



Market research to explore
people's choices to live or
move from the Belfast City
Council Area

Report prepared for:
Belfast City Council



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Executive summary

Belfast City Council commissioned Perceptive Insight to conduct research to explore the factors that are affecting people's decisions to live or move from the Belfast Local Government District (BLGD) area, through an analysis of potential *push* and *pull* factors.

The approach to the research was two-fold. The first phase included a review of the various factors that impact on people's choices about where they have chose to live; assessed population trends in the Belfast LGD and surrounding regions; explored influential policy documents; and summarised previous research findings.

The second phase involved the facilitation of an attitudinal study to investigate the profile of residents from Belfast, those who live in the areas surrounding Local Government Districts (collectively known as the Belfast Metropolitan Area¹ [BMA]), as well as those work in Belfast but live elsewhere. Data was collected between March and May 2013 from the following sample sets:

Sample 1: Residents of Belfast City Council

The survey was conducted with 786 people across 38 wards in the Belfast Local Government District area. The sample was selected based upon analysis of the wards most affected by population increase or decline between 2001 and 2011 (*source*: Census, 2001; Census, 2011). Wards that have experienced a significant population increase or decrease (+/-10% or more) had a higher proportion of the population selected for interview. The distribution of the remaining samples were evenly spread, representative of the population north, south, east and west of the city.

Sample 2: Residents in the wider Belfast Metropolitan Area

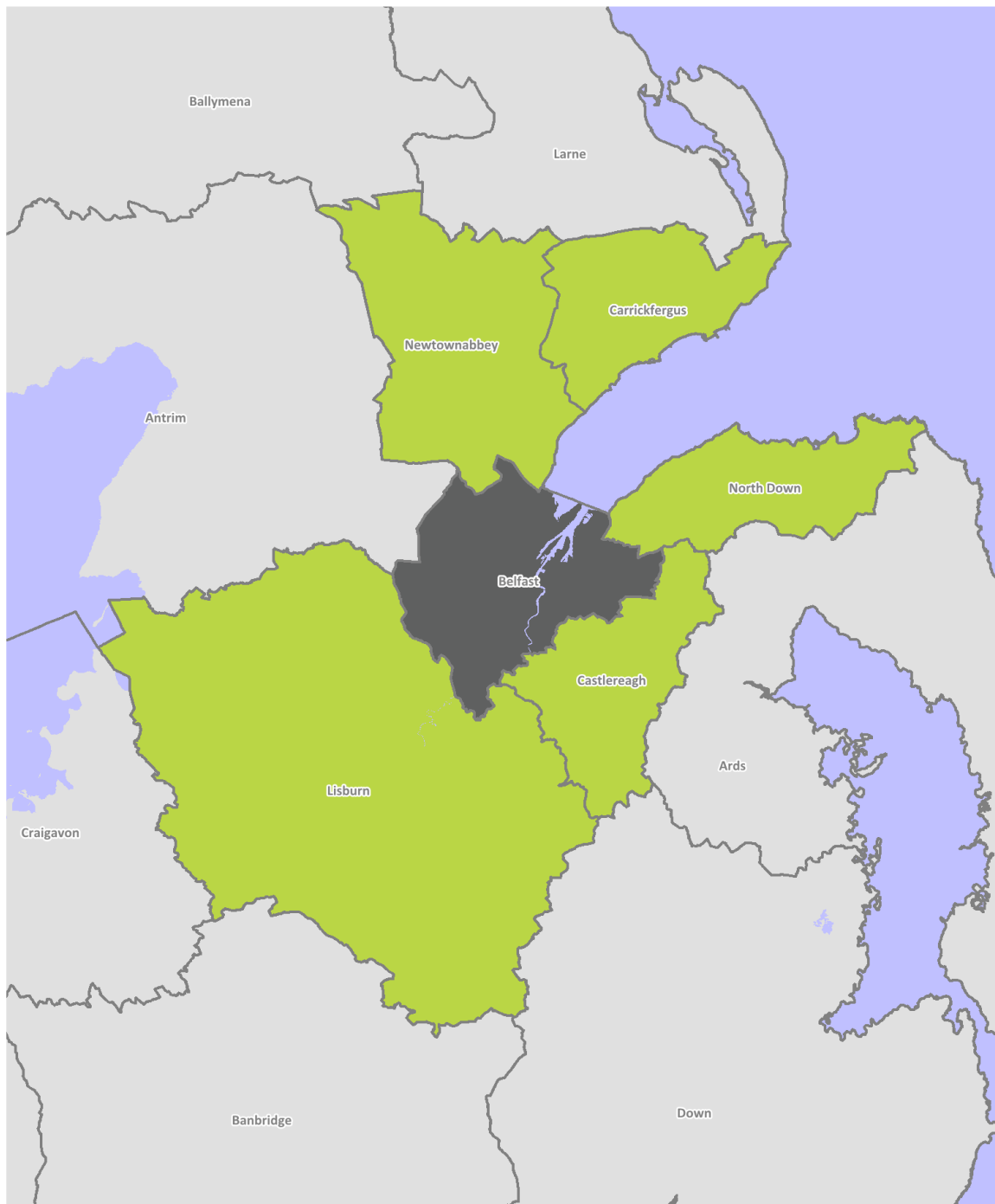
The survey was conducted with 753 people living within the BMA (excluding the Belfast Local Government District).

Sample 3: People who work in Belfast but live elsewhere

This survey was conducted with 323 people who work in Belfast but who live outside the BLGD area. The survey was conducted on-street in the city centre and main thoroughfares, at Park and Ride facilities as well as bus-stops, bus stations and train stations. The purpose of this survey was to capture the views of commuters, who have chosen to live outside the city even though they travel in for employment.




¹ Belfast Metropolitan Area comprises of the Belfast City, Carrickfergus Borough, Castlereagh Borough, Lisburn City, Newtownabbey Borough, and North Down Borough Council areas.

Image 1.1: Belfast Metropolitan Area



Population research study area

Key

-  Belfast Local Government District Area
-  Belfast Metropolitan Area (excluding Belfast Local Government District Area)
-  Northern Ireland

Belfast Mapping Data
Prepared by BRDU
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Key findings from the review

Population trends

According to the 2011 Census, an estimated 280,962 people live in the Belfast Local Government District area, while over 670,700 live in the wider Belfast Metropolitan Area.

The total population of BLGD area has not significantly changed between 1991 and 2011 (increase of only 0.6%). However, between 1991 and 2001, total population fell by 0.7% to 277,392 in 2001 before rising again by 1.3% to 280,962 in 2011 (see Table 1.1). In contrast to Northern Ireland, the population change over the same time period (i.e. from 1991 to 2011) increased by 15.8%.

All of the surrounding Councils in the BMA have also had a much greater change in population, most notable being Lisburn and Carrickfergus with a 20.8% and 19.4% rise respectively.

Table 1.1: Change in population numbers in the Belfast Metropolitan Area between 1991 and 2011

Area	1991	2001	% change since 1991	2011	% change since 2001	% change since 1991
Belfast	279,237	277,392	-0.7	280,962	1.3	0.6
Castlereagh	60,799	66,487	9.4	67,242	1.1	10.6
Lisburn	99,458	108,690	9.3	120,165	10.6	20.8
Newtownabbey	74,035	79,996	8.1	85,139	6.4	15.0
North Down	71,832	76,320	13.1	78,078	6.6	8.7
Carrickfergus	32,750	37,659	15.0	39,114	3.9	19.4
Belfast Metropolitan Area	618,111	646,544	4.6	670,700	3.7	8.5
Northern Ireland	1,577,836	1,685,267	6.8	1,810,863	7.5	15.8

Source: 1991, 2001, 2011 Census

Tables 1.2 and 1.3 show the difference in the number of households, and the change in household size between 2001 and 2011. As these tables show, while Belfast Local Government District area had a 0.9% increase in the number of households, this is considerably lower than the Northern Ireland figure of 12.2% as well as a number of other councils within the BMA.

Table 1.2: Change in number of households in Belfast Metropolitan Area between 2001 and 2011

Area	2001	2011	% change since 2001
Belfast	119,553	120,595	0.9
Castlereagh	27,518	27,733	0.8
Lisburn	41,140	45,723	11.1
Newtownabbey	32,137	33,971	5.7
North Down	32,208	33,255	8.7
Carrickfergus	14,785	16,200	9.6
Belfast Metropolitan Area	267,341	277,477	3.8
<hr/>			
Northern Ireland	626,718	703,275	12.2

In addition, in 2011 Belfast LGD had a relatively small household size (2.29) in 2011, especially when compared with Northern Ireland (2.54) and the other council areas within the BMA. It should be noted that across all areas in Northern Ireland there has been a fall in household size since 2001.

Table 1.3: Change in average household size in Belfast Metropolitan Area between 2001 and 2011

Area	2001	2011	% change since 2001
Belfast	2.38	2.29	-3.8
Castlereagh	2.44	2.40	-1.6
Lisburn	2.67	2.59	-3.0
Newtownabbey	2.51	2.45	-2.4
North Down	2.41	2.33	-3.3
Carrickfergus	2.52	2.39	-5.2
<hr/>			
Northern Ireland	2.65	2.54	-4.2

Push and pull factors

The review examined a number of drivers (i.e. push and pull factors) which influence where a person decides to live. Traditionally, the main components of population changes are²:

- Natural change (difference between births and deaths);
- Internal migration (migration within Northern Ireland);
- External migration (migration from Britain, the Republic of Ireland and the rest of the world).

² Northern Ireland Housing Executive (2011) *The Belfast Metropolitan Housing Market Area: A local housing system analysis*, NIHE.

The following table summarises the push and pull factors which may impact on population change:

Table 1.4: Push and Pull factors

Type	Push	Pull
Physical	Noise pollution	Proximity to amenities
	House or garden size	Public transport links
	Traffic congestion	Access to outdoor environment
Social/Economic		Access to outdoor activities
	Perception of safe environment	Family and friends
	Affordable housing	Community spirit
	Affordable cost of living	Long term residency
		Opportunities of community engagement
		School provision
		Proximity to employment
	Job opportunities	

Key findings from the attitudinal survey

All respondents were asked to rate the extent to which a series of factors have influenced their choice of current residence, using a scale of 1 to 5 (where 1 is no influence and 5 is significant influence), in order to assess which factors influenced where a person chooses to live.

In order to gain an insight into the key push and pull factors affecting peoples' decision to reside, findings have been summarised within three categories of influence (physical, social & cultural, and economic). The summary commences with an overview of the 'influencing factor average scores'.

Table 1.5: Influencing factors average scores by Belfast Local Government District area and the Belfast Metropolitan Area

Influencer	Type	BLGD	BMA
Proximity to amenities	Physical	4.09	3.75
Perception of safe environment	Social	3.91	4.21
Public transport links	Physical	3.90	3.66
Family and friends	Social	3.79	3.74
Community spirit	Social	3.53	3.43
Long term residency	Social	3.62	3.18
Access to outdoor environment	Physical	3.13	3.49
Opportunities of community engagement	Social	3.07	3.03
Access to outdoor activities	Physical	3.06	3.31
House or garden size	Physical	2.92	3.11
School provision	Economic	2.88	2.85
Proximity to employment	Economic	2.84	2.98
Noise pollution	Physical	2.77	3.11
Affordable housing	Economic	2.77	2.93
Traffic congestion	Physical	2.65	2.92
Affordable cost of living	Economic	2.63	2.68
Job opportunities	Economic	2.33	2.35

Physical factors

Those who live in the Belfast Local Government District area are more likely to indicate that they are greater influenced by *proximity to amenities* (BLGD 4.09; BMA: 3.75), a *good*

public transport network (3.90; 3.66) and the *long-term residency* within an area (3.62; 3.18) compared to those who live in the BMA.

Those who reside in the Belfast Metropolitan Area indicated that they are more influenced by how *safe the local environment* is (BMA: 4.21; BLGD: 3.91), a *larger house or garden* (3.11; 2.92), *access to outdoor activities* (3.31; 3.06); and a *good outdoor environment* (3.49; 3.13) than Belfast residents.

Younger respondents who live in BMA are more strongly influenced by proximity to amenities (average score 3.84 for 18 to 35 year olds compared to average score 3.69 for those aged 66+) and the public transport network (average score 3.70 for 18 to 35 year olds compared to average score 3.64 for those aged 66+). Size of house/garden (3.24), access to outdoor activities (3.4) and a good outdoor environment (3.58) were rated most highly by those aged between 36 and 65. ABC1 respondents are more likely to indicate that they are influenced by the size of house/garden (3.33) and satisfaction with the external environment (3.68) compared to those from C2DE groups (2.92 and 3.32 respectively).

Suitability of housing has a moderate influence on why respondents from BMA do not live in the Belfast area (28% cited it as a factor which influences why they do not live in Belfast). Younger respondents (28%) and those from ABC1 groups³ (29%) are more likely to highlight *housing quality* as an influence on why they do not live in Belfast.

Approximately a quarter of BMA respondents (24%) indicated that they are influenced not to live in the Belfast LGD due to *availability of parks and green space*, while almost two fifths of BMA respondents (38%) stated that *traffic congestion* has an influence on why they do not live in Belfast.

Social and cultural factors

Proximity to family/friends appears to have an equal level of influence on both those who live in the BMA (3.79) and BLGD (3.74). Respondents from BLGD area are on average more likely to indicate that they grew up in the area (3.62) than those who live in the BMA (3.18). Also notable is that respondents from BMA are more likely to indicate that they are influenced by *feeling safe* (4.21) than those in BLGD (3.91).

Economic factors

³ Socio-economic group definitions: A – 2-3 per cent of the population, professional people, very senior managers in business or commerce or top level civil servants; B – 12-13 per cent of the population, middle management executives in large organisations, with appropriate qualifications, principle officers in local government and civil service, top management or owners of small business concerns, educational and service establishments; C1 – 31 to 33 per cent of the population, junior management, owners of small establishments, and all others in non-manual positions. Jobs in this group have very varied responsibilities and educational requirements; C2 – 16 to 18 per cent of the population, all skilled manual workers and those manual workers with responsibility for other people. D – 24 per cent of the population. All semi and unskilled manual workers, apprentices and trainees to skilled workers. E – 11 per cent of population. All those entirely dependent on the state long-term through sickness, unemployment, or other reason. Those unemployed for a period exceeding six months. Casual workers and those without a regular income.

Findings reveal little difference in respondents' viewpoint based on where they currently live. On average, respondents rated the following factors similarly in terms of influence:

- Access to better jobs (BLGD: 2.33; BMA: 2.35);
- Better choice of schools (BLGD: 2.88; BMA: 2.85);
- More affordable housing (BLGD: 2.77; BMA: 2.93);
- Cost of living (BLGD: 2.63; BMA: 2.68).

Of the BMA respondents and commuters, 30% and 45% respectively indicated that availability of *affordable quality housing* has a significant influence on why they do not live in Belfast City Council. Whilst younger respondents and those from ABC1 groups are more likely to rate *affordable housing* as a reason why they do not live in Belfast.

Table 1.6: Influencing factors average scores by area

Influencer	Type	Belfast	North	South	East	West	Shankill
Proximity to amenities	Physical	4.09	4.11	4.11	4.19	4.15	3.63
Perception of safe environment	Social	3.91	4.01	3.95	3.89	3.96	3.60
Public transport links	Physical	3.90	3.98	3.83	3.94	4.06	3.43
Family and friends	Social	3.79	4.46	3.43	3.44	4.09	3.78
Community spirit	Social	3.53	3.73	3.61	3.24	3.90	2.98
Long term residency	Social	3.62	4.32	3.26	3.03	4.10	3.88
Access to outdoor environment	Physical	3.13	3.06	3.39	3.10	3.27	2.42
Opportunities of community engagement	Social	3.07	3.39	3.19	2.78	3.42	2.36
Access to outdoor activities	Physical	3.06	2.98	3.31	3.01	3.20	2.47
House or garden size	Physical	2.92	2.88	3.01	2.71	3.15	2.81
School provision	Economic	2.88	3.25	2.74	2.66	3.29	2.27
Proximity to employment	Economic	2.84	2.94	3.04	2.57	3.03	2.53
Noise pollution	Physical	2.77	2.77	2.81	2.62	3.05	2.51
Affordable housing	Economic	2.77	3.17	2.74	2.70	2.79	2.36
Traffic congestion	Physical	2.65	2.68	2.74	2.45	2.88	2.43
Affordable cost of living	Economic	2.63	3.02	2.68	2.56	2.63	2.12
Job opportunities	Economic	2.33	2.56	2.66	2.04	2.32	2.01

Looking ahead

- 85% of respondents who currently live in Belfast LGD envisaged that they will continue to live there in five years time. Respondents from south Belfast (78%) are less likely to agree that they will be living in Belfast in five years time;
- Those who live in wards which have experienced more than 10% decline are more inclined to predict that they will be living in Belfast compared to those from wards which have seen a population increase (88% and 82% respectively);
- Older respondents and those from C2DE groups are more likely to indicate that they will remain living in Belfast City Council area.

Profile of those leaving Belfast

Findings from the survey indicate that those who previously lived in Belfast Local Government District are primarily in the middle to older age bracket (between 36 and 66+ years) and are more likely to be from ABC1 social groups. Such respondents are also more likely to reside in the Castlereagh, North Down or Lisburn Local Government Districts. Overall, the majority of such respondents tended to have lived in BLGD over twenty years ago.

Profile of those who may move to Belfast City Council area

14% of all BMA residents surveyed indicated that they envisage living in Belfast in five years time. Almost one quarter of such respondents were in the younger age category (18 to 35 years) and were from ABC1 groups. Such respondents are also less likely to indicate that they grew up in the BMA than those from the same area who have no intention to move to BLGD area. Physical factors, such as *proximity to amenities* and *better public transport network*, may play an influence on respondents' inclination to move to the city, as 69% and 66% BMA residents cited these factors as influential to their current choice of residence.

Of the Belfast LGD respondents, 85% envisaged that they would continue living in Belfast in five years time. Findings revealed little difference based on age or social class. However, those who live in South Belfast and in areas which have witnessed population increase are less likely to believe that they will be living in Belfast in the future.

Analysis by population shift across wards in Belfast

Analysis by population shift provides some insight into why certain areas (i.e. Andersonstown, Upper Springfield and Woodvale) have experienced a population decline of more than 10% in the last decade. Respondents from these wards are less likely to state that they are influenced by physical factors such as proximity to amenities (67%), good public transport network (64%) and access to a good outdoor environment (34%) - compared to 91%, 83% and 41% (respectively) of those who reside in areas of population increase.

Analysis of the social & cultural factors provides interesting insight on the population decline. Respondents from the Andersonstown, Upper Springfield and Woodvale wards are less likely to state that they are influenced by a *sense of community spirit* (51%), *opportunities to get involved in the local community* (31%) and by *feeling safe* (62%) compared to those who live in wards which have experienced a population increase (63%, 49%, 75% respectively). The findings suggest that population may be retained in these areas by addressing concerns in relation to *safety* and providing *more effective opportunities for community engagement*.

What factors have contributed to the population decline in Belfast?

Further analysis of push and pull factors provides some insight into the reasons why respondents may have moved from the Belfast LGD area.

- **house size and type** appears to have a strong influence on why residents have moved. The survey revealed that Belfast residents (62%) are much more likely to live in terraced housing than their BMA counterparts (33%). Those from the BMA were also more likely to indicate that they have been influenced to live in their current residence due to the *size of the house or garden* (46% compared to 37% BLGD residents) House size and type appears to be a particular influence for younger

respondents in both Belfast LGD and the BMA; with both indicating that suitability of quality housing may play a role in influencing them to move from their current residence;

- economic factors, such as **affordability of housing and cost of living**, also appear to be preventing people from moving to the city. 30% of BMA residents and 45% commuters stated that availability of affordable housing has an influence on why they do not live in the Belfast LGD. Such findings reiterate feedback from the Council's 2007 *Residents Survey*, which indicated that Belfast respondents were dissatisfied with the *lack of affordable housing* (47%) and *cost of living* (44%) in the area;
- exploration of social & cultural factors also provides an indication of why respondents may be moving from Belfast LGD. BMA residents are much more likely to report that they have been influenced to live in their current residence in order to gain a **sense of community spirit and become involved in the local community**. Findings suggest that respondents may be more encouraged to move or remain in Belfast if they felt a better engagement with the community;
- the **influence of crime and anti-social behaviour** was also highlighted within the survey. BMA respondents were more likely to indicate that they are influenced by *feeling safe in their neighbourhood* compared to Belfast LGD residents. Almost half of BMA residents indicated that they do not live in BLGD due to *crime and anti-social behaviour*; a sentiment which was specifically highlighted by younger respondents. Similarly, younger respondents who currently live in Belfast were most likely to indicate that they may be influenced to move from the area as a result of crime and anti-social behaviour (37% of 18 to 35 year olds cited this as a potential factor for moving from the BLGD area compared to 11% of those aged 66+);
- survey findings also revealed that the **political situation in Belfast** may be preventing people from moving to Belfast. 42% of those surveyed in the BMA indicated that the political situation has an influence on why they do not currently live in Belfast. In addition, over a quarter of Belfast residents (27%) indicated that they want to move from the city due to the *political climate*.

Key recommendations to retain and increase population in Belfast

Overall, findings suggest that there may be merit in targeting the younger generation (aged 18 to 35 years) who currently reside in the Belfast LGD area and surrounding regions. This group are most likely to state that they would be willing to move to the city, while Belfast residents aged 18 to 35 are also more likely to report that they may move from the city in five years time. The younger generation in Belfast seem to be much more likely to move from the city due to crime and antisocial behaviour and the political situation in Belfast. Contrastingly, older Belfast residents appear less concerned with such political and social factors.

Comparison of respondents' feedback in relation to push and pull factors provides insight into ways in which Belfast City Council could help combat this decline:

1. address concerns in relation to *crime and antisocial behaviour* in Belfast, with the aim to improve residents' sense of safety and reduce negative perceptions of crime in Belfast;
2. continue to *enhance and regenerate open spaces* to ensure greater availability/access to green space and improved opportunities for physical activity;
3. where possible, support, advocate and adopt plans for the development of *affordable housing*;
4. continue to publicise and actively promote positive aspects of Belfast and city living which are deemed to be attractive, such as *proximity to shops, entertainment and other local amenities*; *access to job opportunities/employment*; and the *reliability and affordability of the public transport network*.
5. encourage *community spirit and support opportunities* for community engagement, particularly in areas of population decline;
6. utilise the research to inform the *ambitions and delivery of the Belfast City Masterplan*.

Introduction

Belfast City Council commissioned Perceptive Insight to conduct research to explore the factors that are affecting people's decisions to live or move from the Belfast City Council Area, through an analysis of potential push and pull factors.

The research addressed the following key questions:

- what factors have contributed to people leaving Belfast and specific areas within the city?
- what is the profile of those people leaving the city (and which areas) and what made them relocate?
- what is the profile of those people moving into the city (and which areas) and what made them move to Belfast?
- what practical policy interventions need to be taken to retain and increase population in Belfast? Specifically those for Belfast City Council.

The study encompassed two key components:

- (1) an attitudinal study to investigate the current profile of current and past residents of Belfast City Council, those who live in the areas surrounding BMA, and those work in Belfast but live elsewhere;
- (2) a review looking at push and pull factors that have impacted on peoples choices about where they have chosen to live and effective policy interventions. The review will also involve previous pieces of research conducted by organisations.

Findings from the research will be used by policy makers to identify potential ways in which they can increase population in Belfast, particularly focusing on trying to attract those people back who have moved out of Belfast but not returned.

Review background

The aim of the review was to set the context for the research findings and to address the following:

- what policy initiatives have been developed to boost physical regeneration and strategically tackle the population decline in Belfast City Council;
- what are the population trends, especially the shift in population from Belfast City Centre to the surrounding metropolitan areas;
- what are the *push* and *pull* factors;
- what previous research have been carried out illustrating resident satisfaction with the Belfast City Council area and recommendations for improvement.

In particular, the review considered the push/pull factors that have impacted people's choices about where they have chosen to live and set this within the policy context for Belfast. Relevant documents referenced include:

- People and Place - A strategy for Neighbourhood Renewal (2003);
- People and Place - A strategy for Neighbourhood Renewal: the mid-term review (2011);
- Regional Development Strategy for Northern Ireland 2025;
- Belfast Metropolitan Area Plan (BMAP) 2015: Housing Need Assessment;
- Belfast Masterplan 2004-2020.

Policy context

In the past decade, a number of significant policy initiatives in relation to development, land use planning and transportation, have been developed in Northern Ireland. The most influential of these include the Regional Spatial Framework - *Shaping Our Future, the Regional Development Strategy for Northern Ireland (RDS) 2025*⁴, and a second transportation policy, which ran concurrently, the Regional Transport Strategy (RTS)⁵. On a metropolitan basis, these initiatives have been mirrored by the development of the Belfast Metropolitan Area Plan⁶ (BMAP) and the Belfast Metropolitan Transport Plan⁷.

In order to provide a better understanding of the policies developed that contribute (directly or indirectly) to the alleviation of population decline, this chapter provides an overview of the policy initiatives adopted in the last ten years. Demonstrating a commitment to physical regeneration, targeting deprivation and improving housing provision in Belfast city centre, this section begins with an examination of the current policy context in relation to the regeneration of Northern Ireland. Policy analysis will be conducted at a regional level, with an overview of the aims and objectives of the Regional Development Strategy and the Investment Strategy for Northern Ireland. It is secondly examined at a metropolitan level⁸, through an exploration of the Belfast Metropolitan Area Plan. This section will also review further policy reforms in relation to physical regeneration, those that aim to increase the city population, and steps taken to target deprivation, enhance tourism and increase employment opportunities for Belfast.

Finally, a number of key strategies which have a specific focus on community safety, culture, housing and transport will be reviewed.

⁴ Department of Regional Development (DRD) (2001) *Shaping Our Future - Regional Development Strategy for Northern Ireland 2025*. Belfast: DRD.

⁵ DRD (2002) *Proposed Regional Transportation Strategy for Northern Ireland*. Belfast: DRD.

⁶ Department of Environment (DOE) (2001) *Belfast Metropolitan Area Plan 2015*. Issues Paper. Belfast: DOE.

⁷ DRD (2003) *Belfast Metropolitan Transport Plan, Working Conference Papers*. Belfast: DRD.

⁸ Having reviewed policy documents for Northern Ireland as a whole, this document then turns to policy reforms for the BLGD area. 'Metropolitan level' refers to Belfast City.

Regional policies

Regional Development Strategy (RDS) for Northern Ireland⁹

The current regional planning framework in Northern Ireland is provided by the Regional Development Strategy (DRD, 2001), a statutory plan endorsed by the Northern Ireland Assembly. This Strategy acts as the overarching framework for development plans in Northern Ireland and guides physical development within the Region up to 2025. Initiated following an extensive public consultation exercise which involved 500 community and interest groups (McEldowney and Sterrett, 2001)¹⁰, the Strategy is shaped by the following vision:

“To create an outward-looking, dynamic and liveable region with a strong sense of its place in the wider world; a region of opportunity where people enjoy living and working and a healthy environment which enhances the quality of people’s lives and where diversity is a source of strength rather than division.”

The Regional Development Strategy was developed in light of the identification of various trends driving change within Northern Ireland. These included:

- a regional population growth rate twice the current UK rate and exceeding that of the Republic of Ireland, making Northern Ireland one of the fastest growing regions in Europe;
- enhancing connectivity and development that improves the health and wellbeing of communities;
- a predicted increase of 160,000 new households by 2015, with over 60 percent of households comprising one and two persons¹¹;
- a regional need for up to 250,000 additional dwellings by 2025;
- the need to create an additional 100,000 jobs to cater for the expanded population.

In essence, the broad aim of the spatial strategy is to guide future development in order to promote a balanced and equitable pattern of sustainable development across the region. It provides an overarching strategic framework for development plans and provides a basis for (1) the strengthening of the regional economy, (2) reduction of social development; and (3) the sustainable planning of future development.

Whilst the RDS outlines plans for the entire Province, it plays a crucial role in setting out a broad strategy for the Belfast Metropolitan Area (BMA), which consequently set the foundations for the Belfast Metropolitan Area Plan (BMAP). It should be noted that the Belfast Metropolitan Area (BMA) covers the administrative districts of Belfast City,

⁹ Department of Regional Development (DRD) (2001) *Shaping Our Future – Regional Development Strategy for Northern Ireland 2025*. Belfast: DRD.

¹⁰ McEldowney, M. and Sterrett, K. (2001) Shaping a Regional Vision: the Case of Northern Ireland, *Local Economy*, 16 (1), 38 – 49.

¹¹ Census (2011): number of households 703, 275.

Castlereagh Borough, Carrickfergus Borough, Lisburn Borough, Newtownabbey Borough and North Down Borough.

The BMA is the largest urban centre in the region, with an estimated population of 671,599 (Census 2011 population statistics), which encompasses 37% of the entire population of Northern Ireland. Strategic objectives specific to the BMA are outlined below:

- ensure a reinforced role for Belfast as regional capital and focus of administration, commerce specialised services and cultural amenities;
- create a stronger role for Belfast as an international city;
- develop an important complementary role for the boroughs of North Down, Carrickfergus and Lisburn, maintaining their distinctive town identities, and for the suburban boroughs of Castlereagh and Newtownabbey;
- ensure a revitalised metropolitan area maintaining a polycentric pattern focused on existing local centres and with a strong emphasis on continuing physical renewal, within the existing urban area, to support existing communities;
- enable the regeneration of areas of social need;
- ensure a compact metropolitan area with a protected environmental setting and an enhanced quality of urban environment;
- reinforced better integration between land use and transportation; and
- develop a modern integrated and inclusive transport system.

McEldowney, Scott & Smyth (2003)¹² recognise that the main thrust of the Regional Development Strategy in relation to the Belfast Metropolitan Area, is to ensure a balance of concentration and decentralisation. Therefore, the development of the BMA is based on: encouraging the revitalisation of the BMA; developing the main towns of Antrim, Downpatrick, Larne, Newtownards, Banbridge and Craigavon as 'counter magnets' to the Metropolitan area; and accommodating 'overspill' growth by the expansion of seven nearby towns, including Ballyclare, Ballynahinch, Carryduff, Crumlin, Dromore and Moira.

In order to achieve the balance of economic development and growth between the wider Belfast area and the rest of Northern Ireland, the RDS 2001 - 2025 included a *Spatial Development Strategy* (SDS) which focused on the following three areas:

- the Belfast Metropolitan Area (BMA), which is identified as the region's engine of growth and where the aim is to ensure it can compete with European cities.
- Londonderry Urban Area, which is described as the economic hub of the North West.
- rural Northern Ireland, where the priority is to promote decentralised growth through focusing development on a network of main and local hubs. This was to be facilitated by an upgrade of transport corridors.

(information sourced from the NIHE (2011) local housing system analysis)¹³

¹² McEldowney, M., Scott, M., and Smyth, A (2003) Integrating land-use planning and transportation - policy formulation in the Belfast Metropolitan Area, *Irish Geography*, 36 (2), 112 - 126.

¹³ Northern Ireland Housing Executive (2011) *The Belfast Metropolitan Housing Market Area: A local housing system analysis*, NIHE.

In total, the RDS 2001-2025 contained 43 long-term strategic planning guidelines to improve the quality of the urban and rural environment within Northern Ireland and the Belfast Metropolitan Area.

Consultative RDS 2011-25: 10 year review¹⁴

The RDS underwent a review in 2011, resulting in a reduction in the number of strategic guidelines from 43 to 27. Despite streamlining the number of strategies, the 10 year review continued to stress the importance of developing the principal cities of Derry / Londonderry, with specific focus on Belfast City and the BMA as the drivers of regional economic growth. In particular, the proposed strategic guidance reiterates the need to:

- increase the population of Belfast City and enhance its role as the regional centre. The drive to increase the scale and mix of housing in Belfast is linked to rebalancing the economy and the need for a thriving metropolitan area that can compete internationally as a place to locate private business and attract inward investment and high value jobs;
- promote economic development at key urban locations throughout the BMA and ensure sufficient land is available for jobs. There is reference to the expansion of the employment and commercial base of Lisburn. There is also reference to the renewal of Bangor and Carrickfergus town centres, both of which have significant housing catchment areas that offer the potential to extend local retail base and to widen their economic and employment base;
- manage the movement of people and goods within the BMA through improvements in transport infrastructure, including the Belfast rapid transit system, alongside better alignment between land use and improvements to public transport.
- protect and enhance the quality of the setting of the BMA and its environmental assets, which is linked not only to conserving and protecting 'natural' assets in rural areas, but also the need for sustained efforts to regenerate deprived communities and to ensure citizens benefit from wealth creation;
- promote population growth and economic development in Newtownards (and the other 8 sub-regional centres) through the provision of additional housing in these areas, although the consultation document poses a question whether Newtownards, which has been suggested as a sub-regional centre, should be included in any new area plans for the metropolitan area;
- identify and consolidate the roles and functions of settlements within each cluster, including the provision of housing in urban centres such as Banbridge and Antrim to limit further decentralisation and support regeneration.

(source: NIHE (2011) local housing system analysis)¹⁵

Investment Strategy for Northern Ireland¹⁶

¹⁴ DRD (2011) Shaping Our Future: Regional Development Strategy (RDS) 2025 Consultation 10 year Review

¹⁵ Northern Ireland Housing Executive (2011) *The Belfast Metropolitan Housing Market Area: A local housing system analysis*, NIHE.

¹⁶ Northern Ireland Executive *Investment Strategy for Northern Ireland 2008 – 2018, Building a Better Future*.

The Government's commitment to regeneration and redevelopment is evidenced in the Investment Strategy for Northern Ireland. This strategy outlined an £18 billion investment programme for the period to 2018, which included regeneration, social housing, welfare reform and modernisation, alongside development of networks including roads, public transport, gateways and telecoms. Whilst investment focused on a range of matters, the areas identified to gain most investment were roads, housing and regeneration, schools, health and environment.

Information within this literature review specifically concentrates on policy strategies in relation to economic development, regeneration and tackling disadvantage.

Belfast Metropolitan Area Plan (BMAP) 2015¹⁷

The key planning document for the BMA, developed in the framework of the Regional Development Strategy, is the Belfast Metropolitan Area Plan (BMAP). The following section explores the purpose and objectives of this initiative in more detail.

BMAP aims to provide a planning framework which is in general conformity with the Regional Development Strategy in facilitating sustainable growth and a high quality of development in the Belfast Metropolitan Area. In simple terms, BMAP was developed by DOE with the purpose of guiding the future development of the BMA for the subsequent 15 years and in doing so, giving effect to the RDS 2025. The long-standing aim for BMAP is further elaborated upon within the *Belfast Metropolitan Area Plan 2015: Issues Paper* and is outlined below:

"[to] secure a strong and vibrant metropolitan area to ensure the economic well being of all of Northern Ireland. The Belfast Metropolitan Area Plan will also aim to secure the long-term status of the Belfast Metropolitan Area as one of Europe's most successful metropolitan regions."

BMAP has the following specific functions:

- provide an essential framework for guiding investment by public, private and community sectors and help harness additional resources through collaboration in tackling problems;
- Provide confidence and context for those wishing to develop and those affected by development proposals;
- establish a framework for positive co-ordination of public policies in joined-up government at both regional and local levels;
- provide an effective land supply phased and allocated to meet the full range of needs to support the life of the local community and social and economic progress;
- establish a process for involvement and ownership by local communities wishing to influence the future development of their districts within the overall metropolitan area; and
- interpret at a local level, planning policies set out in Planning Policy Statements.

¹⁷ DOE (2001) *Belfast Metropolitan Area Plan 2015*. Issues Paper. Belfast: DOE.

In addition, guiding principles for BMAP aim to ensure the (1) promotion of equality of opportunity and social progress for the benefit of the whole community; (2) facilitation of sustainable economic growth; (3) protection of the environment; and (4) promotion of an integrated approach between transportation and land-use. Furthermore, the accommodation of future housing growth was recognised as a key issue in the formulation of BMAP, and was central to the public consultation process which informed the plan (McEldowney et al. 2003)¹⁸.

Regeneration policy measures

Having reviewed the planning framework on a regional and metropolitan level, this paper now turns to policy reforms which aim to tackle deprivation and enhance regeneration. Beginning with the Masterplan for Belfast, this section recognises a policy initiative which encompassed a series of action plans within a singular strategic framework.

Belfast: The Masterplan 2004 - 2020¹⁹

The Belfast Masterplan was commissioned by Belfast City Council in 2003 following a continuing population decline which spanned ten years and resulted in Belfast lagging behind the growth in other district council areas. Following careful analysis of the social, economic and physical needs of the city, the Masterplan provided the Council with a framework in which they could begin the revival of Belfast for the subsequent 16 years.

In essence, the overarching aim of the Masterplan was to stem the decline of the region's capital city, as well as stimulating and focusing growth within the urban area. This involved the development of a series of individual actions, which in conjunction acted as a single, comprehensive strategy framework for the city of Belfast. Actions were encompassed within three priority types: (1) priorities for change; (2) spatial priorities; and (3) organisational priorities. The actions which fell within these priorities are summarised below (it should be noted that this section summarises some of the key action plans included with the Belfast Masterplan, however this is not an exhaustive list of all proposed actions):

Priorities for Change

- **Increase the city population**
 - ensure a population increase of 1.8% per year, from 277,000 in 2004 to 400,000 in 2025²⁰;
 - promote a sustainable, balanced, compact and dense model of population development, with higher densities of living and working in the city, residential use within the Titanic Quarter, and use of strategic city centre brownfield and derelict sites;
- **Ensure development of the city centre**

¹⁸ McEldowney, M., Scott, M., and Smyth, A (2003) Integrating land-use planning and transportation - policy formulation in the Belfast Metropolitan Area, *Irish Geography*, 36 (2), 112 - 126.

¹⁹ Belfast City Council (2004) *Belfast: the Masterplan 2004 - 2020*

²⁰ Census (2011) current Belfast city population - 280, 962

- raise awareness and promote the city centre as a regional asset;
- promote high quality office provision, increase diversity of housing tenure, and better quality open space;
- enhance the wider retail offering of the city;
- diversify the economic and social mix of the city centre;
- **Develop new industries**
 - commission a comprehensive strategy for the knowledge-based industries in integrate business, urban planning and academic policies;
- **Develop land for employment**
 - create new employment zones around the city centre and middle-city to accommodate manufacturing and other traditional industries;
 - increase the supply of land for business and employment opportunities through direct City Council intervention;
 - work with the private sector, local enterprise agencies and other components of the social economy to identify ways of meeting the needs of local businesses;
 - ensure planning policies that emerge from the BMAP and other processes provide sufficient priority for local and smaller businesses;
- **Simplify city governance**

Spatial priorities

- **Energised core**
 - improve and widen the cultural, residential, commercial and retail offering;
 - redevelop city quarters with strong urban design frameworks;
 - introduce high quality architecture on landmark sites.
- **Neighbourhood renewal**
 - implementation of a co-ordinated community approach to neighbourhood renewal and examine opportunities for economic, social, physical and environmental regeneration;
- **Released environmental assets**
 - enhance the city's most prominent natural assets in order to improve accessibility, increase activity and contribute to the redevelopment of the areas;
- **Enhance the presentation of the city**
 - consider the physical enhancement of specific sites, particularly those which are visible to visitors to the city. These include major road corridors (M1, Westlink, M2 and M3); major road junctions (Grosvenor Road, York St / Nelson St, Bridge End); bus and railway stations; car parks throughout the city centre; City airport and surroundings; and the shoreline of the Belfast Lough.

It should be noted that the Masterplan is currently under review to ensure its relevance in the current economic climate.

People and Place - A strategy for Neighbourhood Renewal (2003)²¹

In terms of regeneration and tackling disadvantage, the 2003 *People and Place - A strategy for Neighbourhood Renewal* is instrumental. This long term (7-10 year) strategy targets

²¹ Department for Social Development (DSD) (2003) *People and Place: A Strategy for Neighbourhood Renewal*.

those communities throughout Northern Ireland suffering the highest levels of deprivation. Neighbourhood Renewal is a cross government strategy and aims to bring together the work of all Government Departments in partnership with local people to tackle disadvantage and deprivation in all aspects of everyday life. Specific objectives of this strategy include:

- **Community renewal** - to develop confident communities that are able and committed to improving the quality of life in the most deprived neighbourhoods;
- **Economic renewal** - to develop economic activity in the most deprived neighbourhoods and connect them to the wider urban economy;
- **Social renewal** - to improve social conditions for the people who live in the most deprived neighbourhoods through better coordinated public services and the creation of safer environments;
- **Physical renewal** - to help create attractive, safe, sustainable environments in the most deprived neighbourhoods.

Neighbourhood Renewal Partnerships have been established in the most deprived 10% of wards across Northern Ireland were identified using the Noble Multiple Deprivation Measure. Following extensive consultation, this resulted in a total of 36 areas, and a population of approximately 280,000 (one person in 6 in Northern Ireland), being targeted for intervention. The areas include:

- 15 in Belfast (including five in North Belfast);
- 6 in the North West (including 4 in the city of Derry/Londonderry); and
- 15 in other towns and cities across Northern Ireland.

Neighbourhood Partnerships have been established in each Neighbourhood Renewal Area as a vehicle for local planning and implementation. Each Neighbourhood Renewal Partnership includes representatives of key political, statutory, voluntary, community and private sector stakeholders. Together, they have developed long term visions and action plans designed to improve the quality of life for those living in the area.

In order to measure the effectiveness of the Neighbourhood Renewal Strategy, the Department indicated that a mid-term review should be carried out during 2011. Findings from the review can be found latterly in this paper (within Chapter 5 which summarises the impact of some policy reforms and evaluates findings from previous research publications).

The remainder of this chapter focuses on policy evaluations focused on physical regeneration of Belfast City Centre. Such strategies demonstrate the level of commitment by policy makers to enhance Belfast as a vibrant, modern city.

Belfast State of the City²²

²² Belfast City Council <http://www.belfastcity.gov.uk/stateofthecity/research.asp>

Belfast City Council set up the State of the City initiative in 2004. Its aim is to help organisations to work together on the development and regeneration issues that face the city.

State of the City has been shaped by the expertise of those involved to-date, including leading local and international academics and practitioners in the fields of physical, economic, social and cultural development.

It has helped the Council to build up a picture of the challenges and opportunities facing Belfast. It has also contributed much to our understanding of how Belfast works, plus the debate on how the city should continue to be developed.

Regeneration programmes and measures²³

Over the past decade, Belfast has experienced record levels of investment and growth. Central to this growth is the physical regeneration of many sites across Belfast City Centre. Recent developments include the Titanic quarter, which is one of Europe's largest waterfront regeneration developments and is expected to create significant tourism and employment income for Belfast. A further successful example of physical regeneration is the Gasworks Business Park. This previously derelict and heavily polluted city centre Brownfield site has been turned into a modern business park in recent years, generating income for the city. Further physical regeneration projects are planned to enhance Belfast city. These include:

- Giant's Park: Transforming around 220 acres of land at the Dargan Road Landfill site on the North foreshore into a landmark public park for the city.
- Lagan Corridor Project: This project aimed to rejuvenate the River Lagan, by re-opening around 17 kilometres of the Lagan Navigation, from Belfast to Lisburn.

Belfast City Council also launched a £150m investment programme in 2012 to create a modern infrastructure to help communities and the wider city compete and grow now and in the future. This includes building city and community assets and delivering regeneration projects in local areas to improve quality of life.

Furthermore, within the policy framework for regeneration, the Department for Social Development manages a strategy for the renewal and development of the most deprived areas in and around Belfast. The four most important areas of work are encouraging investment and physical regeneration, raising educational achievement, improving access to employment, and creating safe, healthy communities.

The following programmes and measures are available in the promotion of urban regeneration within the City:

- Urban Development Grants (UDG): These are discretionary grants used for promoting job creation, inward investment and environmental improvement, by developing

²³ Belfast City Council, <http://www.belfastcity.gov.uk/cityregeneration/index.asp>.

vacant, derelict or underused land or buildings in priority areas. Physical development projects such as inner/ middle city housing, retail, commercial and light industry can attract grants.

- Comprehensive Development Schemes: This involves the process of land acquisition and disposal to secure the better planning and regeneration of town and city centres. The scheme empowers the Department of Social Development to acquire land and arrange for its disposal and development, following public consultation, to unlock development opportunities.
- Environmental Improvement Schemes: These schemes are used to improve the appearance of our towns and cities and to regenerate areas by restoring confidence and attracting new investment. The scheme is mainly used to improve the appearance of public open spaces in the centres of our cities, towns and villages. One of the largest schemes carried out in Belfast was the Donegall Square Environmental Improvement Scheme. The Scheme, which was completed in 1996, cost £1.76m of which the Department contributed £1.18m, the balance being funded by Belfast City Council.

Renewing the Routes²⁴

Regeneration is central to the Renewing the Routes project. This Belfast City Council initiative enables regeneration through working in conjunction with communities, businesses and agencies under the scheme to improve shopping areas and green spaces, develop gateways, introduce art and celebrate diverse heritage.

Since 2004, the Arterial Routes and Renewing the Routes programmes have:

- invested £6,000,000 in local regeneration projects;
- enhanced areas along ten main roads;
- revitalised 450 commercial frontages;
- improved 13 miles of the city;
- delivered 80 arts and landscaping projects;
- contributed to increases in turnover for local retailers;
- built relationships with over 50 partners.

Despite the commitment to regeneration and the investments made, the City continues to experience a lag in population in comparison to surrounding areas.

However, it is important to view these changes within the context of Local Government Reform which is due to be implemented in 2015. This will create significant changes with the transfer of planning and regeneration functions from central government to local government, combined with the power of community planning. While the detail of this is still to be worked through, this provides a significant opportunity to align and transform the existing approaches to regeneration and city planning at a city-wide and neighbourhood level. With the community plan providing an overarching framework for the

²⁴ Belfast City Council, <http://www.belfastcity.gov.uk/renewingtheroutes/index.asp>

area it will allow for a more integrated approach to developing and shaping areas that meet the needs of the local population.

Urban Regeneration and Community Development Policy Framework²⁵

In addition, it is important to note that in the context of tackling deprivation the NI Executive has recently committed to deliver a range of measures to tackle poverty and social exclusion which will influence regeneration in its widest sense, through the Delivering Social Change framework. This framework aims to create new ways of working across government and in the wider public sector, in partnership with community, business and wider society.

The Social Investment Fund has been initiated as one of the levers under Delivering Social Change which enabled £80million to be allocated to deliver across four main aims at a regional level in April 2013. These aims include:

- building pathways to employment;
- tackling systemic issues linked to deprivation;
- increasing community services by regenerating and refurbishing existing facilities; and
- addressing dereliction and promoting investment in the physical regeneration of deprived communities.

Current strategy documents

Northern Ireland Housing Strategy 2012-17²⁶

The Northern Ireland Housing Strategy is a five year phased plan which launched in 2012. Its primary focus is ensuring that everyone within Northern Ireland is given the opportunity to secure good quality housing at a reasonable cost. The plan encompasses and recognises the significant role housing can play in supporting and sustaining economic recovery, creating employment and regenerating deprived and neglected communities. To be successful in attaining these goals the Northern Ireland Housing Strategy 2012-2017 outlays a significant structural change to how the housing system operates within Northern Ireland. Three key areas of change have been identified to create the right conditions for a stable and sustainable housing market in the medium to long term:

- funding provisions of advice for those who are experiencing difficulties sustaining home ownership;
- providing support for first time buyers who have the capital available to sustain home ownership but cannot secure access to the housing market due to tough mortgage credit conditions;

²⁵ Department for Social Development (DSD) (2012) *Urban Regeneration and Community Development Policy Framework*. Belfast: DSD

²⁶ Department for Social Development (DSD *Facing the Future: Housing Strategy for Northern Ireland 2012-2017*, Belfast (DSD).

- providing support to others in attempt to increase the supply of new housing to meet the long term need.

With regards to the long-term stability of the housing market, the Regional Development Strategy 2035 indicates the need for around 11,000 new housing units per annum. In recent years the supply of new homes has hovered around 7,000 units per annum. It is believed that addressing this shortfall will create jobs and aid economic recovery. This strategy looks at potential partnerships which could combine to achieve this target.

Another principle area of the Northern Ireland Housing Strategy 2012-2017 focuses on the role housing can play in the regeneration of communities. In particular, communities that have experienced population decline, empty housing and blight. Developing housing can help re-shape communities and areas into places that people are proud to live.

Economic Strategy Priorities for Sustainable Growth and Prosperity 2011²⁷

This strategy has been developed by locally elected politicians to meet the particular needs of the Northern Ireland economy, with the overall aim of increasing the country's economic competitiveness. This has been implicated through a specific focus on export led economic growth, prioritising the need to deepen and diversify our export base in order to increase employment and wealth across Northern Ireland. To attain this goal emphasis has been placed on the skills of our workforce, research, development and innovation. In order to focus on these areas and develop a more competitive economy, two key twin goals were identified; first, the rebalancing of the economy towards higher value added private sector activity, and second, the need to undertake a more immediate rebuilding phase, to address the impact of the global downturn on the local economy and labour market. The strategy outlines short, medium and long term goals for the Northern Ireland economy identifying a strategy up until 2030.

Community Safety Strategy for Northern Ireland 2012-2017²⁸

The 'Building Safer, Shared and Confident Communities' report is a Community Strategy implementation plan phased over a five year period with the aim to provide safer, shared and confident communities across Northern Ireland by 2017. The establishment of these objectives is beyond the ability of the justice system alone, therefore, the plan adopts a multi-agency approach. The strategy provides key figures such as the local government, the Executive, the voluntary and community sector and local communities with an overall direction towards establishing community safety within Northern Ireland. Research conducted prior to the plan identifies the need for;

- **Safer communities:** with lower levels of crime and anti-social behaviour;
- **Shared communities:** where each person's rights are respected in a shared and cohesive community;

²⁷ Northern Ireland Executive (2011) *Economic Strategy Priorities for sustainable growth and prosperity*

²⁸ Department of Justice (DOJ), (2012) *A Community Safety Strategy for Northern Ireland 2012-2017*, Belfast: DOJ.

- **Confident communities:** where local people have confidence in the agencies which work on their behalf.

In aim of attaining these specifications the Community Safety Strategy for Northern Ireland introduced the Policing and Community Safety Partnerships (PCSPs) at Council level. These partnerships provide opportunities for the key figures, identified above, to work together in addressing the problematic issues within communities. The strategy recognises the unique difficulties which arise in communities and the need for each community's issues to be addressed individually. The PCSPs innovative solutions are developed and tailored to effectively address local needs and play a pivotal role in the delivery of community safety at community level. The introduction of PCSPs builds upon the success of District Policing Partnerships and Community Safety Partnerships in recent years.

Regional Transport Strategy 2002 - 2012²⁹

The Regional Transportation Strategy (RTS) for Northern Ireland 2002-2012 identified strategic transportation investment priorities and considers potential funding sources and affordability of planned initiatives. The Strategy tackled deficiencies in the transportation systems to make best use of existing assets and introduced a number of important enhancements to the infrastructure and services.

The Strategy provided a range of transportation initiatives across Northern Ireland. Some of the principal initiatives included:

- upgrading the existing rail network and services (with the possible exception of the Antrim-Knockmore line which is the subject of a separate review);
- provision of new, modern trains and increased rail capacity;
- provision of new, modern accessible buses;
- the introduction of a rapid transit system in the BMA;
- improvements in towns across Northern Ireland to assist pedestrians and cyclists and to provide new bus services throughout the day.

Revised Regional Transportation Strategy 2011³⁰

The Department for Regional Development released a revised strategy in 2011. The purpose of this document was to build on what was achieved through the original strategy, however with a shift towards moving people rather than vehicles and creating space on the networks for people. The primary focus of this revised policy is in relation to greater sustainability which will contribute positively to growing the economy, improving the quality of life for all and reducing the transport impacts on the environment. It includes the following high level aims:

- support the growth of the economy;

²⁹ Department for Regional Development (DRD) (2002), *Regional Transportation Strategy for Northern Ireland 2002 - 2012*, Belfast: DRD.

³⁰ Department for Regional Development (DRD), (2011), *Revised Regional Transportation Strategy*, Belfast: DRD.

- enhance the quality of life for society;
- reduce the environmental impact of transport.

Integrated Tourism Framework 2012-2014³¹

This strategic framework promotes Belfast's authenticity and European city experience. The strategy is aimed at developing and co-ordinating the city's natural, commercial and cultural assets. It is believed that this will attract a greater number of visitors to the city, maximising the economic benefits for Belfast and Northern Ireland, and particularly increasing jobs and opportunities.

The principal aim of this strategy is to make Belfast a recognised leading tourist destination and position it amongst the top twenty in Europe. This plan is implemented through the multi-modal partnership of organisations, institutions and businesses across the whole city. The strategy identifies and audits each tourist destination with an agreed template. It aims to agree a distinctive role for each tourist destination and identify how these hotspots can play a role in outlaying the Belfast story. Other crucial identified aspects to this strategy were: mapping connectivity and linkages between each destination for example access to public transport; possible introduction of bridges linking the Titanic Quarter to City Centre and Cathedral Quarter; enhancing visitor experiences; and other development opportunities, for example concerts, events and public realm opportunities e.g. the Crumlin Road Gaol.

Culture & Arts Framework for Belfast 2012-15³²

Launched in October 2012, the 'Cultural Framework for Belfast' is a strategy outline which recognises the development of the city's culture and arts as central to making the city and its neighbourhoods better places to live, work, invest, visit and study. The three year strategy has developed culture, arts and heritage projects within the city; creating wealth by supporting jobs, attracting visitors and increasing economic investment.

The implementation of this strategy is being conducted through the identification of four key themes of focus; (1) Distinctly Belfast, (2) Inspiring Communities, (3) Attracting Audiences and (4) Strengthening the Sector. Each of these themes represents areas in which development is required to expand the cities cultural horizon in turn enhancing job prospects, tourist attractions and economic investment.

Key aims for 2012 to 2015:

- connect people to the city, its stories, places, arts and heritage;
- promote the value and authenticity of the city's heritage;
- place culture, arts and heritage at the heart of Belfast's ongoing narrative;
- remove barriers to participation to ensure that all sections of the community can engage with high-quality culture, arts and heritage;
- enable people to value and understand their places;

³¹ Belfast City Council (BCC) (2011) *Integrated Strategic Framework for Belfast Tourism 2010-2014*.

³² Belfast City Council (BCC), (2012) *Cultural Framework 2012-2015*.

- develop shared cultural space which celebrates and promotes local cultures and communities;
- target areas and communities with low levels of engagement in culture and arts;
- increase the number of residents taking part in culture and arts;
- increase the number of visitors taking part in culture and arts;
- promote Belfast as a diverse and dynamic cultural city to existing and potential local and out-of state audiences;
- provide opportunities for organisations to develop and diversify their income streams;
- increase investment in culture, arts and heritage;
- develop a better infrastructure for skills development in Belfast;
- promote partnership working and collaboration.

The next chapter will review the changes in Belfast City population in comparison to surrounding metropolitan areas, in an attempt to shed light on population trends and explore potential reasons for this population lag.

Population trends

Belfast City Council is the largest of the 26 Councils in Northern Ireland and is responsible for the city of Belfast. According to the 2011 Census, an estimated 280,962 people live in the city while over 671,599 live in the wider metropolitan area.

The city, and its wider metropolitan area, is the largest settlement in the region and the second largest city on the island of Ireland. The Belfast City Council area sits at the heart of the growing population of the wider Belfast Metropolitan Area, which also comprises the surrounding council areas of Castlereagh, Lisburn, North Down, Newtownabbey and Carrickfergus.

According to the 2011 Census, an estimated 280,962 people live in the city while over 670,700 live in the wider metropolitan area. This compares to 1,810,683 residents in Northern Ireland as a whole.

The total population of Belfast City Council has remained fairly static since 1991 (increase of 0.6%), when 279,237 people lived in the area. It fell by 0.7% to 277,392 in 2001 before rising again by 1.3% to 280,962 people for the most recent census in 2011 (see Table 5.1). In contrast, the population change over the same time period (from 1991 to 2011) for all Northern Ireland is an increase of 15.8%.

All of the surrounding Councils in the BMA have also had a much greater change in population, most notable being Lisburn and Carrickfergus with a 20.8% and 19.4% rise respectively.

Table 5.1: Change in population numbers in Belfast Metropolitan Area

Area	1991	2001	% change since 1991	2011	% change since 2001	% change since 1991
Belfast	279,237	277,392	-0.7	280,962	1.3	0.6
Castlereagh	60,799	66,487	9.4	67,242	1.1	10.6
Lisburn	99,458	108,690	9.3	120,165	10.6	20.8
Newtownabbey	74,035	79,996	8.1	85,139	6.4	15.0
North Down	71,832	76,320	13.1	78,078	6.6	8.7
Carrickfergus	32,750	37,659	15.0	39,114	3.9	19.4
Belfast Metropolitan Area	618,111	646,544	4.6	670,700	3.7	8.5
Northern Ireland	1,577,836	1,685,267	6.8	1,810,863	7.5	15.8

Prior to the economic downturn there was a significant investment in construction within the Belfast Metropolitan area which saw a change in the profile of housing. Many older terraced housing areas within Belfast City Council made way for less dense family housing. However there was also a trend towards apartment living.

While the total number of houses/dwellings across Northern Ireland increased by 12% between 2001 and 2011, there was an increase in the number of apartments/flats by 27%.

In Belfast, the largest increases in the total numbers of houses/dwellings were in Rosetta (25%), Duncairn (25%), Island (22%) and Falls (21%).

Tables 5.2 and 5.3 show the change in number of households as well as the change in household size between 2001 and 2011. While Belfast City Council had a 0.9% increase in the number of households, when compared to 12.2% for the rest of Northern Ireland this is significantly lower.

Table 5.2: Change in number of households in Belfast Metropolitan Area

Area	2001	2011	% change since 2001
Belfast	119,553	120,595	0.9
Castlereagh	27,518	27,733	0.8
Lisburn	41,140	45,723	11.1
Newtownabbey	32,137	33,971	5.7
North Down	32,208	33,255	8.7
Carrickfergus	14,785	16,200	9.6
Belfast Metropolitan Area	267,341	277,477	3.8
Northern Ireland	626,718	703,275	12.2

In addition, in 2011 Belfast LGD had a relatively small household size (2.29) in 2011, especially when compared with Northern Ireland (2.54) and the other council areas within the BMA. It should be noted that across all areas in Northern Ireland there has been a fall in household size since 2001.

Table 5.3: Change in average household size in Belfast Metropolitan Area between 2001 and 2011

Area	2001	2011	% change since 2001
Belfast	2.38	2.29	-3.8
Castlereagh	2.44	2.40	-1.6
Lisburn	2.67	2.59	-3.0
Newtownabbey	2.51	2.45	-2.4
North Down	2.41	2.33	-3.3
Carrickfergus	2.52	2.39	-5.2
Northern Ireland	2.65	2.54	-4.2

Table 5.4 illustrates that wards in West Belfast are most likely to have experienced the highest levels of population decline in the last ten years (Upper Springfield - 11%; Andersonstown - 15%). Contrastingly, those wards in South Belfast were most likely to have experienced the greatest incidence of population increase. Rosetta, Shaftesbury, Windsor and Ballynafeigh had an increase of 28%, 25%, 15% and 13% respectively. Interestingly, The Mount in East Belfast experienced the largest increase in population in the last ten years (31%).

Table 5.4: Change in population from 2001 to 2011 by ward

Ward Name	2001	2004	2007	2010	2011	% change
Andersonstown	5,752	5,645	5,302	5,064	4,907	-15%
Ardoyne	6,592	6,401	6,075	5,938	5,987	-9%
Ballyhackamore	5,689	5,525	5,468	5,646	5,939	4%
Ballymacarrett	4,933	4,756	4,761	4,808	4,908	-1%
Ballynafeigh	5,253	4,967	5,103	5,067	5,928	13%
Ballsillan	6,010	5,904	5,825	5,783	5,626	-6%
Beechmount	5,504	5,589	5,554	5,488	5,485	0%
Bellevue	4,925	4,684	4,691	4,879	4,910	0%
Belmont	6,022	5,919	5,968	6,030	6,165	2%
Blackstaff	3,964	3,730	3,641	3,497	3,998	1%
Bloomfield	5,528	5,325	5,396	5,495	5,453	-1%
Botanic	9,589	8,965	8,451	8,380	8,945	-7%
Castleview	4,862	4,802	4,765	4,684	4,722	-3%
Cavehill	5,270	5,144	4,961	4,901	4,820	-9%
Cherryvalley	5,920	5,748	5,738	5,712	5,920	0%
Chichester Park	5,106	4,946	4,949	5,151	5,452	7%
Cliftonville	5,412	5,106	5,056	5,106	5,330	-2%
Clonard	4,427	4,313	4,252	4,544	4,975	12%
Crumlin	4,351	3,986	4,310	4,504	4,582	5%
Duncairn	3,991	3,675	3,949	4,224	4,901	23%
Falls	5,075	4,946	4,938	4,865	5,184	2%
Falls Park	5,889	5,552	5,292	5,276	5,343	-9%
Finaghy	4,960	4,823	4,536	4,454	4,555	-8%
Fortwilliam	4,776	4,576	4,646	4,596	4,561	-5%
Glen Road	5,868	5,648	5,445	5,324	5,573	-5%
Glencairn	3,998	3,922	3,712	3,660	3,749	-6%
Glencolin	7,130	7,025	6,924	6,726	6,498	-9%
Highfield	5,307	5,360	5,572	5,641	5,651	6%
Island	4,270	4,036	4,456	4,970	5,014	17%
Knock	5,006	4,667	4,657	4,612	4,827	-4%
Ladybrook	6,388	6,171	6,342	6,207	6,519	2%
Legoniel	5,542	5,339	5,628	6,166	6,409	16%
Malone	5,708	5,569	5,373	5,218	5,555	-3%
Musgrave	5,264	5,068	4,899	4,747	4,927	-6%
New Lodge	5,214	5,113	5,019	4,899	4,950	-5%
Orangefield	5,477	5,400	5,462	5,582	5,619	3%
Ravenhill	5,517	5,449	5,516	5,629	6,041	9%
Rosetta	5,116	5,207	5,386	5,595	6,564	28%
Shaftesbury	5,786	6,067	6,266	6,352	7,214	25%
Shankill	3,778	3,811	3,792	3,672	3,816	1%
Stormont	5,516	5,419	5,352	5,357	5,548	1%
Stranmillis	7,652	7,574	7,323	7,358	8,139	6%
Sydenham	5,231	4,990	4,856	4,838	4,874	-7%
The Mount	4,254	4,188	4,596	5,028	5,591	31%
Upper Malone	4,922	4,819	4,659	4,547	4,841	-2%
Upper Springfield	5,907	5,732	5,467	5,245	5,250	-11%
Water Works	6,292	5,984	5,852	5,914	5,829	-7%
Whiterock	5,422	5,195	5,292	5,186	5,694	5%
Windsor	7,089	6,791	6,855	6,978	8,141	15%
Woodstock	5,141	5,007	4,937	4,907	5,445	6%
Woodvale	4,577	4,405	4,268	4,295	4,088	-11%

Given that population change is one of the primary indicators of a city's economic and urban health³³, Belfast City Council is keen to understand the factors that impact on

³³ Parkinson, Michael (2004) *Belfast: Competitive City?*,
<http://www.belfastcity.gov.uk/stateofthecity/michaelparkinson.asp>.

people's choices to live or move from the area so that strategic action can be taken to encourage current residents to remain and encourage others to relocate within Belfast. The next section reviews potential push and pull factors, which have been identified within previous research, in an attempt to understand reasons for this population change.

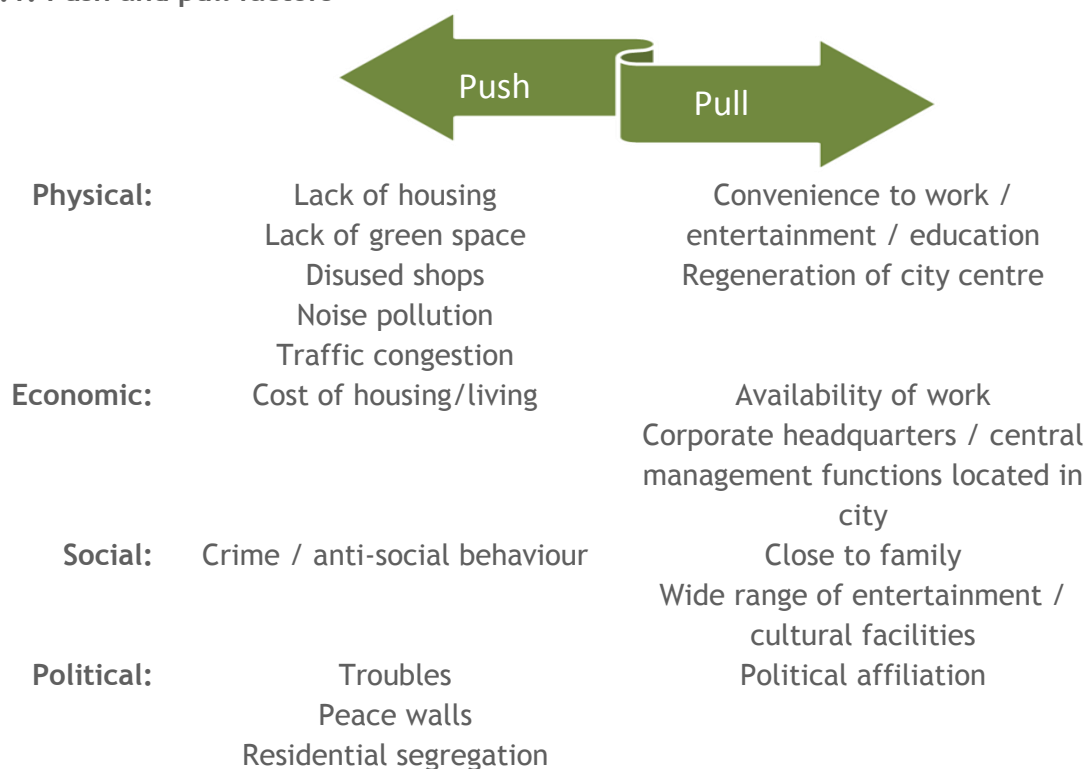
Push and pull factors

There are a number of drivers, known as *push* and *pull* factors that influence where a person decides to live. Historically, the main components of population change are:³⁴

- natural change (the difference between births and deaths);
- internal migration (which refers to migration within Northern Ireland);
- external migration, which refers to migration from Britain, the Republic of Ireland and the rest of the world.

The below diagram summarises some of the push and pull factors (grouped by broad themes of: physical, economic, social and political) which may be impacting on population change in the Belfast City Council area. By understanding the push and pull factors further, the Council will be able to focus on actions it can take to encourage residence.

Figure 6.1: Push and pull factors



³⁴ Northern Ireland Housing Executive (2011) *The Belfast Metropolitan Housing Market Area: A local housing system analysis*, NIHE.

Previous research

Previous research findings³⁵ have highlighted how natural change was the main contributor to population growth in Northern Ireland in the 1990s. This remained the case until 2004 when the increase in international migration led to the emergence of net in-migration. NISRA (2009)³⁶ estimate in the decade to 2004 that the population of Northern Ireland increased by an average of 7,000 persons each year (0.4%) but this figure more than doubled to 16,100 between 2004 and 2008 (1.0%).

In spite of this recent trend, previous publications³⁷ indicate that natural change has remained the main contributor to population growth in the Belfast Metropolitan Area. The decline in the BMA population from 2001-2004 was the result of net out-migration, which was considerably in excess of natural growth. Between 2004 and 2008 a sharp increase in net migration largely offset the continuing outflow of individuals to the rest of Northern Ireland, primarily to other sub-markets in the BMA. At the other end of the scale, net migration was the main driver of population growth in Ards Peninsula and North Down from 2001 to 2008. Evidence suggests that North Down tended to attract mainly middle aged and older residents from BMA. The Ards Peninsula tended to attract people from BMA and North Down, many of whom are aged over 40 years. There was also evidence of an increase in international migrants coming to the Ards Peninsula between 2001 and 2008, mainly from Europe.

Cooper et al. (2001)³⁸ reinforce the notion that population decline in Belfast City has been a result of out migration. This publication recognises that such migration is common to most UK cities, however that it has been exacerbated in Northern Ireland by the 'Troubles'.

Information gathered from *Belfast - A Profile of the City (2009)*³⁹ also suggests that high levels of deprivation may be influential in encouraging people to move from Belfast City Centre. This document highlighted figures from the Northern Ireland Multiple Index of Deprivation (2005) which revealed that Belfast:

- is the most deprived out of the 26 Local Government Districts;
- has eight of the 10 most deprived wards in Northern Ireland and nine of the 10 worst wards in relation to health deprivation;
- there are 82,986 people in Belfast experiencing income deprivation and 30,119 people experiencing employment deprivation.

³⁵ Northern Ireland Housing Executive (2011) *The Belfast Metropolitan Housing Market Area: A local housing system analysis*, NIHE.

³⁶ Northern Ireland Statistics and Research Agency (2009) *Population & Migration Estimates Northern Ireland - Statistical Report*, NISRA.

³⁷ Northern Ireland Housing Executive (2011) *The Belfast Metropolitan Housing Market Area: A local housing system analysis*, NIHE.

³⁸ Cooper, J., Ryley, T., and Smyth, A (2001) Contemporary lifestyles and the implications for sustainable development policy: lessons from the UK's most car dependent city, Belfast, *Cities*, 18 (2), 103 - 113.

³⁹ Belfast City Council (2009) *Belfast: A Profile of the City 2009 - 2010*.

Multiple deprivation indicators

Table 6.1 depicts ward level population change alongside measures of multiple deprivation in order to gain insight into the factors which may be contributing to the population decline. For each of the factors the highest ranking wards are highlighted in blue and the lowest ranking are highlighted in brown.

Interestingly, the trends in population increase/decrease do not appear to correspond to any specific causal factor. For example, Cavehill has experienced a 9% decrease in population in the last ten years. However, this same ward ranks highly in terms of income, health and living environment. The Mount has experienced the greatest level of population increase (+31%) however this ward ranks lowly in terms of living environment domain.

Table 6.1: Multiple deprivation rankings by ward

	Pop. change from 2001 to 2011	Multiple Deprivation Measure Rank	Income Rank	Employment Rank	Health Deprivation and Disability Rank	Living Environment Rank	Crime and Disorder Rank
Andersonstown	-15%	118	129	72	73	160	160
Upper Springfield	-11%	11	16	9	6	107	98
Woodvale	-11%	19	25	22	44	24	138
Ardoyne	-9%	9	7	18	10	11	68
Falls Park	-9%	101	121	81	51	171	55
Cavehill	-9%	523	540	509	532	325	103
Glencolin	-9%	33	49	27	34	134	126
Finaghy	-8%	550	531	543	514	352	254
Botanic	-7%	237	362	519	351	13	1
Sydenham	-7%	206	245	235	169	56	233
Water Works	-7%	16	22	19	20	4	2
Musgrave	-6%	433	400	360	359	214	145
Glencairn	-6%	31	50	31	43	98	153
Ballysillan	-6%	157	198	154	232	102	197
Glen Road	-5%	43	51	24	31	111	121
New Lodge	-5%	3	5	5	3	8	19
Fortwilliam	-5%	293	326	285	222	85	43
Knock	-4%	449	417	411	373	229	290
Malone	-3%	564	575	571	575	196	200
Castleview	-3%	230	218	199	191	121	144
Upper Malone	-2%	328	273	283	347	201	274
Cliftonville	-2%	64	59	71	67	65	11
Ballymacarrett	-1%	18	21	29	21	36	107
Bloomfield	-1%	196	187	322	186	29	81
Cherryvalley	0%	542	487	521	481	315	368
Bellevue	0%	155	138	162	182	143	80
Blackstaff	1%	42	86	79	36	2	40
Shankill	1%	4	6	11	5	26	27
Stormont	1%	576	563	572	563	399	418
Falls	2%	2	4	3	1	39	6
Ladybrook	2%	88	77	65	69	212	154
Belmont	2%	444	404	462	378	237	214
Orangefield	3%	485	459	501	383	186	245
Ballyhackamore	4%	493	456	541	386	136	137
Crumlin	5%	6	13	7	13	51	51
Whiterock	5%	1	1	1	2	33	41
Woodstock	6%	39	53	110	45	5	60
Stranmillis	6%	563	580	582	582	275	244
Highfield	6%	78	139	51	90	131	151
Chichester Park	7%	119	127	149	83	21	10
Ravenhill	9%	469	449	529	474	88	108
Clonard	12%	7	9	8	4	35	22
Ballynafeigh	13%	251	260	434	258	18	47
Windsor	15%	421	484	562	404	31	33
Legoniel	16%	56	64	50	85	91	37
Island	17%	92	97	190	114	58	64
Duncairn	23%	14	20	17	18	15	25
Shaftesbury	25%	22	29	44	15	22	28
Rosetta	28%	476	424	518	377	170	140
The Mount	31%	25	24	58	25	12	29

Noise as a potential 'push' factor

A further example of a potential push factor is noise pollution, evidenced within the following table. This information illustrates the extent of noise pollution in Belfast City in comparison to surrounding areas. However, it is important to note that Belfast City Council is the only area to run an out-of-hours noise service and would therefore be expected to have a higher incidence of recorded noise complaints.

Table 6.2: Incident of noise complaints in Belfast and surrounding areas

	Street Noise complaints 2011	Party noise complaints 2011	Total Noise complaints 2011	Total Noise complaints 2011 as a % of population
Belfast	206	3,220	6,031	2.15%
Castlereagh	6	48	186	0.28%
Lisburn	7	106	457	0.38%
Newtownabbey	13	63	330	0.39%
North Down	0	72	281	0.36%
Carrickfergus	8	45	184	0.47%
Northern Ireland	278	4,742	11,687	0.65%

Previous research findings

Having reviewed the policy context, population trends and potential 'push' factors which may have contributed to the population trends in Belfast City Council, this section reviews previous published literature specific to Belfast City. Such information may reinforce some of the 'push' factors highlighted in the previous chapter, and may shed some light on how the population regression can be tackled.

'Belfast; Competitive City?' (Parkinson, 2004)⁴⁰

Michael Parkinson's research paper, 'Belfast; Competitive City?' was highly influential in recognising the importance of a large population to Belfast's future and in contributing to the development of subsequent policy initiatives. Whilst highlighting the declining population of Belfast City, nevertheless, this paper revealed that Belfast was performing better than most UK cities in terms of employment, with 7% growth between 1996 and 2001. Findings also revealed that Belfast was performing comparatively to other leading European cities.

'Population Change in Belfast' (Belfast City Council, 2006)⁴¹

Subsequent to the publication of the Parkinson (2004) report, Belfast City Council commissioned research to explore the status of Belfast's population. Findings revealed that the City Council area had declined in population, whilst the wider BMA had experienced a rapid population growth. The research enabled Belfast City Council to conclude that population regression may be a consequence of:

- socio-economic influences: with high levels of deprivation and crime in Belfast city compared to surrounding areas;
- low international migration inflows: in contrast to Manchester, Birmingham, Leeds, Newcastle and Liverpool, who experienced large international migration inflows, in contrast, Belfast experienced a high net migration outflow. Although Northern Ireland experienced a large entry of Eastern European migrants in 2004, less than 10% of these were believed to arrive in Belfast.

This research incorporated a series of recommendations to reduce the population decline in Belfast City Council area. These include:

- develop stronger planning controls in order to stimulate economic development;
- increase police presence and instil a sense of safety across the City;
- provide a wider range of entertainment options, suitable for a range of demographics; and

⁴⁰ Parkinson, Michael (2004) *Belfast: Competitive City?*

<http://www.belfastcity.gov.uk/stateofthecity/michaelparkinson.asp>.

⁴¹ *Belfast City Council (2006) Population Change in Belfast: the development brief*

<http://www.belfastcity.gov.uk/stateofthecity/docs/CurrentDevelopmentBrief/DevelopmentBrief9.pdf>.

- Aim to reduce city centre house prices.

'My City: My Neighbourhood (Belfast City Council, 2010)⁴²

More recently, Belfast City Council conducted a consultation with residents of Belfast City Council utilising a combination of questionnaires and public forums. Survey responses revealed that respondents would like the following to be set as priorities for Belfast:

- create a safer city (53%);
- ensuring the city is a cleaner place (31%);
- improving local areas (25%).

Residents also recommended:

- more activities for children and young people (43%);
- lower levels of anti social behaviour (37%);
- cleaner streets (26%);
- more community activities (22%);
- lower levels of crime (19%).

Responses from the consultation were incorporated into the Belfast City Council's Corporate plan, which set out the council's vision and priorities for the future of the city.

Residents' Survey: Belfast City Council⁴³

Belfast City Council also conducts a survey of Belfast City Council residents to explore their satisfaction of living in the city and gain recommendations for improvement. In August 2010, the research consisted of 1,600 face-to-face surveys. The purpose of the survey was to obtain householders' views about living in the city, as well as gauging views of Belfast City Council services. Beforehand, the residents' survey was previously conducted in 2004 and 2007.

Overall, feedback from the 2010 survey indicated that residents were generally very positive about living in Belfast. Findings revealed that:

- 96% of those surveyed enjoy living in Belfast. This has remained the same since 2007;
- 84% were satisfied with their local area;
- 56% think that Belfast has improved over the past three years while 14% thought it had got worse.

However, the survey revealed a number of recommendations for improvement. Consistent with findings from the 'My City: My Neighbourhood' consultation, 50% recommended the creation of a safer city. Other recommendations are summarised below:

⁴² Belfast City Council (2010) *My City, My Neighbourhood*
<http://www.belfastcity.gov.uk/myneighbourhood/surveyresults.asp>.

⁴³Belfast City Council (2010, 2007, 2004) , *Residents Survey*
<http://www.belfastcity.gov.uk/consultations/publicsurvey2010.asp>.

- improve the cleanliness of the city (31%)
- support children and young people (31%);
- invest in improving local areas (30%);
- help to support and improve the city's economy (24%);
- provide value for money services (23%).

Findings from the 2007 residents' survey provide further insight into factors which have reduced householders' satisfaction with living in the Belfast. Respondents indicated that they were dissatisfied with the following aspects of city living:

- lack of affordable housing (47%);
- cost of living (44%);
- traffic congestion (42%);
- antisocial behaviour (24%);
- religious tension (9%).

Such findings may shed some light on potential push factors contributing to population decline in the Belfast City Council area.

Neighbourhood Renewal: Mid-Term review 2011⁴⁴

The purpose of the Neighbourhood Renewal programme and publication of a mid-term review has been outlined in Chapter 2 of this paper. Findings from the 2011 strategy review revealed the following trends in the Neighbourhood Renewal areas:

- between 2001 and 2008 the population of the Neighbourhood Renewal Areas fell by 0.9% whilst the Northern Ireland population increased by 5.1%.

Overall, Neighbourhood Renewal Areas continue to demonstrate higher levels of unemployment and inactivity than in the population as a whole. Although there was a substantial increase in the number of employee jobs in Neighbourhood Renewal Areas between 2001 and 2007 (a 14% increase compared to 8% in the rest of the country), economic inactivity due to ill health remains a problem.

The more recently published *Outcome Indicators Report (2012)*⁴⁵ provides some useful information on Belfast Neighbourhood Renewal Areas. Whilst overall crime rates in Neighbourhood Renewal Areas decreased from 147.3 in 2003/04 to 129.3 in 2010/11, nevertheless Belfast and Regional Development Office areas however continue to have a recorded crime rate almost 3 times that of the non-Neighbourhood Renewal Areas.

Anti-social behaviour

Overall, the number of reported incidents of anti-social behaviour has decreased from 25,826 to 23,845 across the 36 Neighbourhood Renewal Areas. However, this has not been the case across individual areas, as there has been an increase in 12 Neighbourhood

⁴⁴ DSD (2011) *People and Place: A Strategy for Neighbourhood Renewal Mid - Term Review*.

⁴⁵ DSD (2012) *People and Place: A Strategy for Neighbourhood Renewal Outcome Indicators Report*.

Renewal Areas. Those areas experiencing significant increases are Ligoniel (+55.8%), Outer West Belfast (+44.1%) and Dungannon (+31.3%). Therefore, statistics reveal that Belfast based Neighbourhood Renewal Areas continue to experience some of the highest levels of anti-social behaviour.

Alcohol and drug related deaths

Statistics reveal that Neighbourhood Renewal Areas in the Belfast Regeneration Office had the highest level of alcohol and drug related deaths. In the period 2005-2009 the Belfast Regeneration Office area experienced 279 alcohol related deaths, compared to the North West Development Office area with 100 deaths and Regional Development Office area at 82.

Similarly, between 2005 and 2009 the Belfast Regeneration Office area recorded 94 drug related deaths compared to the North West Development Office area with 23 deaths and the Regional Development Office area at 20.

Whilst it should be noted that the information pertains to the Belfast Neighbourhood Renewal Areas and is not relevant to Belfast City Council as a whole, nevertheless, statistics illustrate that some parts of Belfast are continuing to experience higher levels of crime and anti-social behaviour than other Neighbourhood Renewal Areas and non-Renewal areas.

Attitudes to Peace Lines (University of Ulster, 2012)⁴⁶

The University of Ulster recently released findings from a postal survey of over 1,000 Peace Line residents in North, East and West Belfast, as well Peace Line residents from Derry/Londonderry.

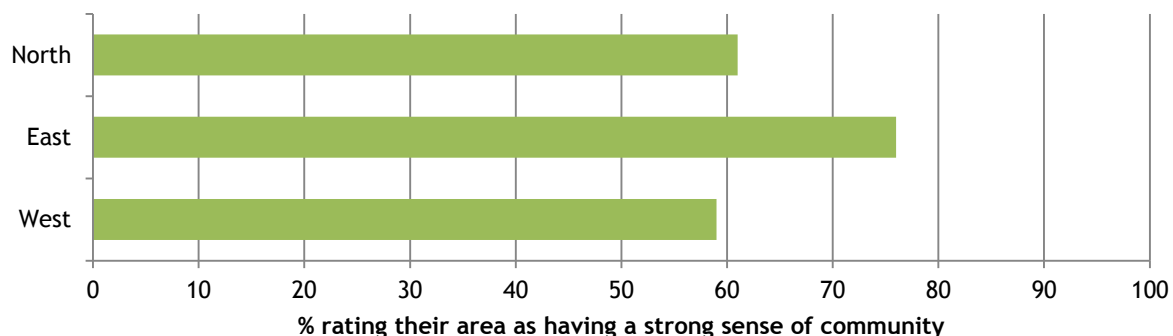
In the context of this review, it is useful to explore some of the findings from the survey with respondents from north, west and east Belfast. Information can be used to understand residents' satisfaction with their neighbourhood and whether they believe peace walls are a barrier to population growth.

Summary of findings

Interestingly, findings showed that respondents generally feel there is a strong sense of community in their area. Residents from east Belfast were more likely to indicate that there was a strong sense of community in their area, compared to those in north and west Belfast (76% compared to 61% and 59% respectively).

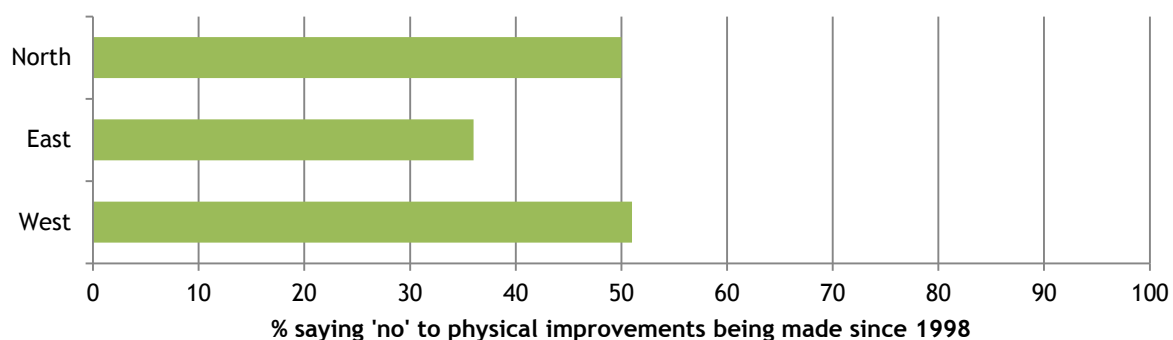
⁴⁶ University of Ulster (2012) *Attitudes to Peace Lines*.

Figure 7.1: Residents' perceptions on the sense of community in their neighbourhood



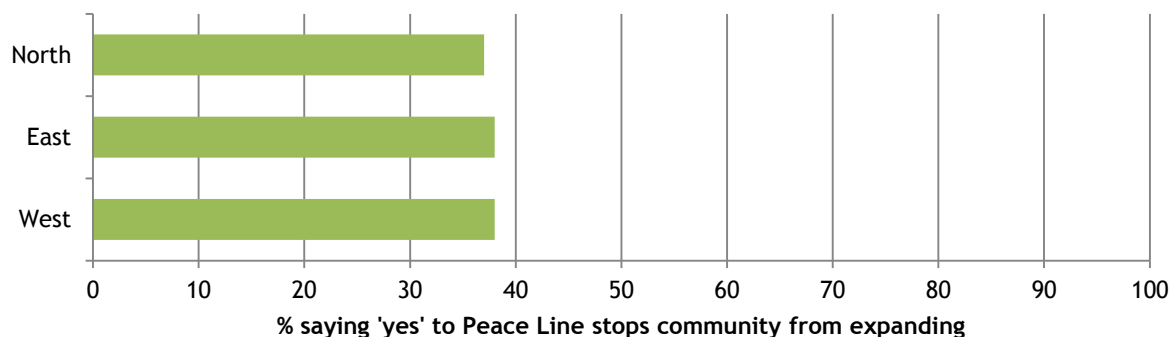
Generally, respondents indicated that there have been no physical developments made to their area since the Good Friday Agreement. Respondents in west (51%) and north (50%) Belfast were more likely than those in east Belfast (36%) to indicate that there had been no physical developments.

Figure 7.2: Incidence of physical re-development



Across north, east and west Belfast, just under 40% indicated that the Peace Line is preventing community expansion in their area. Such findings may provide insight into factors influencing population change in particular areas.

Figure 7.3: Investigating the impact of Peace Line in preventing community expansion



Previous research findings provide some insight to the potential push factors which may be contributing to the population decline in the Belfast City Council Area. These include:

- higher levels of *crime and anti-social behaviour* in Belfast compared to other areas;
- greater incidence of *alcohol and drug related deaths*, suggesting a greater incidence of substance abuse;
- residents' concerns about the *safety*;
- perceived *lack of physical regeneration* in Peace Line areas;
- Peace Lines acting as a physical barrier *limiting community expansion*.

Such findings may be beneficial in supporting policy makers to develop interventions to reduce and negate such concerns amongst residents of the Belfast City Council area. It is worth considering these factors further through the quantitative research.

Attitudinal survey

Summary of approach

In this section we have detailed the tasks that were undertaken during the implementation of the survey. This element of the research targeted three defined samples:

- residents of Belfast City Council;
- residents in the wider Belfast Metropolitan area, including those who previously lived in Belfast;
- people who work in Belfast but live elsewhere.

The following paragraphs comprehensively detail the sampling process for each aspect.

Sample 1: Residents of Belfast City Council

The survey was conducted with 786 people across 38 wards in the Belfast City Council area.

The sample was selected based upon analysis of the wards most affected by population increase or decline in the last ten years (*source*: Census, 2001; Census, 2011). Wards that have experienced a significant population decline or increase (+/-10% or more) had a higher proportion of the population selected for interview. The distribution of the remaining samples were evenly spread across 35 wards, representative of the population north, south, east and west of the city.

Table 8.1 provides an overview of the number of interviews achieved in each ward in relation to areas of 10% growth in population, areas of between +10% and -10% population change and areas of 10% decline in population. Table 8.2 provides a breakdown of the number of interviews achieved in northern, southern, eastern, western and Shankill wards within Belfast City Council area.

Table 8.1: Number of interviews achieved by population increase/decline

	Interviews achieved	% achieved interviews
Wards experiencing an increase (10% or more)		
Ballynafeigh	17	2%
Clonard	20	3%
Duncairn	20	3%
Island	19	2%
Legoniel	20	3%
Rosetta	20	3%
Shaftesbury	20	3%
The Mount	20	3%
Windsor	20	3%
Total	176	22%
Wards experiencing a decrease (10% or more)		
Andersonstown	40	5%
Upper Springfield	40	5%
Woodvale	40	5%
Total	120	15%
Remaining wards		
Wards experiencing an increase/decrease less than 10%	490	62%
Total number of interviews	786	100%

Table 8.2: Number of interviews achieved by location

	Interviews achieved	% interviews achieved
BCC North	126	16%
BCC South	178	23%
BCC East	219	28%
BCC West	182	23%
BCC Shankill	81	10%
Total number of interviews	786	100%

Quotas were applied to the number of interviews conducted based on gender and age, while minimum quotas were applied to Socio-Economic Group (SEG). The following table shows the quotas that were applied based on 2011 Census data and the number of interviews achieved.

Table 8.3: Population distribution and interviews achieved

		Census 2011 data	Interviews achieved	% achieved interviews
Gender	Male	48%	363	46%
	Female	52%	423	54%
Age	18 to 35	37%	265	34%
	36 to 65	45%	363	46%
	66+	18%	158	20%
SEG	ABC1	43%	312	40%
	C2DE	57%	471	60%
	Refused	-	3	0%
Total		100%	786	100%

Respondents were also asked if they considered themselves to be a migrant worker, and 2% of Belfast City Council residents said that they were.

Sample 2: Residents in the wider Belfast Metropolitan area

The survey of consumers was conducted with 753 people living within the BMA (excluding Belfast Local Government District). The following table provides a breakdown of the number of interviews achieved in BMA.

Table 8.4: Number of interviews achieved by location

	Interviews achieved	% achieved interviews
Castlereagh	150	20%
Carrickfergus	104	14%
Newtownabbey	128	17%
North Down	152	20%
Lisburn	219	29%
Total number of interviews	753	100%

Quotas were applied to the number of interviews conducted based on gender, age and SEG. The following table shows the quotas that were applied based on 2011 Census data and the number of interviews achieved.

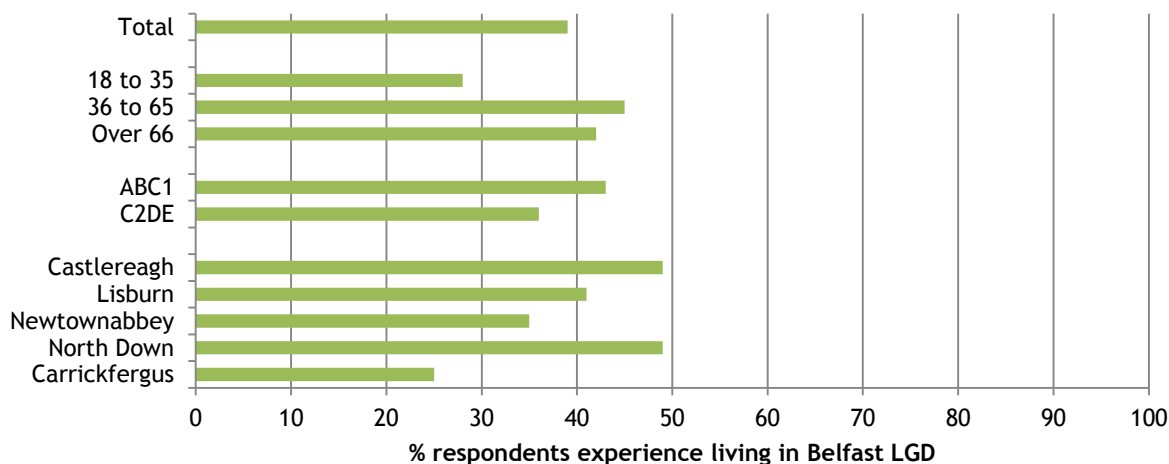
Table 8.5: Population distribution and interviews achieved

		Census 2011 data	Interviews achieved	% achieved interviews
Gender	Male	48%	353	47%
	Female	52%	400	53%
Age	18 to 35	29%	232	31%
	36 to 65	51%	367	49%
	66+	19%	154	20%
SEG	ABC1	47%	354	47%
	C2DE	53%	398	53%
Total		100%	753	100%

3% of BMA respondents considered themselves to be a migrant worker.

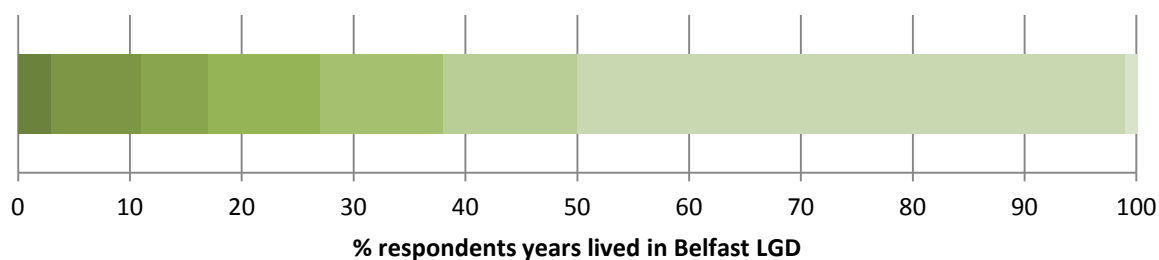
Figure 8.1 illustrates that 39% of BMA respondents have previously lived in Belfast City Council. Older respondents are more likely to have previously lived in Belfast City Council, as are those from ABC1 groups. Over two fifths of respondents from Castlereagh (49%), Lisburn (41%) and North Down (40%) indicated that they have previously lived in BLGD area.

Figure 8.1: Previous experience living in Belfast Local Government District area



Almost half of BMA residents who have previously lived in BLGD indicated that they did so more than 20 years ago. One in ten (11%) indicated that they have moved from Belfast in the last three years.

Figure 8.2: Length of time since respondents lived in Belfast Local Government District



- A year or less
- More than a year, up to 3 years
- More than 3 years, up to 5 years
- More than 5 years, up to 10 years
- More than 10 years, up to 15 years
- More than 15 years, up to 20 years
- More than 20 years
- Don't know/can't remember

Sample 3: People who work in Belfast but live elsewhere

This survey was conducted with 323⁴⁷ people who work in Belfast but who live outside the BLGD area. The survey was conducted on-street in the city centre and main thoroughfares, at Park and Ride facilities as well as bus-stops, bus stations and train stations.

The purpose of this survey was to capture the views of commuters, who have chosen to live outside the city even though they travel in for employment.

The following table illustrates the number of interviews completed with commuters, broken down by their proximity to Belfast:

Table 8.6: Commuters proximity to Belfast

	Interviews achieved	% achieved interviews
Live between 3.1 and 5 miles from BCC	43	13%
Live between 5.1 and 10 miles from BCC	125	39%
Live more than 10 miles from BCC	155	48%
Total number of interviews	323	100%

⁴⁷ This includes 73 people who were interviewed as part of the BMA survey.

Key findings

The following chapters present the findings from the attitudinal survey.

In order to gain an insight into the key push and pull factors affecting peoples' decision to live in and outside Belfast, findings have been summarised within three categories of influence (physical, social and cultural, and economic). For each category, findings are analysed by the following demographics:

- whether the respondent resides in Belfast City Council or BMA;
- whether the respondent resides in a ward in Belfast City Council which has been affected by population increase or decline;
- respondent age;
- social Economic Group;
- intention to live (or continue living) in Belfast City Council area;
- previous history of living in Belfast City Council (BMA residents only);
- number of people living in household.

Physical influences

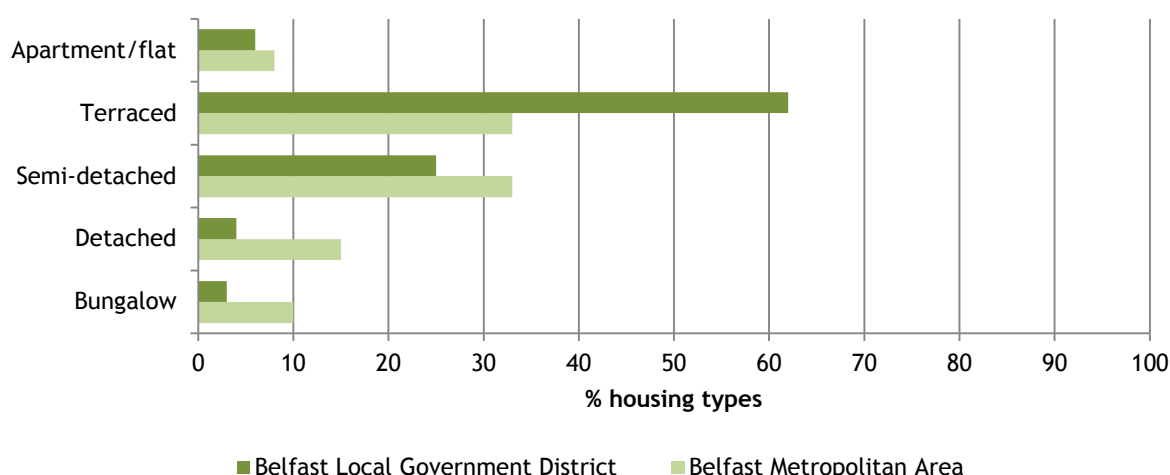
This section reviews the extent to which physical factors may be have influenced respondents' decision to live where they live.

Size and type of housing

Respondents were asked some questions in relation to their size and type of house, in order to gain insight into whether housing has any influence on where people choose to live.

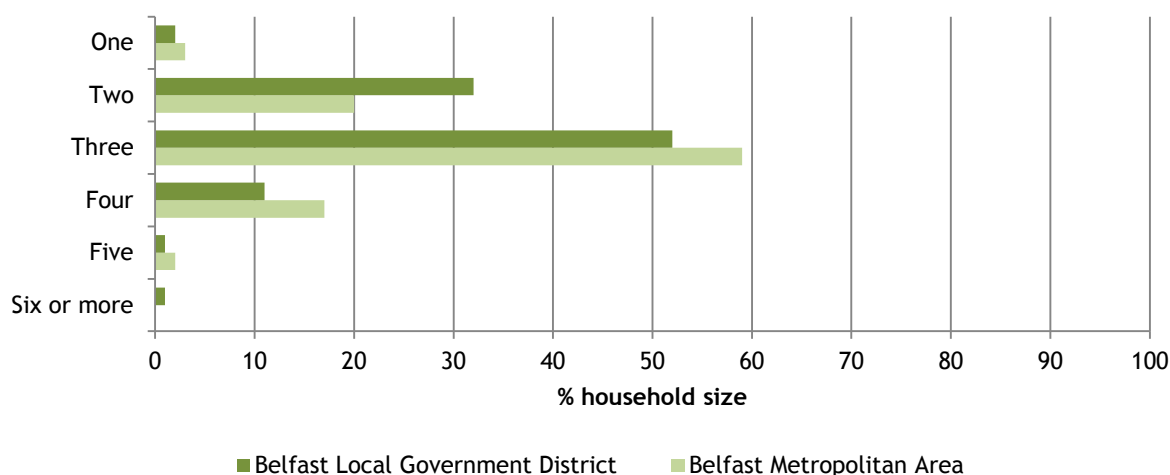
Figure 9.1 illustrates that almost two thirds (62%) of Belfast City Council residents surveyed live in terraced housing, compared to one third (33%) who live in the BMA area. While 15% of BMA respondents live in detaching housing, this compares to 4% Belfast City Council residents. Perhaps not surprisingly, findings suggest that BMA residents may be more influenced by a desire to have a larger house.

Figure 9.1: Comparing type of housing in BMA and Belfast City Council



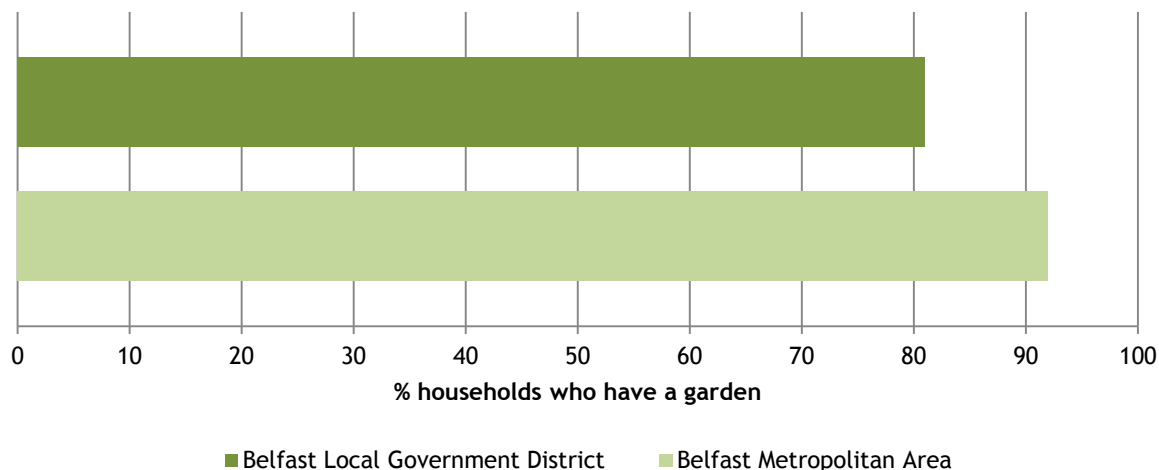
Respondents from Belfast City Council (32%) are more likely to indicate that they live in two bedroom housing compared to those in BMA (20%). Slightly more respondents in the BMA area indicated that they live in three (59%) or four (17%) bedroom housing compared to those from Belfast City Council (52% and 11% respectively). Again, findings suggest that size of house may be an influencer for BMA residents.

Figure 9.2: Comparing size of house in BMA and Belfast City Council



92% of respondents in BMA indicated that they have a garden. This compares to 81% of Belfast City Council residents.

Figure 9.3: Incidence of having a garden by locality



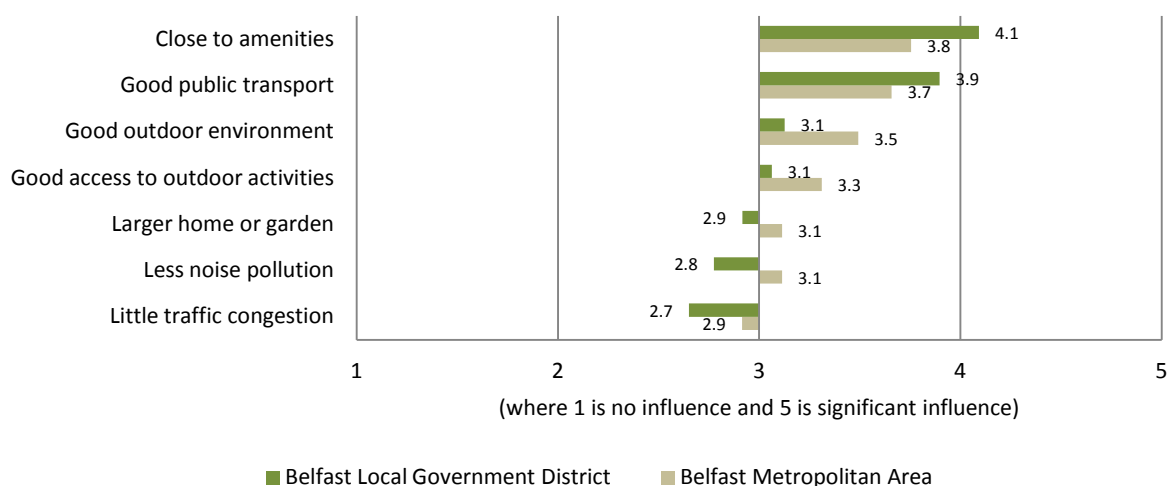
Physical pull factors

All respondents were asked to rate the extent to which a series of factors have influenced their choice of current residence, using a scale of 1 to 5 (where 1 is no influence and 5 is significant influence). This section reviews respondents' feedback in relation to physical pull factors and compares how they rated each factor on average (where 5 is the highest possible average score). The following paragraphs describe the differences and similarities across the various types of respondents, with a series of spider diagrams to illustrate the impact of the various factors.

Belfast City Council vs BMA

Those who live in Belfast City Council are more likely to indicate that they are influenced by *proximity to amenities* (mean score 4.1) and a *good public transport network* (3.9) compared to those who live in BMA. Perhaps not surprisingly, people who reside in BMA indicated that they are more strongly influenced by a *larger house or garden* (3.1), *access to outdoor activities* (3.3); and a *good outdoor environment* (3.5) than Belfast residents.

Figure 9.4: Influence of physical factors by respondent type



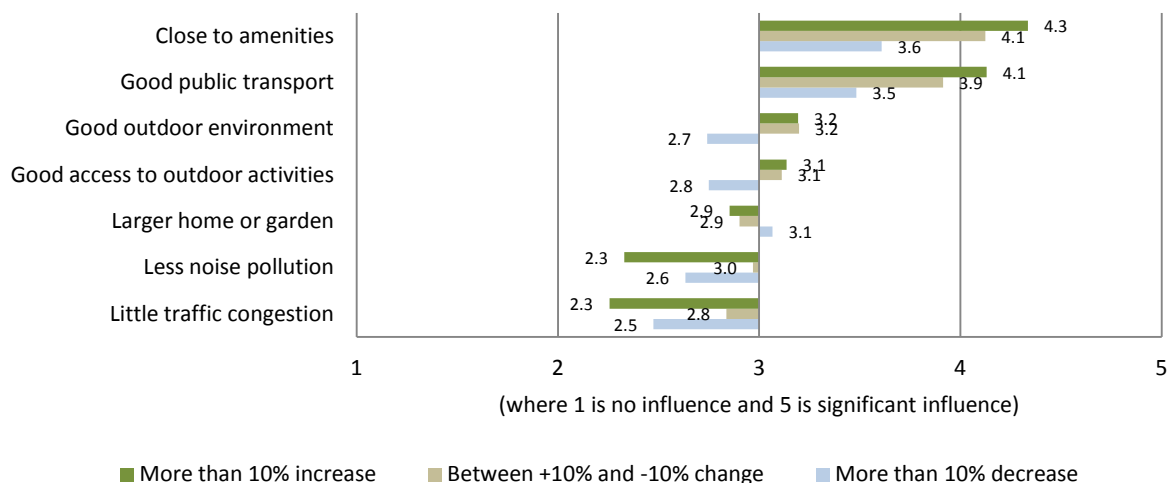
Population shift in Belfast wards

Respondents who reside in Belfast wards that have experienced a population increase in the past ten years (more than 10%) are more likely to indicate that they are influenced by the following factors than those who live in areas which have experienced a decline:

- *proximity to amenities* (average score 4.3 in areas with more than 10% increase; compared to average score 3.6 in areas with more than 10% decrease);
- *good public transport network* (4.1 compared to 3.5);
- *good access to outdoor activities* (3.1 compared to 2.8);
- *good outdoor environment* (3.2 compared to 2.7).

Overall, physical factors were rated less highly in terms of influence by respondents who live in wards which have experienced a population decline, with the exception of larger house or garden (average score 3.1 in areas with more than 10% decrease compared to 2.9 in areas with 10% increase).

Figure 9.5: Influence of physical factors by population shift in Belfast wards



Analysis by age and SEG

Comparison by age reveals that younger respondents are more strongly influenced by proximity to amenities and the public transport network (see Figures 9.6 and 9.7). Size of house/garden, access to outdoor activities and a good outdoor environment were rated most highly by those aged between 36 and 65.

ABC1 respondents are more likely to indicate that they are influenced by the size of house/garden compared to those from C2DE groups (see Figures 9.8 and 9.9). External factors, such as satisfaction with the outdoor environment, were also deemed to be more important by ABC1 respondents.

Figure 9.6: Influence of physical factors by age (BLGD residents)

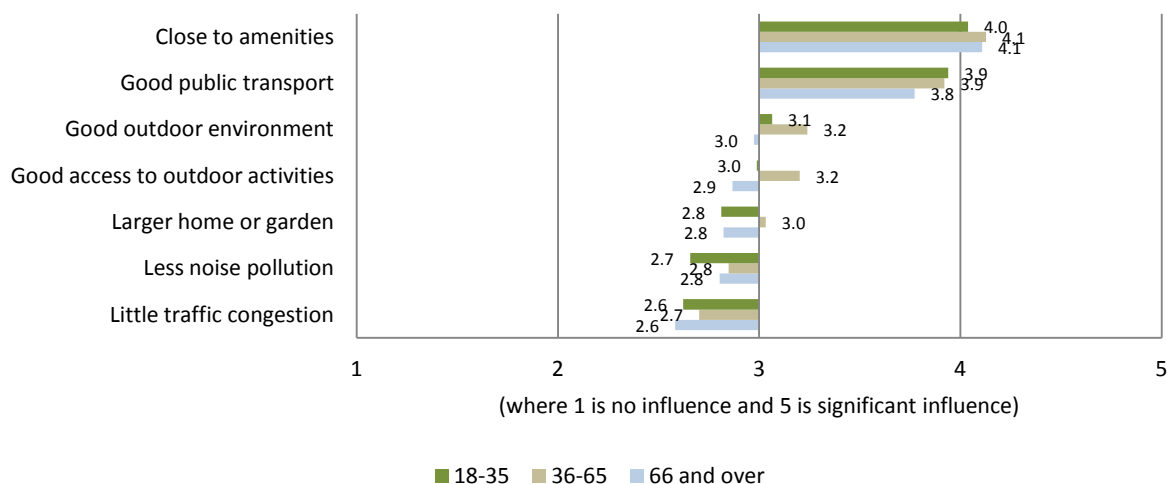


Figure 9.7: Influence of physical factors by age (BMA residents)

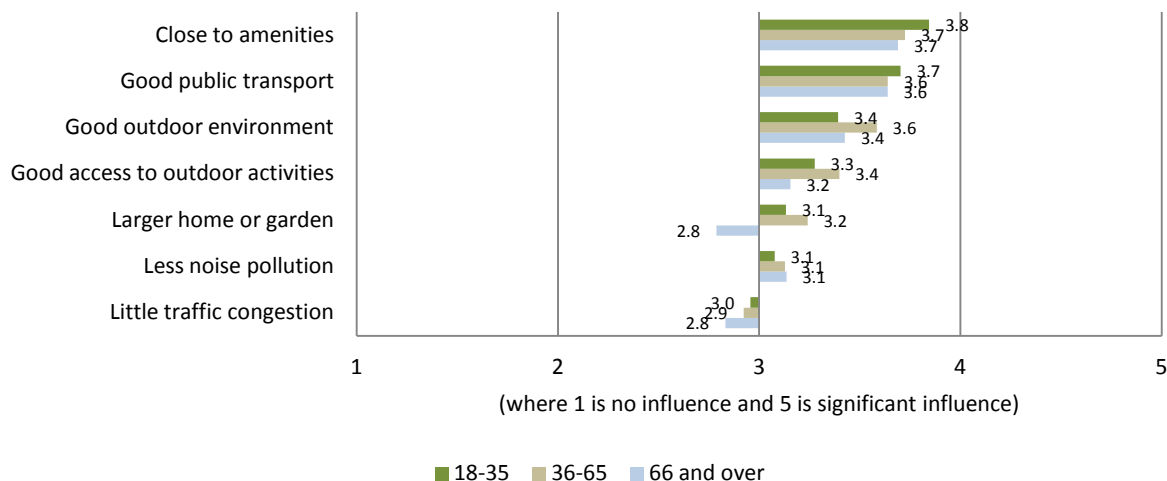


Figure 9.8: Influence of physical factors by socio-economic group (BLGD residents)

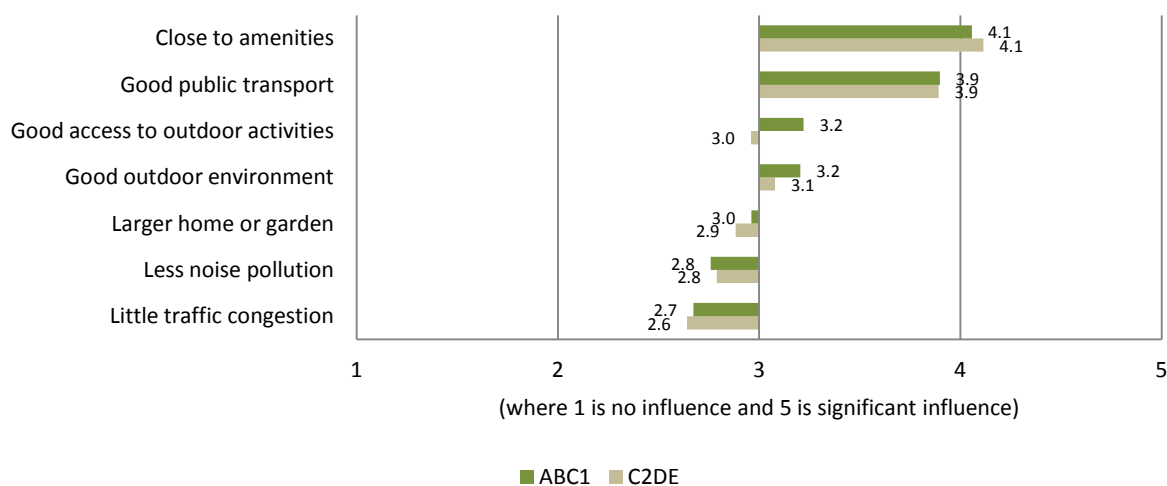
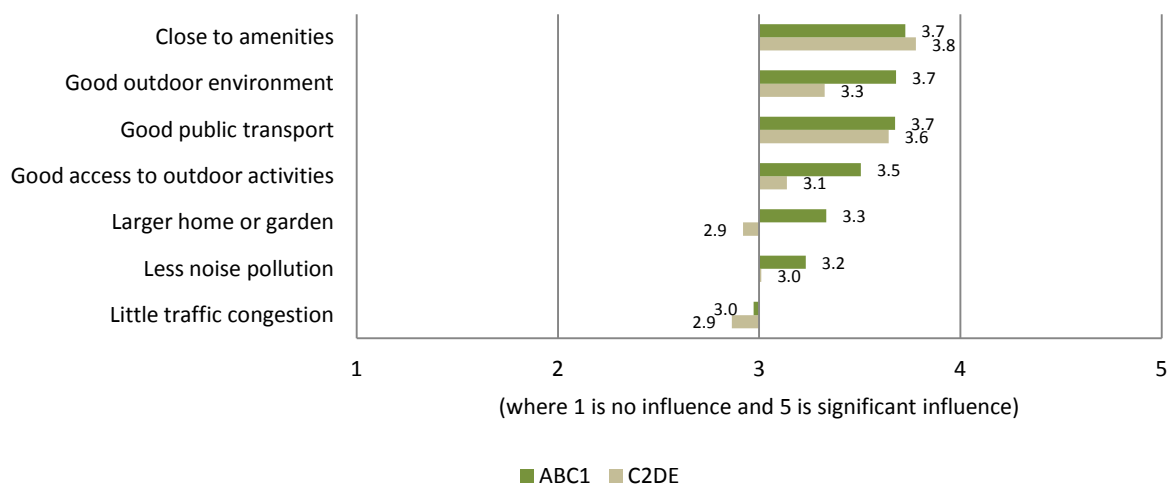


Figure 9.9: Influence of physical factors by socio-economic group (BMA residents)



Intention to live in Belfast City Council

Respondents were asked whether they can see themselves living in Belfast City Council in five years time. Those who currently reside in Belfast and do not envisage that they will live there in the future, are more likely to be influenced by a larger house/garden (average score 3.1 compared to 2.9 by those who intend to continue living in Belfast). This group of respondents also indicated that they would like to live in an area with less traffic congestion.

Contrastingly, those who reside outside the city yet envisage living in Belfast in five years time, are more likely to be influenced by the public transport network (average score 3.8 compared to 3.6 for those who do not intend to continue living in Belfast).

Figure 9.10: Influence of physical factors by intention to continue living in Belfast (Belfast council residents)

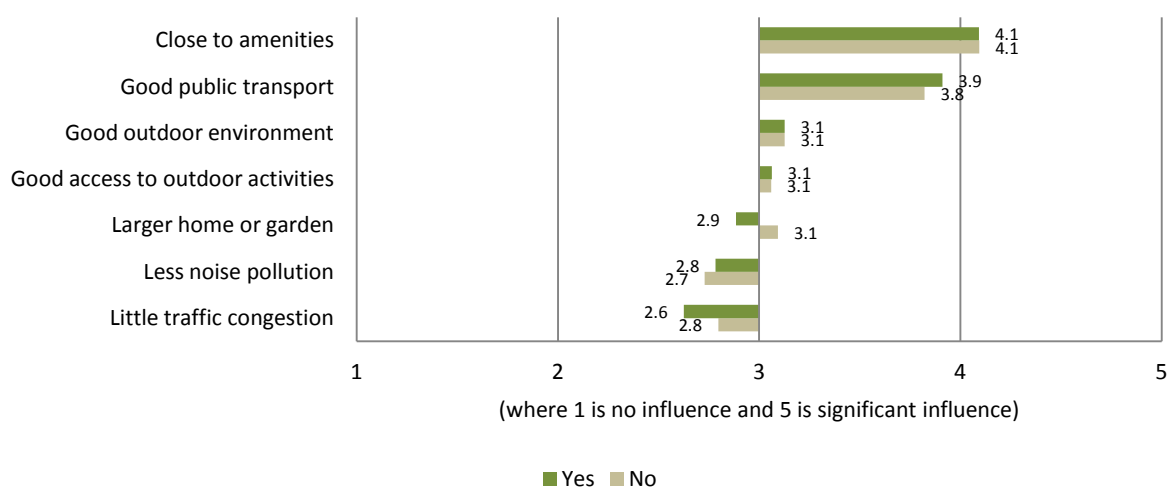
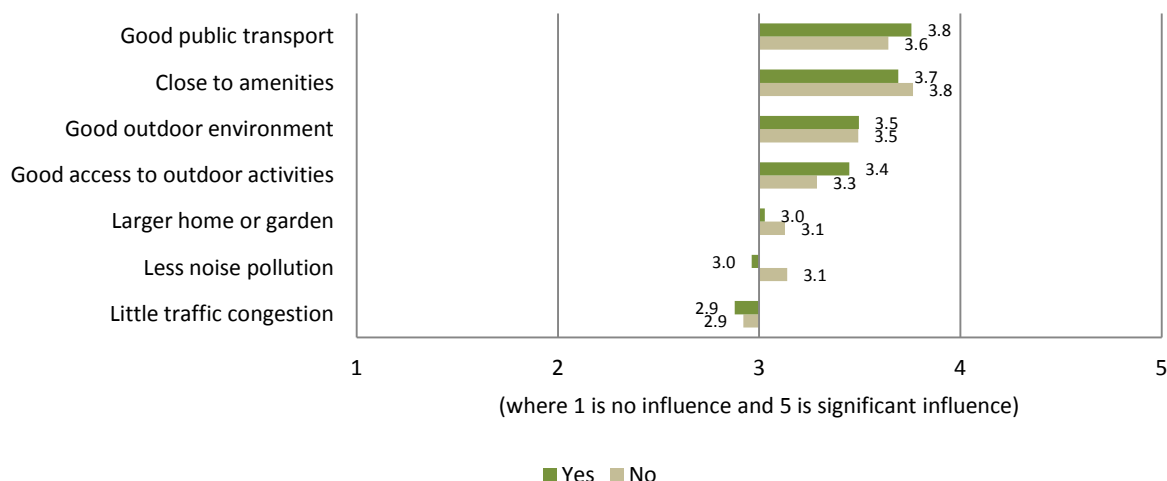


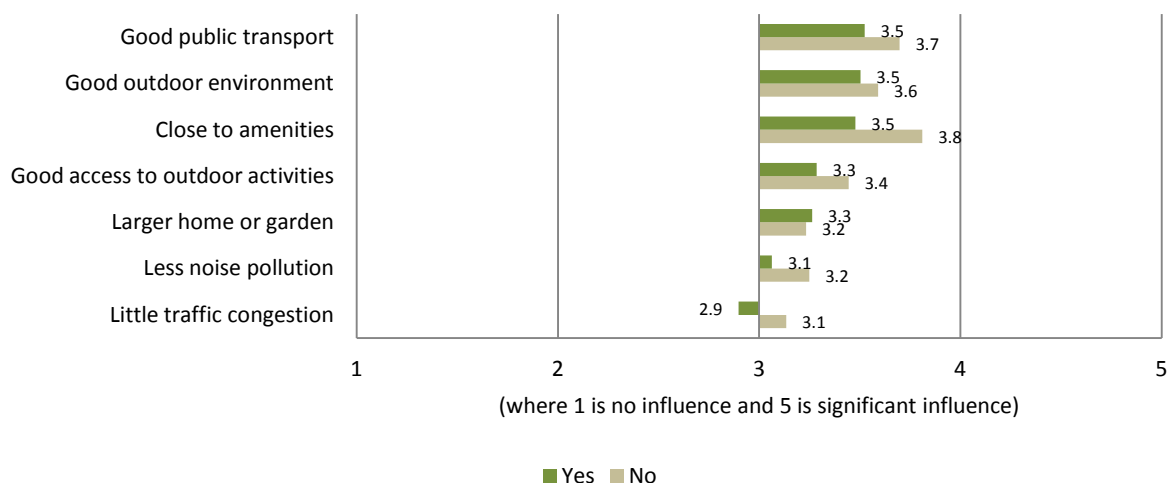
Figure 9.11: Influence of physical factors by intention to live in Belfast (BMA residents)



Previous experience living in Belfast City Council

Those who live in BMA, yet have previously lived in BLGD, are more likely to rate *proximity to amenities* and *transport network* more highly in terms of influence than those who have never lived in Belfast. Not surprisingly, a *good outdoor environment* (3.5), *little traffic congestion* (2.9) and *less noise pollution* (3.2) were rated more highly in terms of importance by those who have never lived in Belfast.

Figure 9.12: Influence of physical factors by previous experience living in Belfast (BMA residents)

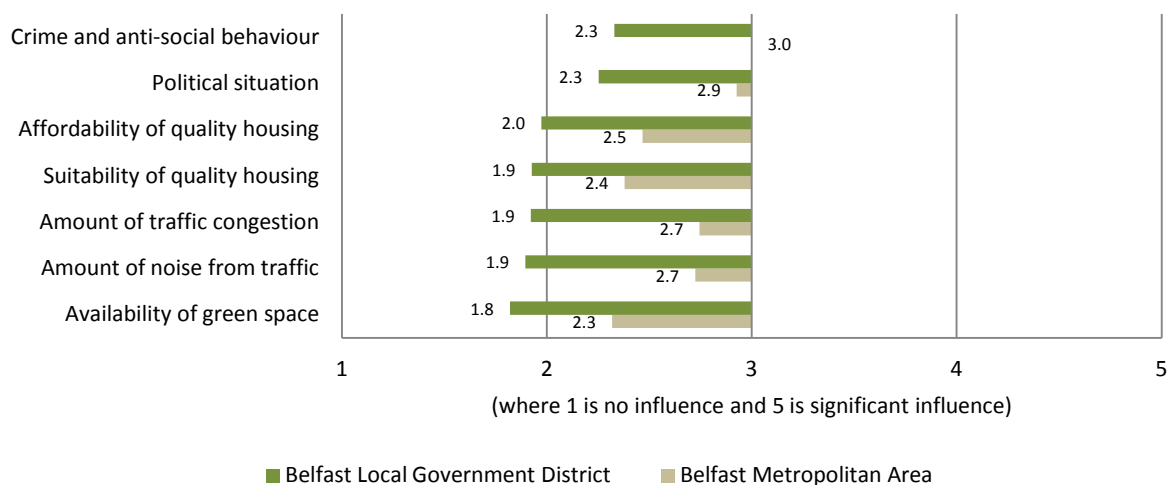


Physical push factors

This section reviews physical push factors and potential reasons which may be preventing BMA residents from moving to the Belfast Local Government District area. In addition, this section reviews push factors which may influence Belfast residents to move from the city.

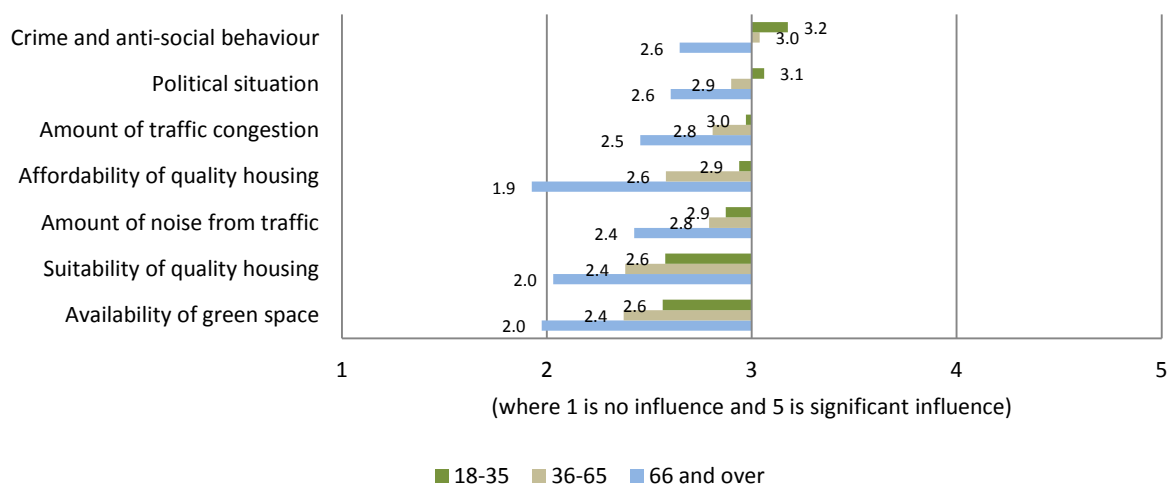
Figure 9.13 suggests that *suitability of housing* has a moderate influence on why respondents from BMA do not live in Belfast (2.4). *Availability of parks and green space* also had a moderate influence on those respondents from BMA (2.3).

Figure 9.13: Influence of physical push factors by area (BLGD and BMA residents)



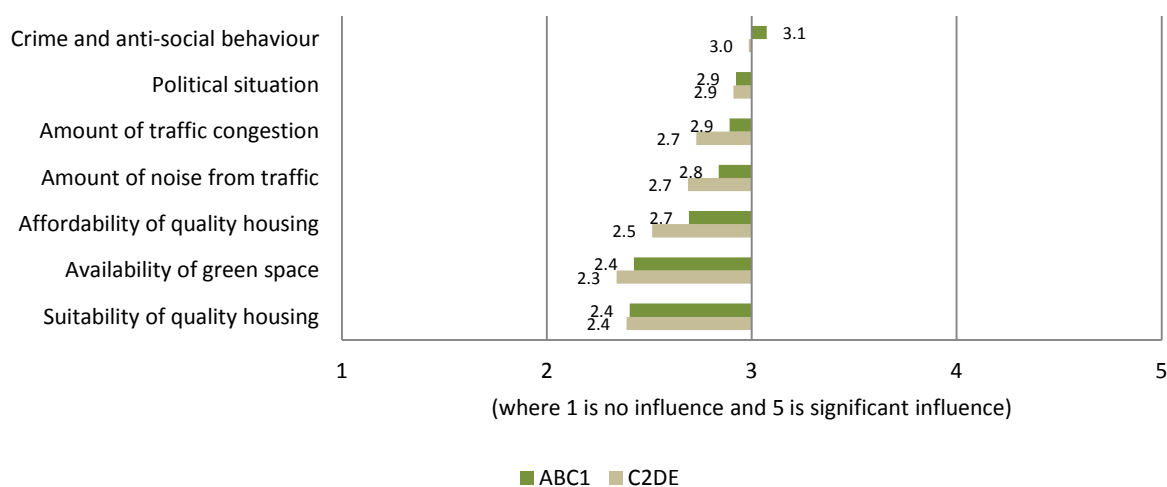
Younger respondents (2.6) (see Figure 9.14) and those from ABC1 groups (2.4) (see Figure 9.15) are more likely to highlight *housing quality* as an influence on why they do not live in Belfast.

Figure 9.14: Influence of physical push factors by age



BMA respondents (2.7) stated that *traffic congestion* has an influence on why they do not live in Belfast.

Figure 9.15: Influence of physical push factors by socio-economic group



Similarly, *traffic noise* (2.7) has some influence on why they do not live in the Belfast.

Respondents who live in Belfast City Council were asked the extent to which physical push factors may influence them to move away from Belfast. *Suitability of quality housing* may have an influence on encouraging them to move from Belfast (1.9). Younger respondents (2.6) are more likely to highlight suitable housing as a push factor than those aged over 66 (2.0). Younger respondents (2.9) are also much more likely than older respondents (2.4) to indicate that noise from traffic may influence them to move from Belfast.

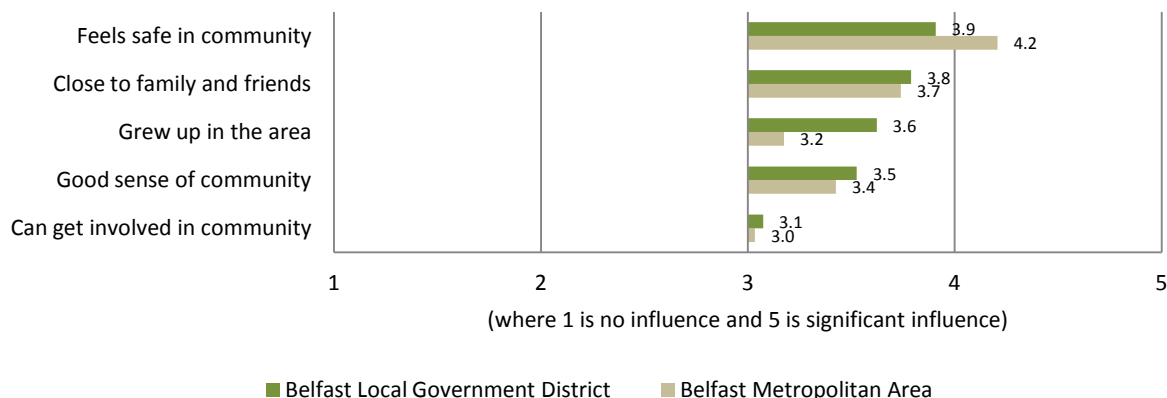
Social and cultural influences

This section analyses the extent to which social and cultural factors have an influence where respondents currently live.

Social and cultural pull factors

Proximity to family and friends appears to have an equal level of influence on both those who live in BMA (3.7) and BLGD (3.8). Respondents from Belfast are on average more likely to indicate that they grew up in the area (3.6) than those who live in BMA (3.2). Perhaps most interestingly, respondents from BMA are more likely to indicate that they are influenced by feeling safe (4.2) than those in Belfast City Council (3.9).

Figure 9.16: Influence of social and cultural factors by respondent type

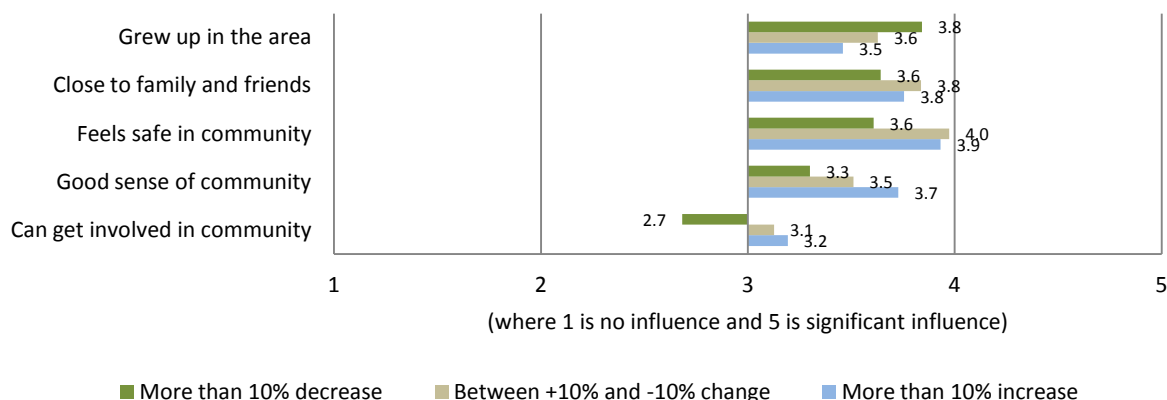


Population shift in Belfast wards

Analysis by population change reveals some interesting trends in residents’ views.

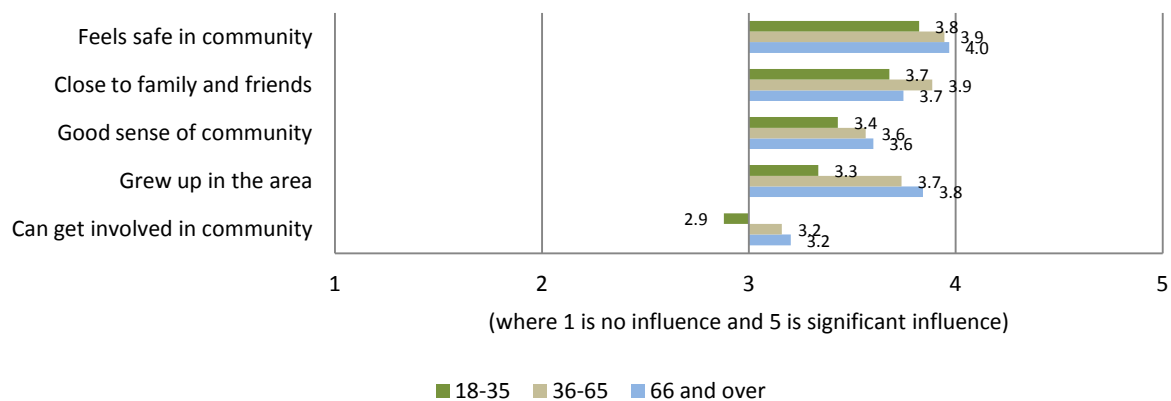
Those who live in wards which have experienced population decline are less likely to report that they are influenced by a *sense of community spirit* (3.3 compared to 3.7 who live in areas of population increase) and opportunities to get involved in the local community (2.7 compared to 3.2 areas of population increase). In addition, those from areas of population increase are more likely to rate *feeling safe* as an influencer (3.9 compared to 3.6 who live in areas of population decline). Findings suggest that lack of *community spirit* and *feeling ‘unsafe’* may be influencing residents to move from those areas which have experienced a decline in the past ten years.

Figure 9.17: Influence of social and cultural factors by population shift in Belfast wards



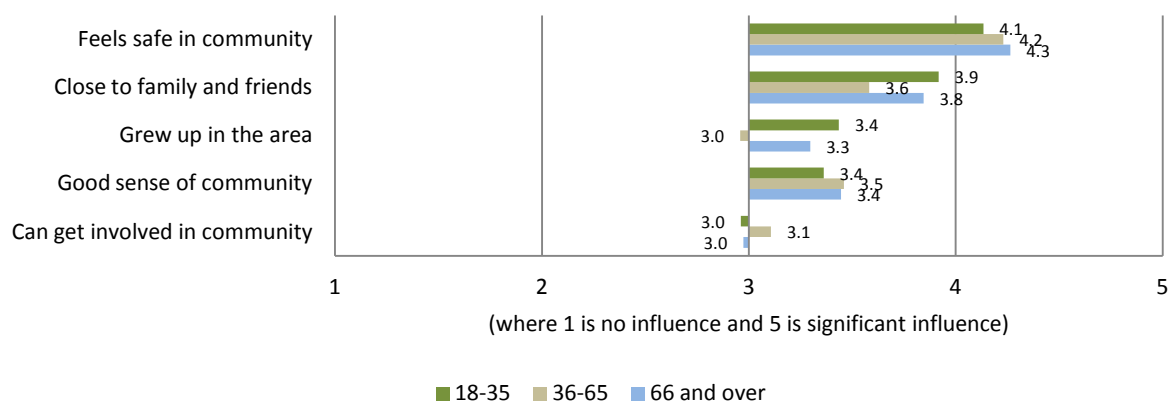
Analysis by age

Comparison by age reveals that older respondents in Belfast are more likely to be influenced by *proximity to family and friends* (3.7), *community spirit* (3.6), opportunities to *get involved in the local community* (3.2) and *feeling safe in the area* (4.0). On average, younger respondents living in Belfast rated social and cultural factors less highly than older respondents.



Contrastingly, younger respondents in BMA are more likely to indicate that they are influenced to live in this area due to *proximity to family and friends* (3.9) and because they *grew up in the area* (3.4). Across age bands, BMA respondents are overall more likely to indicate that they are influenced by *feeling safe* compared to Belfast residents.

Figure 9.19: Influence of social and cultural factors by age (BMA residents)



Analysis by SEG

Findings revealed little difference in feedback based on socio-economic group.

Figure 9.20: Influence of social and cultural factors by socio-economic group (BLGD residents)

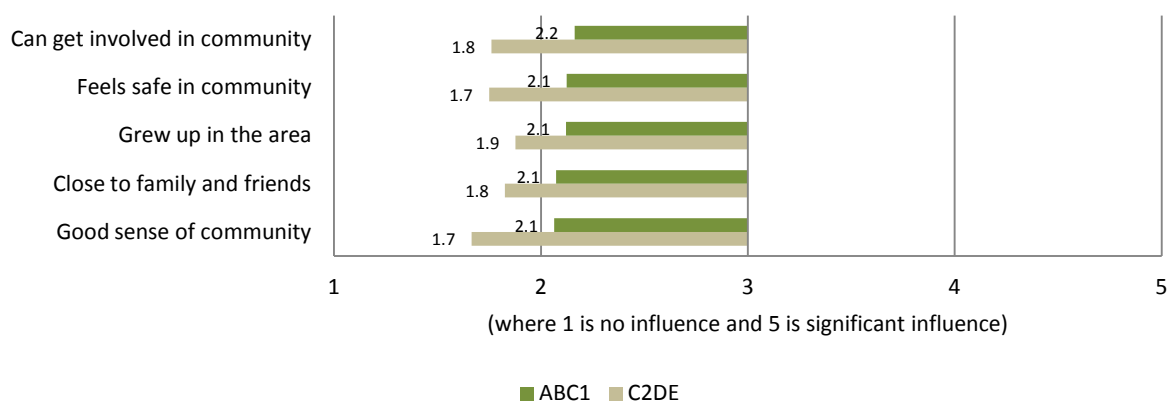
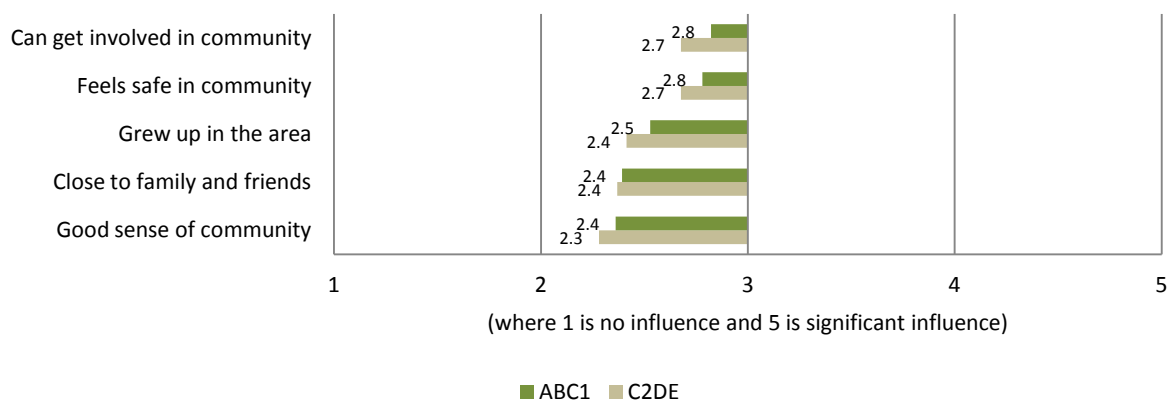


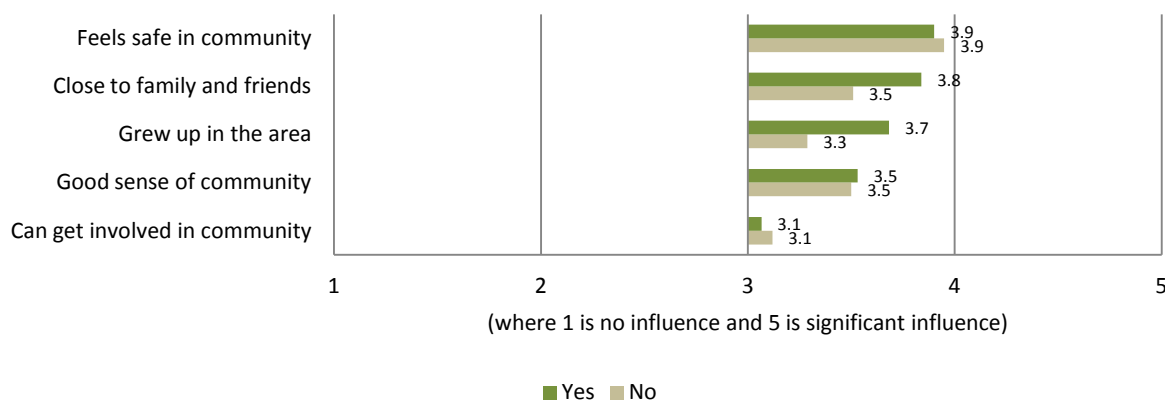
Figure 9.21: Influence of social and cultural factors by socio-economic group (BMA residents)



Intention to live in Belfast City Council

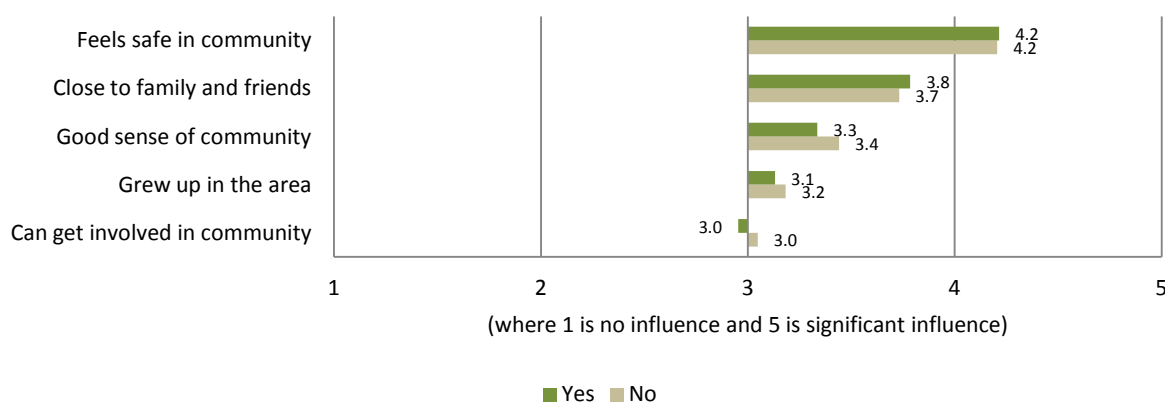
Those who currently reside in Belfast and do not envisage that they will live there in the future, are less likely to indicate that they are influenced by *proximity to family and friends* (3.5) and because they *grew up in the area* (3.3).

Figure 9.22: Influence of social and cultural factors by intention to continue living in Belfast (BLGD residents)



Interestingly, those who live in BMA and indicated that they do not envisage living in Belfast, are more likely to indicate that they are influenced by opportunities to get *involved in the community* (3.1) and by a *sense of community spirit* (3.4). Such findings suggest that some BMA residents believe there are fewer opportunities for community engagement in Belfast, compared to their current residency.

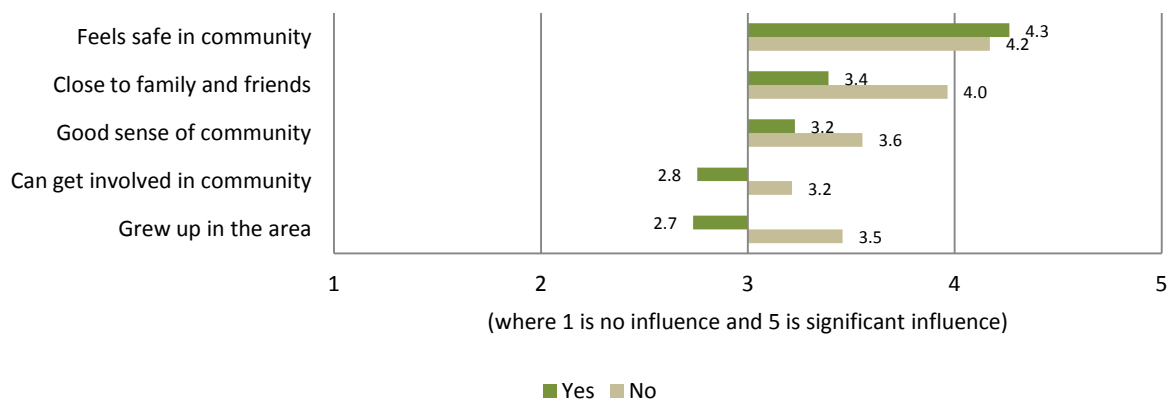
Figure 9.23: Influence of social and cultural factors by intention to live in Belfast (BMA residents)



Previous experience living in Belfast City Council

Similarly, BMA residents who have previously lived in Belfast are less likely to state that they are influenced by opportunities to *get involved in the local community* (2.8) compared to those who have never lived in Belfast (3.2).

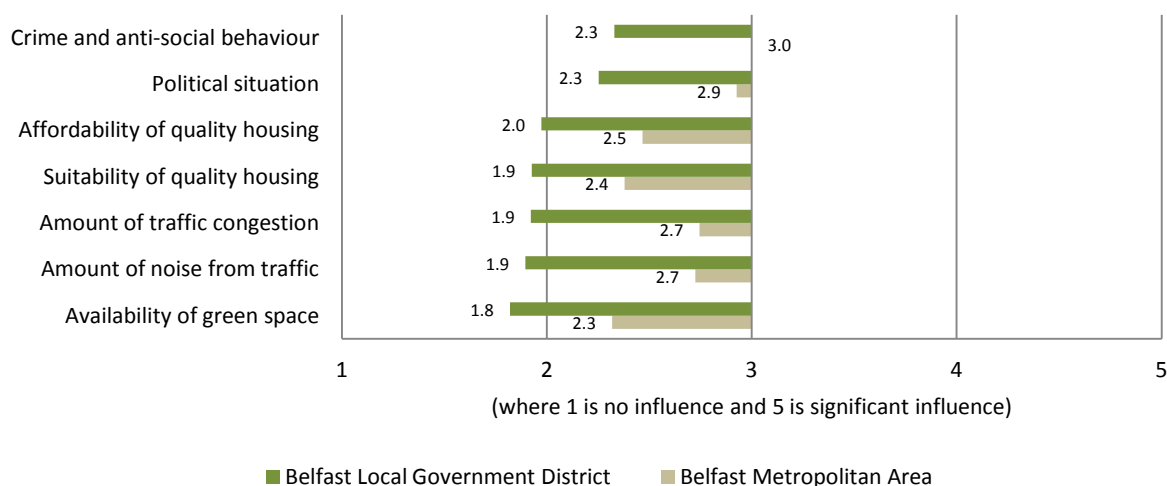
Figure 9.24: Influence of social and cultural factors by previous experience living in Belfast (BMA residents)



Social and cultural push factors

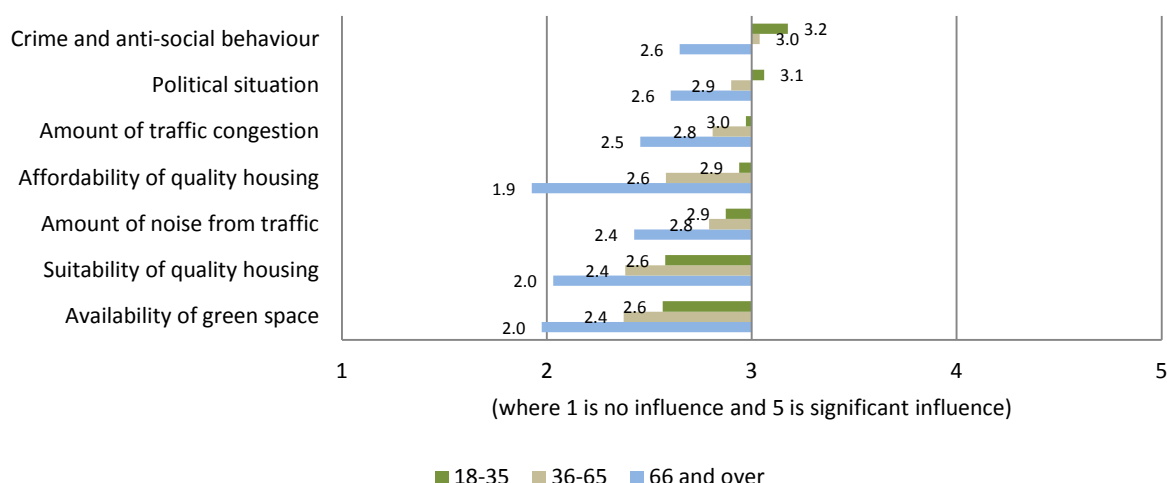
BMA residents (3.0) indicated that *crime and antisocial behaviour* has an influence on why they do not currently live in Belfast. Interestingly, younger respondents (3.2) are more likely to deem *crime and antisocial behaviour* to be influential than those aged 66 and over (2.6).

Figure 9.25 Social and cultural factors on not living in Belfast by area (BLGD and BMA residents)



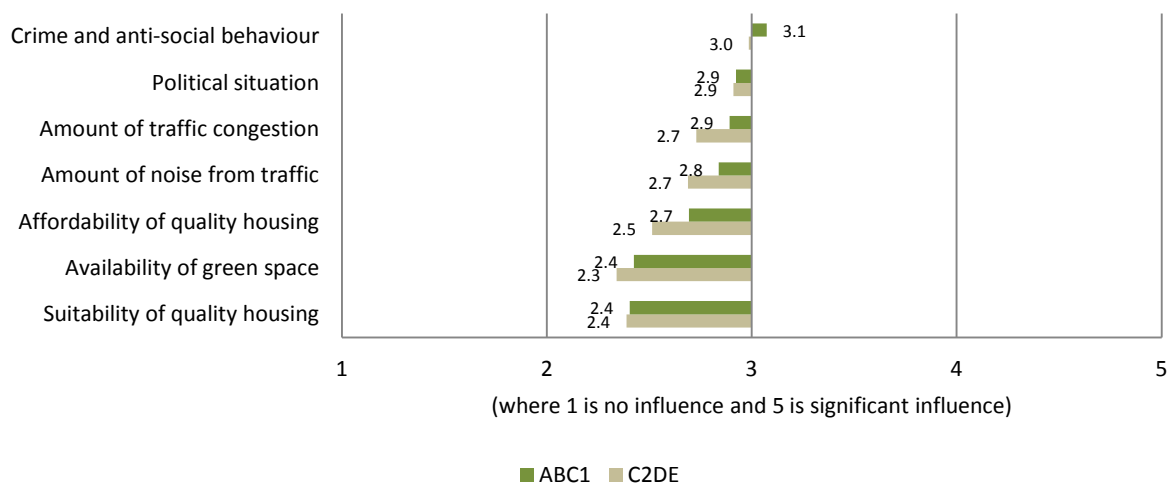
BMA respondents indicated that the *political situation* in Belfast has a moderate to significant influence on why they do not live in the area (2.9).

Figure 9.26 Social and cultural factors on not living in Belfast by age



Interestingly, Belfast residents indicated that *crime and antisocial behaviour* has a similar moderate influence on why they may move from the area (2.3). Younger respondents (3.2) are much more likely to rate *crime and antisocial behaviour* highly in terms of influencing them to move from Belfast.

Figure 9.27 Social and cultural factors on not living in Belfast by socio-economic group



Consistent with previous feedback, younger respondents (3.2) and those from ABC1 groups (2.9) are more highly influenced by the *political situation* than older respondents (2.6) and those from C2DE backgrounds (3.0).

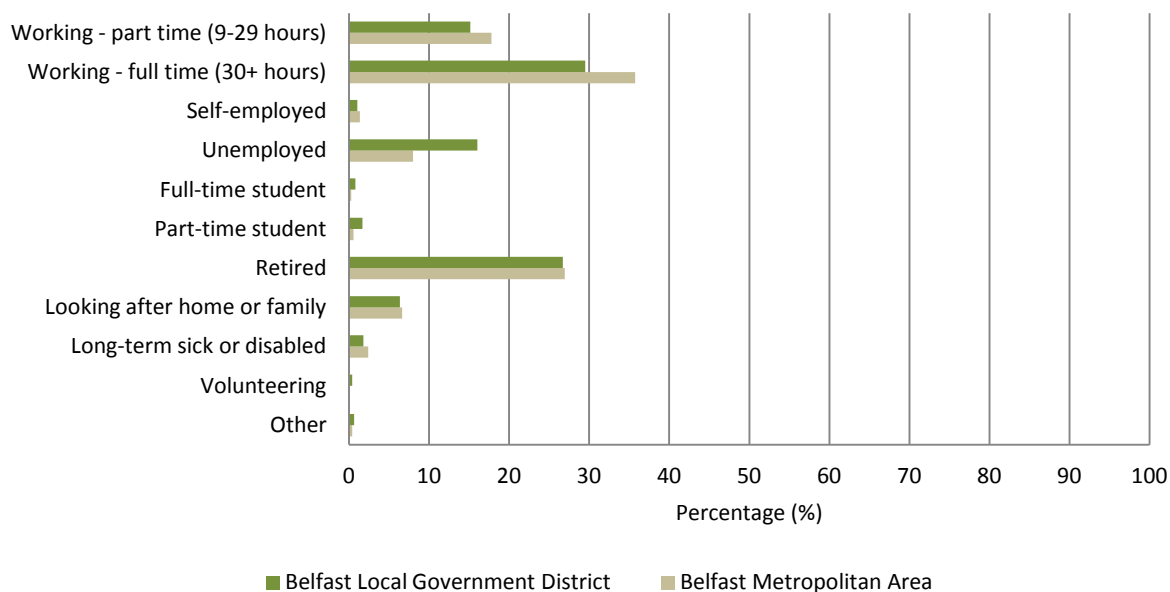
Economic influences

This section analyses the extent to which economic factors, such as *access to better jobs*, *better choice of schools*, and more *affordable housing*, have influenced respondents’ choice of residence.

Employment status

36% of respondents from the BMA area indicate that they work full time, while 18% work part-time. This compares to 30% of Belfast City Council respondents who work full-time and 15% who are employed in part-time positions.

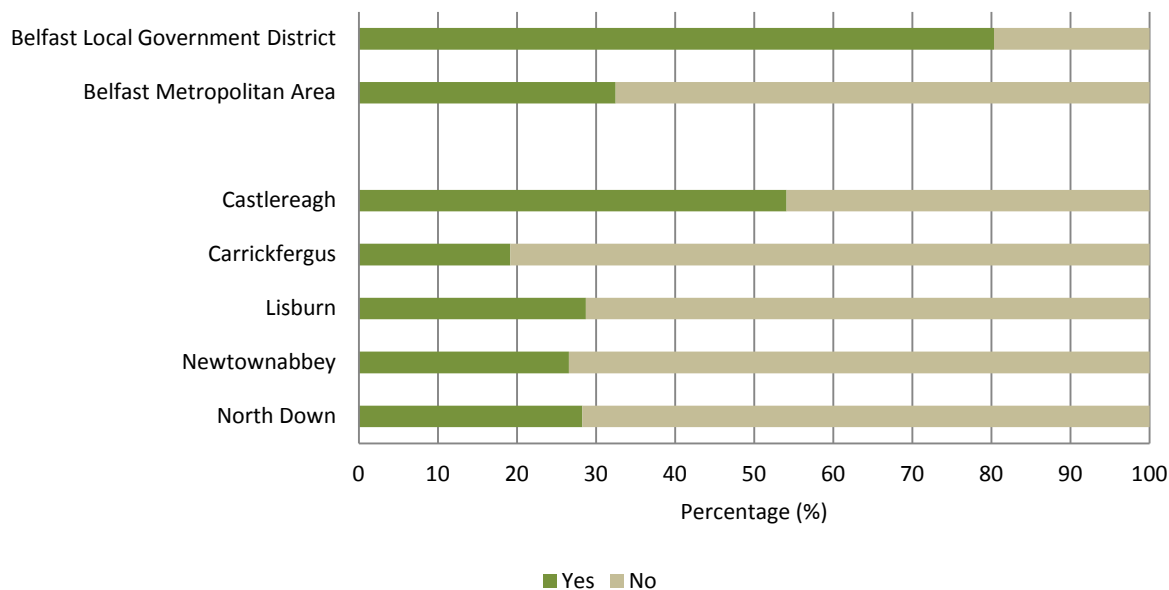
Figure 9.28: Employment status by respondent type



One third of respondents (33%) from BMA and who are in employment reported that they work in Belfast. Respondents from Castlereagh (54%) are more likely to work in Belfast than any other council area in BMA (see Figure 9.35).

A much higher proportion of BLGD residents who are in employment (80%) indicate that they work in Belfast. Findings suggest that *proximity to work* may play a role in influencing Belfast residents to live in the area.

Figure 9.29: Incidence of working in Belfast City Council by locality



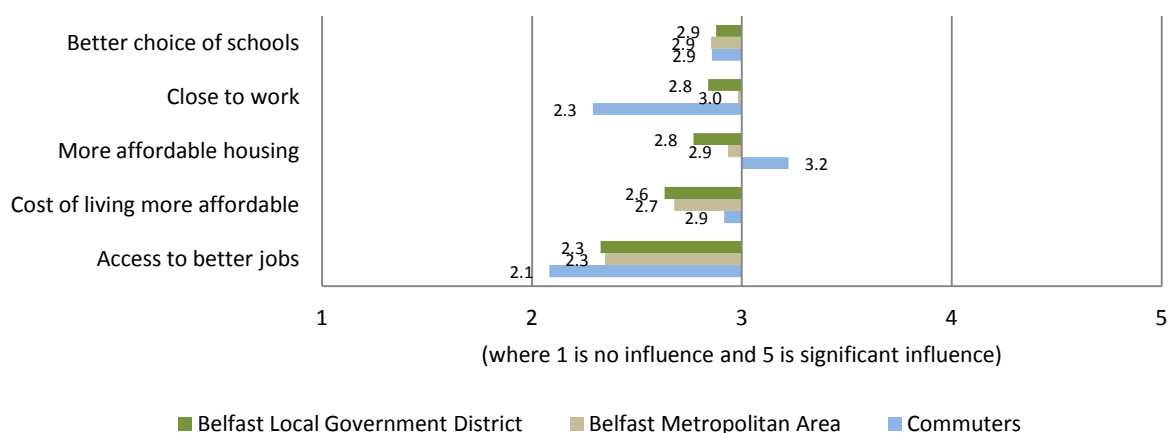
Economic pull factors

Findings reveal little difference in respondents’ viewpoint based on where they currently live. On average, respondents rated the following factors similarly in terms of influence:

- *access to better jobs* (BLGD: 2.3; BMA: 2.3);
- *better choice of schools* (BLGD: 2.9; BMA: 2.9);
- *more affordable housing* (BLGD: 2.8; BMA: 2.9);
- *cost of living* (BLGD: 2.6; BMA: 2.7).

Not surprisingly, commuters are less likely to report that *proximity to work* (2.3) has any influence on where they currently live. Such respondents are more likely to indicate that they are influenced by *affordable housing* (2.9), suggesting that they are discouraged to move to Belfast due to concerns about house prices.

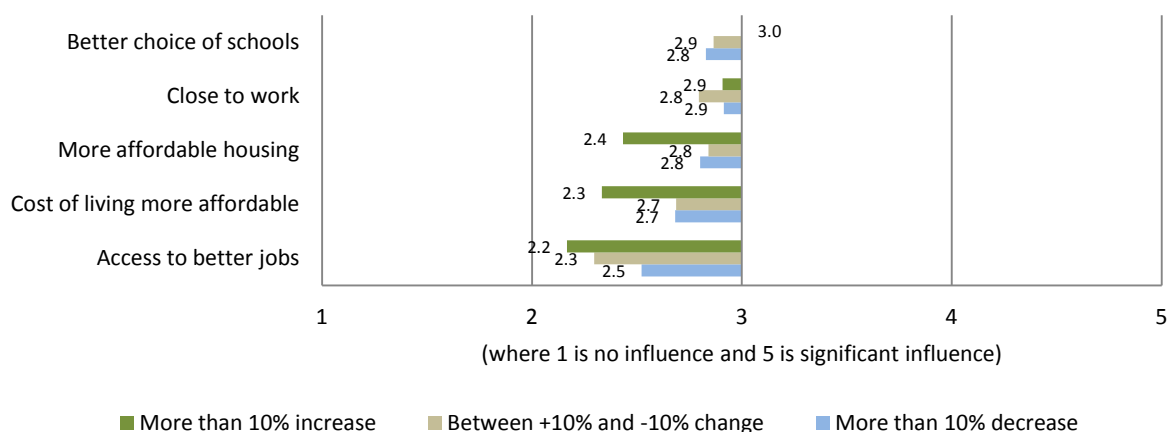
Figure 9.30: Influence of economic factors by locality



Population shift in Belfast wards

On average, respondents who live in areas of population increase are more likely to indicate that they are influenced to live in their current residence due to *access to better jobs* (2.5), *more affordable housing* (2.8) and *cost of living* (2.7). However interestingly, those who reside in areas of decline are more likely to indicate that they are influenced to live in their current residence by *better choice of schools* (3.0 compared to an average score of 2.8 who live in areas of population increase).

Figure 9.31: Influence of economic factors by population shift in Belfast wards



Analysis by age

Not surprisingly, those aged 18 to 35 in BLGD and BMA are more likely to report that they are influenced by *proximity to work* (3.1) and *access to better jobs* (2.5). Younger respondents also rated *affordability of housing* (2.8) more highly than older respondents (2.5). On average, younger respondents in BMA are more likely to indicate that they are influenced by *cost of living* (2.8) and *affordability of housing* (3.1) than 18 to 35 year olds in Belfast (2.8 and 2.9 respectively). Such findings suggest that young people are moving to BMA for financial reasons and that house prices may be less affordable in Belfast.

Figure 9.32: Influence of economic factors by age (BLGD residents)

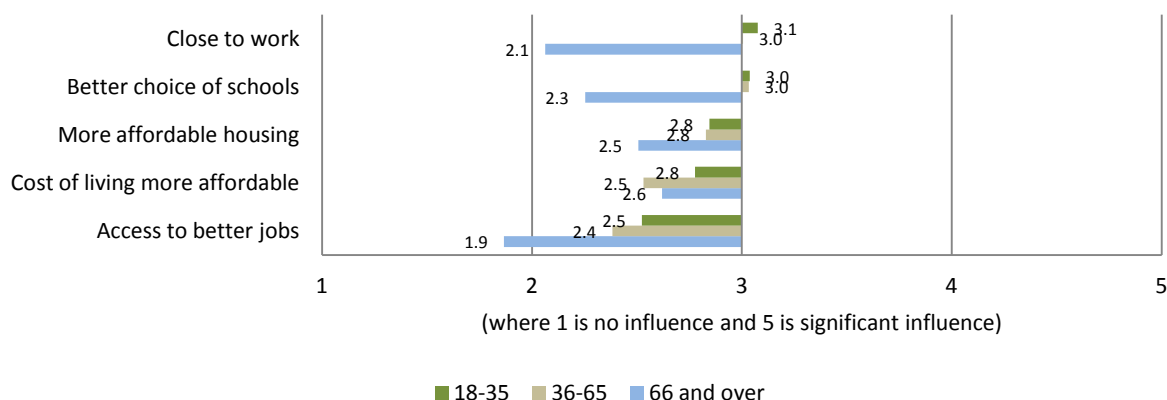
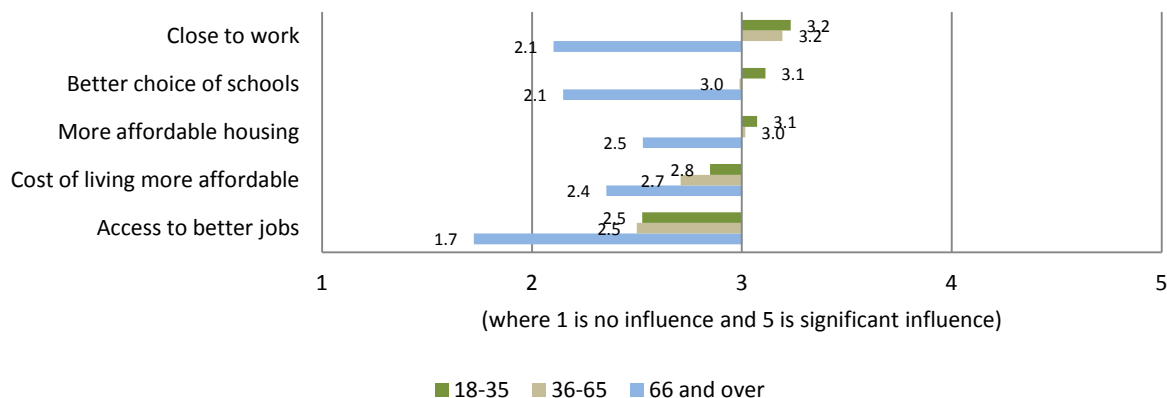


Figure 9.33: Influence of economic factors by age (BMA residents)



Analysis by Socio-economic groups

ABC1 respondents from both BMA and BLGD are more likely to indicate that they are influenced by *proximity to work*, *access to better jobs*, and to enable a *better choice of schools*. On average, ABC1 respondents from BMA rated *affordability of housing* more highly than C2DE residents from the same area (3.1 ABC1 compared to 2.8 C2DE).

Figure 9.34: Influence of economic factors by socio-economic group (BLGD residents)

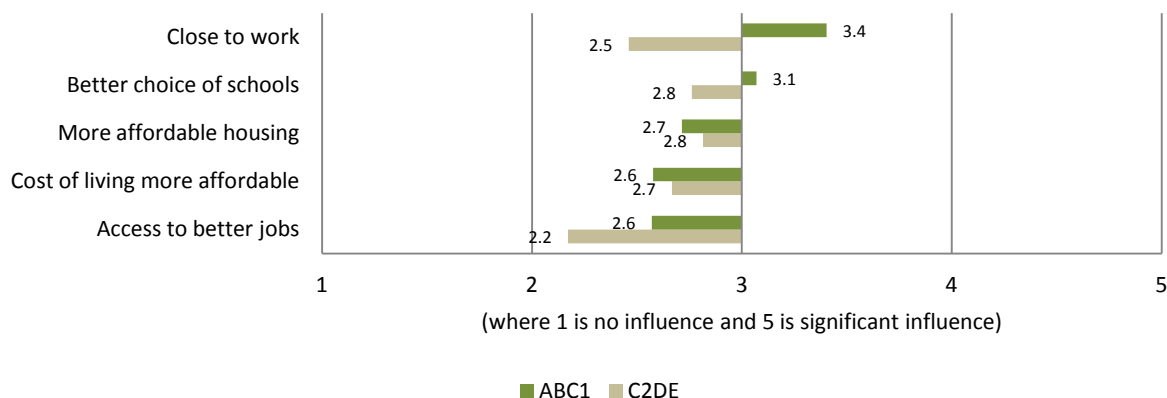
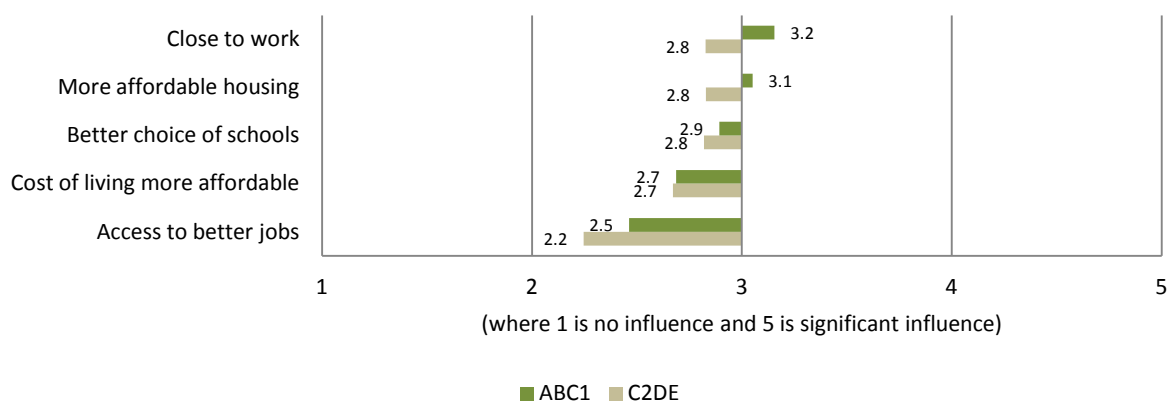


Figure 9.35 Influence of economic factors by socio-economic group (BMA residents)



Intention to live in Belfast City Council

Perhaps not surprisingly, those who live outside Belfast, yet can see themselves living in Belfast in five years time, indicated that they are more influenced by *proximity to work*

(3.2) and *access to better jobs* (2.6) than those who live in Belfast. Findings suggest that commuters may be willing to move to Belfast to ensure proximity to work, however evidence suggests that willingness may be affected by affordability of housing.

Figure 9.36: Influence of economic factors by intention to continue living in Belfast (BLGD residents)

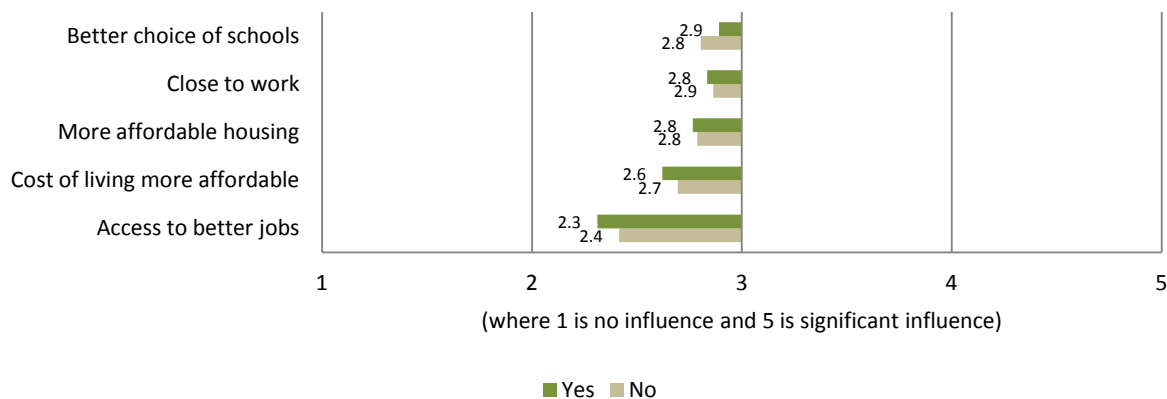
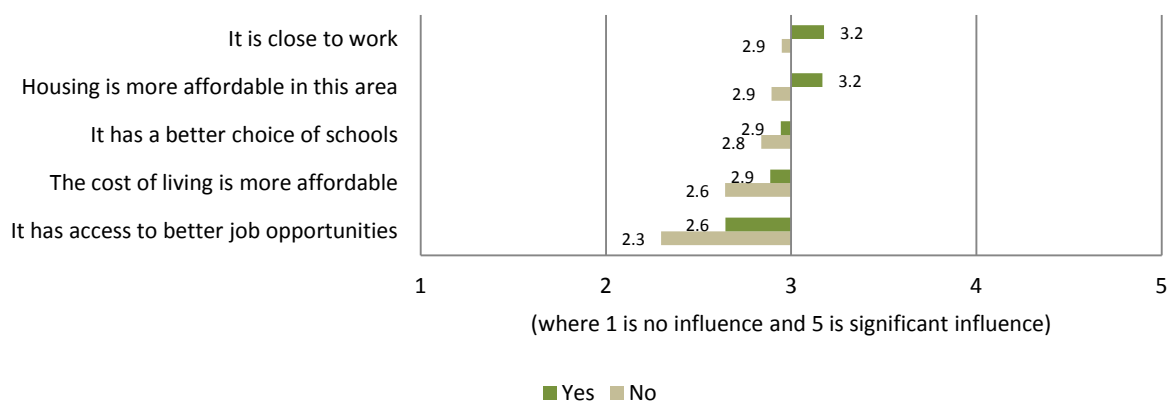


Figure 9.37: Influence of economic factors by intention to live in Belfast (BMA residents)

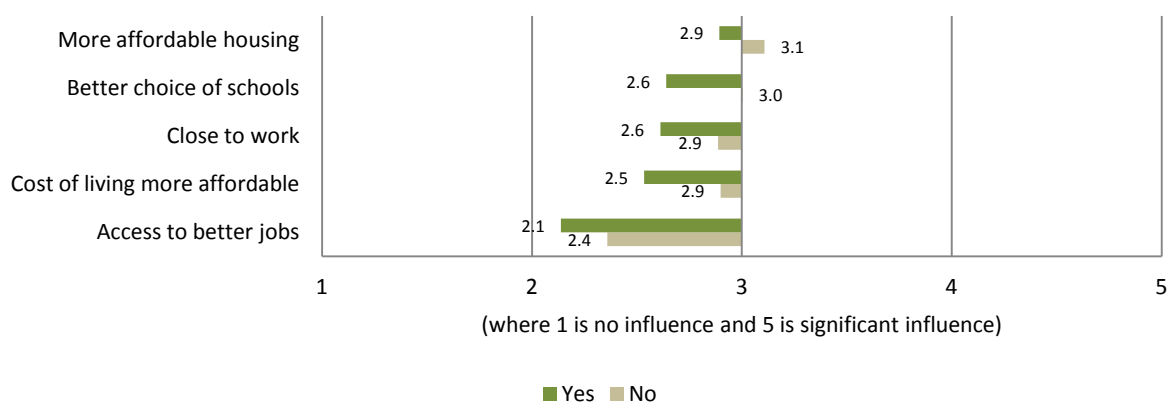


Previous experience living in Belfast City Council

On average, respondents who have never lived in BMA deemed *choice of schools* (3.0) to be more influential than those who have previously lived in Belfast (2.6).

Those who have never lived in Belfast are more likely to indicate that they are influenced by affordability of housing and cost of living than those who have previously lived in Belfast.

Figure 9.38: Influence of economic factors by previous experience living in Belfast (BMA residents)



Economic push factors

BMA respondents (2.4) and commuters (2.5) indicated that *availability of affordable quality housing* has an influence on why they do not live in Belfast. Younger respondents (2.9) and those from ABC1 groups (2.4) are more likely to rate *affordable housing* as a reason why they do not live in Belfast.

Figure 9.39: Influence of affordable quality housing on not living in the Belfast area by area (BMA residents and commuters)

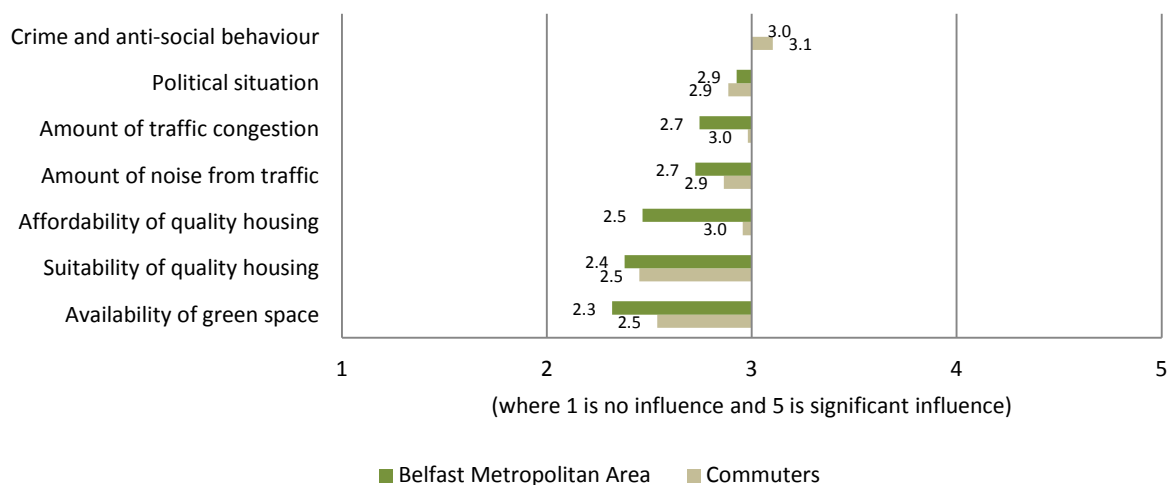


Figure 9.40: Influence of affordable quality housing on not living in the Belfast area by age

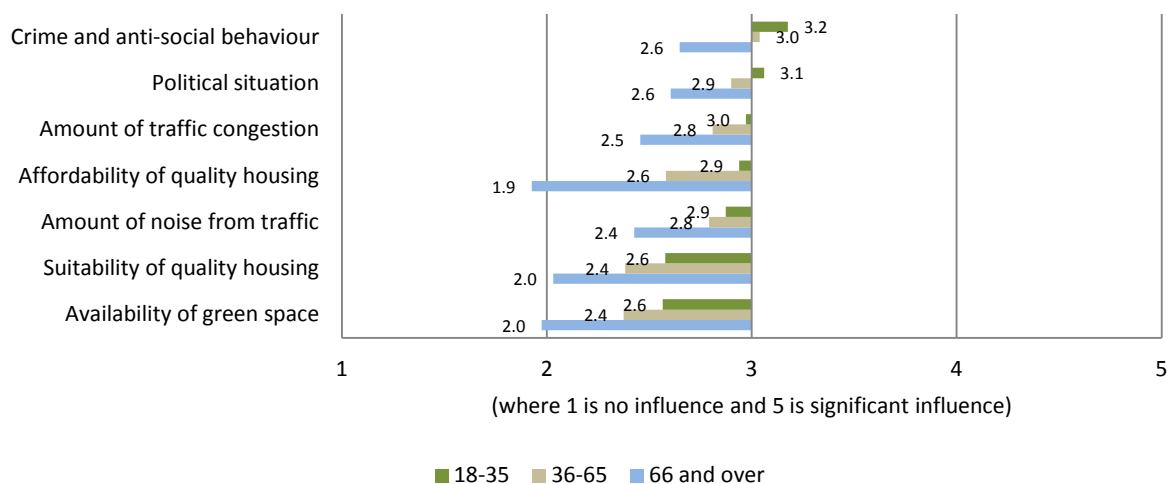
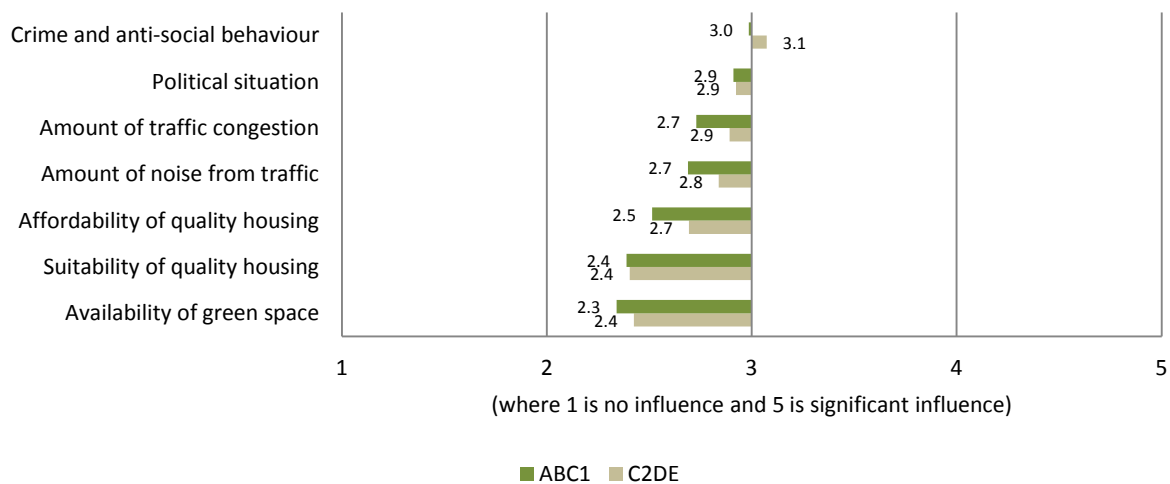


Figure 9.41: Influence of affordable quality housing on not living in the Belfast area by socio-economic group



BLGD respondents (2.0) indicated that *affordable quality housing* may have an influence on whether they will move from the area. Also, young respondents (2.3) from Belfast noted that affordable quality housing was moderately influential, especially when compared to age groups.

Figure 9.42: Influence of affordable quality housing on moving from the Belfast (BLGD residents)

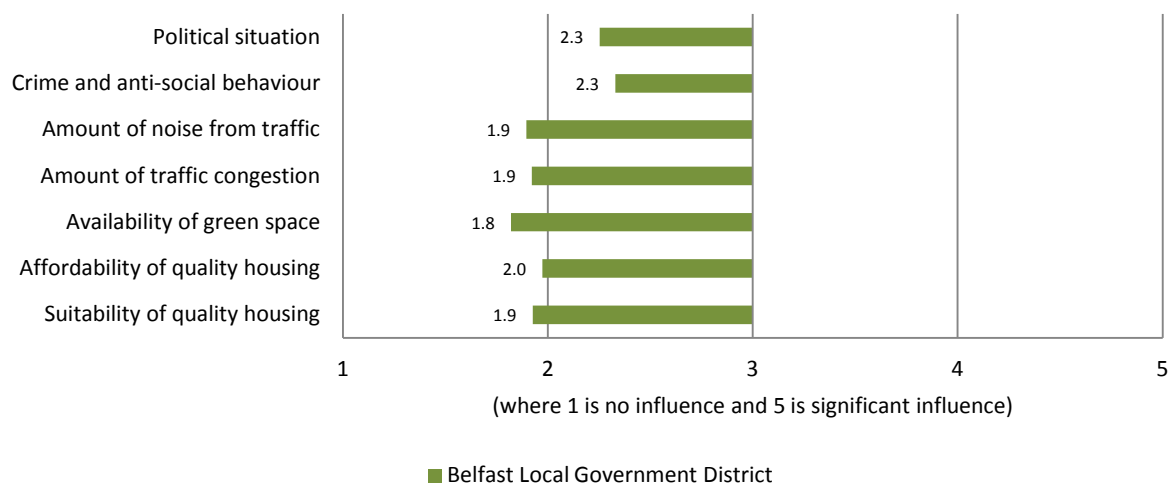


Figure 9.43: Influence of affordable quality housing on moving from the Belfast by age (BLGD residents)

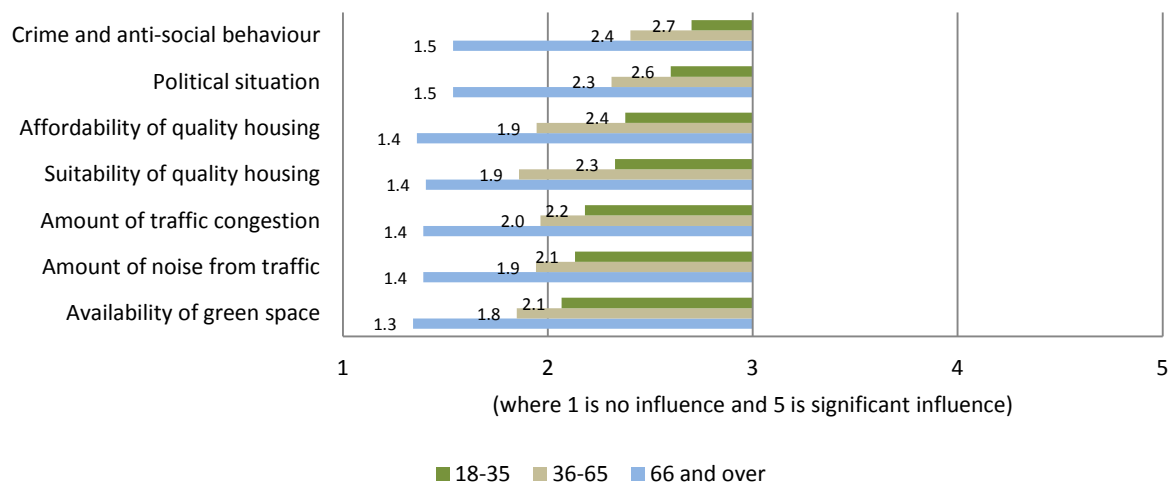
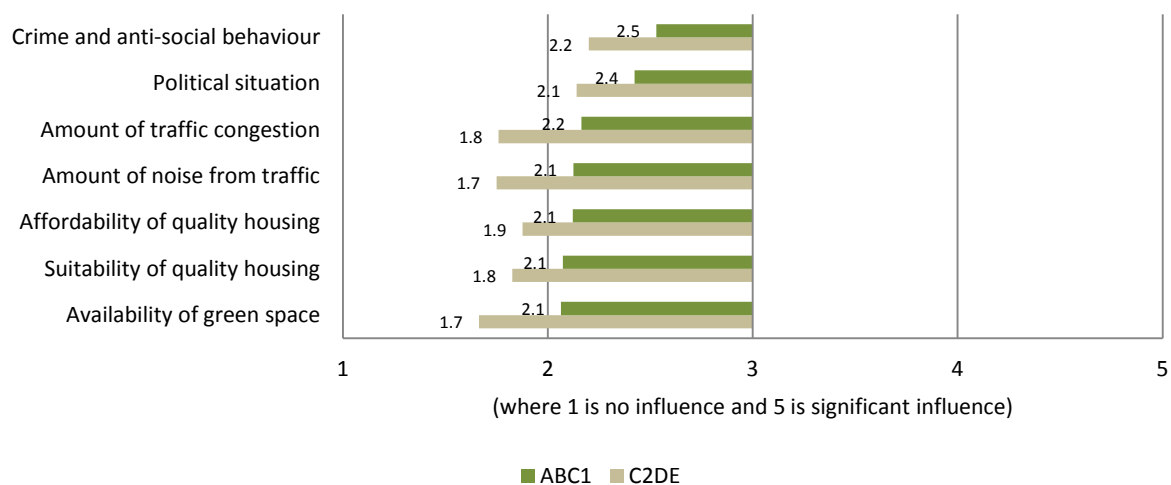


Figure 9.44: Influence of affordable quality housing on moving from the Belfast by socio-economic group (BLGD residents)

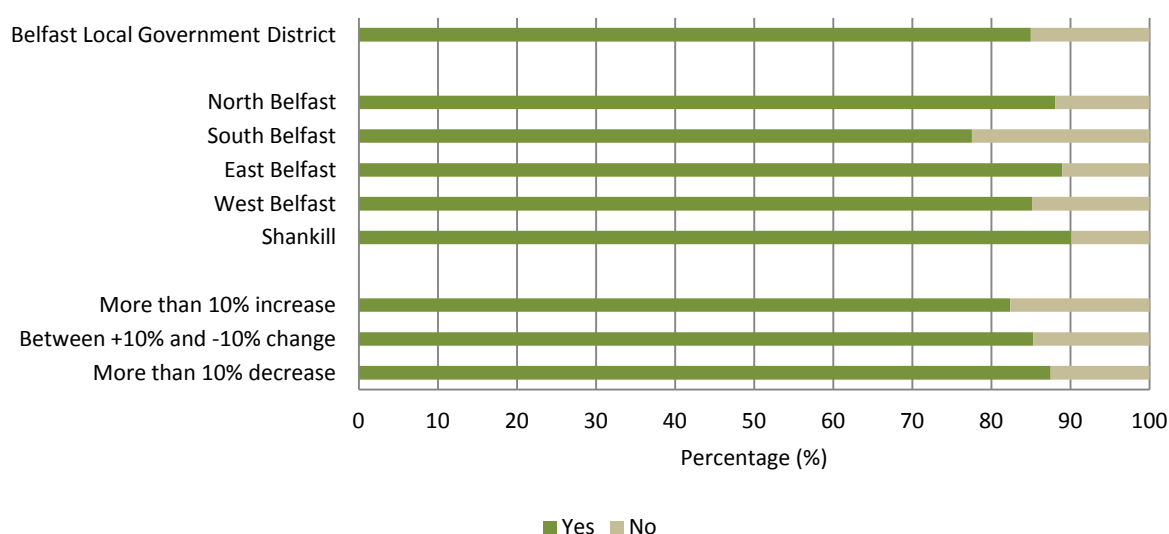


Looking ahead

Having reviewed the push and pull factors influencing respondents’ choice of residence, this section evaluates respondents’ intentions to continue living in Belfast City Council, or to move to the city if they currently reside outside Belfast.

85% of respondents who currently live in Belfast envisaged that they will continue to live there in five years time. Interestingly, respondents from South Belfast are less likely to agree that they will be living in Belfast in five years time. Perhaps surprisingly, those who live in wards which have experienced more than 10% decline are more inclined to predict that they will be living in Belfast compared to those from wards which have seen a population increase (88% compared to 82%).

Figure 9.45: Do you see yourself living in Belfast City Council in five years time? (BLGD residents by ward and population shift)



Older respondents (87%) and those from C2DE groups (86%) are more likely to indicate that they will remain living in Belfast area.

Figure 9.46: Do you see yourself living in Belfast City Council in five years time? (BLGD residents by gender, age and socio-economic group)

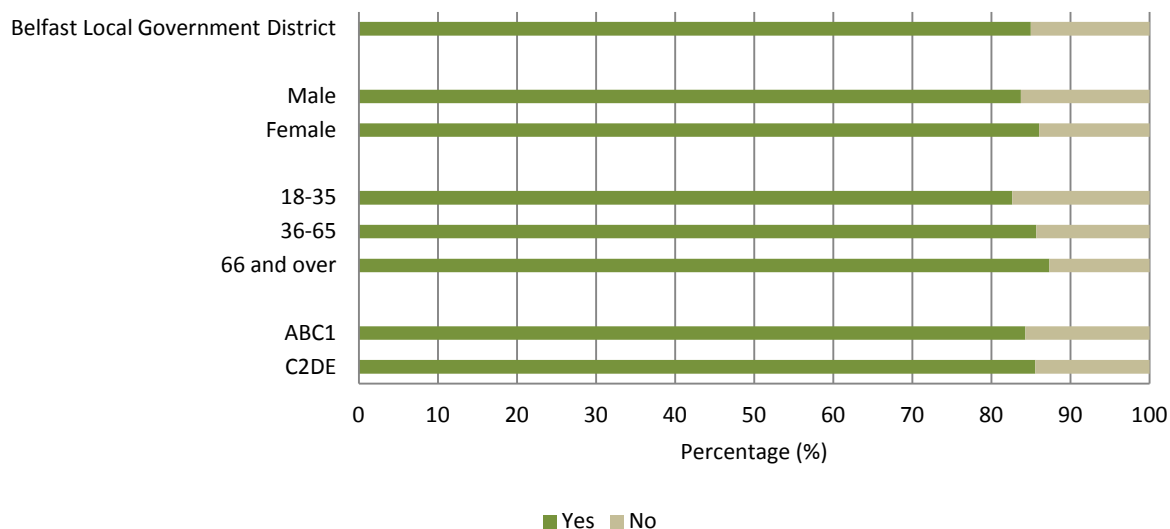
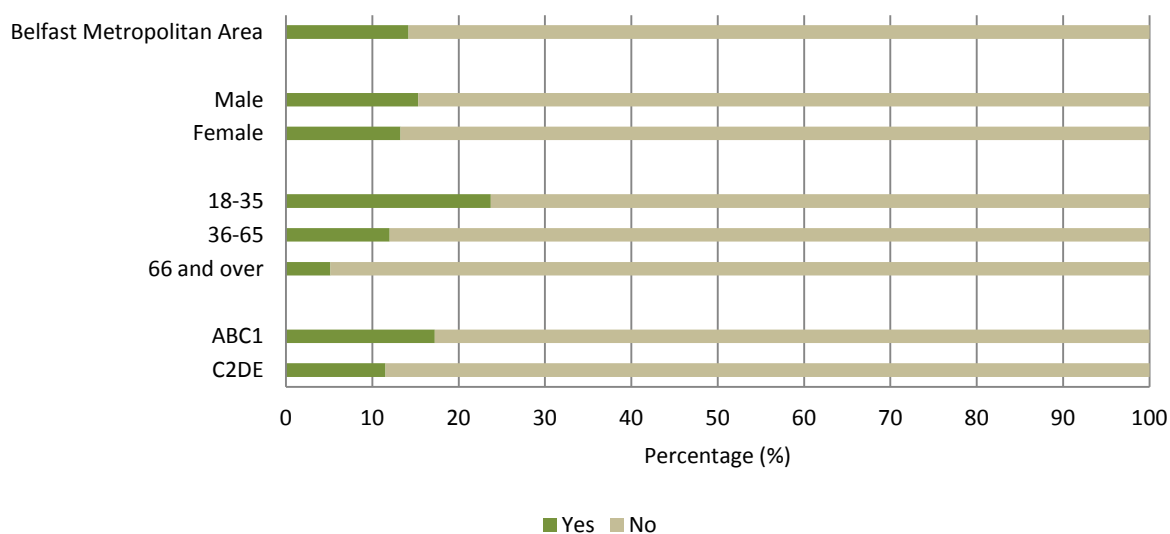


Figure 9.49 shows that only 14% of BMA residents envisage that they will be living in Belfast in five years. Younger respondents (24%) and those from ABC1 groups (17%) are more likely to predict that they will be living in Belfast area in the future.

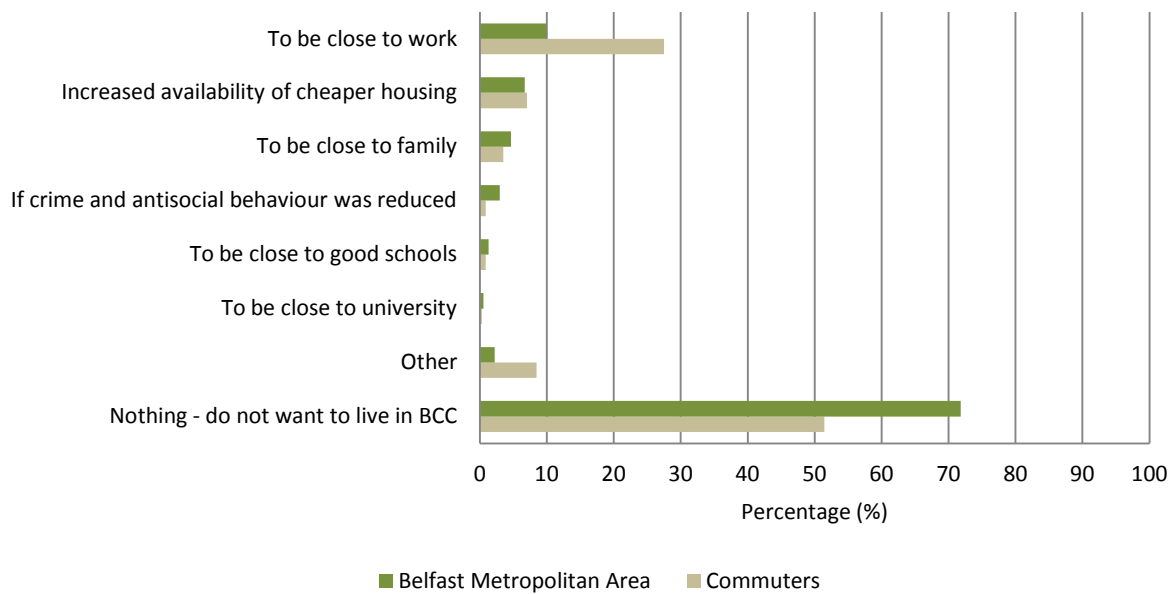
Figure 9.47: Do you see yourself living in Belfast City Council in five years time? (BMA residents)



Those who reside outside Belfast were asked whether any factors would encourage them to move to the city. Almost three quarters of BMA respondents (74%) indicated that nothing would encourage them to move to Belfast. This compares to 55% of commuters.

29% of commuters stated that they may be encouraged to move to Belfast to be closer to work. The same proportion of commuters (7%) and BMA residents (7%) indicated that they would be influenced to move in the instance of more affordable housing in Belfast.

Figure 9.48: Analysis of key factors which may encourage respondents to move to Belfast City Council



Conclusion

In conclusion, this document has reviewed several policy interventions adopted over the last decade, some of which have been developed in order to attempt to stem the population decline in Belfast City Council. These include strategic policies to enable regeneration and stimulate population growth, such as the Belfast Metropolitan Area Plan 2015 and the Belfast Masterplan 2004-2020. Steps have been taken to tackle disadvantage and deprivation within 15 neighbourhoods in the Belfast City Council area, through the Neighbourhood Renewal scheme. Furthermore previous research⁴⁸ has provided insight into Belfast residents' views of their local area; with 84% (*source*: Belfast City Council Residents Survey) indicating that they were satisfied with their neighbourhood.

Despite such findings, trend data illustrates that Belfast has experienced a population lag⁴⁹ in the past decade, whilst surrounding council areas in the Belfast Metropolitan area have witnessed an increase. Lisburn, North Down and Carrickfergus districts have experienced a substantial increase in the number of households (11.1%, 9.6% and 8.7% respectively) in comparison to the Belfast and Castlereagh districts (0.9% and 0.8%). Previous publications, referenced in this document provide some insight into the factors which may have contributed to the decline. Findings from the attitudinal survey reinforce previous research and provide clarification to the questions posed at the beginning of the research.

What is the profile of those leaving Belfast?

The attitudinal survey indicates that those who previously lived in Belfast City Council are primarily in the middle to older age bracket (between 36 and 66+ years), and are more likely to be from ABC1 social groups. Such respondents are also more likely to currently reside in Castlereagh, North Down or Lisburn. Overall, the majority of such respondents tended to live in Belfast City Council over twenty years ago, however over one quarter (27%) indicated that they moved from Belfast in the past ten years.

What is the profile of those who may move to Belfast City Council?

14% of all BMA residents surveyed indicated that they envisage living in Belfast in five years time. Almost one quarter of such respondents were in the younger age category (18 to 35 years) and were from ABC1 groups. Such respondents are less likely to indicate that they grew up in BMA than those from the same area who have no intention to move to Belfast City Council. Physical factors, such as proximity to amenities and better public transport network, appear to have an influence on respondents' inclination to move to the city.

85% of Belfast residents envisaged that they would continue living in Belfast in five years time. Findings revealed little difference based on age or social class. Interestingly, those

⁴⁸ Belfast City Council Residents Survey (2010)

⁴⁹ A population's lag phase is the period when the population size remains constant

who live in South Belfast and in areas which have witnessed population increase are less likely to believe that they will be living in Belfast in the future.

Analysis by population shift across wards in Belfast provides some insight into why certain areas (i.e. Andersonstown, Upper Springfield and Woodvale) have experienced a population decline of more than 10% in the last decade. Respondents from these wards are less likely to state that they are influenced by physical factors such as proximity to amenities, good public transport network and access to outdoor activities. Analysis of social and cultural factors provides interesting insight on the population decline. Respondents from Andersonstown, Upper Springfield and Woodvale are less likely to state that they are influenced by a sense of community spirit, opportunities to get involved in the local community and by feeling safe compared to those who live in wards which have experienced a population increase. The survey suggests that population may be retained in these areas by addressing concerns in relation to safety and providing more effective opportunities for community engagement.

What factors have contributed to the population decline in Belfast City Council?

Further analysis of push and pull factors provides some insight into the reasons why respondents may have moved from Belfast City Council. House size and type appears to have an influence on why residents have moved from the area. The survey reveals that Belfast residents are much more likely to live in terraced housing than their BMA counterparts. Those from BMA were also more likely to indicate that they have been influenced to live in their current residence due to the size of the house or garden. House size and type appears to be a particular influence for younger respondents in both Belfast City Council and BMA; with both indicating that suitability of quality housing may play a role in influencing them to move from their current residence.

Exploration of social and cultural factors also provides an indication of why respondents may be moving from Belfast City Council. BMA residents are much more likely to report that they have been influenced to live in their current residence in order to gain a sense of community spirit and become involved in the local community. Findings suggest that respondents may be more encouraged to move or remain in Belfast if they felt a better engagement with the community.

The influence of crime and anti-social behaviour was also highlighted within the survey. BMA respondents were more likely to indicate that they are influenced by feeling safe in their neighbourhood compared to Belfast residents. Almost half of BMA residents indicated that they do not live in Belfast City Council due to crime and anti-social behaviour; a sentiment which was specifically highlighted by younger respondents. Similarly, younger respondents who currently live in Belfast were most likely to indicate that they may be influenced to move from the area as a result of crime and anti-social behaviour.

Such findings are echoed within previous research. A Belfast City Council consultation (*My City: My Neighbourhood 2010*) highlighted that residents would like a decrease in anti social behaviour in Belfast City. In addition, published data from the *Neighbourhood*

Renewal Outcome Indicators Report (2012) illustrates that neighbourhoods in the Belfast area continue to experience some of the highest levels of anti-social behaviour and substance related deaths.

Survey findings also revealed that the political situation⁵⁰ in Belfast may be preventing people from moving to Belfast. 42% of those surveyed in BMA indicated that the political situation has a high influence on why they do not currently live in Belfast. In addition, over a quarter of Belfast residents indicated that they want to move from the city due to the political climate.

Economic factors, such as affordability of housing and cost of living, also appear to be preventing people from moving to the city. 30% of BMA residents and 45% commuters stating that availability of affordable housing has an influence on why they do not live in Belfast City Council. Such findings reiterate feedback from the *Residents Survey (2007)*, which indicated that Belfast respondents were dissatisfied with the lack of affordable housing and cost of living in the area.

Key recommendations to retain and increase population in Belfast

To conclude, the survey findings, in conjunction with previous research publications, provide insight into the factors which may be contributing to population decline in Belfast. Overall, findings suggest that there may be merit in targeting the younger generation (aged 18 to 35 years) who currently reside in Belfast and in the surrounding areas. For this group are most likely to state that they would be willing to move to the city, while Belfast residents aged 18 to 35 are also more likely to report that they may move from the city in five years time. The younger generation in Belfast seem to be much more likely to move from the city due to crime and antisocial behaviour and the political situation in Belfast. Contrastingly, older Belfast residents appear less concerned with such political and social factors, suggesting that they have become accustomed to such considerations over the years.

In some ways, it is difficult to provide a conclusive list of recommendations to retain and increase the population in Belfast, particularly as 74% of BMA residents indicated that nothing would encourage them to move to Belfast. However, comparison of respondents' feedback in relation to push and pull factors provides insight into ways in which Belfast City Council could combat this decline:

- Address concerns in relation to crime and antisocial behaviour in Belfast, with the aim to improve residents' sense of safety and reduce negative perceptions of crime and social division in Belfast;
- Continue to enhance and regenerate open spaces to ensure greater availability/access to green space and improved opportunities for physical activity. In addition, ensure further promotion and publicity raising of green spaces in Belfast;

⁵⁰ It should be noted that the survey was conducted not long after the protests in relation to the removal of the Union Flag at Belfast City Hall. Therefore, it is possible that this may have had a slight influence on respondents' viewpoints.

- Where possible, support, advocate and adopt plans for the development of affordable housing;
- continue to publicise and actively promote positive aspects of Belfast and city living which are deemed to be attractive, such as:
 - proximity to shops, entertainment and other local amenities;
 - access to job opportunities/employment in the City; and
 - the reliability and affordability of the public transport network.
- encourage community spirit and support opportunities for community engagement, particularly in areas of population decline;
- utilise the research to inform the ambitions and delivery of Local Government Reform and the Belfast City Masterplan.

A number of the strategic documents referenced in this report including: the Community Safety Strategy 2012-2017; Culture & Arts Framework 2012-15; Economic Strategy for NI 2011-15 and the Housing Strategy for NI 2012-17, incorporate plans which may address some of the concerns highlighted by the population research. For example, the Community Safety Strategy (2012-2017) has plans in place to ensure safer, shared and confident communities in Northern Ireland. When implemented, this should have a significant impact on antisocial behaviour, thus alleviating residents' concerns and potentially facilitating increased community interaction.

The Cultural Framework for Belfast is likely to boost employment opportunities in the area and increase the profile of the area. Similarly, it should act as a promotional tool, highlighting the positive aspects of Belfast and City living.

Finally, the primary focus of the Northern Ireland Housing Strategy (2012 - 2017) is to ensure that everyone within Northern Ireland is given the opportunity to secure good quality housing at a reasonable cost. This may have an impact on the number of people choosing to live in Belfast City. As these strategic policies are implemented and embedded this may have an influence on increasing the population of Belfast City Council.