schools in Dungannon 15
Table 2.2	The Examination Performance at GCSE level of Students attending post primary schools in each District Council area – 2000/01 17
Table 2.3	The Examination Performance at A level of Students attending post primary schools in each District Council area – 2000/01 17
Table 2.4	Destination of School Leavers by District Council Area 2000/01 18
Table 2.5	Pupil Teacher Ratio's by Education and Library Board 1999/00 19
Table 2.6	Pupil Teacher Ratio's by Education Sector 19
Table 2.7	New Deal – Number of (Gateway) Starts in Dungannon 21
Table 2.8	Jobskills Programme - Number of Starts per Strand 22
Table 2.9	Breakdown of Trainees in Dungannon on the Jobskills Access Stream by Occupational Area and Gender 23
Table 2.10	Breakdown of Trainees in Dungannon on the Jobskills Traineeship Stream by Occupational Area and Gender 24
Table 2.11	Breakdown of Trainees on the Jobskills Modern Apprenticeship Stream by Occupational Area & Gender 25
Table 2.12	Breakdown of Worktrack Participants by Occupational Area – 2001/02 26
Table 2.13	Breakdown of Enterprise Ulster New Start Trainees by Occupational Area 2001/02 (determined by home address) 28
Table 2.14	Breakdown of Enterprise Ulster New Start Trainees by Occupational Area 2001/02 (determined by placement) 29
Table 2.15	Uptake Levels on the Premier2 Programme by District Council Area – Oct 2002 30
Table 2.16	Uptake levels on the Rapid Advancement Programme by District Council Area – Oct 2002 30

**PAGE**

Table 2.17	Uptake levels on the Business Education Initiative by District Council Area – Oct 2002	31
------------	--	----

**3.0 Labour Markets**

Table 3.1	Percentage Increase in Jobs by District Council Area - 1989-1999	33
Table 3.2	Employees in Employment (ex Agriculture)	34
Table 3.3	Manufacturing Employment by Industrial Sector	35
Table 3.4	Part-Time v Full-Time Employment by Gender – Dungannon 1999 (ex Agriculture)	36
Table 3.5	Unemployment Trends 1991-2002	37
Table 3.6	Unemployment by Duration – September 2002	38
Table 3.7	Percentage Breakdown of Unemployment by Duration – September 2002	38
Table 3.8	Breakdown of Unemployment by Age	39
Table 3.9	Percentage Breakdown of Unemployment by Age	39
Table 3.10	Number of Unemployed Claimants in Dungannon by Usual Occupation – February 2002	40

**4.0 Enterprise**

Table 4.1	Number of VAT based Enterprises by Broad Industry Group – 2001	41
Table 4.2	Number of New Businesses registering for VAT	42
Table 4.3	Year on Year % Change in the number of new Businesses registering for VAT	42
Table 4.4	Number of Invest NI Clients by Sector 2001	44
Table 4.5	Employment in Invest NI Clients by Sector 2001	46
Table 4.6	Average Number of Employees per Company	46
Table 4.7	Breakdown of the Sales of Invest NI Clients in Dungannon by sector - 2000/01	47
Table 4.8	External Sales as a Percentage of Total Sales	48
Table 4.9	Invest NI Led Visits by Potential Investors to District Council areas	49
Table 4.10	Invest NI Financial Support to Client Companies from 1998/99 – 2000/01	50
Table 4.11	Total Investment by Invest NI Clients (£m) as a result of Invest NI activity	50
Table 4.12	Invest NI Industrial Land Holdings (Acres) by District Council Area	51
Table 4.13	Invest NI Land Available for Leasing (Acres)	51

	<b>PAGE</b>
<b>5.0 Earnings</b>	
Table 5.1 Average Gross Weekly Earnings	52
Table 5.2 Average Gross Weekly Earnings of Male Employees	53
Table 5.3 Average Gross Weekly Earnings of Female Employees	54
Table 5.4 Average Gross Weekly Earnings of Public and Private Sector Employees	54
<b>6.0 Transport and Telecommunications</b>	
Table 6.1 Road Length by Type of Road per District Council Area	55
Table 6.2 Household by Number of Cars by Health Board Region 1999/2000	56
<b>7.0 Housing</b>	
Table 7.1 Housing by Tenure (Percentage Breakdown)	58
Table 7.2 Dwelling Type as a percentage of Total Accom in each District Council Area – 1996	60
Table 7.3 Average Property Prices by Property Type for Mid Ulster (including Dungannon)	62
Table 7.4 Average Property Prices by Property Type for NI	63
Table 7.5 Average Rates Bill per District Council Area	64
Table 7.6 Housing Starts by Sector in the Dungannon DCA	65
Table 7.7 NIHE Waiting Lists by District Council Area (Incorporating Housing Associations)	66
<b>8.0 Tourism</b>	
Table 8.1 Visitor Numbers to Dungannon and South Tyrone Borough Council District Council Facilities	68
Table 8.2 Number of Trips (000's) made to each District Council Area per annum	69
Table 8.3 Number of Overnight Visits (000's) made to each District Council Area per annum	70
Table 8.4 Tourist Spend (£m) per District Council Area per annum	71
<b>9.0 Agriculture</b>	
Table 9.1 Number of Farms by Business Size	72
Table 9.2 Percentage Distribution of Farms – 2001	73
Table 9.3 Number of Farms by LFA Designation – 2001	73
Table 9.4 Labour Force – 2001	73
Table 9.5 Number of Farms by Farm Type – 2001	74

## 10.0 Deprivation

Table 10.1	Weighted Domains of Deprivation that comprise the Multiple Deprivation Measure	76
Table 10.2	Ranked Domain Deprivation Measures by Ward in the Dungannon District Council Area	77
Table 10.3	District Council Level summaries of Ward Level	79
Table 10.4	Breakdown of Electoral Wards in the Dungannon District Council Area	82

<b>LIST OF CHARTS</b>	<b>PAGE</b>
<b>1.0 Population</b>	
Figure 1.1	Population Profile by Age 10
Figure 1.2	Percentage Change in Population by Age 1991-2001 12
<b>7.0 Housing</b>	
Figure 7.1	Housing by Tenure (Percentage Breakdown) – 1996 59
Figure 7.2	Dwelling Type as a percentage of Total Accommodation in each District Council area– 1996 61
Figure 7.3	Average House Prices in Mid-Ulster as a percentage of Average Property Prices across Northern Ireland 63
Figure 7.4	Housing Starts by Sector in the Dungannon District Council Area 65
Figure 7.5	Percentage Change in the NIHE/Social Sector Waiting List 1998/99 – 2001/02 67
<b>8.0 Tourism</b>	
Figure 8.1	Tourist Trips per District Council Area as a percentage of the Northern Ireland Total 69
Figure 8.2	Overnight visits per District Council Area as a percentage of the Northern Ireland Total 70
Figure 8.3	Tourist Spend per District Council Area as a percentage of the Northern Ireland Total 71
<b>10.0 Deprivation and New TSN</b>	
Figure 10.1	District Council Areas Designated as New TSN Areas 82

# Introduction

*Dungannon Facts and Figures* provides a unique and comprehensive study of the Dungannon and South Tyrone Borough Council area. It brings together a wide range of demographic, social, industrial and economic statistics relating to the borough and as such, it will act as an important resource for all those organisations, communities and individuals who are engaged in promoting the development of the region.

Whilst the focus of the information is primarily on the Dungannon and South Tyrone Council area, there is a need to see how the borough is performing when compared to neighbouring districts, and indeed the average for Northern Ireland as a whole. From this regard, information has been provided on the neighbouring districts in Tyrone and Fermanagh as a basis to provide a comparative analysis of trends and situations at a sub-regional level. It is hoped that this information will assist local groups in identifying the key issues they need to address as they develop their plans and programmes and implement their monitoring and evaluation systems.

# Executive Summary

## Population

The Dungannon and South Tyrone Borough Council area has a current population of 47,735, representing an increase of 5.1% from 45,428 in 1991. The population age profile of the Borough is broadly similar to that for Northern Ireland as a whole, with just over a quarter (12,315) being children, almost 60% (28,434) being of working age, with the remaining 15% (6,986) being of pensionable age.

The trend in terms of population change in Dungannon, like Northern Ireland as a whole, is toward an ageing population. Between 1991 and 2001 the number of children in Dungannon declined by 7.1% from 13,255 to 12,315. In contrast, the number of people of pensionable age rose by 12.6% from 6,204 to 6,986 over the same period.

Dungannon Town, with a current estimated population of approximately 12,000 people, is the commercial and administrative heart of the borough. However, around 75% of the borough's 47,735 people live in the many small rural towns and villages that are located throughout the borough or in dispersed rural communities.

## Education

Primary, secondary and third level education is available within the Dungannon and South Tyrone area. The Borough currently has four Grammar Schools. Three of these schools, the Royal School, St Patrick's Academy for Boys and St Patrick's Academy for Girls, are located in Dungannon town itself, with the fourth, St Joseph's Convent Grammar, being sited in Donaghmore on the outskirts of the town. These four schools accommodate, between them, around 2,800 students. There are also seven secondary schools providing post primary education to a further 2,500 pupils. Four of these secondary schools are spread out across the borough and located in the key rural towns of Aughnacloy, Fivemiletown, Ballygawley and Coalisland.

East Tyrone College of Further & Higher Education is the major provider of post-16 training and education in the area. With an enrolment of around 800 full-time students and trainees, and 11,000 part-time registrations, East Tyrone College offers full and part-time courses leading to formal accreditation over a wide range of occupational, vocational and academic disciplines, from basic and entry levels through to Diploma and Degree. In recent years, there has been a strong commitment toward the delivery of a range of IT educational and training programmes at all levels up to HND. The College also works closely with both the University of Ulster and

Queens University of Belfast with many of its advanced courses accredited through these Universities.

With regard to examination pass rates, both the grammar and secondary school sectors in Dungannon perform well at both GCSE and A Level. During the 2000/01 academic year 60% of GCSE students in the borough achieved A\* to C grades in five or more subjects, well above the Northern Ireland average of 57%. Furthermore, during the same academic year 47% of A Level students passed 3 or more A Levels with A-E grades again exceeding the Northern Ireland average of 45%, with 95% of students achieving similar grades in 2 or more A Levels.

In reflecting the high level of academic performance of the borough's post primary schools, it is not surprising that almost 72% of the 831 students who left school during the 2000/01 academic year progressed to third level education, compared to just 60% across Northern Ireland as a whole.

In contrast, only 2.89% of school leavers, living in the Borough, left school to become unemployed or are recorded as having an unknown destination, compared to 5.5% across Northern Ireland as a whole

The borough also had a significantly smaller proportion of school leavers opting to enrol on a work related training programme, or go direct to employment when compared to the Northern Ireland average.

## **Training**

There is a broad range of statutory training and unemployment support provision available in the Dungannon and South Tyrone region catering for people with a wide variety of skills and experience, from school leavers and graduates through to the long term unemployed. These programmes offer a broad mix of advice, counselling, on the job training and experience, as well as opportunities to gain new qualifications.

The three main programmes, New Deal (248 Trainees), Jobskills (308 Trainees) and Worktrack (56 Trainees) between them account for the vast majority of all new start trainees in the borough.

## Labour Markets

The service sector plays a major role in the local economy with 10,712 people being employed in this area, representing approximately 65% of the working population of the borough (excluding agriculture). Despite this, the overall impact of the service sector on the local economy is far less pronounced than across Northern Ireland as a whole, where around 75% of the labour force is involved in service sector activities.

In contrast, the percentage of people employed in manufacturing related jobs is significantly higher in the Dungannon area than across Northern Ireland. In 1999 4,711 people were employed in manufacturing related activities, accounting for almost 30% of the borough's working population (excluding agriculture) as compared to just 17% across Northern Ireland and 23% for County Tyrone as a whole.

Dungannon has a broad manufacturing base. Its predominant sectors include Engineering, Food Production and Clothing and Textiles. Between them these three sectors account for over 62% of total employment in manufacturing.

Whilst the vast majority of the borough's 2,695 Vat registered businesses employ less than 10 people, a number of Northern Ireland's leading manufacturing firms have located production facilities within the council area. These include two of Northern Ireland's top 20 businesses; Moy Park Ltd (poultry processor) and Powerscreen International (manufacturer of crushing and screening plant and equipment) which is part of the multi-national TEREX organisation and whose head quarters are in the borough.

There were 684 people unemployed in the Dungannon and South Tyrone Borough in September 2002, approximately 3% of the economically active population, with almost 60% being below the age of 34. The overall trend over the past decade, however, has been one of large decreases in unemployment right across Northern Ireland. In line with these trends, the unemployment rate in Dungannon has fallen from 17.6%, in 1991 to its current level and is now well below the Northern Ireland average of 4.7%.

In terms of long-term unemployment, whilst 20% of Dungannon's unemployed (in September 2002) had been so for more than one year, with 5% having been unemployed for three years or more, the levels of long-term unemployment in Dungannon are generally lower than the levels across Northern Ireland as a whole.

## **Enterprise**

There are 2,695 VAT registered businesses located in the Dungannon and South Tyrone Borough Council area with approximately 48% of these companies being categorised as agricultural based businesses, as compared to just 33% for Northern Ireland as a whole. Other key sectors in the borough include construction, retail and manufacturing

In March 2001 there were a total of 121 Invest NI client companies located in the Dungannon and South Tyrone Borough council area, with food, engineering, glass and concrete being the key sectors. Dungannon based Invest NI clients account for almost 6% of the total number of such companies across Northern Ireland providing employment for over 5,000 people in the borough.

Between 1998/99 and 2000/01 there has been a significant reduction in the levels of financial support from Invest NI (and the former agencies including LEDU and IDB) to companies in Dungannon. This reflects that fact that private sector investment in the borough has also reduced over this period. Despite this Dungannon, as a council area, tends to benefit from higher levels of Invest NI support than each of the other council areas in the region.

## **Earnings**

Based on the findings of the Northern Ireland New Earnings Survey 2001, Sub NI data, the estimated average gross weekly salary for a male in Dungannon is £349.20, this being equivalent to 85% of the Northern Ireland average. Whilst that for a female is £292.60, 91% of the Northern Ireland average. Salaries paid to Non manual male employees in the Borough tend to be significantly higher than those paid to their manual counterparts, this being typical of wage rates across Northern Ireland as a whole.

It is also interesting to note, that whilst average salaries paid to male employees in the private sector in the Dungannon area are higher than those paid to private sector workers in each of the other four district council areas in the Tyrone and Fermanagh region, salaries paid to public sector male workers in Dungannon are lower than in each of the other four district council areas. Despite this, public sector employees in Dungannon continue to be paid higher salaries than those in the private sector.

## **Transport**

The Dungannon and South Tyrone Borough Council area is totally reliant on road-based transport. The total road length for all roads in the borough is approximately 1,530 kilometres of which almost 60% are unclassified.

Whilst public transport within the borough is restricted to bus and coach services, Translink provide a number of express services linking Dungannon with other neighbouring district town's including Cookstown, Omagh, Enniskillen and Portrush. The company also provides 15 return trips to Belfast, one direct service to Dublin and four to Derry. Local provision, however, tends to be focused on the twice-daily transport needs of Dungannon's second and third level Schools and Colleges.

The private car dominates local transport in Dungannon and throughout the region with 76% of households having access to a car

## **Telecommunications**

At present companies in Dungannon can only access broadband through the use of leased lines or Satellite. It is expected, however, that by 2003 Broadband access will be available in Dungannon through Hutchinson 3G.

## **Housing**

The most recent official figures to show home ownership levels in Dungannon were published as part of the 1996 Northern Ireland House Condition Survey. At that time over 67% of people living in the Dungannon and South Tyrone Borough Council area owned their own homes, a higher rate than that for Northern Ireland as a whole (63.3%).

The profile of housing by type in Dungannon, although similar to that of the other four council areas in Tyrone and Fermanagh, does differ significantly to that for Northern Ireland as a whole.

Bungalows account for over 40% of the housing stock in the council area compared to 24.1% for Northern Ireland, whilst terraced houses account for less than 20% compared to 33.5% for Northern Ireland. Dungannon also has a higher percentage of detached houses in comparison to the Northern Ireland average, yet its stock of flats and apartments is relatively low.

## **Housing Market**

Over recent years house prices across the Mid-Ulster region, which includes Dungannon, have been performing well, with price movements generally following an upward trend. During the first quarter of this year the average price across all property types in the area was £73,085, representing a decline of 2.33% relative to the first quarter of 2001 (£74,827). Since then there appears to have been a sharp increase in property prices across the region, with the average price of all property being valued at £80,632 during the second quarter of this year. This represents a rise of over 10% in average prices between quarters one and two in the Mid-Ulster area in comparison to a 2.8% rise across Northern Ireland over the same time period

It is important to point out that, with the average property price for all property across Northern Ireland being valued at £95,007, prices in Dungannon and the Mid-Ulster region are around 85% of the Northern Ireland average. This would suggest that Dungannon does offer the local community relatively affordable housing when compared to other districts in the province.

## **Tourism**

In general Dungannon tends to lag behind many other areas in Northern Ireland in terms of attracting tourists and generating revenue from tourism activity. Whilst there has been a 35% increase in the number of tourists visiting the borough between 1998 and 2001, revenue generated through tourism has actually decreased from £5.45 million in 1998 to £4.70 million in 2001.

## **Agriculture**

The agricultural industry continues to be an important sector within the economy of the Dungannon and South Tyrone Borough Council area. It accounts for almost 48% of the 2,695 VAT registered enterprises in the borough and provides employment for 3,713 people.

The agricultural sector, however, continues to be an industry under pressure. Of the 2,101 farms in the borough, 80% are categorised as either very small or and 72% are located in Less Favoured Areas (LFA). Furthermore, approximately half of the 3,713 people employed in this sector locally are part-time or casual employees, with a further 11% being categorised as the spouse.

## Deprivation and New TSN Areas

Based on the findings of the report “Measures of Deprivation in Northern Ireland” (NISRA June 2001), at an electoral ward level, Dungannon registers its highest levels of deprivation in relation to income, access to services and housing. The area in which the Borough exhibits significantly lower levels of deprivation is in relation to Education.

Overall, the Dungannon and South Tyrone Borough Council area is ranked as the 9<sup>th</sup> most deprived local government district in Northern Ireland. In comparison to the other three district council areas in Tyrone, it exhibits the lowest levels of deprivation, and is second only to Fermanagh as the least deprived local government district in the wider Tyrone and Fermanagh region.

In terms of new TSN, with the publication of the Noble Measures of Deprivation the Department of Enterprise Trade and Investment has drawn up a Council-level map by selecting the six most deprived Council areas in Northern Ireland. The six Council areas are Strabane, Derry, Omagh, Moyle, Cookstown and Newry & Mourne

In recognition of the significant economic difficulties, particularly in relation to job losses and rising unemployment experienced by certain areas over the past several months, DETI has also decided to supplement the New TSN Council area map by awarding “special” status to those areas which have experienced an unemployment rate of at least 20% above the Northern Ireland average over the past year. This brings into the equation Carrickfergus, Larne, Limavady and Fermanagh District Councils.

Although the Dungannon and South Tyrone Borough Council area as a whole is no longer deemed to be a New TSN area, nor does it qualify as a special status area, six electoral wards within the borough continue to be recognised as areas of high of deprivation. These are Ballysaggart, Coalisland North, Coalisland South, Drumglass, Mullaghmore and Washing Bay.

# 1.0 Population

## 1.1 Population Change

The Dungannon and South Tyrone Borough Council area has a current population of 47,735. Over the past ten years the borough's population has increased by 5.1% from 45,428 in 1991. Whilst this is lower than the change in population across Northern Ireland as a whole, it does closely match the rate of change in population within Tyrone.

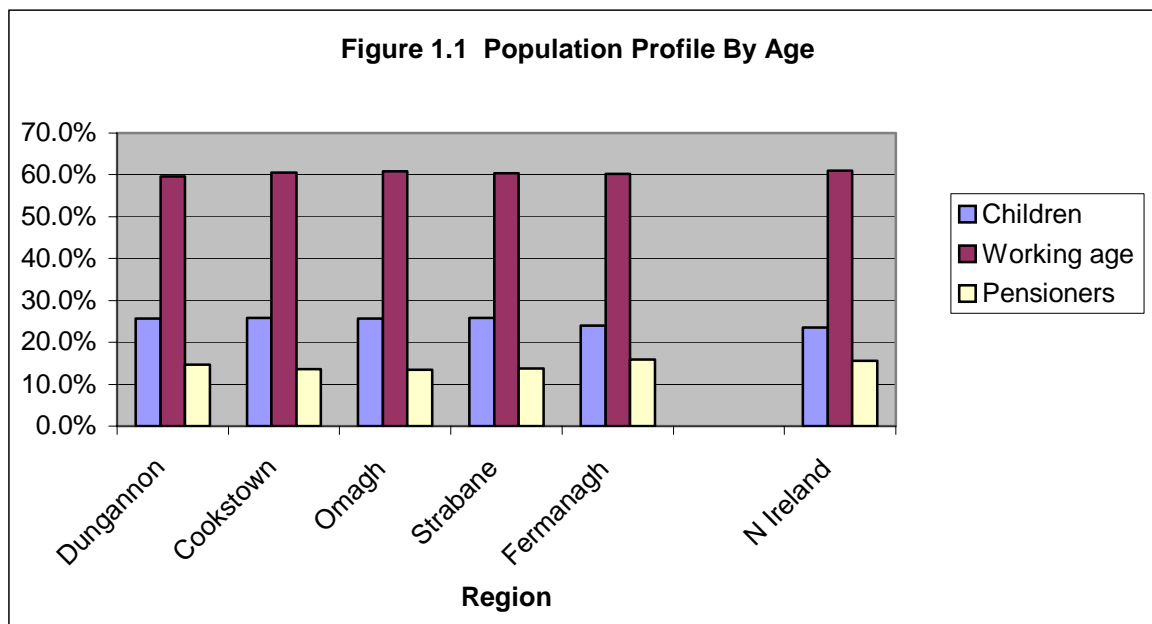
**Table 1.1 Population Change 1991 – 2001**

	<b>1991</b>	<b>2001</b>	<b>%Change</b>
<b>Dungannon</b>	<b>45,428</b>	<b>47,735</b>	<b>5.1%</b>
Cookstown	31,082	32,581	4.8%
Omagh	45,809	47,952	4.7%
Strabane	36,141	38,248	5.8%
Fermanagh	54,033	57,527	6.4%
<b>Tyrone</b>	<b>158,460</b>	<b>166,516</b>	<b>5.1%</b>
Tyrone/Fermanagh	212,493	224,043	5.4%
<b>Northern Ireland</b>	<b>1,577,836</b>	<b>1,685,267</b>	<b>6.8%</b>

*Source: The Northern Ireland Census 1991 & 2001 General Register Office 2002*

## 1.2 Population Age Profile

The population age profile of the Dungannon and South Tyrone Borough Council area is largely similar to that for Northern Ireland as a whole (see tables 1.2 and 1.3). Just over a quarter of the borough's population (12,315) are children, almost 60% (28,434) are of working age, with the remaining 15% (6,986) being of pensionable age. Despite there being small deviations in the age profiles of each of the other four district council areas in the Tyrone and Fermanagh region, in general terms, they all conform to this broad regional age profile.



Source: *The Northern Ireland Census 2001 – General Register Office 2002*

**Table 1.2 Population Age Profile by District Council Area - 2001**

	Dungannon	Cookstown	Omagh	Strabane	Fermanagh	N Ireland
<b>Children</b>	<b>12315</b>	8445	12399	9957	13864	398056
<b>Working age</b>	<b>28434</b>	19700	29055	23017	34514	1025700
<b>Pensioners</b>	<b>6986</b>	4426	6498	5274	9149	261511
<b>Total</b>	<b>47735</b>	32571	47952	38248	57527	1685267

Source: *The Northern Ireland Census 2001 – General Register Office*

Notes: Children are defined as those in the population aged under 16.

Working age is defined as the female population aged 16 to 59 and the male population aged 16 to 64.

Pensioners are defined as the female population aged 60 and over and the male population aged 65 and over

**Table 1.3 Population Age Profile (In Percentages) by District Council Area - 2001**

	Dungannon	Cookstown	Omagh	Strabane	Fermanagh	N Ireland
<b>Children</b>	<b>25.8%</b>	25.9%	25.9%	26.0%	24.1%	23.6%
<b>Working age</b>	<b>59.6%</b>	60.5%	60.6%	60.2%	60.0%	60.9%
<b>Pensioners</b>	<b>14.6%</b>	13.6%	13.6%	13.8%	15.9%	15.5%

Source: *The Northern Ireland Census 2001 – General Register Office*

Notes: Children are defined as those in the population aged under 16.

Working age is defined as the female population aged 16 to 59 and the male population aged 16 to 64.

Pensioners are defined as the female population aged 60 and over and the male population aged 65 and over

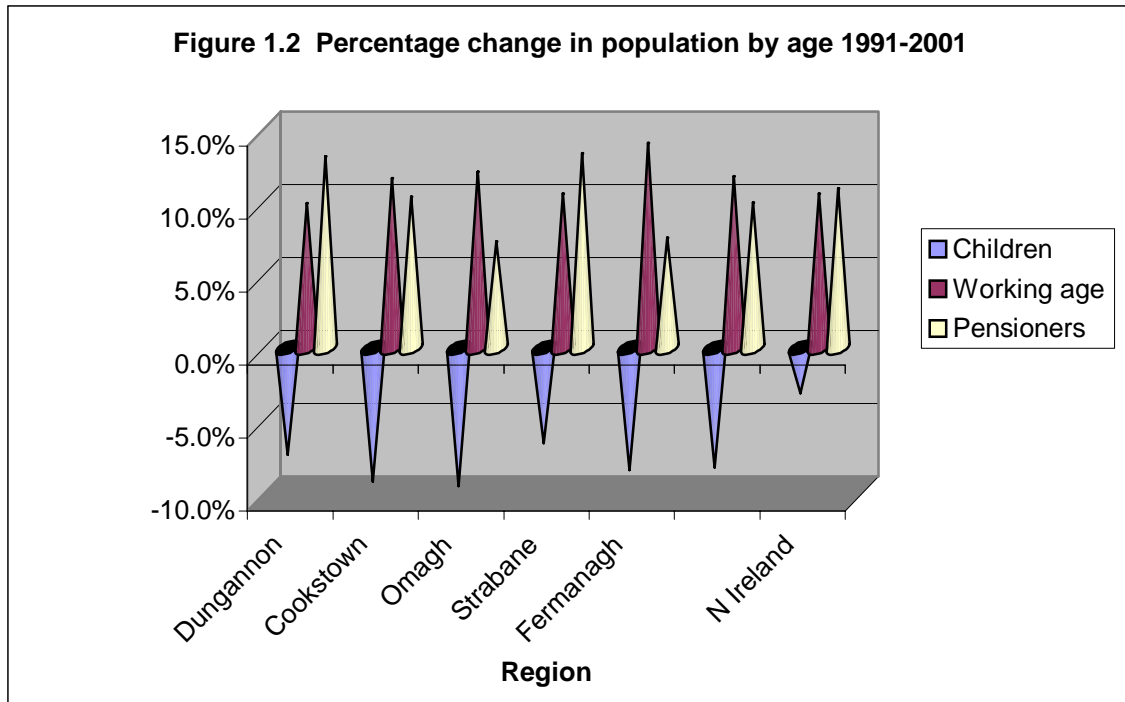
It is interesting to note, that in relation to population change over the past ten years, the general trend toward an ageing population in Northern Ireland appears to be more accentuated in the Tyrone and Fermanagh region.

Between 1991 and 2001 the number of children in Northern Ireland fell by 2.9% from 409,898 to 398,050. During the same period, the population in Dungannon, of this age group, fell by 7.1% from 13,255 in 1991 to 12,315 in 2001, with similarly sharp falls also being recorded in the other four district council areas in the Tyrone and Fermanagh region (see Table 1.4). These figures generally point toward a birth rate that is declining significantly faster in the Western region than in other parts of Northern Ireland.

It is also worth noting that whilst the numbers of children have been declining, in contrast, the numbers of people of pensionable age have been increasing steadily both across the Tyrone and Fermanagh region, as well as Northern Ireland as a whole. Furthermore, Dungannon (12.6%), along with Strabane (13.1%), has experienced a faster rate of growth in its population of this group than the average rate of growth across Northern Ireland as a whole (10.6%) (See Table 1.4).

**Table 1.4 Percentage change in population by age and District Council – 1991-2001**

	Dungannon	Cookstown	Omagh	Strabane	Fermanagh	N Ireland
<b>Children</b>	<b>-7.1%</b>	-9.2%	-9.0%	-6.1%	-8.0%	-2.9%
<b>Working age</b>	<b>9.5%</b>	11.0%	11.2%	10.3%	13.3%	10.1%
<b>Pensioners</b>	<b>12.6%</b>	9.7%	7.2%	13.1%	7.6%	10.6%
<b>All Persons</b>	<b>5.1%</b>	4.8%	4.7%	5.8%	6.5%	6.8%



The growth in the borough's population over the past ten years has been largely fuelled by the increase in the number of people of working age living in the area (see Figure 1.2). Between 1991 and 2001 the number of people of working age living in the Dungannon area increased by 2,465 from 25,969 to 28,434, a rise of almost 10%. This is broadly in line with the overall increase in the population of this age group across Northern Ireland as a whole.

### 1.3 Distribution of Population Figures By Key Towns

The Dungannon and South Tyrone Borough Council area occupies a central position in Northern Ireland. Situated to the West of Lough Neagh and stretching up through the Clogher Valley towards the Sperrins, the borough covers an area of some 315 square miles (816 square kilometres).

Dungannon Town, with a current estimated population of approximately 12,000 people, is the commercial and administrative heart of the borough. However, around 75% of the borough's 47,735 people live in the many small rural towns and villages that are located throughout the Borough or in dispersed rural communities. This has helped to retain the strong rural character, culture and sense of community identity that has long been associated with the region.

**Table 1.5 Main Towns in each District Council with a Population of 1000 or more based on 1991 Census Figures (See Notes Below)**

Area	Total	Male	Female
<b><u>Dungannon DCA</u></b>			
Coalisland	3,802	1,848	1,954
Dungannon	9,190	4,407	4,783
Fivemiletown	1,107	533	574
Moygashel	1,178	551	627
<b><u>Cookstown DCA</u></b>			
Cookstown	9,842	4,797	5,045
Moneymore	1231	583	648
<b><u>Strabane DCA</u></b>			
Castledearg	2,579	1,221	1,358
Newtownstewart	1,520	751	769
Sion Mills	1,676	833	843
Strabane	11,670	5,624	6,046
<b><u>Omagh DCA</u></b>			
Fintona	1,324	661	663
Omagh	17,280	8,448	8,832
<b><u>Fermanagh DCA</u></b>			
Enniskillen	11,436	5,470	5,966
Irvinestown	1,906	911	995
Lisnaskea	2,367	1,120	1,247

Source: *The Northern Ireland Census 1991*

Notes: More recent figures based on the 2001 Northern Ireland Census are not due to be published until Spring 2003

## 1.4 Population By Religion

The three main churches in Dungannon (see Table 1.6), the Roman Catholic Church, the Church of Ireland and the Presbyterian Church represent the religious affiliations of 87% of the people living within the district, with the Roman Catholic Church being the predominant religion overall.

The Church of Ireland is the largest Protestant denomination in Dungannon (18%) followed by the Presbyterian Church (13%).

**Table 1.6 Population Breakdown by Religion**

	Dungannon	Tyrone	Northern Ireland
<b>Catholic</b>	56%	59%	38%
<b>Church of Ireland</b>	18%	15%	18%
<b>Presbyterian</b>	13%	14%	21%
<b>Methodist</b>	2%	2%	4%
<b>Other</b>	5%	5%	8%
<b>None</b>	1%	1%	4%
<b>Not Stated</b>	5%	5%	7%

*Source: The Northern Ireland Census 1991*

Notes: More recent figures based on the 2001 Northern Ireland Census are not due to be published until early 2003

## 2.0 Education and Training

### 2.1 Education

#### 2.1.1 General Overview

The Dungannon and South Tyrone Borough currently has four Grammar Schools. Three of these schools, the Royal School, St Patrick's Academy for Boys and St Patrick's Academy for Girls, are located in Dungannon town itself, with the fourth, St Joseph's Convent Grammar, being sited in Donaghmore on the outskirts of the town. These four schools accommodate, between them, around 2,800 students. Whilst St Patrick's Academy for Boys and St Patrick's Academy for Girls are presently two independent schools, these two schools will merge for the 2003/2004 academic year

The borough has also seven secondary schools providing post primary education to a further 2,500 pupils. Four of these secondary schools are spread out across the borough and located in the key rural towns of Aughnacloy, Fivemiletown, Ballygawley and Coalisland.

**Table 2.1 Numbers attending Post-Primary Schools in Dungannon**

Secondary Schools	No. on Roll	Grammar Schools	No. on Roll
<b>Aughnacloy High School</b>	100	<b>Royal School Dungannon</b>	614
<b>Drumglass High School</b>	440	<b>St Joseph's Convent Grammar</b>	493
<b>Fivemiletown High School</b>	426	<b>St Patrick's Boys' Academy</b>	852
<b>Integrated College Dungannon</b>	306	<b>St Patrick's Girls' Academy</b>	823
<b>St Ciaran's High School</b>	847		
<b>St Joseph's High School</b>	604		
<b>St Patrick's High School</b>	652		
<b>TOTAL</b>	<b>3,375</b>	<b>TOTAL</b>	<b>2,782</b>

Source: School Performance Tables 1998/99 – DENI

East Tyrone College of Further & Higher Education is the major provider of post-16 training and education in the area. The main campus, which is to be fully replaced by a new purpose built facility on the existing site, is located in Dungannon town with easy transport access. The College plan to commence the first phase in the re-development of the existing campus in 2003.

With an enrolment of around 800 full-time students and trainees, and 11,000 part-time registrations, the East Tyrone College offers full and part-time courses leading to formal accreditation over a wide range of occupational, vocational and academic disciplines, from basic and entry levels through to Diploma and Degree. In recent years there has been a strong commitment toward the delivery of a range of IT educational and training programmes at all levels up to HND. These courses have proven to be highly popular, attracting some 2,600 enrolments during the 2001/02 academic year. The College works closely with both the University of Ulster and also with the Queens University of Belfast with many of its advanced courses accredited through these Universities.

## 2.1.2 School Performance Levels

Information regarding the performance of individual schools is no longer made available by the Department of Education and Learning (DEL), with the school league tables having last been published for the 1998-99 academic year. However, the department does publish data relating to the average performance of all schools within a district council area.

**Table 2.2 The Examination Performance at GCSE level of Students attending Post Primary Schools in each District Council Area – 2000/01.**

	Dungannon		Omagh		Strabane		Fermanagh		N. Ireland Average %
	No.	%	No.	%	No.	%	No.	%	
5+ GCSE's A*-C	<b>615</b>	<b>60</b>	553	64	235	41	676	66	57
No GCSE's	<b>42</b>	<b>4</b>	29	3	44	8	14	1	4
Year 12 Population	<b>1027</b>		858		571		1021		

Note: Figures for the Cookstown District Council area are not available due to the small number of schools in the district.

From Tables 2.2 and 2.3 it can be seen that both the grammar and secondary school sectors in Dungannon perform well at both GCSE and A Level. During the 2000/01 academic year 60% of GCSE students in the borough achieved A\* to C grades in five or more subjects, well above the Northern Ireland average of 57% (see Table 2.2). Furthermore, during the same academic year 47% of A Level students passed 3 or more A Levels with A-E grades (see table 2.3), again exceeding the Northern Ireland average of 45%, with 95% of students achieving similar grades in 2 or more A Levels.

**Table 2.3 The Examination Performance at A level of Students attending Post Primary Schools in each District Council Area – 2000/01.**

	Dungannon		Omagh		Strabane		Fermanagh		N. Ireland %
	No	%	No	%	No	%	No	%	
2+ A Levels A-E	<b>447</b>	<b>95</b>	390	96	182	95	464	97	93
3+ A Levels A-E	<b>178</b>	<b>47</b>	170	45	79	41	233	48	45
No. A-Level Students	<b>456</b>		408		186		482		

### 2.1.3 Destination of School Leavers

In reflecting the high level of academic performance of the borough's post primary schools, it is not surprising that almost 72% of the 831 students who left school during the 2000/01 academic year progressed to third level education, compared to just 60% across Northern Ireland as a whole (see Table 2.4). In fact, a significantly higher proportion of school leavers living in Dungannon chose to continue to third level education, when compared to their counterparts resident in each of the other four council areas in the Tyrone in Fermanagh region.

In contrast, only 2.89% of school leavers, living in the Borough, left school to become unemployed or are recorded as having an unknown destination, compared to 5.5% across Northern Ireland as a whole. After Fermanagh (2.03%), Dungannon recorded the second lowest level of unemployment amongst school leavers of all five districts in the Tyrone and Fermanagh region during 2001.

The borough also had a significantly smaller proportion of school leavers opting to enrol on a training programme, when compared both against the other four district council areas in the region, as well as Northern Ireland as a whole. Furthermore, a smaller proportion of school leavers in Dungannon (11.31%) entered employment when compared to the average uptake of employment amongst this group across Northern Ireland (13.1%).

**Table 2.4 Destination of School Leavers by District Council Area – 2000/01**

	D/gannon	C/town	Omagh	Strabane	Fermangh	Northern Ireland
	%	%	%	%	%	%
<b>Total No. School Leavers</b>	<b>831</b>	<b>571</b>	<b>805</b>	<b>626</b>	<b>787</b>	<b>25,162</b>
Inst. of Higher Education	<b>36.34</b>	32.75	36.27	31.95	39.90	32.9
Inst. of Further Education	<b>35.38</b>	28.37	31.18	22.36	21.98	27.2
Employment	<b>11.31</b>	16.46	10.31	14.06	10.93	13.1
Training	<b>14.08</b>	18.39	17.76	26.04	25.16	21.3
Unemployment/Unknown	<b>2.89</b>	4.03	4.47	5.59	2.03	5.5

Source: DEL 2002

NB: District Council is determined by the home postcode of the school leaver and not the school they attended)

## 2.1.4 Pupil Teacher Ratios

As illustrated in Table 2.5 there appears to be very little deviation in Pupil Teacher Ratios in both primary and secondary level school sectors when comparing the five Education and Library Boards in Northern Ireland. Broadly speaking the Pupil Teacher Ratios in each board area closely matches the Northern Ireland average for each sector.

**Table 2.5 Pupil Teacher Ratio's by Education and Library Board 1999/00**

Board	Primary	Secondary
Southern	19.1	14.6
Western	20.4	14.6
Belfast	20.0	14.6
South Eastern	20.8	14.9
North Eastern	21.0	14.8
Northern Ireland	20.2	14.7

Source: *Economic Outlook & Business Review - Volume 16.2 June/July 2001*

Note: The Southern Education Board takes in all the schools in the Dungannon and South Tyrone Borough Council Area

It is interesting to note, that between 1990/91 and 1999/00 the overall Pupil Teacher Ratio (PTR) in Northern Ireland fell from 18.2 to 16.0, a trend reflected in all school sectors with the exception of the Nursery and Secondary school sectors (see table 2.6).

**Table 2.6 Pupil Teacher Ratio's by Education Sector**

Sector	1990/91	1999/00
Nursery	24.7	25.7
Primary	22.8	20.2
Secondary	14.1	14.2
Grammar (Preparatory)	24.8	17.5
Grammar (Secondary)	15.8	15.5
Northern Ireland	18.2	16.0

Source: *Economic Outlook & Business Review - Volume 16.2 June/July 2001*

## 2.2 Training

Details on statutory training provision in the Dungannon and South Tyrone Borough Council Area outlined in this section of the report, relate to the following key government training initiatives:

- Jobskills Programme
- New Deal (aged 18-24 years)
- New Deal (aged 25+ years)
- Worktrack
- Enterprise Ulster
- Support for Future Managers

### 2.2.1 New Deal

Targeting the long-term unemployed, New Deal is designed to provide participants with advice and skills to prepare them for the workplace and to secure and retain employment.

There are two New Deal programmes. The New Deal programme for 18-24 year olds is targeted at young people who have been claiming Jobseekers Allowance for six months or more, whereas the New Deal programme for those aged 25 or over, is targeted at those who have been claiming Jobseekers Allowance for 18 months or more (or for those who have been claiming Jobseekers allowance for 18 out of the past 21 months).

The programmes provide individual participants with a personal adviser whose role is to offer one to one careers counselling and advice and an action plan to help participants find employment. If individuals have not been successful in finding a job after the first four months (Gateway phase) a range of options are made available e.g.: subsidised employment or a training placement with a local voluntary sector provider etc (options do differ between the two programmes).

During 2001/02 there were 248 registered new starts on New Deal in Dungannon (see Table 2.7), an increase of 30% from 193 the previous year, with more people over the age of 25 registering to participate on New Deal than under the age of 25. (It must be

noted, however, that as the eligibility criteria for New Deal (18-24) is six months unemployment, it is conceivable that an individual can register on the programme twice in one year).

The New Deal programme for those aged 25 or over was first introduced on a pilot basis during 1998/99 and only became mandatory in 1999/00. As a result there was a peak in the numbers starting the programme during that year, as all long-term unemployed, who had been so for 18 months or more, were obliged to register. Since then, however, the numbers starting this programme annually only relate to those who have become eligible during each individual year.

**Table 2.7 - New Deal – Number of (Gateway) Starts in Dungannon**

	<b>1998/99</b>	<b>1999/00</b>	<b>2000/01</b>	<b>2001/02</b>
Aged 18-24	205	133	110	112
Aged 25+	117	515	76	136

*Source: Department of Education and Learning (DEL)*

Note: A breakdown of the New Deal Programme by Occupational area is not available.

## 2.2.2 Jobskills Programme

The Jobskills programme is a government funded training programme for young unemployed people aged 16-24. During 2001/02 308 young people across the Borough started a Jobskills programme, a fall of almost 11% from 346 the previous year. The main reason for this fall has been a significant reduction in the numbers of trainees taking on a traineeship. During 2000/01 there were 211 new starts on the traineeship programme and this had fallen by 35% to 137 last year.

It is worth pointing out that each of the other council areas in the Tyrone and Fermanagh region, with the exception of Strabane (see Table 2.8), also experienced a decline in the numbers of people taking on a traineeship through the jobskills programme.

In contrast the number of trainees in Dungannon taking on a Modern Apprenticeship rose by almost 40% from 102 in 2000/01 to 141 in 2001/02, in line with the general trend across the region. In fact, on this occasion, Cookstown was the only council area to register a fall in the numbers of people taking on a modern apprenticeship

**Table 2.8 Jobskills Programme – Number of starts per Strand**

	Access		Traineeship		Modern Apprenticeship	
	00/01	01/02	00/01	01/02	00/01	01/02
<b>Dungannon</b>	<b>33</b>	<b>30</b>	<b>211</b>	<b>137</b>	<b>102</b>	<b>141</b>
Cookstown	16	27	100	76	60	48
Omagh	30	56	242	194	111	106
Strabane	50	37	168	169	48	77
Fermanagh	49	65	252	206	127	166

Source: Department of Education and Learning(DEL)

There are two strands to the ‘mainstream’ Jobskills Programme;

1. Traineeships
2. Modern Apprenticeships.

In addition to these, the Jobskills Access strand is designed for those individuals who require extra assistance to prepare them for ‘mainstream’ training. This can last up to 52 weeks, focusing on basic skills development such as literacy, numeracy and/or other similar needs. As illustrated in Table 2.9 there were 30 trainees undergoing initial training through this strand of Jobskills during 2001/02.

**Table 2.9 Breakdown of Trainees in Dungannon On the Jobskills Access Stream by Occupational Area and Gender**

Occupational Area	Access			
	00/01		01/02	
	M	F	M	F
Initial Training	22	11	24	6
Administration	-	-	-	-
General Computing, Familiarisation	-	-	-	-
Leisure	-	-	-	-
Social Work & Care	-	-	-	-
Hair & Cosmetics	-	-	-	-
Retailing	-	-	-	-
Storage/Warehousing	-	-	-	-
Food Preparation and Cooking	-	-	-	-
Agriculture	-	-	-	-
Civil Engineering & Construction	-	-	-	-
Building Trades: Brick, Paving	-	-	-	-
Building Trades: Plumbing, Heating	-	-	-	-
Building Trades: Wood, Glazing	-	-	-	-
Motor Vehicle Repair & Maintenance	-	-	-	-
Processing	-	-	-	-
Mechanical Engineering	-	-	-	-
Electrical Engineering	-	-	-	-
<b>Totals</b>	<b>22</b>	<b>11</b>	<b>24</b>	<b>6</b>

Source: Department of Education and Learning (DEL)

## Traineeships

Traineeships offer trainees the opportunity to gain job related skills and a National Vocational Qualification (NVQ) at Level 2. Eligible applicants are school leavers under 18 years of age (or under 22 years of age for young people with a disability).

During 2001/02 there were a total of 137 new start trainees registering for a traineeship place in Dungannon, the vast majority (75%) being male.

The most popular occupational area amongst male trainees was Building Trades; Wood and Glazing (54 Trainees), followed by Building Trades; Brick & Paving (16 Trainees) and Mechanical Engineering (13 Trainees). Between them these three sectors accounted for over 80% of all male trainees (See Table 2.10).

In relation to female trainees on the programme, Social Work and Care (14 Trainees) Administration (8 Trainees) and Hair & Cosmetics (8 Trainees) were the three most popular occupational areas and between them they accounted for almost 80% of all female trainees (See Table 2.10).

**Table 2.10 Breakdown of Trainees in Dungannon On the Jobskills Traineeship Stream by Occupational Area and Gender**

Occupational Area	Traineeship			
	00/01		01/02	
	M	F	M	F
Initial Training	-	2	-	-
Administration	1	18	-	8
Information Science	-	-	1	3
General Computing, Familiarisation	3	6	3	-
Leisure	3	-	-	-
Social Work & Care	1	21	-	14
Hair & Cosmetics	-	9	-	5
Retailing	-	1	1	2
Storage/Warehousing	1	-	1	-
Food Preparation and Cooking	13	1	5	2
Agriculture	2	-	2	-
Civil Engineering & Construction	4	-	-	-
Building Trades: Brick, Paving	20	-	16	-
Building Trades: Plumbing, Heating	9	-	3	-
Building Trades: Wood, Glazing	58	-	54	-
Motor Vehicle Repair & Maintenance	14	-	3	-
Processing	2	1	1	-
Mechanical Engineering	20	-	13	-
Electrical Engineering	1	-	-	-
<b>Totals</b>	<b>152</b>	<b>59</b>	<b>103</b>	<b>34</b>

## Modern Apprenticeships

Modern Apprenticeships are aimed at young people wishing to gain the skills and qualifications needed to become the technicians and managers of the future. Modern Apprenticeships offer structured training leading to NVQ Level 3 and including key skills. Trainees, however, are normally employed and earn a wage set by their employer.

It is possible for applicants to start a Modern Apprenticeship at any stage after leaving full-time education, provided the training is completed by the time the trainee reaches 25 years of age. In practice, the upper age for starting this programme is often set at 21 years of age.

During 2001/02, 141 people in Dungannon started a Modern Apprenticeship Programme, with the overwhelming majority (88%) being male (see Table 2.11). As with Traineeships, the most popular occupational areas were Building Trades; Wood and Glazing, Building Trades; Brick & Paving, Electrical and Mechanical Engineering. Between them, these four sectors accounted for 65% of all trainees (See Table 2.11).

**Table 2.11 Breakdown of Trainees in Dungannon On the Jobskills Modern Apprenticeship Stream by Occupational Area and Gender**

Occupational Area	Modern Apprenticeships			
	00/01		01/02	
	M	F	M	F
Initial Training	-	-	-	-
Administration	-	4	-	3
Reception, Secretarial	-	1	-	1
Information Science	-	-	-	-
Computer Science	-	1	-	-
General Computing, Familiarisation	-	-	-	-
Leisure	-	-	-	-
Social Work & Care	-	1	1	7
Hair & Cosmetics	-	-	-	2
Retailing	1	5	-	-
Storage/Warehousing	-	-	-	-
Food Preparation and Cooking	2	1	5	-
Food Service	-	-	-	3
Agriculture	2	-	2	-
Civil Engineering & Construction	-	-	3	-
Building Trades: Brick, Paving	11	-	14	-
Building Trades: Plumbing, Heating	6	-	9	-
Building Trades: Wood, Glazing	24	-	33	-
Motor Vehicle Repair & Maintenance	2	-	11	-
Processing	1	-	1	-
Mechanical Engineering	28	-	20	1
Electrical Engineering	12	-	25	-
<b>Totals</b>	<b>89</b>	<b>13</b>	<b>124</b>	<b>17</b>

## 2.2.3 Worktrack

Worktrack is targeted at assisting unemployed adults who fall outside the criteria of the New Deal options. By identifying their training and employment aspirations, this programme provides temporary employment focusing on the individual needs of the participant. It is aimed at getting participants into sustainable employment at the earliest opportunity and participation on this programme is for a maximum of 26 weeks. The Dungannon Development Association administers the Worktrack programme throughout the borough.

**Table 2.12 Breakdown of Worktrack Participants by Occupational Area – 2001/02**

	Dungannon	Cookstown	Strabane	Omagh	Fermanagh
Personal Administration	1	-	-	-	1
Administration	13	12	8	-	24
OP Research, Statistical and MGT Support	-	-	-	-	2
Reception, Secretarial	12	-	8	21	-
Computer Science	2	-	-	-	-
General Computing, Familiarisation & DP	2	-	-	-	1
Design	2	1	-	-	-
Teacher Training & Techniques of Instruction	-	-	-	-	22
Provision of Education & guidance in Training & Careers	2	1	-	2	-
Leisure	1	-	-	-	-
Nursing Studies	1	-	-	-	-
Medical and Technical	-	-	-	-	1
Social Work & Care for Special Groups	13	9	13	18	27
Cleaning, Ward Auxiliary & Laundry	1	-	9	-	1
Housekeeping & Domestic Help	-	-	-	10	3
Retailing	5	4	7	1	5
Marketing & Advertising	-	1	-	-	-
Environmental and Public Health	-	-	-	-	3
Food Preparation & Cooking	1	6	4	-	1
Food Service	-	-	22	-	-
Hotel & Inn Keeping	-	-	-	-	1
Horticulture, Gardening	-	-	1	-	19
Transport Operations	-	-	8	-	-
Building Trades: Brisk, Paving & Stone	-	2	-	-	-
Building Trades: Wood, Glazing, Paint, Plaster	-	-	2	8	-
Motor Vehicle Maintenance & Repair	-	-	-	-	1
<b>TOTAL</b>	<b>56</b>	<b>36</b>	<b>82</b>	<b>60</b>	<b>112</b>

Source: Department of Education and Learning (DEL)

As illustrated in Table 2.12 above, during 2001/02, 56 people in Dungannon started a Worktrack programme, with the three most popular occupational areas being Social Work and Care (13 Trainees), Administration (13 Trainees) and Reception/Secretarial (12 Trainees). Between them these three sectors accounted for 68% of all Worktrack trainees in the borough.

## 2.2.4 Enterprise Ulster

Enterprise Ulster provides training that, like Worktrack, is targeted at assisting unemployed adults who fall outside the criteria of the New Deal options.

The main aim of this programme is to provide participants with opportunities to obtain NVQ qualifications at level 2 or above, in order to enhance their chances of attaining sustainable employment. Depending on the needs of the individuals, the programme can last for between six and twelve months.

Just three people with home addresses in the Dungannon and South Tyrone Borough Council area started an Enterprise Ulster Training Programme during 2001/02 (See Table 2.13), with just four Enterprise Ulster Trainees having occupational placements in the Borough (See Table 2.14).

**Table 2.13 Breakdown of Enterprise Ulster New Start Trainees by Occupational Area – 2001/02. (District Council area is determined by the Trainees home address)**

<b>Occupation</b>	<b>Dungannon</b>	<b>Cookstown</b>	<b>Strabane</b>	<b>Omagh</b>	<b>Fermanagh</b>
Construction	-	-	-	1	2
Painting/Decorating	-	-	-	-	4
Joinery	-	-	-	-	-
Auto Mechanics	-	-	-	-	-
Office/IT	-	-	2	3	3
Research Technician	-	-	-	-	1
Horticulture	-	-	1	-	9
Child Care	<b>2</b>	2	-	24	12
Community Care	<b>1</b>	-	1	1	2
Sport & Leisure	-	-	-	-	2
Others	-	-	1	2	14
<b>TOTAL</b>	<b>3</b>	<b>2</b>	<b>5</b>	<b>31</b>	<b>49</b>

*Source: Department of Education and Learning (DEL)*

**Table 2.14 Breakdown of Enterprise Ulster New Start Trainees by Occupational Area – 2001/02. (District Council area is determined by the Trainee’s Placement).**

<b>Occupation</b>	<b>Dungannon</b>	<b>Cookstown</b>	<b>Strabane</b>	<b>Omagh</b>	<b>Fermanagh</b>
Construction	-	-	-	1	2
Painting/Decorating	-	-	-	-	4
Joinery	-	-	-	-	-
Auto Mechanics	-	-	-	-	-
Office/IT	-	-	2	3	3
Research Technician	-	-	-	-	1
Horticulture	-	-	2	-	9
Child Care	<b>3</b>	1	4	17	13
Community Care	<b>1</b>	-	1	1	2
Sport & Leisure	-	-	-	-	2
Others	-	-	1	3	13
<b>TOTAL</b>	<b>4</b>	<b>1</b>	<b>10</b>	<b>25</b>	<b>49</b>

*Source: Department of Education and Learning (DEL)*

## 2.2.5 Support For Future Managers

The **Premiere 2 Programme** offers graduates the opportunity to develop management skills through a combination of structured training, study and work placement.

**Table 2.15 Uptake levels on the Premier2 Programme By District Council Area Oct 2002**

	Dungannon	Cookstown	Strabane	Omagh	Fermanagh
<b>Participants</b>	2	1	-	4	5

Source: Department of Education and Learning (DEL)

The **Rapid Advancement Programme (RAP)** forms part of the Department for Employment and Learning's commitment to address the identified skills gap in the technology and knowledge based sector. It enables Non IT graduates to 'Fast Track' their careers in a new direction within the IT sector.

The 32-week programme, which includes a 15-week placement, provides training in the following disciplines:

- Database design and management
- Programming
- Network management
- IT support
- Web design and development

**Table 2.16 Uptake levels on the Rapid Advancement Programme By District Council Area Oct 2002**

	Dungannon	Cookstown	Strabane	Omagh	Fermanagh
<b>Participants</b>	2	5	1	1	1

Source: Department of Education and Learning (DEL)

The **Business Education Initiative** provides pre final year students with an external perspective through a year long placement in a college or university in the United States. This programme brings together students of Northern Ireland colleges and universities to study business for a year at colleges and universities in the United States. Through study outside their home country these students gain confidence in themselves, an international outlook, and enhanced business and management skills.

During the academic year each student is required to complete a business project related to their experience in the United States and to submit a paper to their home institution upon return.

**Table 2.17 Uptake levels on the Business Education Initiative By District Council Area Oct 2002**

	Dungannon	Cookstown	Strabane	Omagh	Fermanagh
<b>Participants</b>	2	2	5	2	3

*Source: Department of Education and Learning (DEL)*

## **3.0 Labour Markets**

This section provides an outline of the structure and trends in employment and unemployment in the Dungannon and South Tyrone Borough Council area. Aspects of the local labour market structures include:

- Employment by Industrial Sector
- Occupational Structure
- Unemployment Rates and Trends

Note: This section does not include employment within agriculture, which is dealt with separately in Section 8.0.

### **3.1 Employees in Employment**

#### **3.1.1 Employment Trends**

Between 1989 and 1999 the number of available jobs in the Dungannon and South Tyrone area increased by 33% (see Table 3.1). In fact, over this period, Dungannon recorded the 6<sup>th</sup> highest percentage increase in available jobs of all 26 district councils in Northern Ireland, with much of this new jobs creation arising from opportunities within the borough's small and medium sized companies.

**Table 3.1 Percentage Increase in Jobs by District Council Area - 1989-1999  
(Excluding Belfast City Council Area)**

Rank	Council	Percentage Increase in Jobs
1	Antrim	70
2	Cookstown	40
3	Carrickfergus	37
4	Ballymoney	35
5	Limavady	34
<b>6</b>	<b>Dungannon</b>	<b>33</b>
7	Newry/Mourne	31
8	N.Down	30
9	Derry	29
10	Lisburn	28
11	Fermanagh	27
12	Moyle	26
13	Ballymena	25
13	Armagh	25
15	Down	23
15	Strabane	23
15	Omagh	23
15	Banbridge	23
19	Castlereagh	22
20	Craigavon	21
21	Magherafelt	20
22	Newtownabbey	19
22	Coleraine	19
24	Larne	11
25	Ards	5

Note: The Council Area with a rank position of 1 has had the highest rate of increase in jobs and the council with a rank position of 25 the lowest rate of increase in the number of new jobs.

### 3.1.2 Employment by Sector

The service sector plays a major role in the local economy (see Table 3.2). According to the 1999 Northern Ireland Census of Employment, 10,712 people are employed in service sector jobs. This represents approximately 65% of the working population of the borough (excluding agriculture), with marginally more people employed in the public sector than in the private sector. Whilst these figures confirm the service sector as the predominant employer in the district, its impact on the local economy is far less pronounced than across Northern Ireland as a whole, where around 75% of the labour force is involved in service sector activities.

In contrast the percentage of people employed in manufacturing related jobs is significantly higher in the Dungannon area than across Northern Ireland (see Table 3.2). In 1999 4,711 people were employed in manufacturing related activities, accounting for almost 30% of the borough's working population (excluding agriculture) as compared to just 17% across Northern Ireland and 23% for County Tyrone as a whole.

**Table 3.2 Employees in Employment (ex Agriculture)**

	Dungannon		Tyrone		NI
<b>Manufacturing</b>	<b>4,711</b>	<b>28.6</b>	<b>11,457</b>	<b>23%</b>	<b>18%</b>
<b>Construction</b>	<b>770</b>	<b>4.7%</b>	<b>3,538</b>	<b>7%</b>	<b>5%</b>
Services – Private Sector	4,984	30.3%	15,748	32%	40%
Services – Public Sector	5,728	34.8%	17,656	36%	35%
<b>Services Total</b>	<b>10,712</b>	<b>65.1%</b>	<b>33,404</b>	<b>68%</b>	<b>75%</b>
<b>TOTAL</b>	<b>16,446</b>		<b>49,119</b>		

*Source: NI Census of Employment Sept 1999*

Dungannon has a broad manufacturing base. Its predominant sectors include Engineering, Food Production and Clothing and Textiles. Between them these three sectors account for over 62% of total employment in manufacturing across the Borough (see table 3.3).

Whilst the vast majority of the borough's 2,695 Vat registered businesses employ less than 10 people, a number of Northern Ireland's leading manufacturing firms have located production facilities within the council area. These include two of Northern Ireland's top 20 businesses; Moy Park Ltd (poultry processor) and Powerscreen

International (manufacturer of crushing and screening plant and equipment) which is part of the multi-national TEREX organisation and whose headquarters are in the borough itself.

Other key manufacturing employers in the borough include Dungannon Meats (meat processor), Moygashel Ltd (apparel and furnishing fabrics), McAvoy Group (portable and modular buildings), Tyrone Crystal (designers and manufacturers of cut crystal), Tyrone Brick (brick manufacturers), Viper International (manufacturer of crushing and screening plant and equipment), Metso Minerals (manufacturer of crushing and screening plant and equipment) and Finlay Block Making Equipment (manufacturer of batching plant and mobile and stationary block machines).

**Table 3.3 Manufacturing Employment by Industrial Sector - 1999**

	Total Manufacturing Employees	Engineering	Food	Textiles & Clothing	Other Manufacturing
<b>Dungannon</b>	<b>4711</b>	<b>19.2%</b>	<b>31%</b>	<b>12.4%</b>	<b>37.4%</b>
Cookstown	1854	17%	36.1%	15.7%	31.2%
Omagh	1889	19.6%	24.6%	33.8%	22.0%
Strabane	3003	2.8%	7.2%	80.3%	9.5%
Fermanagh	3814	7.2%	15.7%	18.9%	58.2%
N Ireland	105,810	28.7%	18.8%	18.4%	34.1%

### 3.1.3 Employment Profile by Gender

As illustrated in Table 3.4, whilst male employment is primarily full-time, female employment tends to be more equally balanced between part-time and full-time. Approximately 48% of female employees in the district are in full-time employment with the remaining 52% in part-time work.

An important feature of the employment profile of Dungannon, is that the vast majority of employees in the manufacturing and construction sectors are male with full-time jobs. Female employees in the manufacturing labour force, account for just 28% of total manufacturing employees, and over 30% of these female employees are employed on a part-time basis.

With regard to service sector employment in the borough, although female employees account for approximately 63% of the total service sector labour force, there are more male employees with full-time jobs than female employees.

**Table 3.4 Part-Time v Full Time Employment by Gender, Dungannon 1999  
(ex Agriculture)**

	<b>Male Full-Time</b>	<b>Male Part-Time</b>	<b>Female Full Time</b>	<b>Female Part Time</b>
<b>Manufacturing</b>	3,023	362	914	412
<b>Construction</b>	661	41	47	21
<b>Services</b>	3,202	792	2,954	3,764
<b>TOTAL</b>	6,684	1,195	3,915	4,197

*Source: NI Census of Employment Sept 1999*

## 3.2 Unemployment in Dungannon

### 3.2.1 Unemployment Trends

There were 684 people unemployed in the Dungannon and South Tyrone Borough in September 2002, approximately 3% of the economically active population.

As illustrated in Table 3.5 below, the overall trend over the past decade has been one of large decreases in unemployment right across Northern Ireland. In line with these trends, the unemployment rate in Dungannon has fallen from 17.6%, in 1991 to its current level of approximately 3.1% and is now well below the Northern Ireland average of 4.7%.

It must be noted, when reviewing the information relating to trends in unemployment over the past decade, that there have been two changes that have affected the claimant count unemployment series in Northern Ireland over this period. The first of these was a new system for compiling the statistics, which was introduced in 1994 and removed approximately 1,500 people from the Northern Ireland live register. The second was the introduction of the Job Seekers allowance in 1997, which led to a significant reduction in the claimant count. Nonetheless, even taking these two factors into account, there have been significant reductions in the levels of unemployment across the province

**Table 3.5 Unemployment Trends 1991 - 2002**

	1991	1996	Sept - 2002
<b>Dungannon</b>	<b>17.6</b>	<b>15.0</b>	<b>3.1</b>
Omagh	16.9	14.5	5.5
Strabane	23.6	17.0	9.5
Fermanagh	14.9	14.4	6.7
<b>Northern Ireland</b>	<b>12.9</b>	<b>10.7</b>	<b>4.7</b>

Source: DETI

### 3.2.2 Unemployment By Duration

Based on Claimant Count statistics released in September 2002, the majority (62.6%) of those registered as being unemployed in Dungannon at that time, had been so for less than six months.

In terms of long term unemployment, whilst 20% of Dungannon's unemployed had been so for more than one year, with 5% having been unemployed for three years or more, the levels of long term unemployment in general is lower in Dungannon than across Northern Ireland as a whole. Furthermore, in terms of the Tyrone and Fermanagh region, after Cookstown (which has the lowest levels of long-term unemployment overall) the levels of long-term unemployment are significantly lower in Dungannon than in Omagh (26%), Strabane (29.7%) and Fermanagh (32.4%)

**Table 3.6 Unemployment by Duration – Sept 2002**

	Dungannon	Cookstown	Omagh	Strabane	Fermanagh	N Ireland
Duration						
1 to 26 wks	<b>428</b>	322	656	621	844	20657
26 to 52wks	<b>119</b>	81	225	284	331	7288
1 to 3yrs	<b>103</b>	60	213	278	354	6371
3yrs plus	<b>34</b>	8	96	104	211	2101
Total	<b>684</b>	471	1190	1287	1740	36417

Source: Northern Ireland Labour Market Statistics 2002- DETI

**Table 3.7 Percentage Breakdown of Unemployment by Duration – Sept 2002**

	Dungannon	Cookstown	Omagh	Strabane	Fermanagh	N Ireland
Duration						
1 to 26 wks	<b>62.6</b>	68.4	55.1	48.3	48.5	56.7
26 to 52wks	<b>17.4</b>	17.2	18.9	22.1	19.0	20.0
1 to 3yrs	<b>15.1</b>	12.7	17.9	21.6	20.3	17.5
3yrs plus	<b>5.0</b>	1.7	8.1	8.1	12.1	5.8

Source: Northern Ireland Labour Market Statistics 2002 - DETI

### 3.2.3 Unemployment By Age

As illustrated in Tables 3.8 and 3.9 below, almost 60% of those unemployed in Dungannon are between the ages of 17 and 34, with those aged 17 to 24 being the age grouping with largest proportion of Dungannon's unemployed population.

**Table 3.8 Breakdown of Unemployment By Age – Sept 2002**

	Dungannon	Cookstown	Omagh	Strabane	Fermanagh	N Ireland
Age						
Under 17	<b>0</b>	1	1	2	2	14
17 to 24	<b>249</b>	167	388	412	486	11890
25 to 34	<b>160</b>	130	278	308	386	9011
35 to 54	<b>215</b>	137	423	462	654	12446
55 plus	<b>60</b>	36	100	103	212	3056
Total	<b>684</b>	471	1190	1287	1740	36417

Source: Northern Ireland Labour Market Statistics 2002 - DETI

**Table 3.9 Percentage Breakdown of Unemployment By Age – Sept 2002**

	Dungannon	Cookstown	Omagh	Strabane	Fermanagh	N Ireland
Age						
Under 17	<b>0</b>	0	0	0	0	0
17 to 24	<b>36</b>	35	33	32	28	33
25 to 34	<b>23</b>	28	23	24	22	25
35 to 54	<b>31</b>	29	36	36	38	34
55 plus	<b>9</b>	8	8	8	12	8

### 3.2.4 Unemployment By Usual Occupation

As illustrated in Table 3.10 almost three quarters of Dungannon's unemployed population are male with 45% of these male unemployed indicating that their usual occupation is either, Labouring (13.5%), Construction (13.4%), Transport (8%), Agriculture (5%) or Skilled (4.6%). It is worth noting that 35% of unemployed males in the borough are not associated with an identified occupational area.

In terms of female unemployed, almost 40% have previously been employed in either a clerical (14 %), health (11%) sales (9%) or teaching position, with 43% not being associated with an identified occupational area.

**Table 3.10 Number of Unemployed claimants in Dungannon by Usual Occupation – Feb 2002**

	Female	Male	Total
Health.	20	1	21
Teaching.	10	7	17
Construction.	0	64	64
Transport.	1	38	39
Clothing.	2	1	3
Agriculture.	1	24	25
Business	2	3	5
Law.	1	5	6
Food.	1	10	11
Catering.	9	12	21
Clerical.	26	12	38
Labouring.	5	65	70
Managerial.	3	4	7
Engineering.	0	4	4
Miscellaneous	5	17	22
Skilled.	1	22	23
Sales.	17	10	27
Computing.	1	11	12
Other/NK	79	168	247
Total	184	478	662

*Source: Northern Ireland Labour Market Statistics 2002 – DETI*

## 4.0 Enterprise

### 4.1 VAT Registered Businesses

There are 2,695 VAT registered businesses located in the Dungannon and South Tyrone Borough Council area (see Table 4.1). Approximately 48% of these companies are categorised as agricultural based businesses, as compared to just 33% for Northern Ireland as a whole.

Other key sectors in the borough include construction, retail and manufacturing. Between them, the agricultural, construction, retailing and manufacturing sectors account for over 76% of all VAT registered businesses in Dungannon. Across Northern Ireland, these same four sectors account for around 65% of all VAT registered businesses.

**Table 4.1 Number of VAT based enterprises by broad Industry group 2001**

	Dungannon	Cookstown	Strabane	Omagh	Fermanagh	N. Ireland
<b>Agriculture</b>	<b>1,305</b>	885	845	1,510	1,985	17,735
<b>Production</b>	<b>235</b>	140	90	130	130	3,970
<b>Construction</b>	<b>275</b>	230	185	315	290	6,900
<b>Motor Trade</b>	<b>100</b>	95	60	95	120	2,275
<b>Wholesale</b>	<b>125</b>	65	50	85	105	3,280
<b>Retail</b>	<b>245</b>	150	180	220	315	6,420
<b>Hotel/Catering</b>	<b>105</b>	70	80	85	130	2,935
<b>Transport</b>	<b>95</b>	70	35	35	55	1,875
<b>Post/Telecom</b>	<b>5</b>	-	-	5	10	200
<b>Finance</b>	<b>5</b>	-	-	5	5	185
<b>Property/Business</b>	<b>140</b>	90	55	150	135	5,835
<b>Education</b>	<b>5</b>	-	-	5	10	125
<b>Health</b>	<b>10</b>	-	5	5	20	240
<b>Public Admin</b>	<b>45</b>	25	30	40	65	1,705
<b>TOTAL</b>	<b>2,695</b>	<b>1,815</b>	<b>1,615</b>	<b>2,685</b>	<b>3,370</b>	<b>53,675</b>

Source: Northern Ireland Annual Abstract of Statistics 2001 – NISRA

## 4.2 New Businesses Registering for VAT

Between 1996 and 2000 there has been a general decline in the number of new businesses that have been registering for VAT each year across Northern Ireland (see Tables 4.2 and 4.3). In 2000, 3,460 firms registered for VAT in Northern Ireland, 7% lower than in 1996 when there were 3,715 new VAT registrations (See Table 4.2). On average, the number of new businesses registering for VAT across the province has been declining at a rate of 1.75% per annum over this period.

In Dungannon however, the rate of decline appears to be running at a more than twice that for Northern Ireland as a whole (see Table 4.3). In 2000, 145 firms registered for VAT in the borough, 15% less than in 1996 when there were 170 new VAT registrations. It is worth pointing out, however, that whilst Dungannon has exhibited a steady decline in the number of new VAT registrations year on year over this five-year period, other neighbouring council areas like Cookstown, Omagh and Strabane have experienced more dramatic year on year changes, with a large number of VAT registrations one year being followed by a dramatic drop the following year.

**Table 4.2 Number of new businesses registering for VAT**

	1996	1997	1998	1999	2000	1996 - 2000
<b>Dungannon</b>	<b>170</b>	<b>170</b>	<b>160</b>	<b>165</b>	<b>145</b>	<b>-15%</b>
Cookstown	115	125	95	105	100	<b>-13%</b>
Strabane	80	95	95	105	95	<b>19%</b>
Omagh	165	160	130	145	165	<b>0%</b>
Fermanagh	185	210	190	160	160	<b>-14%</b>
<b>N Ireland</b>	<b>3,715</b>	<b>3,845</b>	<b>3,650</b>	<b>3,565</b>	<b>3,460</b>	<b>-7%</b>

**Table 4.3 Year on Year % Change in the number of new businesses registering for VAT**

	1996-97	1997-98	1998-99	1999-00
<b>Dungannon</b>	<b>0%</b>	<b>-6%</b>	<b>3%</b>	<b>-12%</b>
Cookstown	9%	-24%	11%	-5%
Strabane	19%	0%	11%	-10%
Omagh	-3%	-19%	12%	14%
Fermanagh	14%	-10%	-16%	0%
<b>N Ireland</b>	<b>3%</b>	<b>-5%</b>	<b>-2%</b>	<b>-3%</b>

## 4.3 Invest NI

Invest NI is Northern Ireland's new economic development agency. Established in April 2002 under the Industrial Development Act (Northern Ireland) 2002, it is a Non-Departmental Public Body (NDPB) operating under a Board, and it is charged with the responsibility of carrying out the functions previously undertaken separately by:

- The Industrial Development Board (IDB)
- The Local Enterprise Development Unit (LEDU),
- The Industrial Research and Technology Unit (IRTU),
- Business Support Division of the Department of Enterprise, Trade and Investment (DETI)
- The business support functions of the Northern Ireland Tourist Board (NITB).

Invest NI's corporate mission is:

**to accelerate economic development in Northern Ireland, applying expertise and resources to encourage innovation and achieve business success, increasing opportunity for all within a renewed culture of enterprise.**

This section details key statistics relating to the activities of Invest Northern Ireland in the Dungannon and South Tyrone Borough Council area and the wider Tyrone and Fermanagh region.

### 4.3.1 Invest NI Clients by Sector

From Table 4.4 it can be seen that in March 2001 there were a total of 121 Invest NI client companies located in the Dungannon and South Tyrone Borough council area, with food, engineering, glass and concrete being the key sectors. In fact, in terms of the SIC descriptions the top four classifications which, between them, account for almost 60% of all Invest NI supported companies in the Borough are Machinery and Equipment (24), Food, Drink and Tobacco (16), Fabricated Metal Products (15) and Glass, Ceramic and Concrete Products (14).

Dungannon has a significantly higher concentration of Invest NI clients than each of the other district councils in the Tyrone and Fermanagh region, accounting for almost 6% of the total number of Invest NI clients across Northern Ireland.

**Table 4.4 Number of Invest NI clients by sector – March 2001**

<b>Sector (SIC Description)</b>	<b>D/gannon</b>	<b>C/town</b>	<b>Omagh</b>	<b>Strabane</b>	<b>F/managh</b>	<b>N. Ireland</b>
Business & Finance	<b>5</b>	3	8	3	2	161
Chem/Pharmaceuticals	<b>1</b>	0	2	0	0	64
Computer Services	<b>3</b>	2	1	2	2	154
Construction Services	<b>4</b>	4	2	3	1	91
Electrical, Electronic Optical	<b>1</b>	4	3	0	2	129
Fabricated Metal	<b>15</b>	13	4	1	4	155
Food, Drink & Tobacco	<b>16</b>	11	6	7	5	275
Glass, Ceramic Concrete	<b>14</b>	5	0	0	11	99
Machinery and Equip.	<b>24</b>	4	7	1	1	123
Paper, Print & Pub.	<b>0</b>	1	1	0	1	81
Rubber & Plastics	<b>1</b>	3	1	2	4	78
Textiles,	<b>5</b>	0	4	8	4	148
Tourism Services	<b>0</b>	0	0	0	0	1
Transport Equipment	<b>5</b>	0	2	1	3	57
Wood & Wood Pds	<b>6</b>	6	2	1	3	72
Other Manufacturing	<b>7</b>	6	1	5	5	124
Other Services	<b>14</b>	5	4	3	11	228
<b>Total Companies</b>	<b>121</b>	67	48	37	59	2040

*Source: Invest NI*

### **4.3.2 Employment**

It is not surprising that, as there are significantly more Invest NI client companies in the Dungannon and South Tyrone Borough there are also significantly more people employed within this group of companies, when compared to the other district council areas in the Tyrone and Fermanagh region.

In total there were over 5,000 employees working for Invest NI client companies in the Dungannon area in March 2001 (see Table 4.5). This represents 4.7% of the total labour force employed by Invest NI clients across Northern Ireland.

Generally speaking Invest NI clients in Dungannon tend to be smaller, in terms of the average number of employees per company when compared to the wider Northern Ireland average. In Dungannon the average number of employees per company across all sectors is 41, whereas for Northern Ireland as a whole it is 52 (see Table 4.6).

This aside, Dungannon does have a number of major employees including two of Northern Ireland's top 20 businesses, Moy Park Ltd (poultry processor) and Powerscreen International (manufacturer of crushing and screening plant and equipment) which is part of the multi-national TEREX organisation and whose head quarters are in the borough itself.

Other key employers include; Dungannon Meats (meat processor), Moygashel Ltd (apparel and furnishing fabrics), McAvoy Group (portable and modular buildings), Tyrone Crystal (designers and manufacturers of cut crystal), Tyrone Brick (brick manufacturers), Viper International (manufacturer of crushing and screening plant and equipment), Metso Minerals (manufacturer of crushing and screening plant and equipment) and Finlay Block Making Equipment (manufacturer of batching plant and mobile and stationary block machines).

**Table 4.5 Employment in Invest NI Client Companies by sector- March 2001**

Sector (SIC Description)	D/gannon	C/town	Omagh	Strabane	F/managh	N Ireland
Business & Finance	26	19	65	22	2	4798
Chem/Pharmaceuticals	2	0	13	0	0	3712
Computer Services	12	15	3	25	14	3853
Construction Services	38	50	19	96	4	2281
Electrical, Electronic Optical	10	47	44	0	141	13052
Fabricated Metal	298	292	24	36	203	4599.5
Food, Drink & Tobacco	1979	585	339	199	298	17684
Glass, Ceramic Concrete	755	24	0	0	1282	4660
Machinery and Equip.	735	377	341	0	6	5892.5
Paper, Print & Pub.	0	1	20	0	22	3289
Rubber & Plastics	139	20	12	93	243	5689
Textiles,	403	0	481	2090	202	12596
Tourism Services	0	0	0	0	0	51
Transport Equipment	135	0	17	1	57	11799
Wood & Wood Pdts	131	138	68	15	261	2250
Other Manufacturing	117	143	3	44	61	2667
Other Services	222	148	50	5	312	6411
<b>Total Employees</b>	<b>5002</b>	1859	1499	2626	3108	105284

Source: Invest Northern Ireland

**Table 4.6 Average Number of Employees per Company – March 2001**

Sector (SIC_Description)	Dungannon	Northern Ireland
Business & Financial Services	5	30
Chemicals, Pharmaceuticals & Man-ma	2	58
Computer Services	4	25
Construction Services	10	25
Electrical, Electronic & Optical Equip	10	101
Fabricated Metal Products & Metal Fin	20	30
Food, Drink & Tobacco	124	64
Glass, Ceramic and Concrete Products	54	47
Machinery and Equipment	31	48
Paper Products, Printing & Publishing	0	41
Rubber & Plastic Products	139	73
Textiles, Clothing & Leather	81	85
Tourism Services	0	51
Transport Equipment	27	207
Wood & Wood Products	22	31
Other Manufacturing	17	22
Other Services	16	28
<b>All Companies</b>	<b>41</b>	<b>52</b>

### 4.3.3 Exporting

Sales by Invest NI clients in Dungannon were valued at £503.89m between April 2000-March 2001 (see Table 4.7). Sales of food products accounted for almost 50% of total sales with over 80% of food sales being to customers outside of Northern Ireland.

Other key sectors generating significant sales turnover included; Machinery and Equipment; Glass, Ceramics and Concrete; Textiles; Fabricated Metal Products; Clothing and Leather; and other Services, which between these sectors accounted for a further 44% of total sales.

It is interesting to note that whilst 76% of sales by Dungannon based Invest NI clients are to customers outside of Northern Ireland (4% higher than the Northern Ireland average), just 21% of sales are to markets beyond the United Kingdom, compared to a Northern Ireland average of 40%. In fact, Dungannon has the lowest level of export sales when compared to the other council areas in the Tyrone and Fermanagh region (see Table 4.8).

**Table 4.7 Breakdown of the Sales of INI Clients' in Dungannon By Sector – 2000/01**

	Sales (£m)	External Sales (£m)	Exports (£m)
Business & Financial Services	8.66	3.91	3.69
Chemicals, Pharmaceuticals & Man-made Fibres	0.20	0.10	0.06
Computer Services	1.65	0.90	0.88
Construction Services	1.75	0.78	0.60
Electrical, Electronic & Optical Equipment	0.25	0.06	0.06
Fabricated Metal Products & Metal Finishing	13.44	8.87	2.67
Food, Drink & Tobacco	249.61	201.76	20.20
Glass, Ceramic and Concrete Products	63.17	23.45	13.39
Machinery and Equipment	76.12	67.43	51.82
Paper Products, Printing & Publishing	0.00	0.00	0.00
Rubber & Plastic Products	7.35	6.08	1.46
Textiles, Clothing & Leather	23.41	22.78	1.91
Tourism Services	0.00	0.00	0.00
Transport Equipment	2.71	1.69	1.67
Wood & Wood Products	3.71	1.53	0.52
Other Manufacturing	5.88	2.44	1.83
Other Services	45.98	39.87	3.52
<b>Total Sales</b>	<b>503.89</b>	<b>381.64</b>	<b>104.27</b>

Source: Invest Northern Ireland

Notes: External Sales relate to all sales outside Northern Ireland.

Export Sales relate to External Sales less sales to Great Britain

**Table 4.8 External Sales as a percentage of Total Sales**

	<b>External Sales</b>	<b>Exports</b>
<b>Dungannon</b>	<b>76%</b>	<b>21%</b>
Cookstown	62%	26%
Omagh	81%	37%
Strabane	74%	34%
Fermanagh	63%	56%
NI	72%	40%

*Source: Invest Northern Ireland*

#### 4.3.4 Invest NI Led Investment Visits

In recent years the number of visits by potential investors to Dungannon, which are led by Invest NI (and formerly the Industrial Development Board), has been declining, as it has in each of the other council areas in the region with the exception of Omagh (see table 4.9). In fact during the past year there hasn't been a single visit to the borough, with only nine such visits having been brought to the Tyrone and Fermanagh region.

**Table 4.9 Invest NI led visits by potential investors to District Council Areas**

	1997/98	1998/99	1999/00	2000/01	2001/02
<b>Dungannon</b>	<b>3</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>0</b>
Cookstown	9	3	4	1	0
Omagh	5	5	8	8	7
Strabane	2	7	4	3	2
Fermanagh	5	2	6	5	0
<b>Total Visits - Tyrone and Fermanagh</b>	<b>24</b>	<b>18</b>	<b>23</b>	<b>18</b>	<b>9</b>
<b>Total Visits - Northern Ireland</b>	<b>260</b>	<b>299</b>	<b>256</b>	<b>268</b>	<b>173</b>

*Source: Invest Northern Ireland*

#### 4.3.5 Financial Assistance Provided by Invest NI

Between 1998/99 and 2000/01 there has been a significant reduction in the levels of financial support from Invest NI (and the former agencies including LEDU and IDB) to companies in Dungannon (see Table 4.10). This reflects the fact that total investment by Invest NI clients in the borough has reduced over this period (see Table 4.11).

Despite this Dungannon, as a council area, tends to benefit from higher levels of Invest NI support than each of the other council areas in the region. This could be reflective of the fact that Dungannon has significantly higher numbers of Invest NI client companies to begin with, generating higher levels of private sector investment overall.

**Table 4.10 Invest NI Financial Support to Client Companies from 1998/99 -2000/01**

<b>DCA</b>	<b>98/99 (£m)</b>	<b>99/00 (£m)</b>	<b>00/01 (£m)</b>	<b>Total for 3 Years (£m)</b>
<b>Dungannon</b>	<b>9.40</b>	<b>3.53</b>	<b>2.65</b>	<b>15.58</b>
Cookstown	1.21	0.86	1.14	3.21
Omagh	1.60	1.25	1.12	3.97
Strabane	4.94	0.61	1.10	6.65
Fermanagh	1.47	7.54	2.22	11.23
<b>Total Offers Tyrone and Fermanagh</b>	<b>18.62</b>	<b>13.78</b>	<b>8.23</b>	<b>40.63</b>
<b>Total Offers Northern Ireland</b>	<b>102.84</b>	<b>117.99</b>	<b>107.72</b>	<b>328.55</b>

Source: Invest Northern Ireland

Note: 2001/02 Figures not yet available.

**Table 4.11 Total Investment by INI Clients (£m) as a result of INI activity (Figures Include INI investment)**

<b>DCA</b>	<b>98/99 (£m)</b>	<b>99/00 (£m)</b>	<b>00/01 (£m)</b>	<b>Total for 3 Years (£m)</b>
<b>Dungannon</b>	<b>45.69</b>	<b>18.25</b>	<b>17.85</b>	<b>81.78</b>
Cookstown	6.07	4.29	5.69	16.04
Omagh	7.68	6.24	5.61	19.53
Strabane	17.20	3.05	4.81	25.06
Fermanagh	8.34	32.70	12.99	54.03
<b>Total Investment Tyrone and Fermanagh</b>	<b>84.98</b>	<b>64.52</b>	<b>46.94</b>	<b>196.44</b>
<b>Total Investment Northern Ireland</b>	<b>453.72</b>	<b>584.94</b>	<b>575.21</b>	<b>1,613.87</b>

Source: Invest Northern Ireland

Note: Investment by ex-LEDU is calculated as Assistance to LEDU projects multiplied by 5.

### 4.3.6 Invest NI Industrial Land Holdings

At present the Invest NI hold 95 acres of industrial land in the Dungannon and South Tyrone Borough Council area an increase of 44 acres the previous year.

Currently 22 acres of this land is available for leasing.

**Table 4.12 INI Industrial Land Holdings (Acres) By District Council Area**

	1997/98	1998/99	1999/00	2000/01	2001/02
<b>Dungannon</b>	<b>51</b>	<b>51</b>	<b>51</b>	<b>51</b>	<b>95</b>
Cookstown	37	38	38	38	38
Omagh	47	47	47	47	47
Strabane	31	31	31	31	31
Fermanagh	126	126	126	126	126
<b>Total Land Holdings Tyrone and Fermanagh</b>	<b>292</b>	<b>293</b>	<b>293</b>	<b>293</b>	<b>337</b>
<b>Total Land Holdings Northern Ireland</b>	<b>2,824</b>	<b>2,795</b>	<b>2,778</b>	<b>2,823</b>	<b>2,848</b>

*Source: IDB Annual Report and Accounts 1999-2000*

**Table 4.13 INI Land Available for Leasing (Acres)**

	1997/98	1998/99	1999/00	2000/01	2001/02
<b>Dungannon</b>	<b>26</b>	<b>26</b>	<b>26</b>	<b>22</b>	<b>22</b>
Cookstown	16	8	5	6	6
Omagh	36	31	31	22	17
Strabane	15	15	16	10	5
Fermanagh	82	82	62	45	45
<b>Total Tyrone and Fermanagh</b>	<b>175</b>	<b>162</b>	<b>140</b>	<b>105</b>	<b>95</b>
<b>Total Northern Ireland</b>	<b>1,311</b>	<b>1,326</b>	<b>1,246</b>	<b>1,084</b>	<b>1,044</b>

*Source: IDB Annual Report and Accounts 1999-2000*

## 5.0 Earnings

This section provides details of earnings based on the findings of the Northern Ireland New Earnings Survey 2001, Sub NI data. It is important to note that when reviewing the tables in this section, the following comments should be taken into account:

1. Earnings is a measure of the money people receive in return for work done. It includes salaries and bonuses but does not include non-monetary perks such as benefits in kind. This differs from income, which is the amount of money received from all sources. Income includes interest from building society accounts, dividends from shares, benefit receipts, trust funds, etc
2. Unless otherwise stated, the average earnings figures in this booklet relate to:
  - Gross pay (including basic pay, overtime pay, commissions, shift pay, profit related pay and bonuses).
  - Before statutory deductions (PAYE, National Insurance etc.)
  - Full-time employees (those working more than 30 hours each week excluding overtime and main meal breaks – 25 hours for teachers and academics)
  - Excluding those whose pay has been affected by absence
3. The average earnings estimates provided in this section are subject to standard error of the mean and caution should be used when drawing references from such estimates. For more detailed information and analysis the reader should refer directly to the Northern Ireland New Earnings Survey 2001.

Based on the findings of the Northern Ireland New Earnings Survey 2001, Sub NI data, the estimated average gross weekly salary for a male in Dungannon is £349.20, this being equivalent to 85% of the Northern Ireland average, whilst that for a female is £292.60, 91% of the Northern Ireland average (see Table 5.1).

**Table 5.1 Average Gross Weekly Earnings**

	Male	As a % of NI	Female	As a % of NI
<b>Dungannon</b>	<b>349.20</b>	<b>85%</b>	<b>292.60</b>	<b>91%</b>
Cookstown	291.20	71%	300.30	93%
Omagh	<b>332.20</b>	81%	<b>264.00</b>	82%
Strabane	355.80	87%	337.60	105%
Fermanagh	389.40	95%	344.50	107%
Northern Ireland	<b>409.20</b>		<b>322.20</b>	

Source: Northern Ireland New Earnings Survey 2001 – Sub NI Data – NISRA

Salaries paid to Non manual male employees in the Borough tend to be significantly higher than those paid to their manual counterparts, this being typical of wage rates across Northern Ireland as a whole (see Table 5.2).

**Table 5.2 Average Gross Weekly Earnings of Male Employees**

	Manual	As a % of NI	Non-Manual	As a % of NI
<b>Dungannon</b>	<b>292.20</b>	<b>92%</b>	<b>450.80</b>	<b>90%</b>
Cookstown	265.70	84%	*	
Omagh	266.60	84%	449.70	90%
Strabane	243.90	77%	420.50	84%
Fermanagh	310.20	98%	477.80	96%
Northern Ireland	317.50		499.60	

Source: Northern Ireland New Earnings Survey 2001 – Sub NI Data - NISRA

**Table 5.3 Average Gross Weekly Earnings of Female Employees**

	Non-Manual	As a % of NI
<b>Dungannon</b>	<b>308.30</b>	<b>90%</b>
Cookstown	324.60	94%
Omagh	365.70	106%
Strabane	296.90	86%
Fermanagh	365.10	106%
Northern Ireland	344.10	
	Non-Manual	As a % of NI

Source: Northern Ireland New Earnings Survey 2001 – Sub NI Data - NISRA

Note: Due to an insufficient sample size, it was not possible to determine a reasonably accurate average weekly earning for female manual employees within the district council areas listed above.

It is also interesting to note, that whilst average salaries paid to male employees in the private sector in the Dungannon area are higher than those paid to private sector workers in each of the other four district council areas in the Tyrone and Fermanagh region, salaries paid to public sector male workers in Dungannon are lower than in each of the other four district council areas (see table 5.4). Despite this, public sector employees in Dungannon continue to be paid higher salaries than those in the private sector.

**Table 5.4 Average Gross Weekly Earnings of Public and Private Sector Employees**

	Public	As a % of NI	Private	As a % of NI
<b>Dungannon</b>	<b>373.50</b>	<b>89%</b>	<b>323.40</b>	<b>93%</b>
Cookstown	390.10	93%	258.90	74%
Omagh	401.80	95%	275.30	79%
Strabane	425.80	101%	263.80	76%
Fermanagh	479.10	114%	297.00	85%
Northern Ireland	420.90		348.20	

Source: Northern Ireland New Earnings Survey 2001 – Sub NI Data - NISRA

## 6.0 Transport and Telecommunications

### 6.1 Transport

Dungannon's position at the heart of Northern Ireland, with its excellent road network, allows for fast access to Northern Ireland's main towns, seaports and airports. Belfast City, with its seaport and two airports, is less than a one-hour drive from Dungannon. The Port of Larne on the Antrim Coast is less than ninety minutes away, with Derry City, its port and airport, also being approximately a one and a half hour drive. Dungannon has also fast access to the port of Warrenpoint, with Dublin being around two hours driving time away.

Two main road routes service the district. The M1 is the main road route linking Dungannon to Craigavon, Lisburn and Belfast to the East, with the A4 linking the town to Omagh, Fermanagh, Derry, Donegal and Sligo to the West. The A29 passes through the town and links Dungannon to Cookstown, Ballymena, and Coleraine to the North and Armagh, Newry, Monaghan and Dublin to the South.

**Table 6.1 Road Length by Type of Road per District Council Area**

	Dungannon	Cookstown	Omagh	Strabane	Fermanagh
<b>Total Road Length in Kms</b>	<b>1529.69</b>	892.09	1863.69	1353.42	2047.03
<b>Road Type as a % Of Total Road Length</b>					
Motorway	<b>1%</b>	0%	0%	0%	0%
Dual Carriageway	<b>0%</b>	0%	0%	0%	0%
Single Carriageway	<b>8%</b>	4%	5%	3%	11%
Class II	<b>11%</b>	15%	12%	13%	12%
Class III	<b>22%</b>	22%	24%	22%	21%
Unclassified	<b>59%</b>	59%	60%	62%	56%

*Source: Department for Regional Development*

Whilst public transport within the borough is restricted to bus and coach services, Translink provide a number of express services linking Dungannon with other neighbouring district town's including Cookstown, Omagh, Enniskillen and Portrush. The company also provides 15 return trips to Belfast, one direct service to Dublin and four to Derry. Local provision, however, tends to be focused on the twice-daily transport needs of Dungannon's second and third level Schools and Colleges.

The private car dominates local transport in Dungannon and throughout the region with 76% of households in the Southern Health Board Area (which includes Dungannon and South Tyrone Borough Council Area) having access to a car (see Table 6.2).

**Table 6.2 Household by Number of Cars By Health Board Region – 1999/2000**

	<b>Southern</b>	<b>Western</b>	<b>Northern</b>	<b>Eastern</b>	<b>Northern Ireland</b>
<b>No Cars</b>	<b>24%</b>	<b>31%</b>	<b>24%</b>	<b>34%</b>	<b>30%</b>
<b>One Car</b>	<b>47%</b>	<b>48%</b>	<b>48%</b>	<b>43%</b>	<b>46%</b>
<b>Two Cars or More</b>	<b>29%</b>	<b>21%</b>	<b>28%</b>	<b>23%</b>	<b>25%</b>

*Source: Continuous Household Survey 1999 - 2000*

## 6.2 Dungannon – Broadband Access

A universally accessible broadband network is central to the successful realisation of e-business initiatives and services. The Internet can only provide access to the global marketplace if businesses can connect to a sufficiently high speed, high quality and reliable network that is reasonably priced.

Broadband connectivity is essentially a high-speed telecommunications link. The capacity of broadband networks is described by the rate of transmission or bandwidth, measured in bit/s. The minimum capacity for a “broadband” connection, and that most commonly provided, is 2Mbit/s. Although this capacity is adequate for most of today’s applications, as we move forward into the Information Society many customers are already demanding increased bandwidths of 34 Mbit/s, 155 Mbit/s and higher.

At present companies in Dungannon can only access broadband through the use of leased lines or Satellite. It is expected, however, that by 2003 Broadband access will be available in Dungannon through Hutchinson 3G.

Within the Dungannon area, there are both Optical Fibre access nodes Synchronous Digital Hierarchy (SDH) nodes currently in place. There are also plans for an Asynchronous Transfer Mode (ATM) node to be set-up. The key services currently available include:

- High Speed Digital Subscriber Line (HDSL)
- 2Mbps
- 34Mbps
- STM1 - 155Mbps
- STM4 (622 Mbps) and 16 (2.4 Gbps) can be deployed on demand

*Source: Telecommunications for E-Business – A Users Guide, 2001. (DETI)*

## 7.0 Housing

### 7.1 Housing in Dungannon – By Tenure

The most recent official figures to show home ownership levels in Dungannon were published as part of the 1996 Northern Ireland House Condition Survey. At that time 67.7% of households throughout the borough were owner occupied, as compared to a Northern Ireland average of just 63.3%. Furthermore, the proportion of households in both NIHE and Housing Association rented properties is significantly lower in Dungannon than across Northern Ireland as a whole. With the exception of Strabane, each of the other district council areas in the Tyrone and Fermanagh region exhibit higher levels of home ownership than the Northern Ireland average, with Cookstown having the highest rate of home ownership overall (72.5%).

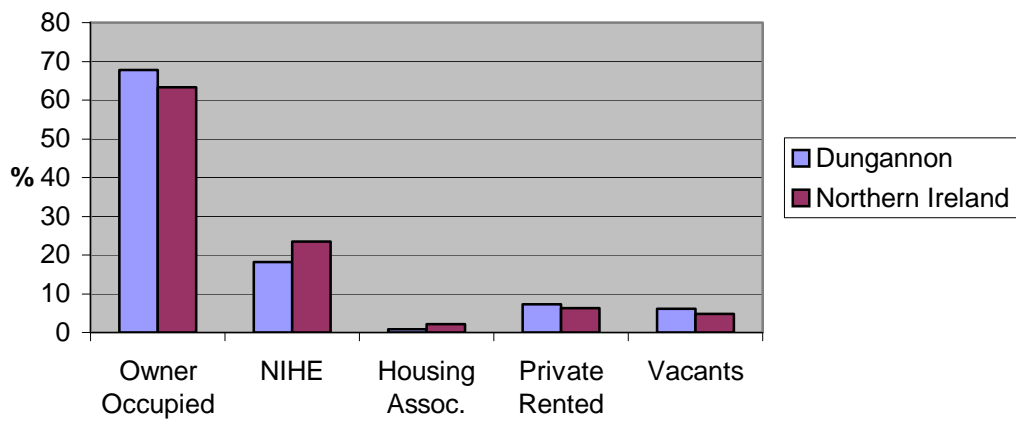
This survey is due to be updated by December 2002 and it is expected that, given the growth in the housing market in recent times, home ownership levels across Northern Ireland will be even higher today than in 1996.

**Table 7.1 Housing By Tenure (Percentage Breakdown)**

	<b>Owner Occupied</b> %	<b>NIHE</b> %	<b>Housing Assoc.</b> %	<b>Private Rented</b> %	<b>Vacants</b> %	<b>Total Number</b>
<b>Dungannon</b>	<b>67.7</b>	<b>18.2</b>	<b>0.8</b>	<b>7.3</b>	<b>6.1</b>	<b>16,280</b>
Cookstown	72.5	15.1	0.7	4.7	7	12,010
Omagh	65.5	19.9	0.4	8.9	5.3	15,050
Strabane	57.4	28.5	1.4	7.5	5.1	12,610
Fermanagh	70.2	17.1	1.1	5.4	6.1	20,040
<b>Northern Ireland</b>	<b>63.3</b>	<b>23.4</b>	<b>2.1</b>	<b>6.3</b>	<b>4.8</b>	<b>602,500</b>

*Source – Northern Ireland House Condition Survey 1996 - NIHE*

**Figure 7.1 Housing By Tenure (Percentage Breakdown)  
1996**



## 7.2 Housing in Dungannon - By House Type

The profile of housing by type in Dungannon, although similar to that of the other four council areas in Tyrone and Fermanagh, does differ significantly to that for Northern Ireland as a whole.

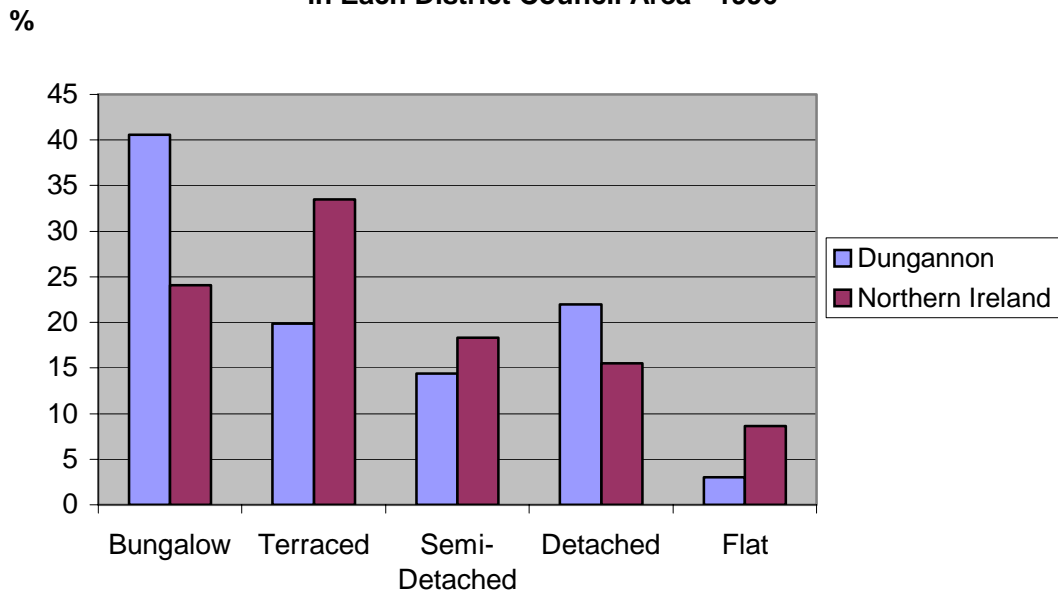
Bungalows account for over 40% of the housing stock in the council area compared to 24.1% for Northern Ireland, whilst terraced houses account for less than 20% compared to 33.5% for Northern Ireland. Dungannon also has a higher percentage of detached houses in comparison to the Northern Ireland average yet its stock of flats and apartments is relatively low.

**Table 7.2 Dwelling Type as a Percentage of Total Accommodation in Each District Council Area - 1996**

	Bungalow	Terraced	Semi-Detached	Detached	Flat	Total
<b>Dungannon</b>	<b>40.6</b>	<b>19.9</b>	<b>14.4</b>	<b>22</b>	<b>3</b>	<b>16,280</b>
Cookstown	43.8	21.3	11.9	17.8	5.1	12,010
Omagh	41.8	17.6	8.9	24.8	6.9	15,050
Strabane	39.9	26.2	14.1	17.1	2.8	12,610
Fermanagh	41.6	14.4	9.4	28.9	5.7	20,040
<b>Northern Ireland</b>	<b>24.1</b>	<b>33.5</b>	<b>18.3</b>	<b>15.5</b>	<b>8.6</b>	<b>602,500</b>

*Northern Ireland House Condition Survey 1996 - NIHE*

**Figure 7.2 Dwelling Type as a Percentage of Total Accommodation in Each District Council Area - 1996**



## 7.3 Housing Market

### 7.3.1 House Prices

Over recent years house prices across the Mid-Ulster region, which includes Dungannon, have been performing well, with price movements generally following an upward trend. During the first quarter of this year the average price across all property types in the area was £73,085, representing a decline of 2.33% relative to the first quarter of 2001 (£74,827). Since then there appears to have been a sharp increase in property prices across the region, with the average price of all property being valued at £80,632 during the second quarter of this year. This represents a rise of over 10% in average prices between quarters one and two in the Mid-Ulster area in comparison to a 2.8% rise across Northern Ireland over the same time period

It is important to note, however, that there has been a variable pattern of price movement across the different property types over the past year. Broadly speaking whilst the price of terraced, detached and semi-detached houses have continued to perform well, the price of detached bungalows appears to have been more volatile. The average price of a detached Bungalow in quarter one of 2002 was £82,245 compared to £96,774 for the same quarter in the previous year, yet by quarter two of 2002 it had risen by almost 24% to £101,691 (see table 10).

It is important to point out that, with the average property price for all property across Northern Ireland being valued at £95,007, prices in Dungannon and the Mid-Ulster region are around 85% of the Northern Ireland average. This would suggest that Dungannon does offer the local community relatively affordable housing when compared to other districts in the province.

**Table 7.3 Average Property Prices By Property Type For Mid-Ulster (including Dungannon)**

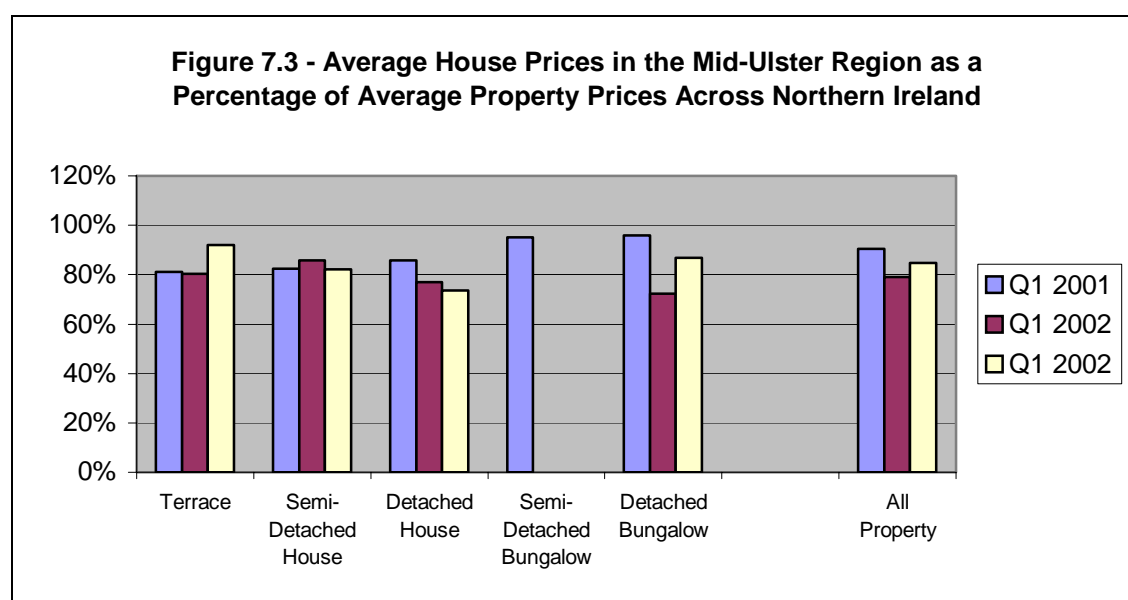
	Q1 2001 £	Q1 2002 £	Q2 2002 £
<b>Terrace</b>	49,325	53,617	62,522
<b>Semi-Detached House</b>	63,503	70,641	71,150
<b>Detached House</b>	102,179	109,542	104,609
<b>Semi-Detached Bungalow</b>	64,921	*	*
<b>Detached Bungalow</b>	96,774	82,245	101,691
All Property	74,827	73,085	80,632

*Source: Northern Ireland Quarterly House Price Index*

**Table 7.4 Average Property Prices By Property Type For Northern Ireland**

	2001 (Q1) £	2002 (Q1) £	2002 (Q2) £
<b>Terrace</b>	60,867	66,811	67,947
<b>Semi-Detached House</b>	77,005	82,444	86,486
<b>Detached House</b>	119,012	142,196	142,045
<b>Semi-Detached Bungalow</b>	68,343	74,228	71,103
<b>Detached Bungalow</b>	100,866	113,780	117,000
<b>Apartment</b>	86,557	90,219	92,169
All Property	82,833	92,448	95,007

Source: Northern Ireland Quarterly House Price Index



Source: Northern Ireland Quarterly House Price Index

Note: Due to insufficient sample size the survey was unable to produce an average price for Semi-Detached Bungalows for Q1 2002 and Q2 2002.

### 7.3.2 Rates

The average rates bill in Dungannon, as illustrated in Table 7.5, has been consistently lower than the Northern Ireland average each year over the past four years

It is interesting to note that whilst the Borough has experienced the second highest rate of increase in its average rates bill (34.3%) over this period, when compared to the other council areas in the Tyrone and Fermanagh region, it has generally had one of the lowest average rates bills over all. In fact, between 1998 and 2001 the average rates bill in Dungannon was lower, year on year, than in each of the other four districts in the Tyrone and Fermanagh region.

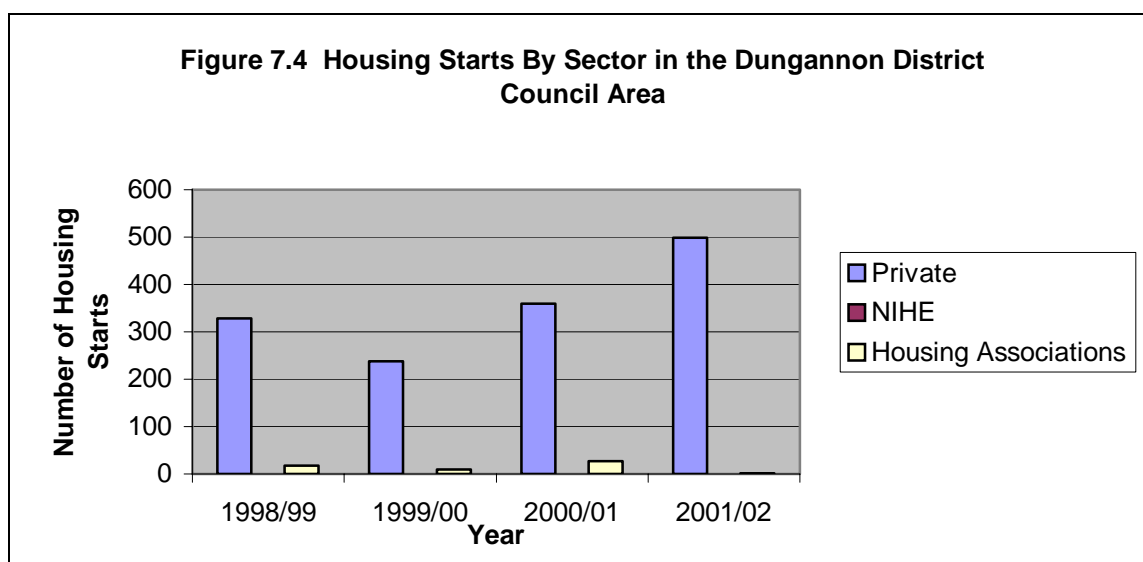
**Table 7.5 Average Rates Bill per District Council area (£)**

	<b>98/99</b>	<b>99/00</b>	<b>00/01</b>	<b>01/02</b>	<b>% Change</b>
<b>Dungannon</b>	<b>286.51</b>	<b>320.88</b>	<b>357.08</b>	<b>384.69</b>	<b>34.3</b>
Cookstown	318.81	380.81	387.88	414.02	29.9
Omagh	343.66	408.93	456.78	468.33	36.3
Strabane	301.67	339.36	374.69	400.51	32.8
Fermanagh	299.92	356.29	368.75	368.75	22.9
<b>Northern Ireland</b>	<b>353.65</b>	<b>391.53</b>	<b>437.26</b>	<b>437.26</b>	<b>23.6</b>

*Source: Housing Statistics for 2001/02 – DOE for Northern Ireland*

### 7.3.3 House Building

The share of house building projects in Dungannon and South Tyrone continues to be dominated by the private sector. In fact, over the past four years there has been no new house building projects undertaken by the NIHE, with the housing associations being involved in very limited activity.



**Table 7.6 Housing Starts By Sector in the Dungannon District Council Area**

	Private	NIHE	Housing Associations
1998/99	329	0	18
1999/00	238	0	10
2000/01	360	0	27
2001/02	499	0	2

*Source: Housing Statistics for 2001/02 – DOE for Northern Ireland*

## 7.4 Social Housing

The number of people in Dungannon area on the waiting list for NIHE/Social Housing has increased from 333 during 1998/99 to 563 last year, an increase of 69%. This has occurred during a period when the overall number of people on the waiting list across Northern Ireland has risen from 23,193 to 40,616, a rise of 75%.

Whilst all of the council areas in the Tyrone and Fermanagh region have experienced increases in the number of people registered on the waiting list for social housing, the increases in both Dungannon and Strabane have been significantly higher than their neighbours.

It must be noted, however, that these increases do in part reflect a change in the way NIHE and Housing Association transfers are counted following the introduction of the New Housing Selection Scheme in November 2000. Prior to this, only NIHE applicants were counted.

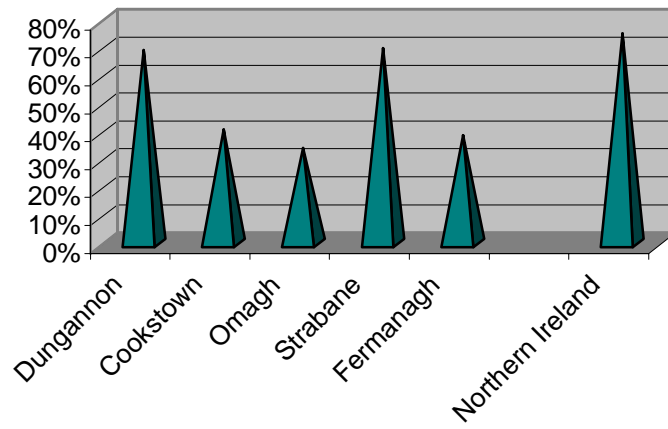
**Table 7.7 NIHE Waiting Lists By District Council Area (\*Incorporating Housing Associations)**

	1998/99	1999/00	2000/01	2001/02	% Change
<b>Dungannon</b>	<b>333</b>	<b>349</b>	<b>571</b>	<b>563</b>	<b>69%</b>
Cookstown	207	176	274	291	41%
Omagh	400	415	472	536	34%
Strabane	381	423	680	647	70%
Fermanagh	527	422	702	731	39%
<b>Northern Ireland</b>	<b>23,193</b>	<b>26,006</b>	<b>36,418</b>	<b>40,616</b>	<b>75%</b>

*Source: Housing Statistics for 2000/01 – DOE for Northern Ireland*

Note: A common social rented sector waiting list for applicants to NIHE/Housing Associations has been in operation since June 1997

**Figure 7.5 Percentage Change in the NIHE/Social Sector Waiting List 1998/99 - 2001/02**



# 8.0 Tourism

## 8.1 Introduction

Dungannon and South Tyrone has much to offer the visitor. Its unspoilt and picturesque landscape is the perfect setting to relax, take long leisurely walks or to explore by car or by bicycle.

The district boasts two main cycle routes that are part of the National Cycle Network. Route 95 takes the cyclist from Benburb through Moygashel, Dungannon and Donaghmore to Stewartstown, whilst Route 94, the Loughshore trail, passes through the district along the coast of Lough Neagh.

Golfing, fishing and horse riding are among the many activities that can be enjoyed throughout the area.

Tyrone is noted for its excellent restaurants and fine food and Dungannon is no exception. Local restaurants are not hard to find and using fresh local produce they create an array of exciting dishes from the traditional to the contemporary and the ethnic.

From forest parks to stately homes, ancient burial tombs and archaeological sites to cathedrals and churches, the borough is steeped with a long and proud history and culture, offering the visitor many exciting and beautiful places to explore and experience.

**Table 8.1 Visitor Numbers to Dungannon and South Tyrone Borough Council District Council Facilities**

	1999	2000	2001
<b>Killymaddy Tourist Amenity Centre</b>	89,760	104,196	145,695
<b>U.S. Grant Ancestral Homestead</b>	3,216	2,010	3,075
<b>* Dungannon Park</b>	117	424	674

Source: *Killymaddy Tourist Informatin Centre*

\*Dungannon Park figures relate to the number of caravans and tents that use the facilities

Note: The tourism data in sections 8.2, 8.3 and 8.4 of this report are survey based and are therefore subject to normal statistical error. The tables in this section have been compiled on the basis of a three year moving average; that is the observed distribution of tourism trips, nights and expenditure is calculated and averaged over a three year period. As a visitor can stay in more than one location during their trip, the total number of trips to each location will be greater than the number of trips taken to Northern Ireland.

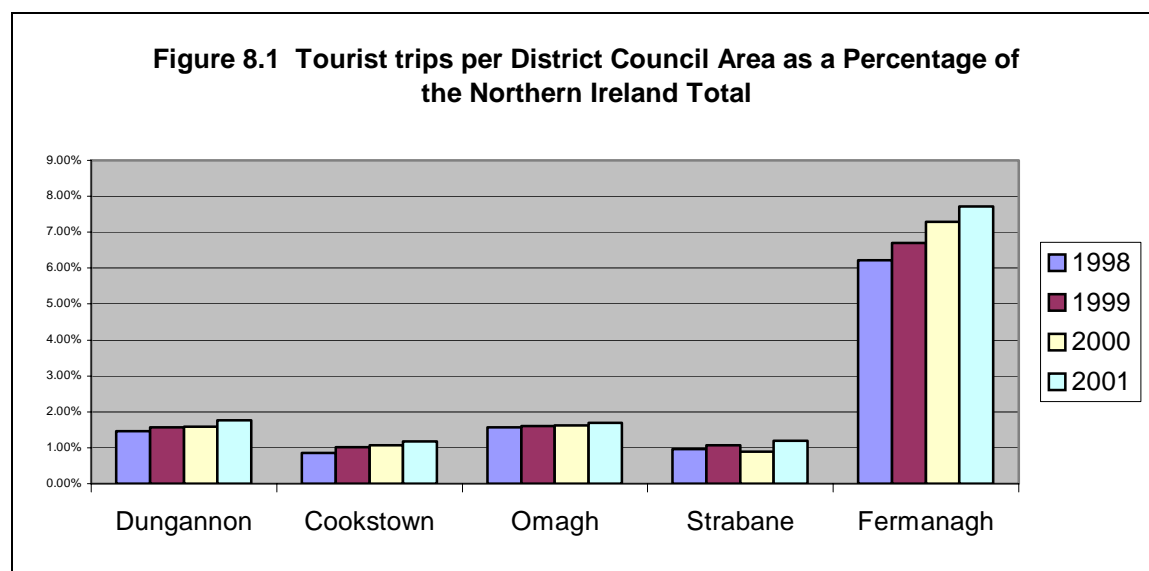
## 8.2 Tourist Trips

Between 1998 and 2001 the number of visits by tourists to the Borough increased by almost 35%, from 31,400 to over 42,000 (see Table 8.2). Despite this increase in tourism activity, Dungannon continues to lag behind many other areas in Northern Ireland in attracting tourists, with the number of recorded trips in 2001 representing only 1.77% of the total number of trips taken by tourists across Northern Ireland.

**Table 8.2** Number of Trips (000's) made to each District Council area per annum

	1998	1999	2000	2001
<b>Dungannon</b>	<b>31.4</b>	<b>36.7</b>	<b>38.2</b>	<b>42.3</b>
Cookstown	18.3	24	25.7	28.1
Omagh	33.8	37.5	38.9	40.3
Strabane	20.8	25	21.4	28.4
Fermanagh	134.2	156.9	175	184.7
<b>Northern Ireland</b>	<b>2,156.40</b>	<b>2,342.30</b>	<b>2,403.30</b>	<b>2,391.20</b>

Source: NITB



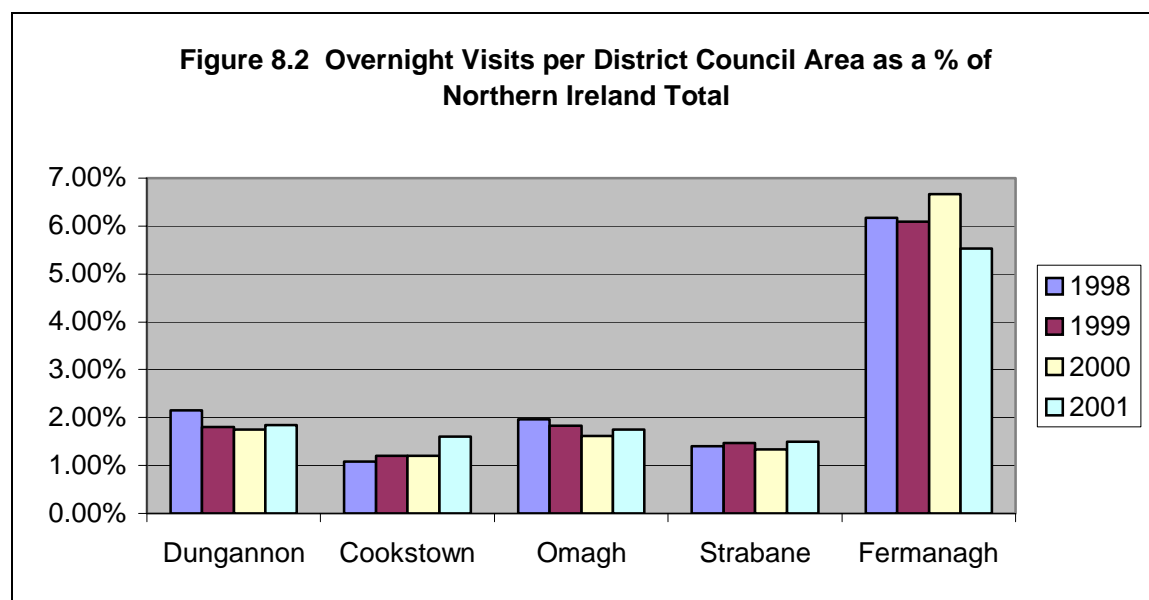
### 8.3 Overnight Stays

In relation to overnight stays by visitors to the borough, there has been an estimated decrease from 213,000 in 1998 to 184,300 in 2001. Whilst this does appear to signify a general trend, over the past three years, toward fewer visitors staying in the borough, the Foot and Mouth crises of last year has impacted further upon this, particularly as it did result in fewer overseas visitors coming to Northern Ireland as a whole during the year.

**Table 8.3** Number of Overnight visits (000's) made to each District Council area per annum

	1998	1999	2000	2001
<b>Dungannon</b>	<b>213</b>	<b>192.2</b>	<b>187.8</b>	<b>184.3</b>
Cookstown	107	127.7	129	160.3
Omagh	194	194.7	173.3	174.5
Strabane	138	156.4	143.5	149.2
Fermanagh	609	647.6	713.7	553.5
<b>Northern Ireland</b>	<b>9,876</b>	<b>10,628</b>	<b>10,716</b>	<b>10,006.60</b>

Source: NITB



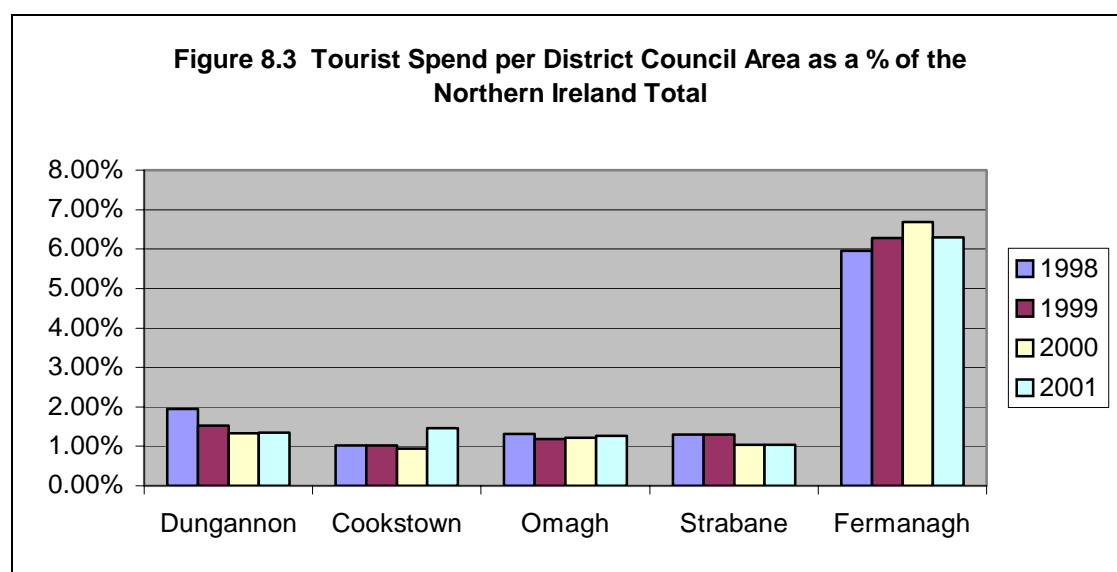
## 8.4 Tourism Spend

Tourist spend in Dungannon has also decreased over the past three years. Tourism revenue across the Borough in 2001 was estimated to be worth £4.7m equivalent to just 1.35% of total tourism revenue across Northern Ireland as a whole.

**Table 8.4 Tourist spend (£m) per District Council area per annum**

	1998	1999	2000	2001
<b>Dungannon</b>	<b>5.45</b>	<b>4.9</b>	<b>4.4</b>	<b>4.7</b>
Cookstown	2.88	3.3	3.1	5.1
Omagh	3.69	3.8	4	4.4
Strabane	3.65	4.2	3.4	3.6
Fermanagh	16.68	20.2	22	21.9
<b>Northern Ireland</b>	<b>280.04</b>	<b>322</b>	<b>329</b>	<b>348</b>

Source: NITB



## 9.0 Agriculture

The agricultural industry continues to be an important sector within the economy of the Dungannon and South Tyrone Borough Council area. As illustrated in section 4.0 of this paper, it accounts for almost 48% of the 2,695 VAT registered enterprises in the borough and provides employment for 3,713 people (see Table 9.4).

The agricultural sector, however, continues to be an industry under pressure. Of the 2,101 farms in the borough, 80% are categorised as either very small or small (see Table 9.2) and 72% are located in Less Favoured Areas (LFA) (see Table 9.3). Furthermore, approximately half of the 3,713 people employed in this sector locally, are part-time or casual employees, with a further 11% being categorised as the spouse (see Table 9.4).

**Table 9.1** Number of Farms by Business Size.

	V. Small		Small		Medium		Large		Total	
	2000	2001	2000	2001	2000	2001	2000	2001	2000	2001
<b>Dungannon</b>	<b>1,209</b>	<b>1,263</b>	<b>670</b>	<b>636</b>	<b>186</b>	<b>184</b>	<b>14</b>	<b>18</b>	<b>2,079</b>	<b>2,101</b>
Cookstown	839	866	476	454	166	159	31	33	1,512	1,512
Omagh	1,269	1,298	940	894	209	211	25	31	2,443	2,434
Strabane	609	652	561	535	198	197	43	50	1,411	1,434
Tyrone	3,926	4,079	2,647	2,519	759	751	113	132	7,445	7,481
NI	15,535	16,153	10,547	9,833	3,153	3,103	6,56	729	29,891	29,818

Source: *The Agriculture Census in NI 2001*

**Table 9.2 Percentage Distribution of Farms, 2001**

	V. Small	Small	Medium	Large
<b>Dungannon</b>	<b>60%</b>	<b>30%</b>	<b>9%</b>	<b>1%</b>
Cookstown	57%	30%	11%	2%
Omagh	53%	37%	9%	1%
Strabane	45%	37%	14%	3%
Tyrone	55%	34%	10%	2%
<b>NI</b>	<b>54%</b>	<b>33%</b>	<b>10%</b>	<b>2%</b>

Source: *The Agriculture Census in NI 2001*

**Table 9.3 - Number of Farms by LFA Designation, 2001**

	LFA		Non LFA	
	No.	%	No.	%
<b>Dungannon</b>	<b>1,520</b>	<b>72%</b>	<b>581</b>	<b>28%</b>
Cookstown	861	57%	651	43%
Omagh	2,282	94%	152	6%
Strabane	1,178	82%	256	18%
Tyrone	5,841	78%	1,640	22%
<b>NI</b>	<b>20,780</b>	<b>70%</b>	<b>9038</b>	<b>30%</b>

Source: *The Agriculture Census in NI 2001*

**Table 9.4 Labour Force, 2001**

	Full-time		Part-time		Spouses		Casual/Seasonal		Total
	No.	%	No.	%	No.	%	No.	%	
<b>Dungannon</b>	<b>1,463</b>	<b>39%</b>	<b>1,329</b>	<b>36%</b>	<b>409</b>	<b>11%</b>	<b>512</b>	<b>14%</b>	<b>3,713</b>
Cookstown	1,077	41%	923	35%	287	11%	364	14%	2,651
Omagh	1,786	43%	1,407	34%	424	10%	563	13%	4,180
Strabane	1,196	44%	800	30%	279	10%	413	15%	2,688
Tyrone	5,522	42%	4,459	34%	1,399	11%	1,852	14%	13,232
<b>NI</b>	<b>22,966</b>	<b>41%</b>	<b>18,568</b>	<b>33%</b>	<b>6,520</b>	<b>12%</b>	<b>8,308</b>	<b>15%</b>	<b>56,362</b>

Source: *The Agriculture Census in NI 2001*

**Table 9.5 Number of Farms By Farm Type, 2001**

	Cereals	Cropping	Horticulture	Pigs/ Poultry	Dairy	Cattle & Sheep		Mixed	Others	Total
						LFA	Lowland			
<b>Dungannon</b>	<b>16</b>	<b>7</b>	<b>27</b>	<b>49</b>	<b>369</b>	<b>1,121</b>	<b>359</b>	<b>62</b>	<b>91</b>	<b>2,101</b>
Cookstown	24	9	2	52	304	671	331	50	69	1,512
Omagh	5	4	3	33	396	1,818	89	29	57	2,434
Strabane	20	12	3	13	228	963	131	39	25	1,434
Tyrone	65	32	35	147	1,297	4,573	910	180	242	7481
<b>NI</b>	<b>537</b>	<b>311</b>	<b>331</b>	<b>523</b>	<b>4,741</b>	<b>16,061</b>	<b>4,850</b>	<b>1,067</b>	<b>1,397</b>	<b>29,818</b>

*Source: The Agriculture Census in NI 2001*

# 10. Deprivation

## 10.1 Domain Deprivation Measures

The Deprivation Measures for the Dungannon and South Tyrone Borough Council area, referred to in this section of the report, relate to those constructed by the Social Disadvantage Research Centre at Oxford University and published in their report, “*Measures of Deprivation in Northern Ireland*” (NISRA June 2001).

The new Northern Ireland Measures of Deprivation score each of the seven Domains of Deprivation listed in Table 10.1, producing **Domain Deprivation Measures** that can then be ranked across Northern Ireland. In order to determine a **Multiple Deprivation Measure** each of the domain scores are then weighted and combined.

The criteria for selecting an appropriate weighting system for the standardised domains are as follows:

- 1) The importance of their contribution to an overall concept of multiple deprivation,
- 2) Robustness of the indicators comprised within each domain. Details on the indicators comprised in each domain are given in Appendix 1.

As can be seen from Table 10.1, the Income and Employment domains are regarded as the most important contributors to the concept of multiple deprivation and the indicators comprising the domains are considered very robust.

**Table 10.1 Weighted Domains of Deprivation that comprise the multiple Deprivation Measure**

<b>Deprivation Domain</b>	<b>Purpose</b>	<b>Weighting</b>
<b>Income deprivation</b>	To capture the extent of income deprivation in an area	25%
<b>Employment deprivation</b>	To measure enforced exclusion from the world of work	25%
<b>Health deprivation and disability</b>	To identify areas with people whose quality of life is impaired by poor health and/or disability or whose life is cut short by premature death	15%
<b>Education, skills and training deprivation</b>	To measure the key educational characteristics of the local area that might contribute to the overall level of deprivation	15%
<b>Geographical access to services</b>	To measure the extent to which people have poor geographical access to certain key services	10%
<b>Social environment</b>	To measure deprivation in the social environment. Indicators about crime and local area problems have been combined to measure local conditions that reduce the quality of life	5%
<b>Housing stress</b>	To identify areas of unsatisfactory housing by using indicators of "housing stress", this considers the condition of the housing itself, rather than the status of the occupants	5%

### 10.1.1 Ward Level Data

**Table 10.2** Ranked domain Deprivation Measures by Ward in the Dungannon District Council Area.

Ward Name	Rank of Multiple Deprivation Measure Domain	Rank of Income Domain	Rank of Employment Domain	Rank of Health Domain	Rank of Education Domain	Rank of Access Domain	Rank of Social Environment Domain	Rank of Housing Domain
Altmore	146	129	174	84	351	48	537	367
Augher	203	166	374	178	429	32	367	27
Aughnacloy	264	220	366	239	347	88	268	91
Ballygawley	178	126	210	362	231	49	240	331
Ballysaggart	67	35	148	49	87	483	169	140
Benburb	371	296	292	392	464	180	361	168
Caledon	258	262	397	264	395	29	433	39
Castlecaulfield	335	246	261	448	502	123	279	227
Clogher	164	128	199	327	226	22	312	555
Coalisland North	213	65	269	324	375	241	226	243
Coalisland South	104	30	173	123	229	354	239	228
C/island West & N/mills	210	138	258	156	372	270	337	32
Coolhill	452	426	330	373	439	395	373	369
Donaghmore	233	189	175	215	506	176	362	73
Drumglass	200	186	123	87	385	427	203	534
Fivemiletown	159	222	186	319	282	65	108	1
Killyman	421	368	403	471	462	109	400	205
Killymeal	332	244	302	251	504	334	207	102
Moy	302	331	325	363	497	240	69	3
Moygashel	401	340	353	344	402	261	184	336
Mullaghmore	186	204	110	238	519	421	32	31
Washing Bay	198	84	272	202	292	134	479	411

Source: NISRA 2001

Note: Ranked positions relate to ward ranking across Northern Ireland. The ward with a rank of 1 is the most deprived and that with a rank of 566 is the least deprived.

From Table 10.2 it can be seen that at an electoral ward level, Dungannon registers its highest levels of deprivation in relation to income, access to services and housing.

In relation to the ranking of electoral wards in terms of income deprivation, 77% (17/22) of wards in Dungannon register deprivation scores which position them amongst the bottom half (those with a rank of 283 or lower) all wards in Northern Ireland. Furthermore, 45% (10/22) of wards in Dungannon register deprivation scores which place them amongst the most deprived third (those with a rank of 187 or lower) of all wards in the province.

In terms of access to public services, 73% (16/22) of wards in the borough register deprivation scores which position them amongst the bottom half of all wards in the province, with 54% (12/22) being ranked amongst the most deprived third.

With regard to housing, 68% (15/22) of wards in Dungannon are ranked amongst the bottom half of all wards in the province, with 45% (10/22) being ranked amongst the bottom third. It is also worthy of note that in relation to housing, Fivemiletown is deemed to be the most deprived ward in Northern Ireland, with five other wards in the district (Moy, Augher, Mullaghmore, Coalisland West and Newmills and Caledon) being ranked amongst the most deprived 10% of wards across the province.

The area where Dungannon exhibits significantly lower levels of deprivation is Education. Just 23% (5/22) of the wards in the borough are ranked amongst the bottom half of all wards in Northern Ireland, with just 1 ward, Ballysaggart, being ranked amongst the most deprived third of all the wards in the province.

In reflecting the present situation in the Dungannon and South Tyrone area, it is not surprising that 68% (15/22) of electoral wards register multiple deprivation scores which position them amongst the most deprived half of all wards in Northern Ireland, with 32% (7/22) being amongst the bottom third. It is important to note that, overall, none of the electoral wards in Dungannon are ranked amongst the most deprived 10% of wards in Northern Ireland in terms of the multiple deprivation measure.

## 10.1.2 District Council Level Data

**Table 10.3 District Council Level summaries of Ward Level**

Name	Number of Income Deprived	Rank of Income Scale	Number of Employment Deprived	Rank of Employment Scale	Extent Rank	Local Concentration Rank	Rank of Average of Ward Ranks	Rank of Average of Ward Scores
<b>Dungannon</b>	<b>16085</b>	<b>7</b>	<b>3538</b>	<b>15</b>	<b>16</b>	<b>15</b>	<b>9</b>	<b>9</b>
Cookstown	10944	17	2653	20	16	11	5	6
Omagh	15222	9	4119	8	8	9	7	7
Strabane	15362	8	3785	11	3	3	1	1
Fermanagh	17030	6	3749	13	16	21	10	11

Source: NISRA 2001

**Notes:** The district council level summaries are presented in five categories. For each category the Local Government District (LGD) in Northern Ireland with a rank of 1 is the most deprived and 26 the least deprived

**Income Scale** Income Scale is the number of people who are Income deprived.

**Employment Scale** Employment Scale is the number of people who are employment deprived.

**Extent** Proportion of an LGD's population living in the wards which rank within the most deprived 10% of wards in Northern Ireland. The aim of this measure is to portray how widespread high levels of deprivation are in a LGD. It only includes LGDs which contain wards which fall within the top ten percent of the most deprived wards on the MDM in Northern Ireland. A rank of 16 indicates an LGD with no score on this measure.

**Local Concentration** Local concentration is the population weighted average of the MDM ranks of an LGD's most deprived wards that contain exactly 10% of the LGD's population. Local Concentration is an important way of identifying LGDs' "hot spots" of deprivation.

**Average of Ward Rank** Population weighted average of the combined MDM ranks for the wards in an LGD. This measure is useful because it summarises the LGD taken as a whole, including both deprived and less deprived wards.

**Average of Ward Scores** Population weighted average of the combined MDM scores for the wards in an LGD. This measure also describes the LGD as a whole, taking into account the full range of ward scores across an LDG. The advantage of the Average of Ward Scores measure is that it describes the wards by retaining the fact that the more deprived wards may have more "extreme" scores, which is not revealed to the same extent if the ranks are used.

In relation to the Multiple Deprivation Measure, as illustrated in the previous section, none of the wards in Dungannon are ranked amongst the most deprived 10% of wards in Northern Ireland and therefore the borough does not register a score in relation to the measure of extent.

Whilst the borough performs relatively well in terms of employment deprivation (ranked 15<sup>th</sup> most deprived LGD), it does perform less well in relation to income deprivation, where it is ranked as the 7<sup>th</sup> most deprived council area overall, and the most deprived when compared to the other three districts in Tyrone.

Based on the average deprivation scores at ward level however, the Dungannon and South Tyrone Borough Council area is ranked as the 9<sup>th</sup> most deprived local government district in Northern Ireland. In comparison to the other three district council areas in Tyrone, it exhibits the lowest levels of deprivation overall, and is second only to Fermanagh as the least deprived local government district in the wider Tyrone and Fermanagh region.

## **10.2 New Targeting Social Need (TSN)**

### **10.2.1 Introduction to New TSN**

Through New Targeting Social Need (New TSN) the Government aims to tackle social need and social exclusion in Northern Ireland by targeting its efforts and available resources on people, groups and areas in greatest social need.

New TSN was announced in the Partnership for Equality White Paper (Cm 3890), which was published in March 1998, as part of the Government's wider agenda for making Northern Ireland a more fair, just and prosperous society and it was identified in the Good Friday Agreement as one of the Government's key socio-economic commitments.

When New TSN was first launched DETI defined New TSN areas as those areas, both at a District Council and Ward level, in which 47% or more of the claimant count were categorised as long-term unemployed (i.e. unemployed for one year or more).

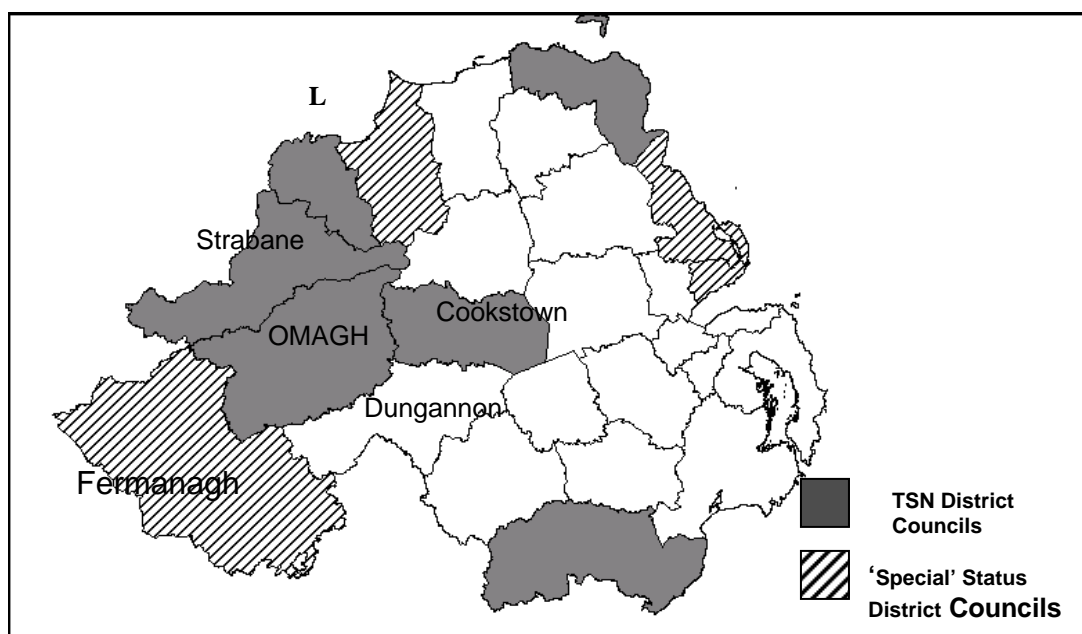
In total 11 (42%) out of the 26 District Council areas in Northern Ireland were initially designated as areas of greatest disadvantage - or New TSN areas and this included all five District Council areas in the Tyrone and Fermanagh region.

This definition has since been revised on the basis of the Noble Measures of Deprivation. Under the revised scheme DETI has designated the 160 most deprived wards in Northern Ireland, containing around 30% of the total population, as its focus for New TSN activities.

In addition, the Department has also drawn up a Council-level map by selecting the six most deprived Council areas, based on the same methodology, as the focus for its New TSN activities. The six Council areas are Strabane, Derry, Omagh, Moyle, Cookstown and Newry & Mourne (See Figure 10.1).

In recognition of the significant economic difficulties, particularly in relation to job losses and rising unemployment experienced by certain areas over the past several months, DETI has decided to supplement the New TSN Council area map by awarding "special" status to those areas which have experienced an unemployment rate of at least 20% above the Northern Ireland average over the past year. This brings into the equation Carrickfergus, Larne, Limavady and Fermanagh District Councils.

**Figure 10.1 District Council Areas Designated as New TSN Areas**



Source: *The first New TSN Annual Report – November 1999*

Whilst the Dungannon and South Tyrone Borough Council area as a whole is no longer deemed to be a New TSN area, six electoral wards within the council area continue to be recognised as areas of high of deprivation (See Table 10.4).

**Table 10.4 Breakdown of Electoral Wards in the District Council Area**

Revised NewTSN Wards In Dungannon - 2002	Original New TSN Wards In Dungannon - 1999
Ballysaggart Coalisland North Coalisland South Drumglass Mullaghmore Washing Bay	Altmore Ballygawley Ballysaggart Caledon Castlecaulfield Clogher Coalisland North Coalisland South Fivemiletown Killyman Mullaghmore Washing Bay