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BELFASTCHAMBER.COM



# NEXT GEN BELFAST

WHAT BELFAST'S  
NEXT GENERATION  
THINKS ABOUT OUR CITY



# INTRODUCTION

SIMON HAMILTON | CHIEF EXECUTIVE

**More than a century ago, whenever Belfast was in the midst of its industrial heyday, the engineering capabilities of shipyard workers, machine manufacturers and aircraft builders attracted investment from far and wide. Today, it is the fintech, medtech, cyber security and legal and professional services sectors that are booming, but the central principle remains the same. Belfast's economic success is built on one fundamental foundation – our ability to produce highly skilled, talented people.**

These highly skilled, well educated young people – what leading urbanist Richard Florida calls the “creative class” – are, basically, Belfast's secret sauce. Yes, we are blessed with many of the ingredients that any city needs for a successful economy like research led universities and a world class telecommunications infrastructure, but without that elusive, all-important talent, we are nothing. Businesses – like the 30 whose team members took part in our survey – simply wouldn't invest here, spin out or start up if it weren't for the talent that is synonymous with Belfast.

We in this part of the world know better than most that retaining the talent you have is hard enough never mind attracting people from elsewhere. For too many years, we have witnessed thousands of our young people leave these shores annually for greater opportunity elsewhere. Few from outside NI chose Belfast as a place to settle. Things have, thankfully, changed for the better with Belfast's economy utterly transformed in spite of numerous challenges and crises. That transformation has resulted in Belfast being a destination where increasing numbers of young talent wants to locate.



As the voice of business, Belfast Chamber wants to see our city continue to grow economically for the benefit of all of our people and for Belfast to become an even better place to live, work, visit and invest in. We know that nurturing talent through our schools, colleges and universities is essential in achieving that aim and that understanding what motivates young people and encourages them to make Belfast their home will be crucial to our city's success in the race for talent.

Belfast Chamber is delighted to have been able to partner with PwC to produce this 'Next Gen Belfast' survey. With the help of 30 businesses working in sectors like law, accountancy, media, health technology, financial technology, cyber security artificial intelligence and data analytics, as well as Ulster University and Belfast Metropolitan College,



we were able to ascertain the attitude towards Belfast of almost 1,000 students and young professionals. Their thoughts about our city are absolutely fascinating.

Whilst the overall picture they paint of Belfast is a positive one, we also gain an intriguing insight into the challenges our city faces if we are to remain appealing to talent. Establishing Belfast as a place for this 'Next Generation' requires a careful balance of protecting those elements that have enriched our city and made it such a draw for young people in particular, but also begin to address those issues like affordable, quality housing and better transport links that could, if allowed to fester, make it harder for talent to remain here in the long term.

What is absolutely evident from our research is that ensuring a good quality of life is key to this next generation's enjoyment of Belfast. More and better jobs have clearly been critical in Belfast's renaissance, but so too are a whole range of environmental, cultural and social issues. Factors such as our excellent bars, cafes and restaurants, our great arts and music offering and ease of access to the coast and countryside are viewed as every bit as valuable, if not more so, than traditional drivers like employment and career prospects.

Belfast Chamber sees our 'Next Gen Belfast' survey as a useful resource for decision makers in City Hall and at Stormont as they continue in their efforts to regenerate Belfast and also grapple with the challenges our results highlight. They will find willing partners in Belfast Chamber as we seek to work together in the shared endeavour of making Belfast a magnet for talent.

In closing, I would like to express our thanks to PwC for their assistance in producing 'Next Gen Belfast'. Without their work, this project simply wouldn't have been possible. Likewise, we are indebted to the 30 businesses who helped us survey their staff and to Ulster University and Belfast Met for sharing the survey with their students.

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# SUMMARY

The majority enjoy living, working, and studying in Belfast, and plan to continue to do so

**69%**

are satisfied with living/working/studying in Belfast.

**71%**

recommend Belfast as a place to live.

**53%**

plan on living/working/studying in Belfast in 5 years.

**25%**

are more likely to stay in Belfast as a result of Covid.

However, under 30s feel there is room for improvement in some areas

**49%**

feel that Belfast is a congested city.

**44%**

do not agree that Belfast has lots of high paying jobs.

**28%**

Only 28% consider Belfast a green/environmentally friendly city.

**28%**

do not believe that Belfast is home to affordable housing.

# PERCEPTIONS OF BELFAST

Participants in our survey were asked for their views about Belfast across a range of topics including safety and inclusivity, our environment, access and connectivity, education, business and the economy, the cost of living and the city's cultural, leisure and nightlife offering. This is what our city's next generation thinks is good about Belfast and also where they think it could be improved.



# SATISFACTION WITH BELFAST

There is a high level of satisfaction amongst students and young professionals with their education, careers and social life in Belfast.

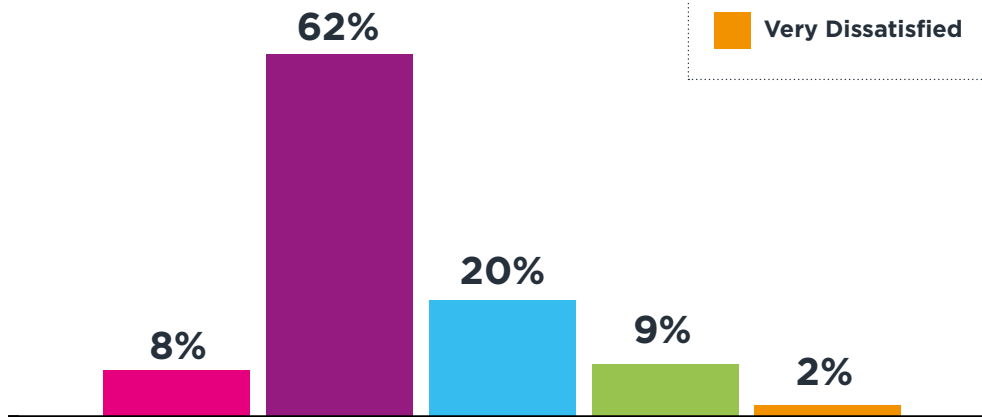
**QUESTION**

**On a scale of 1-5 how would you rate living/ studying/ working in Belfast?**

(with 1 being extremely dissatisfied and 5 being extremely satisfied)

**KEY**

- Very Satisfied
- Satisfied
- Neither Nor
- Dissatisfied
- Very Dissatisfied



Base: All respondents (910)

‘A lot of good, recognised companies to work for, and despite lower levels of pay this gives young professionals a great opportunity to get ‘on the map’ in their careers. Very good social side to the city, nightlife/shopping/cafe etc all good, so a good blend for young professionals.’

‘Noticeable improvement over the last ten years in terms of aesthetics, retail & hospitality. Getting on the house ownership ladder is accessible given the reasonably affordable housing market. Close to countryside and coastline.’

‘The city’s development over my 7 years living here has been fantastic to see. In terms of education, job prospects and cultural & social events/venues there has been an infectious positive development.’

‘The city is full of individual creativity which is the main reason I love living here. The independent businesses and ventures that pop up constantly across the city are really inspiring. It feels like an exciting time for Belfast.’

# SAFETY AND INCLUSIVITY

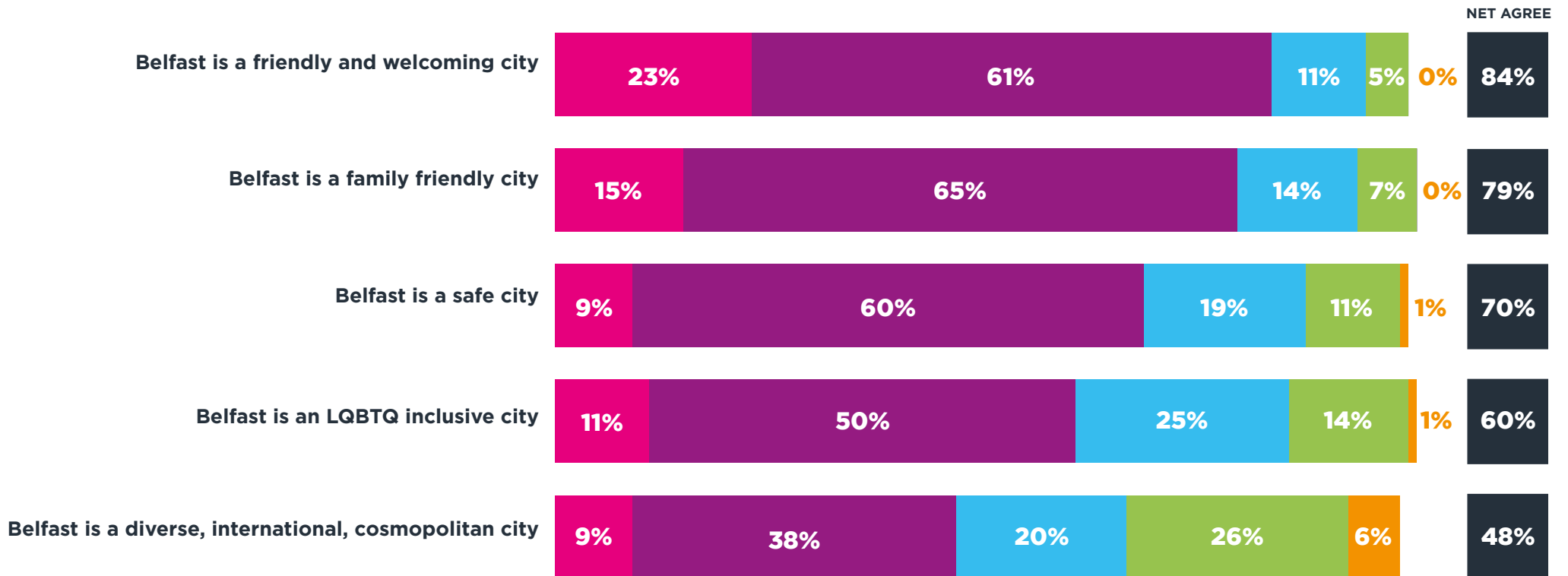
Overall, Belfast is seen as very safe, welcoming, and inclusive, though perhaps lacking somewhat in diversity.

**QUESTION**

For each of the following statements, please indicate if you believe that they accurately apply to Belfast?

**KEY**

- Strongly Agree
- Neither nor
- Strongly Disagree
- Agree
- Disagree
- Net Agree



Base: All respondents (910)



# ENVIRONMENT

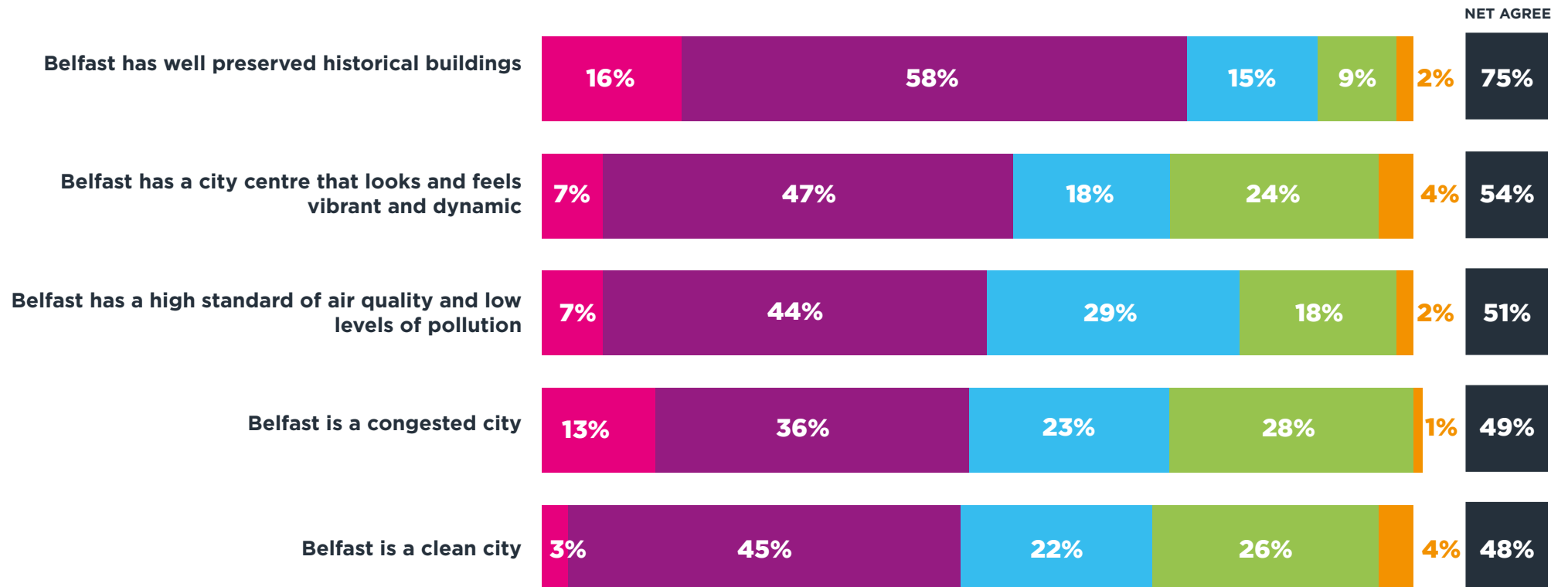
While there's agreement that Belfast's historical buildings are well preserved, there are mixed views on cleanliness, pollution, and the vibrancy of the city centre. Almost half agree it is a congested city.

**QUESTION**

**For each of the following statements, please indicate if you believe that they accurately apply to Belfast?**

**KEY**

- Strongly Agree
- Neither nor
- Strongly Disagree
- Agree
- Disagree
- Net Agree



Base: All respondents (910)

# ACCESS AND CONNECTIVITY

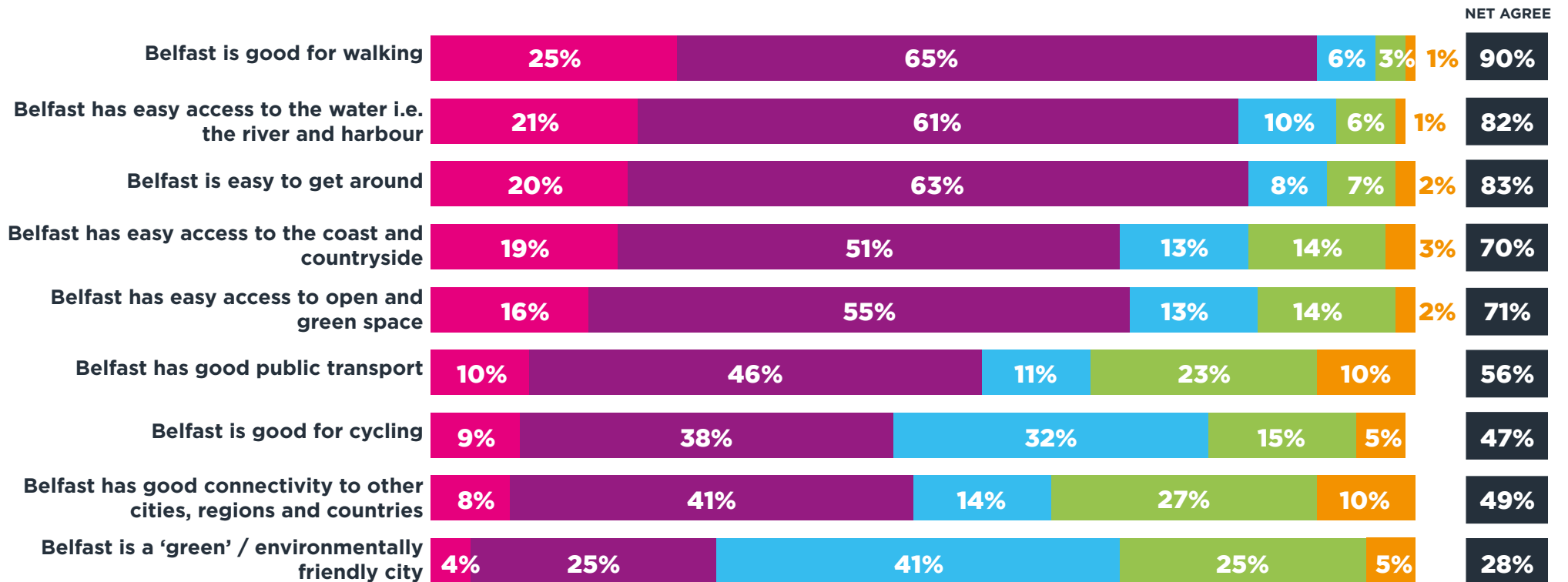
Young people’s views on walking around Belfast and accessing the water, coast, and country are very positive, however Belfast is not perceived as particularly environmentally friendly.

**QUESTION**

**For each of the following statements, please indicate if you believe that they accurately apply to Belfast?**

**KEY**

- Strongly Agree
- Neither nor
- Strongly Disagree
- Agree
- Disagree
- Net Agree



Base: All respondents (910)

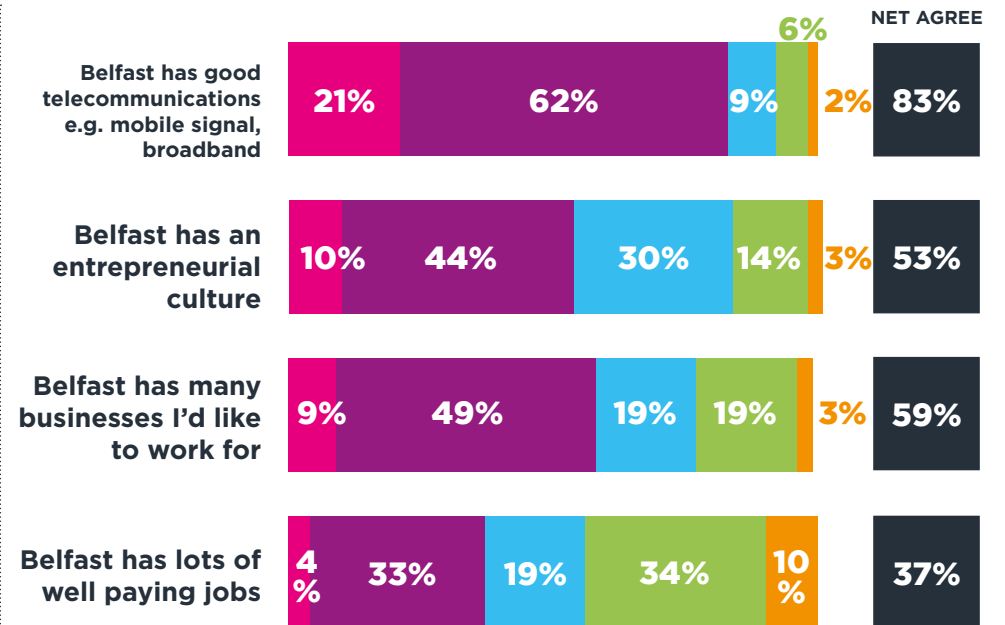
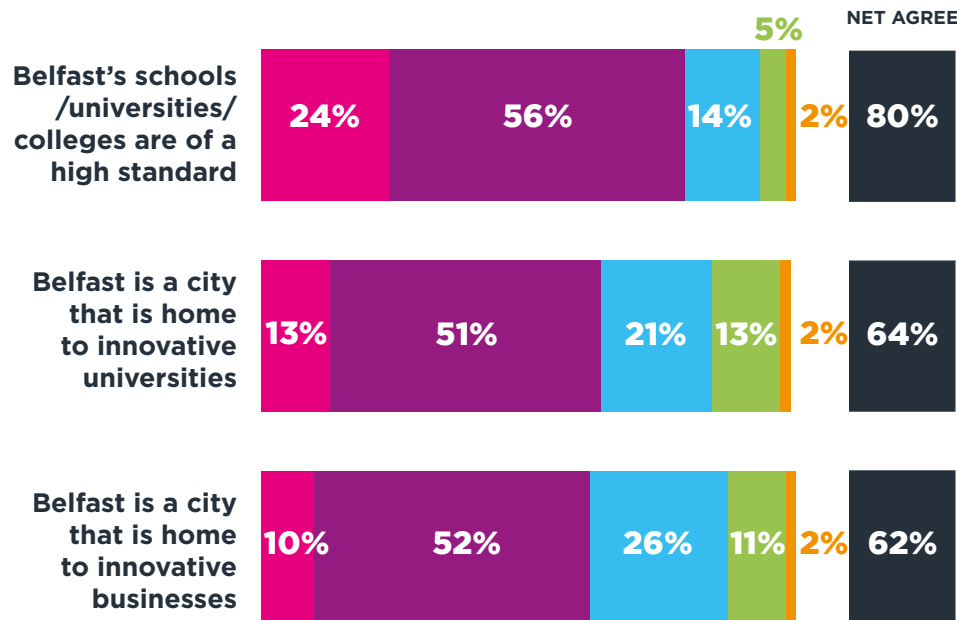
# EDUCATION, BUSINESS AND THE ECONOMY

While four in five respondents agree that Belfast offers high quality education, only just over two in five disagree that it is home to well paying jobs.

**QUESTION**

For each of the following statements, please indicate if you believe that they accurately apply to Belfast?

**KEY**



Base: All respondents (910)

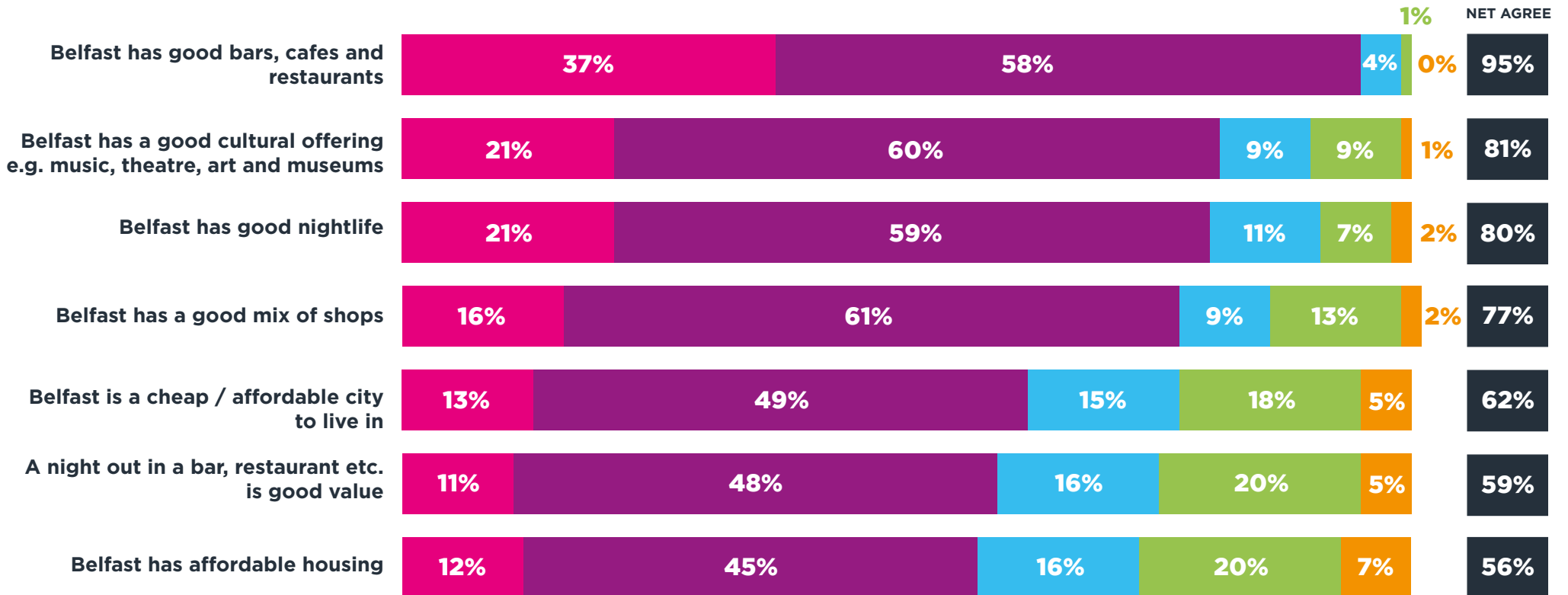
# COST OF LIVING, CULTURE, LEISURE & NIGHTLIFE

The majority agree on all statements regarding culture, leisure and nightlife.

**QUESTION**

For each of the following statements, please indicate if you believe that they accurately apply to Belfast?

**KEY**



Base: All respondents (910)

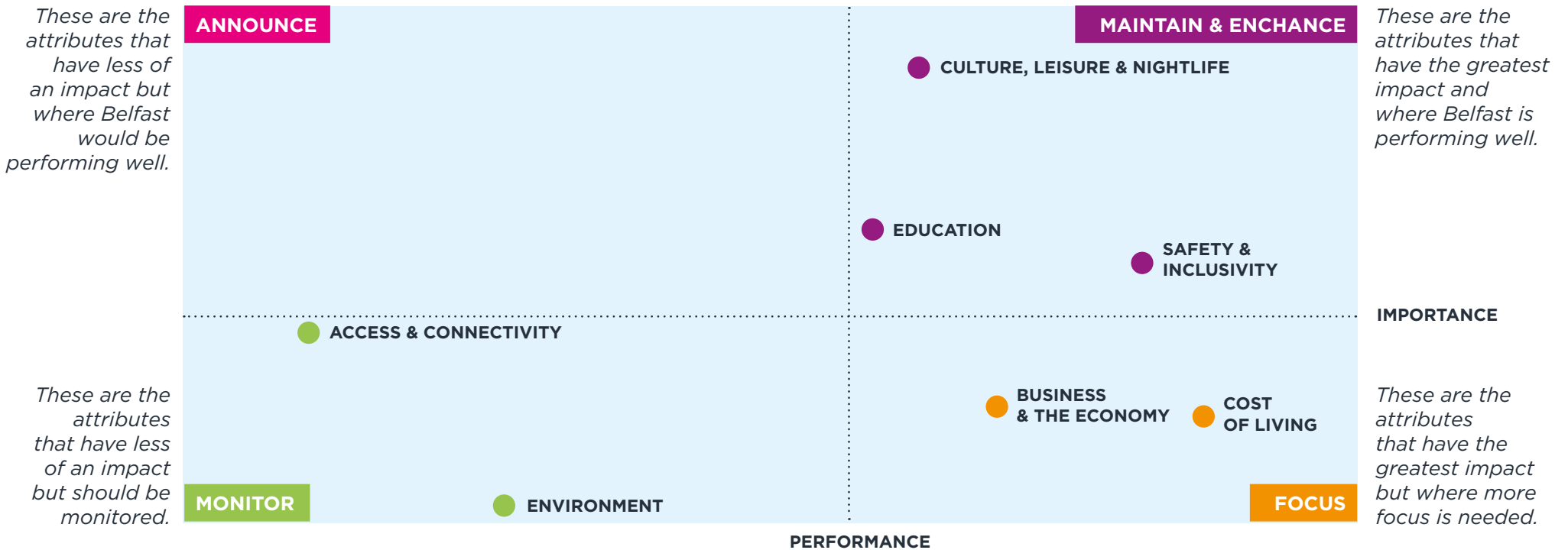
# KEY DRIVER ANALYSIS

Relatively speaking, Belfast is performing well on the whole however there are areas where more focus and monitoring may be required in the future.

**QUESTION**

For each of the following statements, please indicate if you believe that they accurately apply to Belfast?

KEY DRIVER ANALYSIS: Q12 SATISFACTION VS Q2 HIGH LEVEL



# RECOMMENDING BELFAST

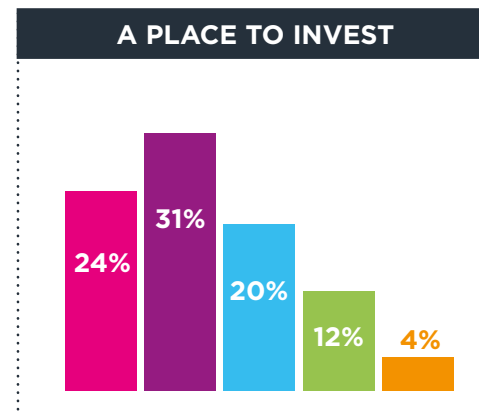
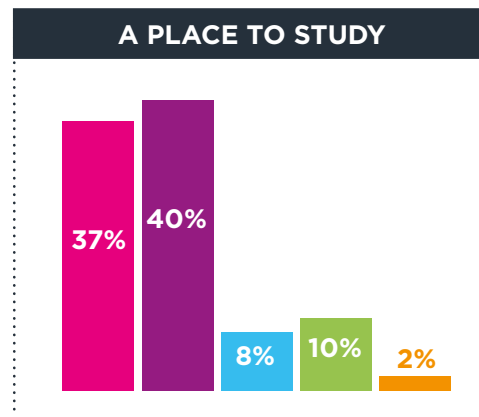
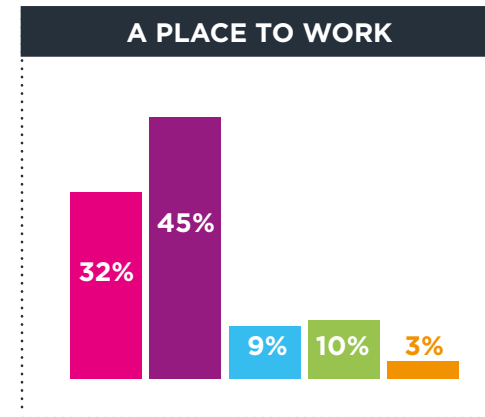
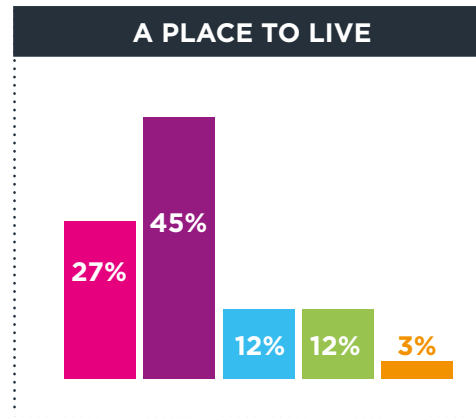
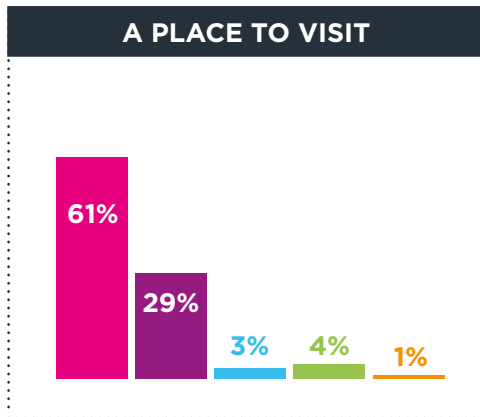
There was a strong sense of advocacy for Belfast, particularly as a place to visit and a place to study.

**QUESTION**

How likely would you be to recommend Belfast to a friend or family member who doesn't live, work or study here as:

**KEY**

- Very Likely
- Likely
- Neither nor
- Unlikely
- Very Unlikely



Base: All respondents (910)

# THE BEST THINGS ABOUT BELFAST

Relatively speaking, Belfast is performing well on the whole however there are areas where more focus and monitoring may be required in the future.

**QUESTION**

**In your view, what makes Belfast a good city?**

'Belfast is fairly innovative when it comes to technology and this is starting to be seen throughout the city. Jobs offer a higher level of income compared to surrounding areas with similar opportunities and generally there are a lot more job opportunities available to young people within the city. There are plenty of retail shops available in the city centre, and you can find fantastic places to eat and drink throughout the city.'

'It is fun has lots of great bars and restaurants, it has nice scenery and walks nearby and there are plenty of amenities like gyms etc. It has really good culture and some beautiful architecture when things are normal there are often quite good events on especially around Custom House Square etc'

'I love Belfast and will always encourage people to visit our city. The people are friendly, our local produce is top tier, our local businesses, restaurants etc are fantastic. We have a lot to offer as we have city life but the coast is only a stones throw away and we have such a strong heritage. There is something for everyone in Belfast. There is not many cities which offer the value, security and atmosphere that Belfast does.'

'Wide array of retail, bars and restaurants. Close proximity to green spaces such as forests and mountains. High level of accredited education. Good infrastructure for the most part. Growing job prospects for school leavers. There is a nice atmosphere in the city centre which seems to be lacking in other British/Irish cities. Inclusive attitude for the most part for people not from Belfast.'

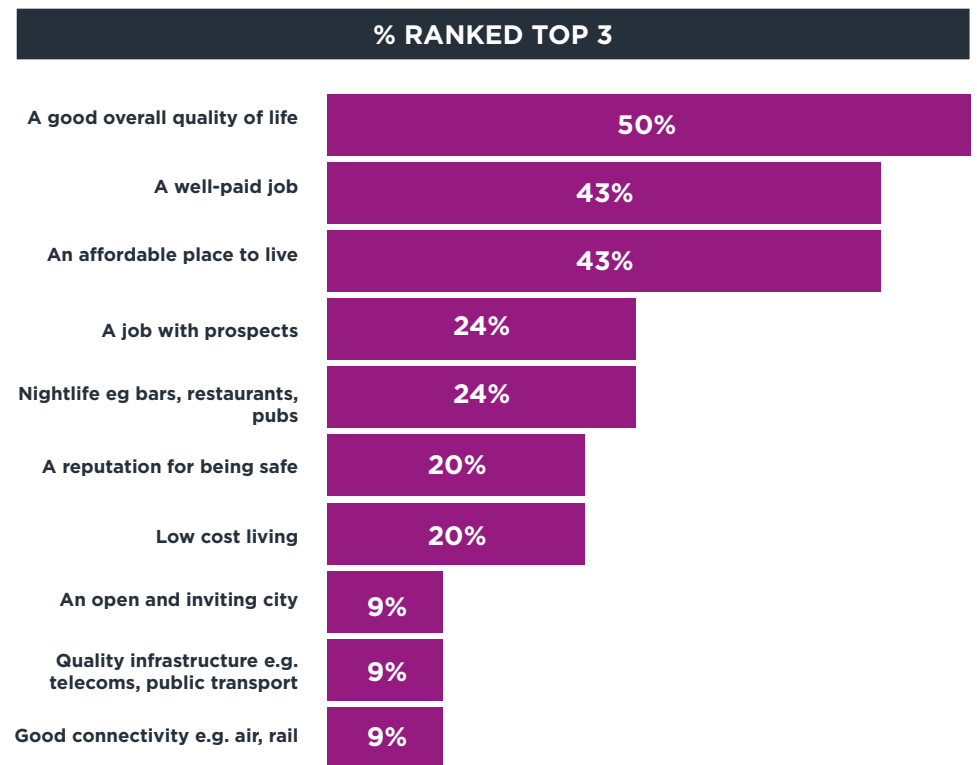
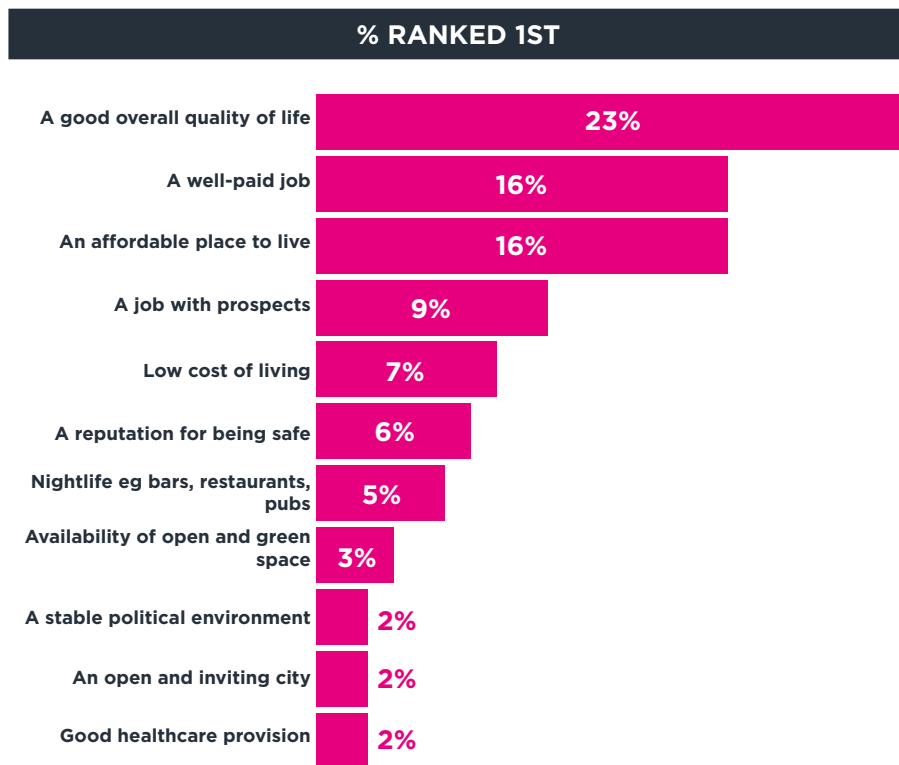


# IMPORTANT FACTORS ABOUT LIVING IN A CITY

For under 30s, good quality of life, including a well paid job with good prospects and an affordable place to live is most important, whereas retail, schools, and child care have little impact.

**QUESTION**

**When thinking about living in a city, please rank the 5 factors listed below that are most important to you. (Top 10)**



Base: All respondents (910)

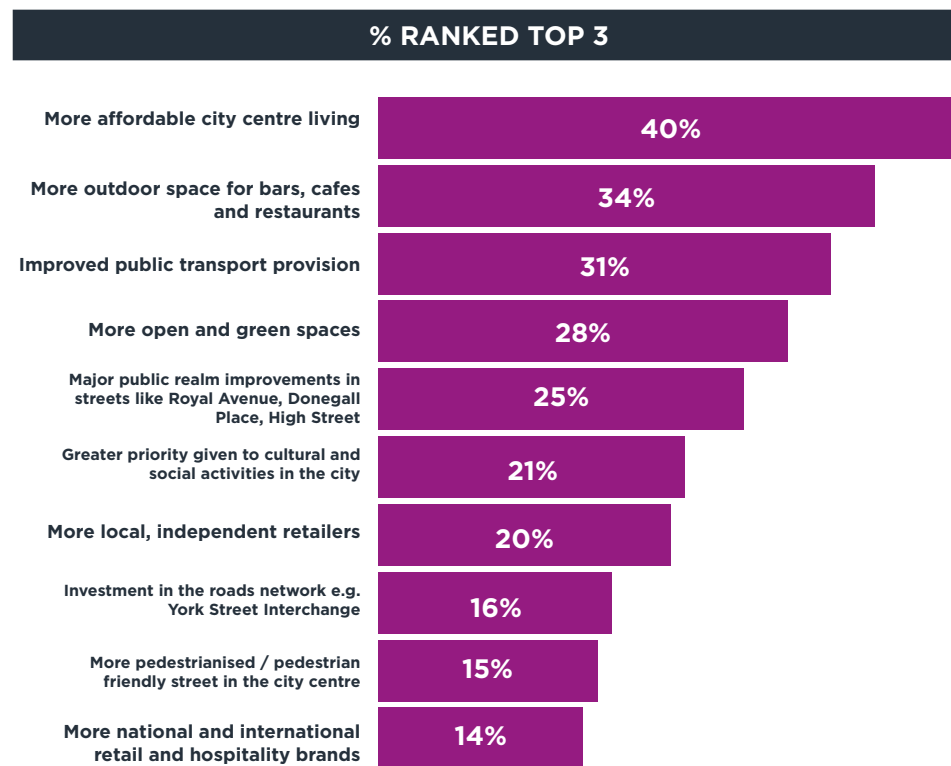
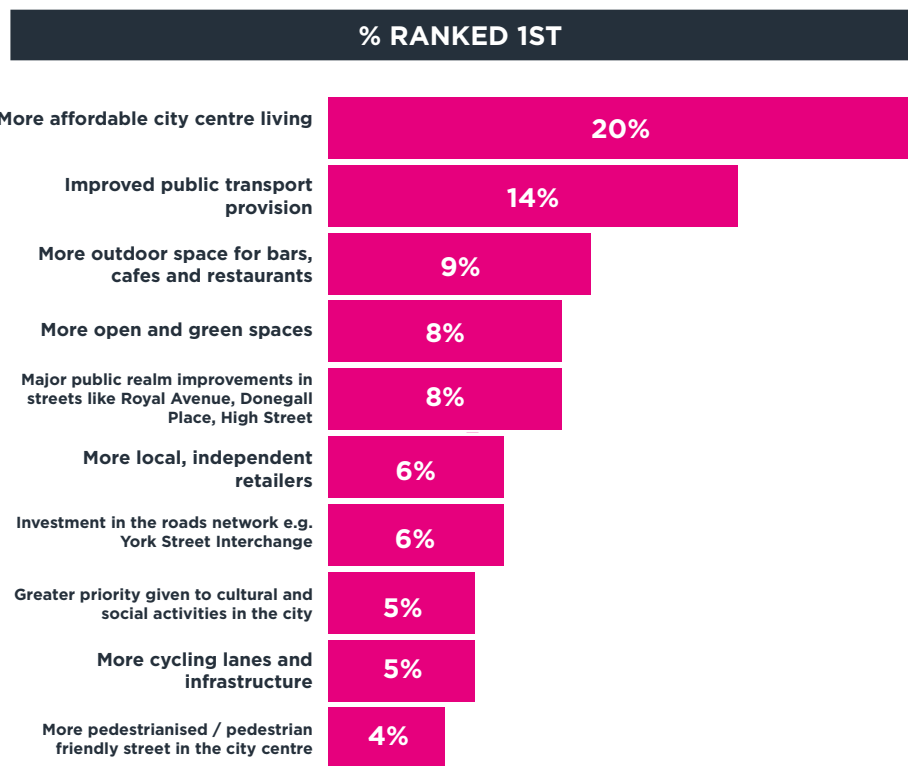


# HOW THE CITY COULD BE IMPROVED

More affordable city centre living and outdoor space to socialise are seen as key to improving Belfast, where as play parks and connectivity are not seen as important.

**QUESTION**

**What specific improvements would you like to see in Belfast? Please rank your top 3 from the list below. (Top 10)**



Base: All respondents (910)

# SATISFACTION AND AREAS OF SUGGESTED IMPROVEMENT

On the whole, our young people have many more reasons for being satisfied with living, working or studying in Belfast as opposed to being dissatisfied.

**QUESTION**

**Please explain why you are satisfied / dissatisfied with living, working or studying in Belfast?**



<b>SATISFACTION</b> WITH BELFAST CITY
1. Affordability/cost of living
2. Work-life balance
3. Career/job opportunities
4. Location/accessibility
5. Good transport/commute
6. Social amenities
7. Culture/atmosphere
8. Close to family/home
9. Friendly people
10. Size/city living close to country/beach

<b>DISSATISFACTION</b> WITH BELFAST CITY
1. Salary - in comparison to other cities, renting expense and difficulty getting on the housing ladder
2. Transportation - congestion, long commute, limited city centre parking, costs of public transport
3. The impact of Covid-19 on Education/University
4. Limited retail offering and opportunities to socialise in comparison to other cities
5. Political situation

# ONE WORD TO DESCRIBE HOW BELFAST COULD BE EVEN BETTER IMPROVEMENT

**QUESTION**  
**What one thing / word, in your view, would make Belfast an even better city?**



# PERSONAS

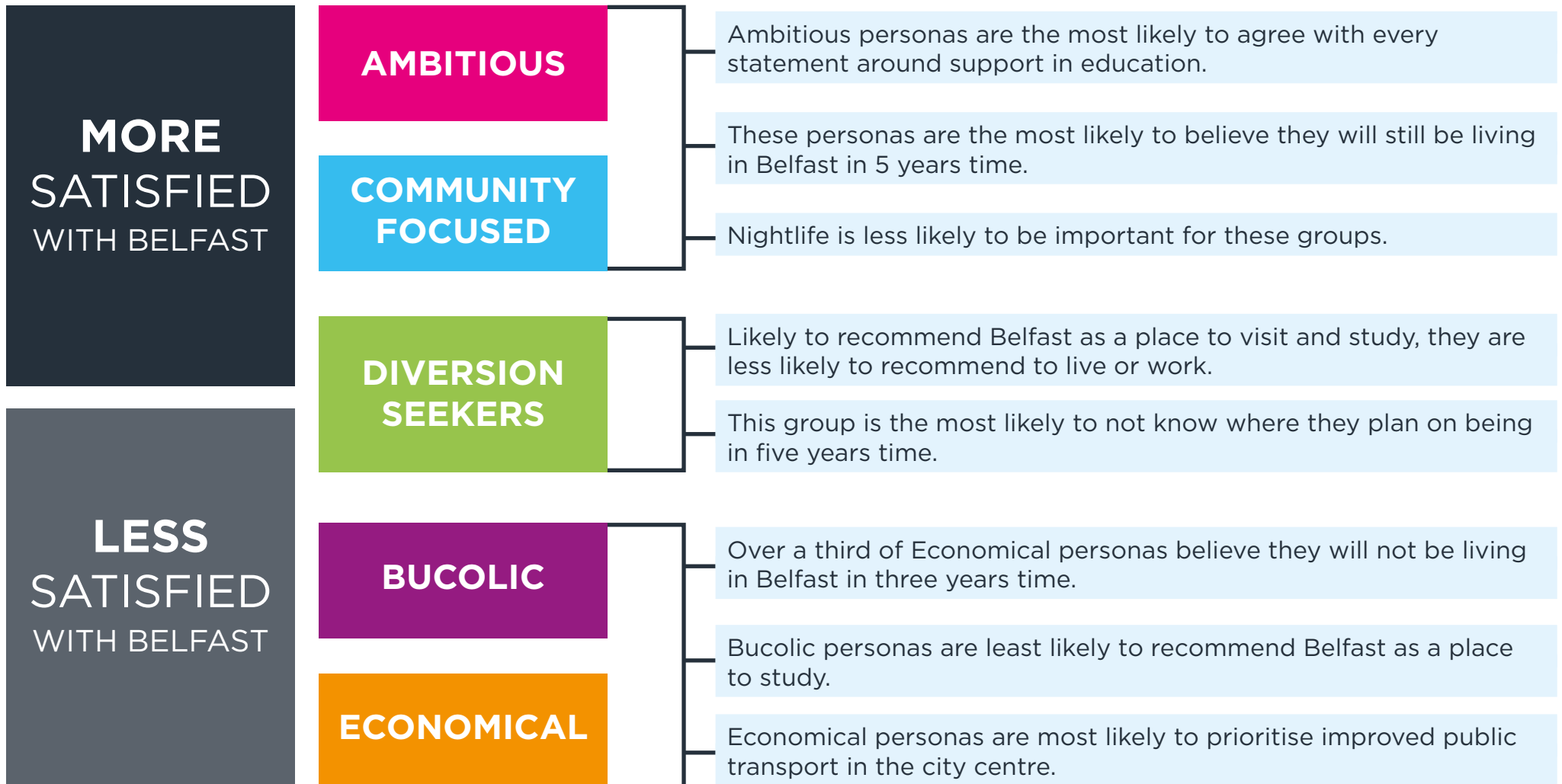
Based on their demographics and key belief areas, respondents tend to fall into one of five typologies outlined below.

AMBITIOUS	BUCOLIC	COMMUNITY FOCUSED	DIVERSION SEEKERS	ECONOMICAL
<p><b>KEY BELIEFS AREAS:</b></p> <ul style="list-style-type: none"> <li>Belfast has an entrepreneurial culture, innovative businesses and universities</li> <li>Belfast has good telecoms, connectivity to other countries and is a cosmopolitan city</li> </ul> <p><b>MOST LIKELY TO BE:</b></p> <ul style="list-style-type: none"> <li>Students, 18-24, female, heterosexual, and from NI</li> </ul>	<p><b>KEY BELIEFS AREAS:</b></p> <ul style="list-style-type: none"> <li>Belfast is good for walking, and has easy access to coast, countryside, and the water</li> <li>Belfast is a green/ environmentally friendly city with a high standard of air quality</li> </ul> <p><b>MOST LIKELY TO BE:</b></p> <ul style="list-style-type: none"> <li>S18-24, male, LGBTQ+, from outside NI.</li> </ul>	<p><b>KEY BELIEFS AREAS:</b></p> <ul style="list-style-type: none"> <li>Belfast is safe, friendly and welcoming, clean, and LGBTQ+ inclusive</li> <li>Belfast is family friendly</li> </ul> <p><b>MOST LIKELY TO BE:</b></p> <ul style="list-style-type: none"> <li>25-30, male, heterosexual, employed.</li> </ul>	<p><b>KEY BELIEFS AREAS:</b></p> <ul style="list-style-type: none"> <li>Belfast has good shops, bars, cafes, restaurants, and nightlife</li> <li>Belfast has good cultural offering and well preserved historical buildings</li> <li>Belfast centre is dynamic</li> </ul> <p><b>MOST LIKELY TO BE:</b></p> <ul style="list-style-type: none"> <li>18-24, female, from NI/GB, student</li> </ul>	<p><b>KEY BELIEFS AREAS:</b></p> <ul style="list-style-type: none"> <li>Belfast is a cheap/ affordable city to live in, and has affordable housing</li> <li>A night out in a bar, restaurant etc is good value</li> </ul> <p><b>MOST LIKELY TO BE:</b></p> <ul style="list-style-type: none"> <li>25-30, male, GB (not NI) employed.</li> </ul>



# HOW DO THE PERSONAS DIFFER?

There are some stark contrasts across the five personas that may impact their future in Belfast.



# THE IMPACT OF THE PANDEMIC AND PLANS FOR THE FUTURE



# WORKING FROM HOME

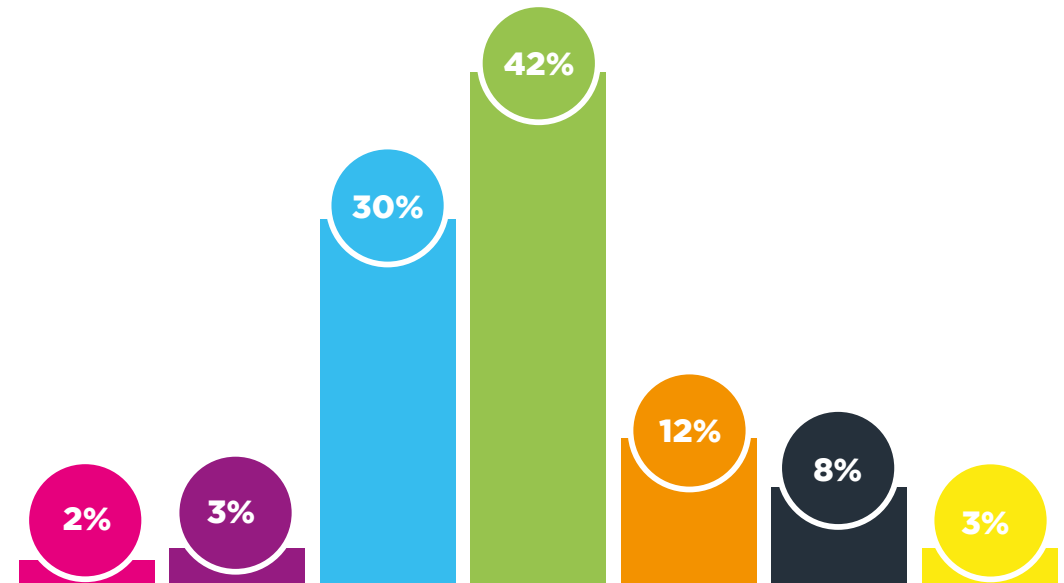
The majority of our young people surveyed would, ideally, aim to work from home 2-3 days per week.

## QUESTION

Based on your experiences during the pandemic and associated lockdowns, how many days per week working from home would be your ideal.

## KEY

IDEAL WORK FROM HOME DAYS PER WEEK



Those who stated 'N/A' are either not able to work from home currently or are not currently studying or employed.

Base: All respondents (910)

# IMPACT OF THE PANDEMIC

Overall, COVID-19 has not made a significant difference to young people’s plans with regards to education, work or their social life with regards to Belfast, and a quarter say it has made them more likely to want to stay.

## QUESTION

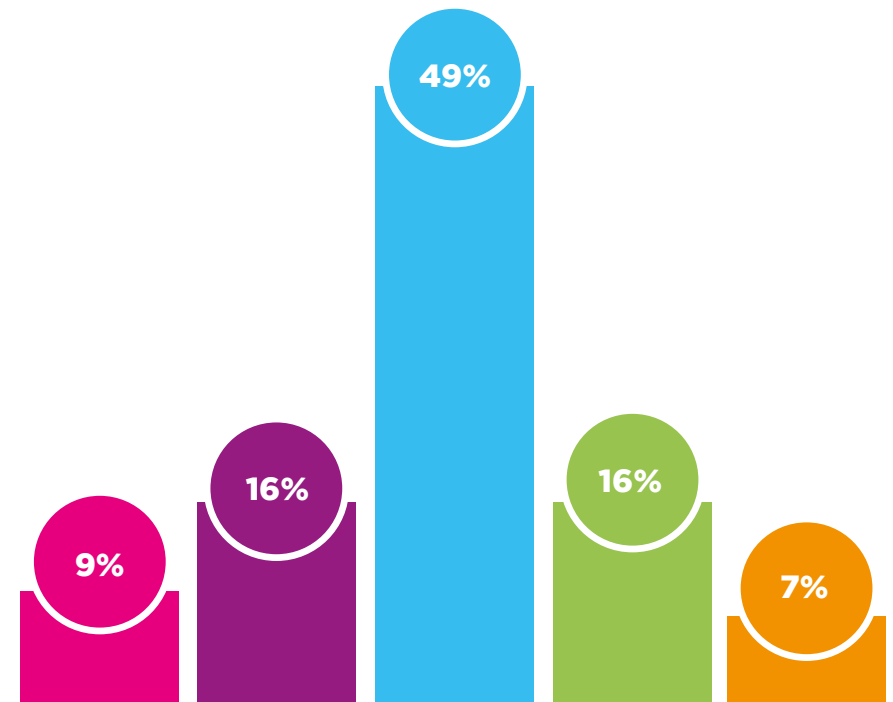
One a scale of 1 to 5, with 1 being much less likely and 5 being much more likely, to what extent has COVID-19 changed your opinion of wanting to live, work or study in Belfast?

## KEY

- Much More Likely
- More Likely
- No Change
- Less Likely
- Much Less Likely



Base: All respondents (910)





# PLANS FOR THE FUTURE

Overall, young professionals express their likelihood to settle more readily in Belfast over the next five years. Students, however, do appear to be slightly less settled than those further on in their careers.

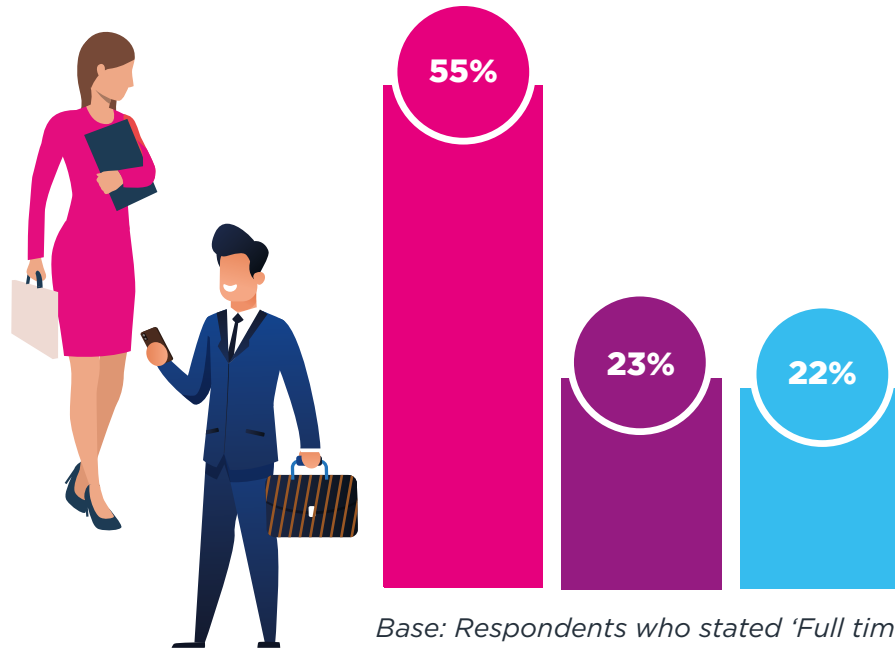
## QUESTION

Do you believe that you will still be living, working or studying in Belfast in five years time?

## KEY

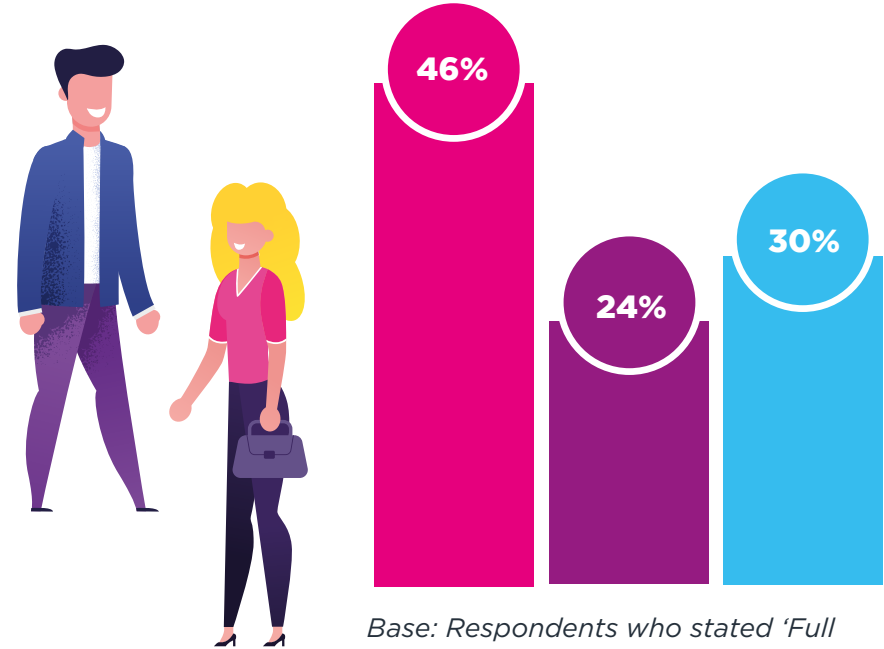
Yes No Don't Know

### EMPLOYED



Base: Respondents who stated 'Full time' or 'Part time' employment (716)

### STUDENTS

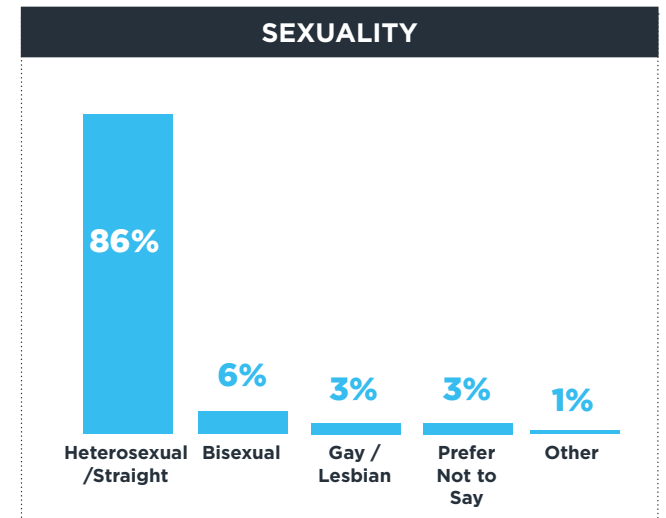
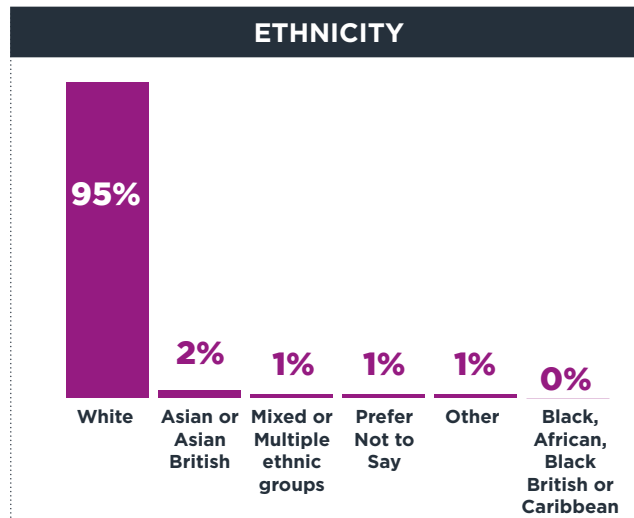
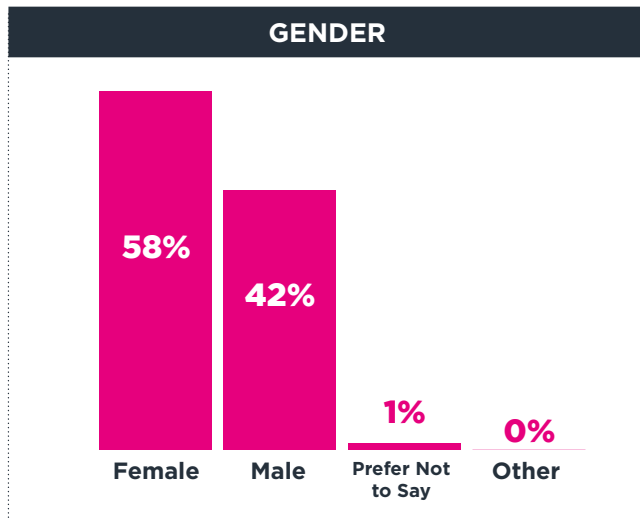
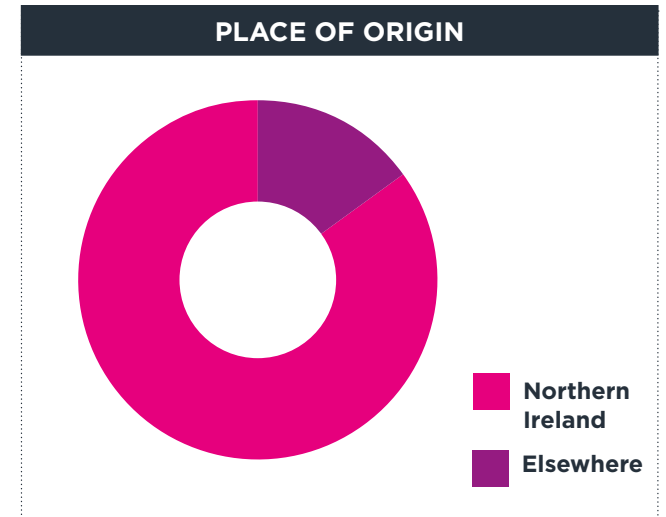
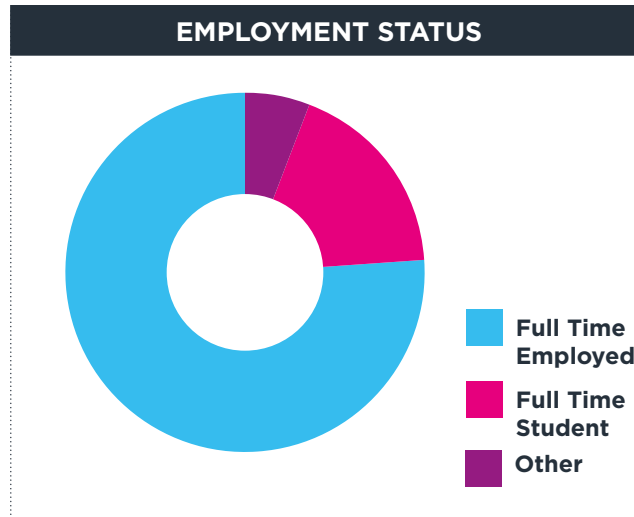
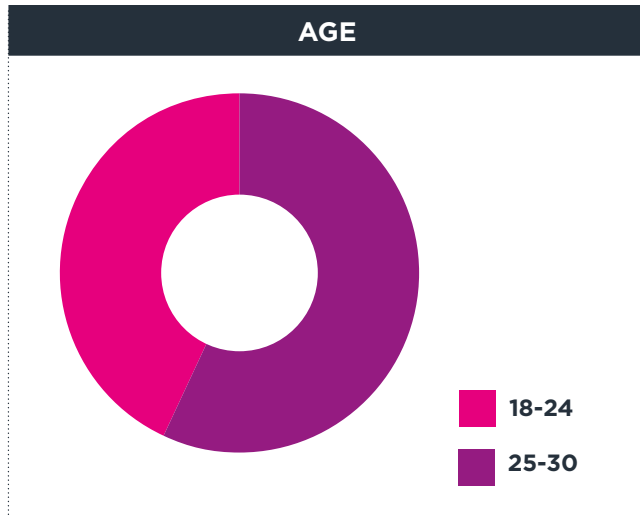


Base: Respondents who stated 'Full time' or 'Part time' student (191)

# PROFILING THE PARTICIPANTS



# KEY DEMOGRAPHICS



Base: All respondents (910)



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