Mid Ulster
DISTRICT COUNCIL

The Mid-Ulster Community Plan: Community Consultation Feedback

A Summary

March 2015

Venture
NETWORK

Contents

1. Executive Summary

2. Introduction and Background

3. The Questionnaire Surveys

- Introduction
- The General Survey
- The Youth Survey

4. The Consultation Feedback by Theme

- Introduction
- Rural Development
- Economic Development and Town Centre Regeneration
- Health and Education
- Culture, Arts and Leisure
- Planning and Environment
- Good Relations, Peace and Community Safety
- Social and Community Development

1. Executive Summary

Background

The new Mid-Ulster Council undertook a broadly-based Community Planning Consultation Process during October – December 2014. The Process was underpinned by 13 different consultation events which attracted over 800 participants and three questionnaire-based surveys which gathered the views of almost 1,600 respondents.

The consultation events focussed on seven themes which had been put forward as the framework for the Mid-Ulster Community Plan, ie:

- Rural Development
- Economic Development and Town Centre Regeneration
- Health and Education
- Culture, Arts and Leisure
- Planning and Environment
- Good Relations, Peace and Community Safety
- Social and Community Development

Strategic Feedback

Some of the high-level findings from the surveys were as follows:

- 80% of respondents were either Satisfied or Very Satisfied with their area as a place to live
- Half the adults but less than a quarter of the younger people felt their area was changing for the better
- Family, community and neighbours underpin people of all ages' attraction to/affinity with their area: this suggests that kinship ties remain strong here and that local communities are robust and are valued.
- More employment, better transport, better access to health care and more sports/play/leisure facilities were respondents' main priorities for change
- A number of core Council services such as recycling/refuse collection, parks/open spaces, street cleaning and sport/leisure facilities are seen to perform well
- Schools and libraries are also seen to perform well
- Among the areas that need attention meanwhile are roads, support for carers and adult/elderly health care

Priorities for Moving Forward

The main priorities which emerged from the Consultation Process in terms of each of the Community Plan's themes are set out below:

Theme 1: Rural Development

Sort out Broadband/mobile phone coverage and make the next Rural Development Programme similar to the last one but ensure it is much easier to access. Support manufacturing and farm diversification, retain rural schools and make much more use of Lough Neagh and the Sperrins as assets. Be aware of the close links between social and economic development, for example the importance of childcare provision as an economic enabler.

Theme 2: Economic Development and Town Centre Regeneration

Sort out Broadband/mobile phone coverage and prioritise job creation, investment and the enhancement of people's skills and employability, whilst continuing with support to Small-to-Medium-sized-Enterprises (SMEs) across all sectors. Drive forward Engineering, Farming and Construction, proceed with already-planned major capital projects and capitalise more on The Sperrins and Lough Neagh. Reduce the Rates burden, keep progressing town centre and village regeneration and recognise/build on the links between social and economic development.

Theme 3: Health and Education

Bolster community health and prevention programmes and initiatives, improve the availability of/access to health and social care services and restore/revitalise the Mid-Ulster and South-Tyrone Hospitals. Recognise the significant role of un-paid caring. Maintain a strong focus on education at all levels and make better use of the existing schools estate to drive forward life-long learning across Mid-Ulster.

Theme 4: Culture, Arts and Leisure

The same type of Council support needs to be maintained by the new Council and a Mid-Ulster Arts/Culture Forum set up to improve integration and communication. Access to funding needs to be made much easier/less burdensome for community groups. Some imbalances in culture, arts and leisure ('CAL') provision across the new Council area should be addressed and the current variety of 'CAL' activities should be maintained.

Theme 5: Planning and Environment

The new Mid-Ulster Council needs to get Planning right and maintain the current Councils' standards re waste management and recycling. A major litter education programme is essential as is a strategy re renewable energies generally. More social housing – possibly using existing empty buildings – and low-cost housing are needed as is investment in public transport.

Theme 6: Good Relations, Peace and Community Safety

The new Mid-Ulster Council should continue on with the type and style of previous Council support. Low key initiatives, funding that's easily accessed and good, empathetic staff are all central to this. It is vital that town centres and civic spaces/places are seen to be shared by all and to be welcoming to all. Ongoing work is also needed with Ethnic Minority and Single Identity communities as well as on ‘the marking of territory’ and silent sectarianism. ‘Boy racers’/speeding and alcohol/drug abuse are major concerns as is night-time crime.

Theme 7: Social and Community Development

Again it is seen as essential that the new Mid-Ulster Council should continue on with the type and style of previous support. The use of the existing community infrastructure, small grants and good, empathetic staff are all central to this. The risk of groups/communities ‘getting lost’ in the big Council has to be avoided. Communication and collaboration within and between the community and statutory sectors have to be improved and traditional community capacity building should remain a priority. Work is also needed re giving young people a voice and providing more facilities and activities for them.

2. Introduction

This report summarises the feedback obtained through the Mid-Ulster Council Community Planning Consultation Process carried out in October – December 2014.

It presents the main thrusts of what was said at a number of consultation events as well as core feedback obtained from questionnaire-based surveys which were carried out at the same time. Thirteen different consultation events were facilitated by teams of staff from the current Cookstown, Dungannon and South Tyrone and Magherafelt District/Borough Councils. These took place across Mid-Ulster as follows:

Date	Location
15 October	Dungannon, Council Offices
16 October	Magherafelt, Council Offices
27 October	Cookstown, Burnavon Arts Centre
10 November	Pomeroy, Rowan Tree Centre
11 November	Coalisland, Cornmill Centre
13 November	Maghera, Walsh's Hotel
19 November	Fivemiletown, College Buildings
20 November	Castledawson, Presbyterian Hall
24 November	Ballyronan, Marina Centre
8 December	Tobermore, Kilcronaghan Activity Centre
10 December	Aughnacloy, Aghaloo Community Centre
11 December	Broughderg, Community Centre
	TOTAL ATTENDANCES: 800+

Each consultation event focussed on all seven Mid-Ulster Community Plan themes, ie:

- Rural Development
- Economic Development and Town Centre Regeneration
- Health and Education
- Culture, Arts and Leisure
- Planning and Environment
- Good Relations, Peace and Community Safety
- Social and Community Development

Meanwhile, three different questionnaire-based surveys were also undertaken:

- A paper-based survey and an E-based version of the same survey (using 'Survey Monkey') which attracted a total of 707 responses
- A paper-based survey of Young People, which repeated some but not all of the questions asked in the other survey, which attracted 561 responses
- A paper-based survey focusing on rural development issues and which attracted 299 responses

3. The Questionnaire Surveys

Introduction

The questionnaire surveys were carried out in parallel with the Community Planning Consultation Events. Because they were not applied on the basis of a stratified random sample – a sampling frame was not constructed which would ensure a 'fair' representation across the gender, ages, backgrounds and locations of people living in Mid-Ulster – the survey results are not 'statistically significant'. That means they cannot be taken to be an accurate representation of the views of the overall Mid-Ulster population.

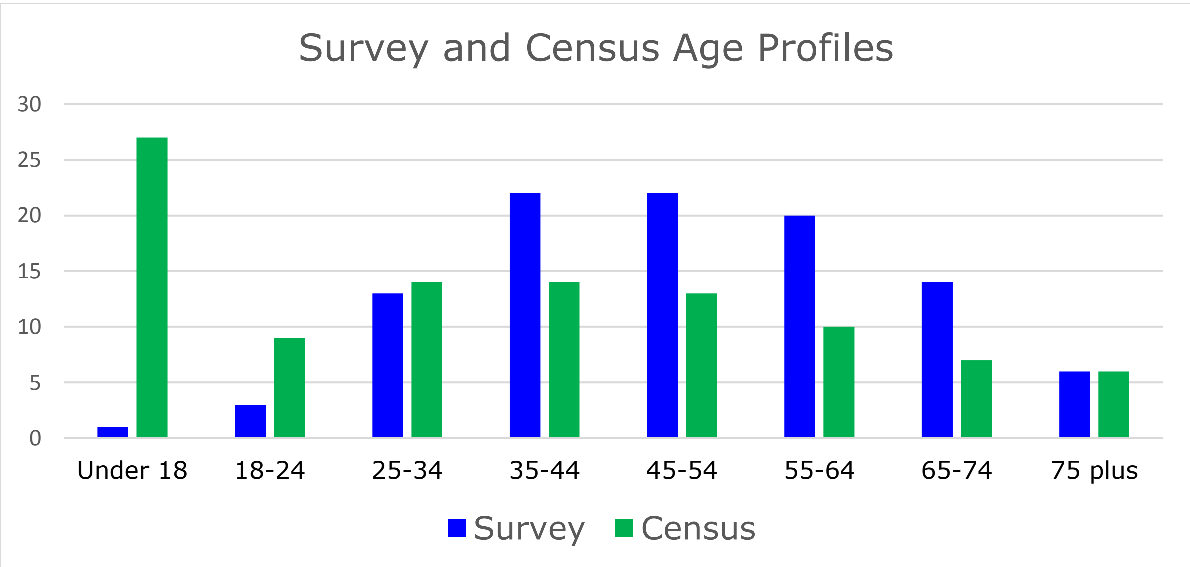
They are however a useful indication of community views and thinking and can reasonably be used to inform discussions around planning and policy-making.

Some of the Surveys' findings are summarised below whilst others are slotted in later in the Report, under particular Mid-Ulster Community Plan themes.

The General Survey

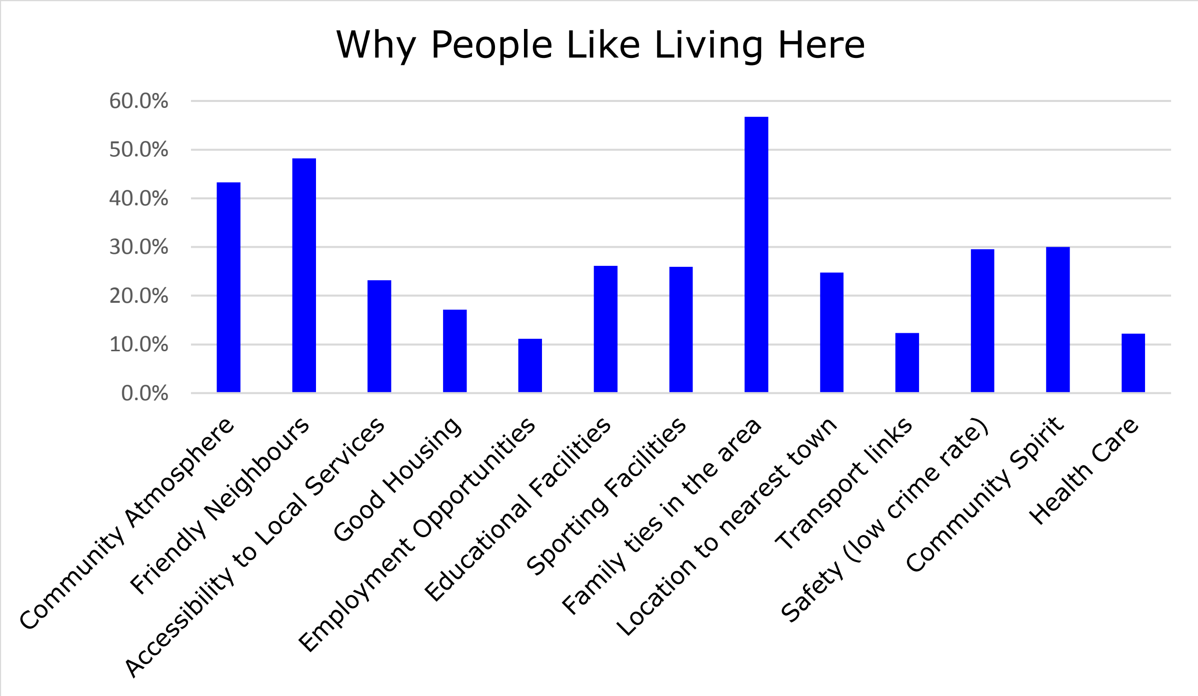
Some 707 people took part in the General Survey. Of these, 58% were Female and 42% were Male, whilst the 2011 Census showed the Mid-Ulster population to be evenly balanced, 50:50, in gender terms. The Survey's religious breakdown was 56:33 Catholic:Protestant compared with a 59:30 Catholic:Protestant balance across Mid-Ulster overall.

The Age Profile of Survey respondents relative to the Mid-Ulster Age Profile is set out below and shows that, as would be expected, very few of the new Council Area's Under 18s took part in the Survey:



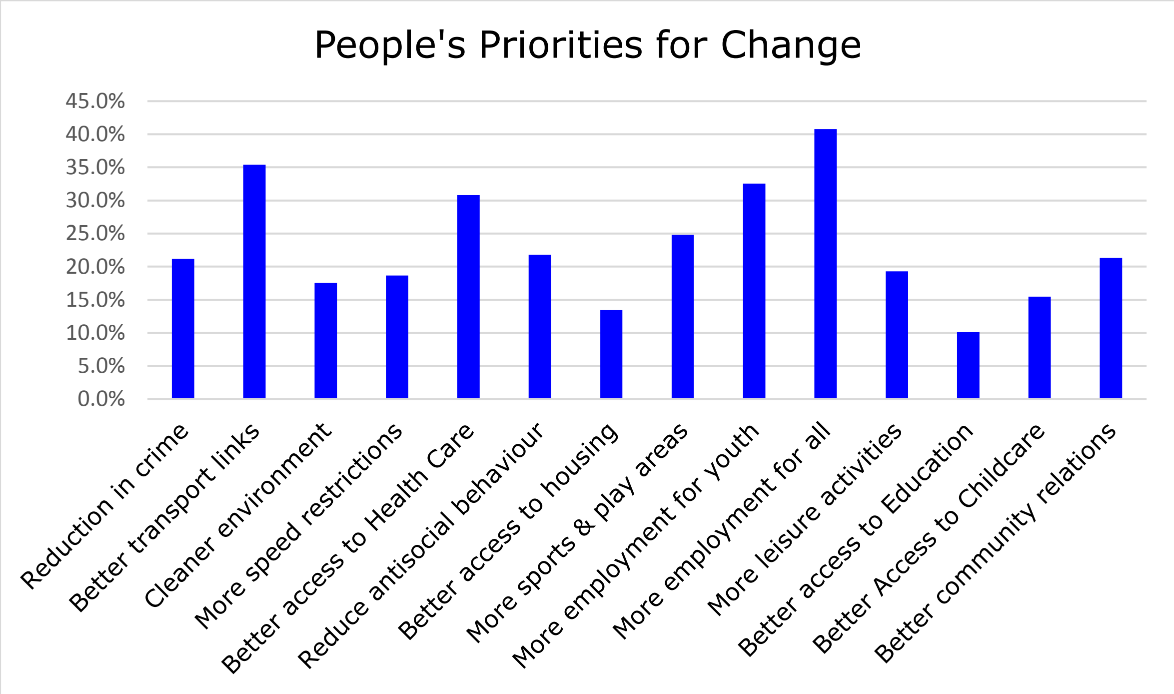
In terms of the strategic questions put by the Survey, **80% of respondents were either Satisfied or Very Satisfied with their area as a place to live**. Exactly **half the respondents (50%) felt their area was changing for the better** whilst just over a third (36%) felt it wasn't changing at all and one-in-ten felt it was changing for the worse.

The main reasons why respondents like living in their parts of Mid-Ulster are set out below:



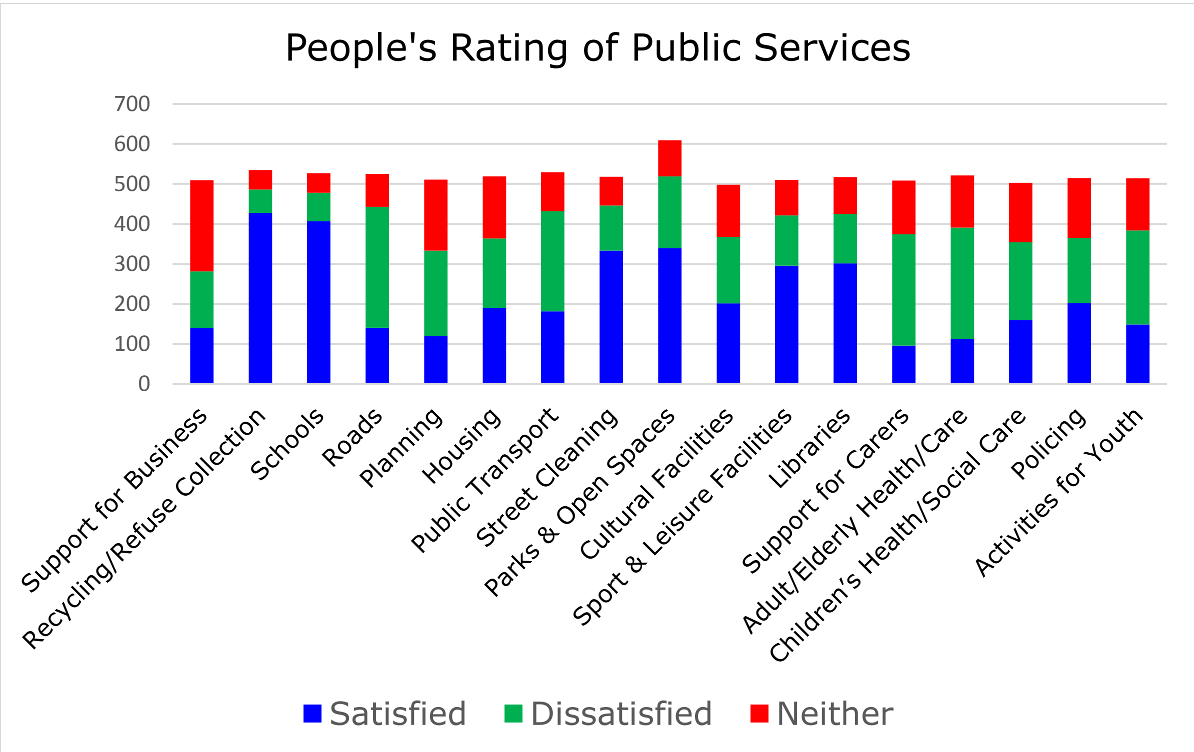
Family, community and neighbours underpin people's attraction to/affinity with their area: this suggests that kinship ties remain strong here and that local communities are robust and are valued.

Notwithstanding their affinity with/appreciation of Mid-Ulster, respondents also identified a number of priorities for change:



More employment is the main priority but **transport, better access to health care** and **more sports/play facilities** were also popular choices.

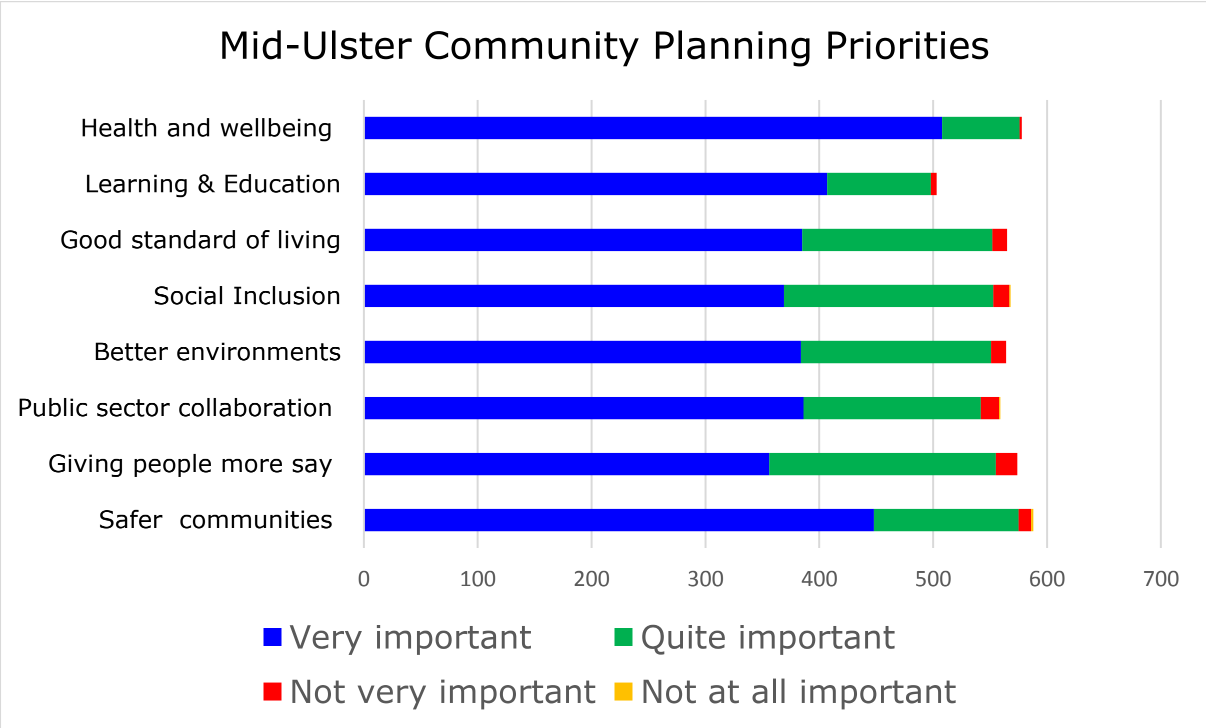
Respondents were also asked to rate the performance of a number of public services, as presented below:



Among the comments that can be passed on this are:

- A number of core Council services such as **recycling/refuse collection, parks/open spaces, street cleaning and sport/leisure facilities are seen to perform well**
- **Schools and libraries** are also seen to perform well
- Among the **areas that need attention meanwhile are roads, support for carers** and **adult/elderly health care**

Respondents went on to more-or-less unanimously agree that a number of broad community planning themes put to them were either Very or Quite Important, though **health and well-being** and **safer communities** are 'marginally ahead of the pack':

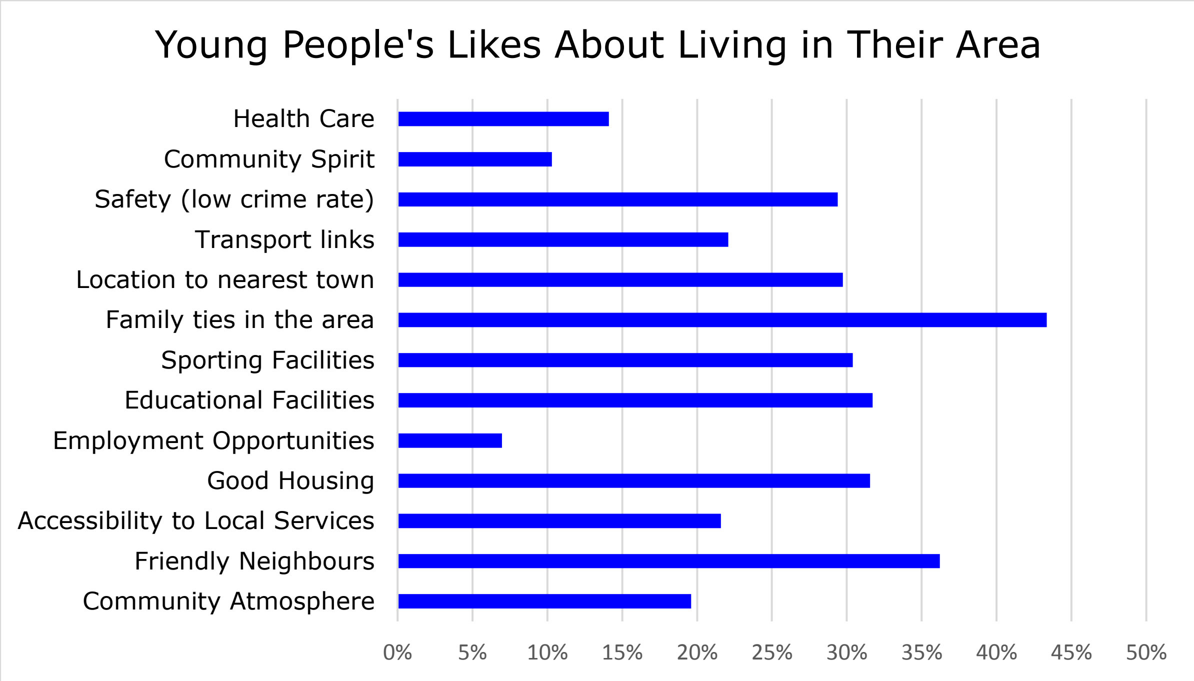


The Youth Survey

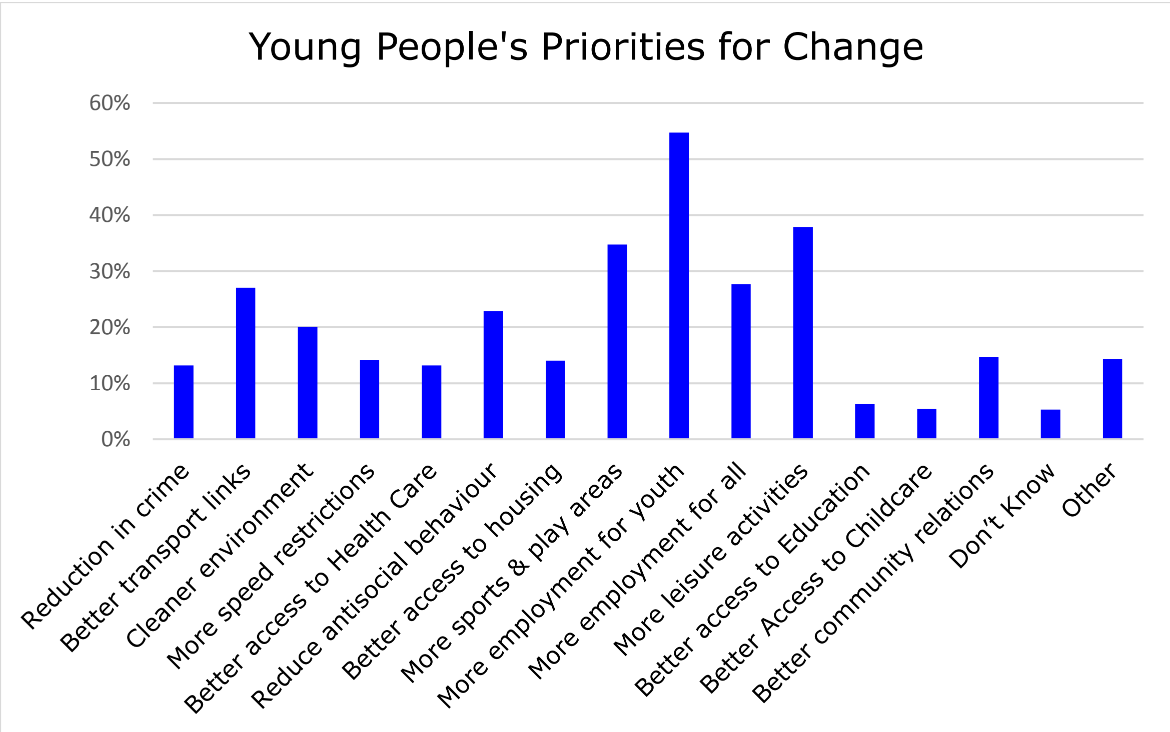
Some 607 people took part in the Youth Survey.

The younger people's views on Mid-Ulster were more pessimistic that those uncovered by the General Survey with fewer than a quarter of respondents (22%) felt their area was changing for the better whilst **just over half (52%) felt it wasn't changing at all** and one-in-ten felt it was changing for the worse: 16% Didn't Know.

As before, **family and neighbours** underpin young people's attraction to/affinity with their area. Also rated were housing, sporting and educational facilities, urban facilities and safety:



Again, a number of priorities for change were identified and as before **more employment** was the most popular choice, followed by **more sports, play and leisure facilities**:



The Rural Survey

Some 299 people (77% of whom lived in rural areas and 23% in urban areas) took part in the Rural Survey which was designed to feed into the development of the forthcoming Mid-Ulster Rural Development Strategy. Some of its findings only are therefore included in this report.

4. The Consultation Feedback by Theme

Introduction

This section summarises the feedback gleaned and the points made during the 13 Community Planning Events hosted by the Council in October-December 2014. It also includes responses from the General and Youth Surveys, slotted in under Theme headings as appropriate.

By way of explanation, at each Consultation Event participants chose one of the Community Plan Themes as their main focus on the night but were also given the opportunity to contribute, an a structured way to the other Themes. The Community Plan Themes are:

- Rural Development
- Economic Development and Town Centre Regeneration
- Health and Education
- Culture, Arts and Leisure
- Planning and Environment
- Good Relations, Peace and Community Safety
- Social and Community Development

Under each Theme below the feedback is summarised under three headings:

- What has worked well?
- What hasn't worked particularly well?
- What are the priorities going forward?

Feedback from the Surveys is then added in as appropriate.

Finally, the Priorities for Going Forward 'summary box' at the start of each Theme summarises at a high level the strategic thrust of the steer given by the consultation process here.

The overall 'working principles' of the Report are:

- The 'most popular' responses/comments made are listed first and thereafter in an approximate descending order of 'popularity'
- Points made are relayed as they were made with minimal editing other than to group similar points/comments together
- Because this is necessarily a strategic document, specifics are avoided (though they remain collated within the overall feedback)

T1: Rural Development

Priorities for Going Forward
Sort out Broadband/mobile phone coverage and make the next Rural Development Programme similar to the last one but ensure it is much easier to access. Support manufacturing and farm diversification, retain rural schools and make much more use of Lough Neagh and the Sperrins as assets. Be aware of the close links between social and economic development, for example the importance of childcare provision as an economic enabler. Respond to the needs of young people and older people.

What the Consultation Events Told Us

What Has Worked Well?

- The LAG system (where local people 'make the calls') has been very good as has the SWARD delivery of the NIRDP
- Rural communities tend to be strong and well-bonded together, with good volunteer bases
- Good assets/facilities have been put in place via NIRDP/SWARD (eg Davagh, Lissan House, Ballyronan, Blessingbourne, Aghaloo Hall and Kilcronagh): NIRDP/SWARD has definitely strengthened rural communities and economies
- Village Renewal has worked very well: good rural signage has been a key part of that
- Tourism, based on local assets, has been taken forward but much more could and should be done
- COSTA and CWSAN played important roles in the NIRDP process
- There are now a growing number of social enterprises

What Hasn't Worked Particularly Well?

- Problems persist re accessing NIRDP funding: these include knowing what's available, eligibility issues (particular difficulties experienced by Church/Parish-based projects and the 'lesser grant rates' given to private businesses), 'red tape' (people/groups need 'hands-on' support), bureaucracy, jargon, slowness of the process, communities being 'forced into' creating umbrella groups (another layer of bureaucracy when an existing group could easily act as lead partner) and cash-flow issues faced by those who do get grants
- Concerns that DARD/others still don't 'get it' re rural communities/rural living: too many don't seem to be aware that most rural dwellers are not farmers
- Rural Planning continues to cause problems, for example re business projects, B&Bs (bed spaces are vital if Tourism is to 'deliver'): funders/decision-makers seem to be unaware of the ongoing importance of Farming and Construction

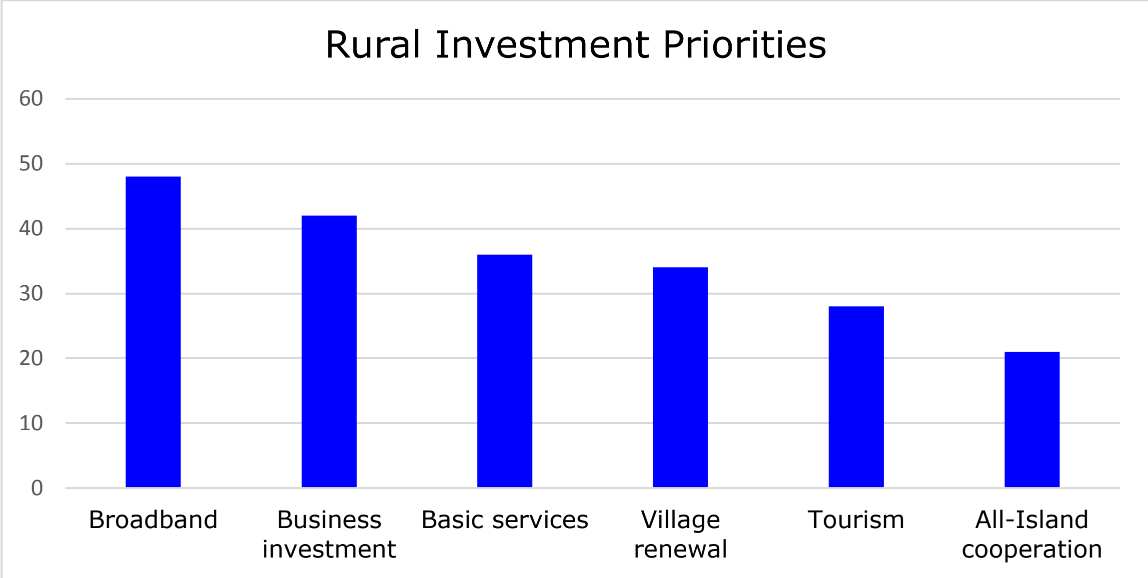
- Key services such as Healthcare, Childcare and rural schools remain poor or are under threat and Broadband/mobile phone coverage can be very poor
- There are limited initiatives/supports for older people and (apart from sports-based ones) for younger people
- We still have a lack of 'all-in-one' rural community facilities/centres
- Youth facilities are still limited as is business support for young people
- Rural transport is still limited and roads are often poor
- Increasing regulation is off-putting for volunteers
- Funders too often push the 'new and innovative' at the expense of the 'tried and tested'
- Lough Neagh and the Sperrins remain under-used/under-appreciated

What are the Priorities Going Forward?

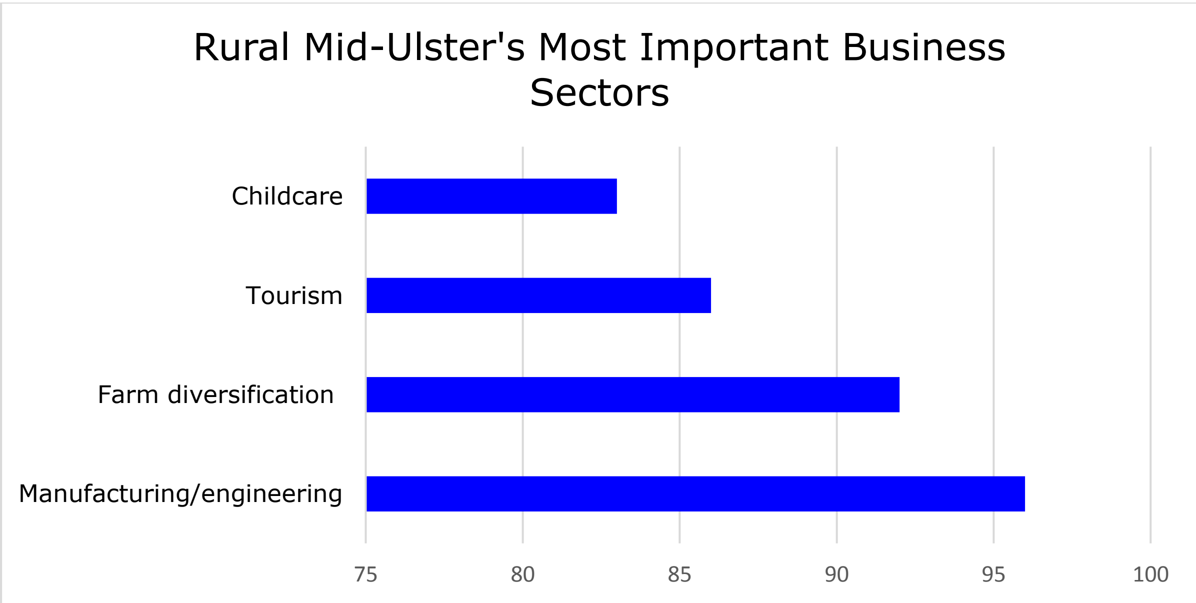
- Improve Broadband and mobile coverage
- Support farm families, diversification and local businesses, keep rolling out village improvements and raise awareness of/support for the links between economic and social development
- Reduce bureaucracy and match the complexity of the application process to the level of money being sought (an 'easier' process for small grants)
- We need better promotion of programmes and where/how they are available followed by 'hands-on' support re how to access them, develop the necessary business plans etc
- Support the provision of central, multi-focused community hubs which can drive social and economic development
- Improvements to rural services (Child Care, Education and Health), rural roads and rural transport, activities for young people, older people
- Make more of Lough Neagh and the Sperrins (re their tourism, work, leisure/recreation and environmental potential) and do it on an integrated basis under the new Council
- New Council could act as a one-stop-shop for funding applications
- Move away from a one-size-fits-all Rural Planning Policy
- Use decentralisation of public jobs to aid rural development
- Maintain rural Schools as vital community anchors and also maintain Library service/provision

What the Survey Said

Broadband was the area of business support ranked as Most Important by the single largest group of respondents (nearly half, or 48%) but the other options put forward also attracted significant support. The full findings are set out below:

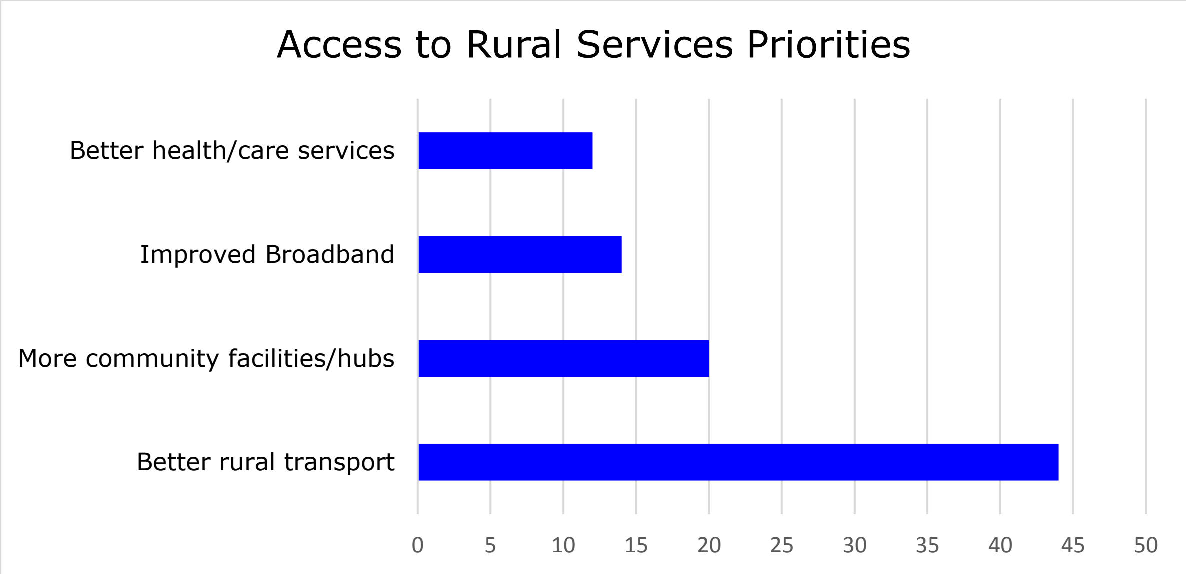


The business sectors deemed to be most important for rural Mid-Ulster meanwhile were:



Childcare was seen to be a vital **enabler of economic activity**, rather than as provider of jobs itself

The main issues in terms of access to basic services in rural areas were meanwhile seen to be:



The two key groups of rural dwellers seen as needing support were **Young People** - identified by over two-thirds (67%) of respondents – and **Older People** – identified by 63% of respondents.

T2: Economic Development/Town Centre Regeneration

Priorities for Going Forward

Sort out Broadband/mobile phone coverage and prioritise job creation, investment and the enhancement of people's skills and employability, whilst continuing with support to Small-to-Medium-sized-Enterprises (SMEs) across all sectors. Drive forward Engineering, Farming and Construction, proceed with already-planned major capital projects and capitalise more on The Sperrins and Lough Neagh. Reduce the Rates burden, keep progressing town centre and village regeneration and recognise/build on the links between social and economic development.

Economic Development

What the Consultation Events Told Us

What Has Worked Well?

- We have many, many strong local businesses in place, across a range of sectors and our traditional industries of agriculture, construction and engineering remain particularly strong

- There has been a series of good business support programmes and initiatives developed and delivered by Councils, LEAs etc
- Several major project developments have been achieved (eg MUSA, Davagh, Greenvale Leisure Centre, imminent Seamus Heaney Centre, Blessingbourne, Dungannon Park, Ranfurly House/Hill of the O'Neills, Termoneeny Centre etc)
- Contributions by Workspace Ltd, Cookstown and Dungannon Enterprise Centres, Maghera Station Yard, Granville Industrial Estate and other more local initiatives/projects
- Mid-Ulster enjoys a good local entrepreneurial culture/base and a strong tradition of self-help/self-reliance
- The A4 dual-carriageway project has been very positive
- Flavour of Tyrone initiative has been good

What Hasn't Worked Particularly Well?

- Broadband and mobile phone coverage are often very poor, right across the new Mid-Ulster Council area: roaming charges add to the problems close to the Border
- Large numbers of working age people are now leaving to work elsewhere
- Rates can be crippling for businesses and a barrier to start-ups and growth
- There has been poor and disappointing progress re major projects (Police College, the Cookstown by-pass, the new A5 road)
- Transport and roads need attention
- Childcare deficits are restricting many women's ability to work as is a lack of 'women-specific' programmes and supports
- The bureaucracy involved with funding is increasingly off-putting
- Business support can be sporadic, restricted and 'stop-start'
- Hotel provision across the new Mid-Ulster Council area is varied
- Access/accessibility issues persist for people with disabilities
- Availability of Phase 3 electricity in many rural areas is limited and holds back economic development

What are the Priorities Going Forward?

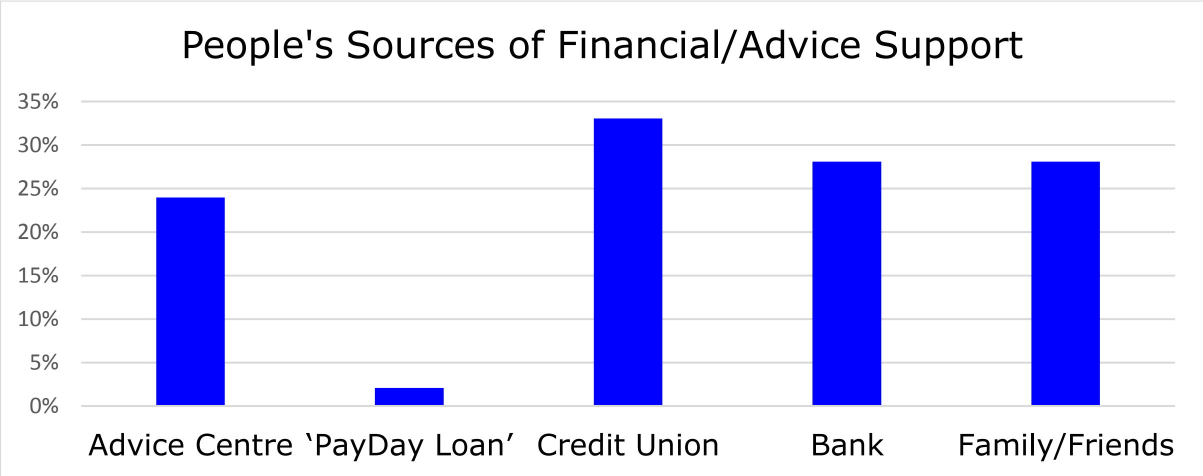
- Improve Broadband and mobile coverage and provide as much free wi-fi as possible
- Provide a range of supports for micro/SMEs (including independent retailers and support re E-commerce) and robustly promote/advertise these supports
- Support farming/agri-food, construction and engineering – which are very strong presences locally - and develop an 'Engineering Centre of Excellence'
- Capitalise on assets such as The Sperrins, Lough Neagh, the River Bann, forests, traditional skills, Seamus Heaney legacy: build the 'tourism product', eg via an integrated tourism trail … but also make sure tourists/visitors <u>stay overnight</u> in the area
- Sustain and support the town centres of our three major towns (including their evening/night-time economies) and keep supporting village renewal/regeneration
- Decentralise public jobs out of Belfast
- Reduce Rates
- Create/introduce more high-value jobs
- Develop Police College/Loughry/CAFRE/SW College
- Improve roads and transport
- Put in place a 'more friendly' Planning regime

- Develop a better fit between education/training and employers' needs
- Keep building strong Council/business and education/business links
- Seek more Foreign Direct Investment
- Provide more zoned land for industry/make planning permission for enterprise easier and look at the possibility of a Mid-Ulster Enterprise Zone

What the Survey Said

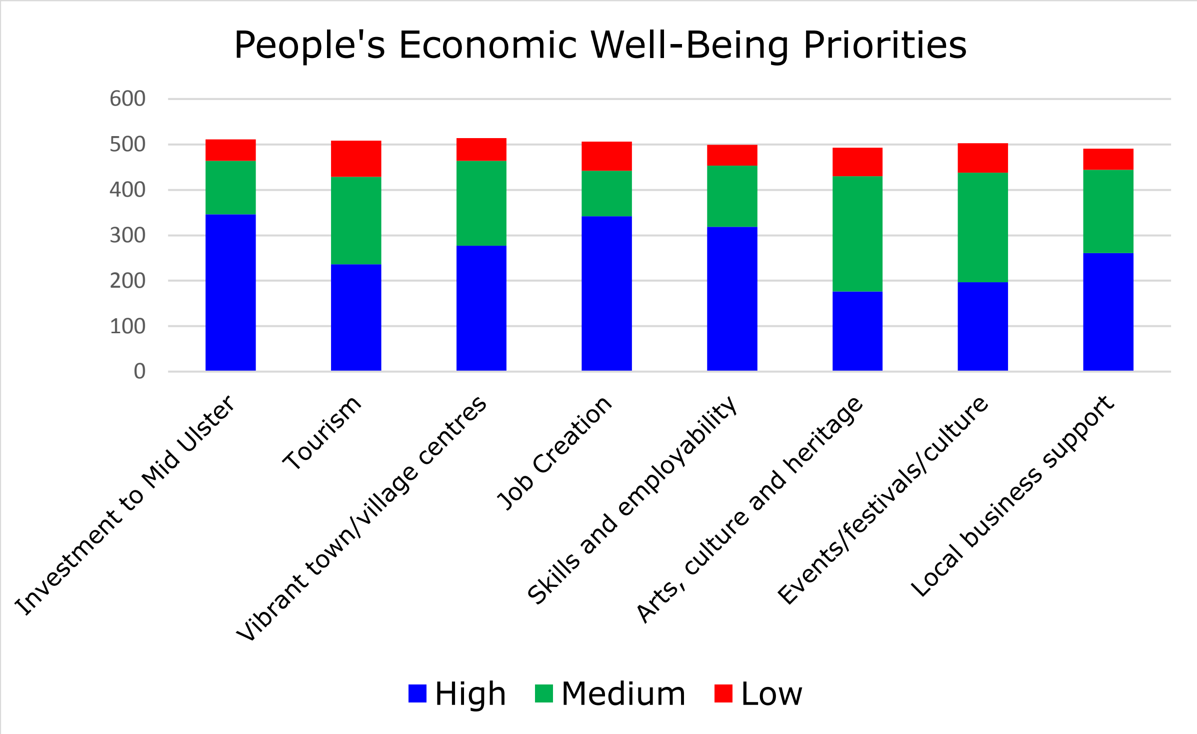
There was no consistent pattern in terms of whether people felt their financial security had or hadn't changed over the past five years: fewer than a third (28%) felt it had, 40% felt it hadn't whilst a further third (32%) felt it was about the same.

For those who had sought financial advice, their main sources are set out below. Again, the importance of **family/friends** and **community-based options such as the Credit Union** are clear:

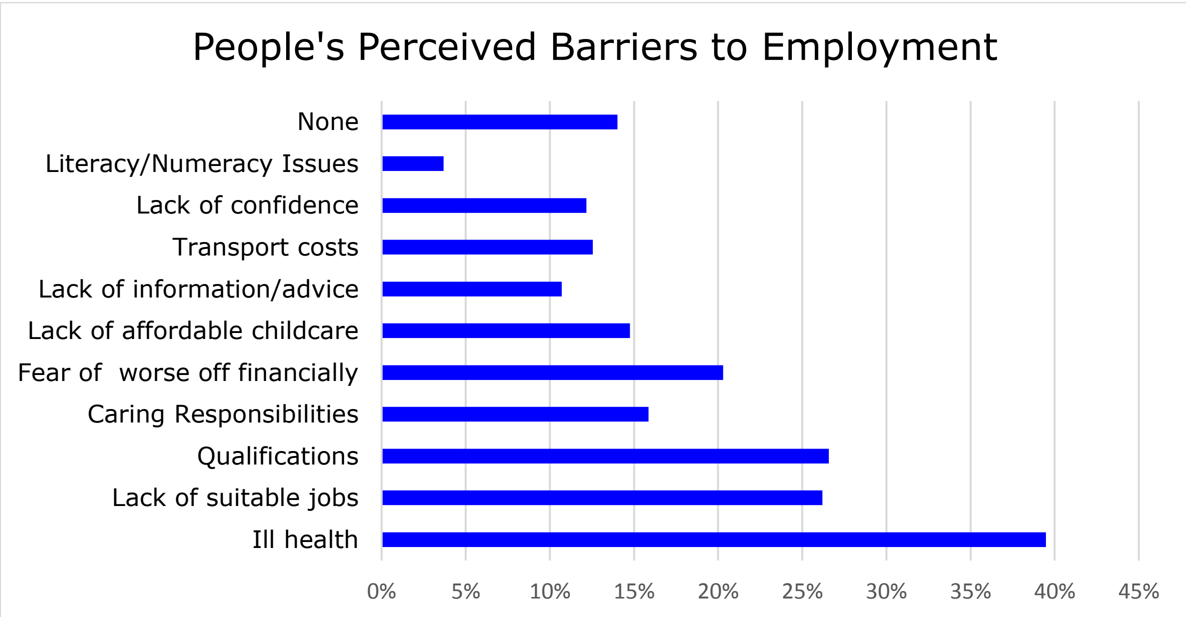


Of those who had sought financial advice or support, 55% found it easy to access whilst 45% did not. In terms of the advice/support given, 59% felt it was Helpful, 12% felt it was Not Helpful, whilst 29% were Unsure.

The Survey also asked respondents for their priorities in terms of Mid-Ulster's economic well-being. The main priorities were seen to be in the areas of **job creation, investment** and **skills/employability**:



At the same time the Survey asked unemployed people what prevented them from seeking employment, training or learning. Some 38% of respondents (271 people) answered the question and the findings were as follows:



Ill-health is the single most 'popular' barrier put forward, followed by **qualifications issues** and **lack of suitable jobs**.

An overwhelming 96% of Rural Survey respondents felt that improvements were needed to **Broadband connectivity** in rural Mid-Ulster.

Town Centre Regeneration

What the Consultation Events Told Us

What Has Worked Well?

- Work in/for Cookstown town centre, eg shop fronts, (independent) retail promotion/support, Christmas Lights, Continental Market, 'Street Angels', free parking, marketing campaigns: the key has been partnership working and the multi-pronged approach to a number of town centre issues
- Magherafelt town centre initiatives, especially Queen Street
- Dungannon town centre work, especially the Ranfurly House/Hill of the O'Neills project
- Improvements to/upgrading of village centres, eg Pomeroy, Ballyronan, Castledawson, Bellaghy, Maghera and Fivemiletown
- Positive working between business/property owners and the current Councils
- Presence of services/facilities and events/festivals in villages and support from the Councils for these
- Neighbourhood Renewal has been good (in those places designated for it)

What Hasn't Worked Particularly Well?

- Too many empty shops and growing numbers of charity shops in town centres and derelict buildings generally
- Rates can be crippling
- Poor progress re major projects such as the Police College, the Cookstown by-pass and the A5 road
- There are still access/accessibility issues for people with disabilities, for example getting to upper-floor premises
- Not all public realm work 'works well' and there are reservations about the value of the 'streetscape painting schemes'
- There could be more and better joined-up working within government

What are the Priorities Going Forward?

- Maintain the focus on and work in/for the three main town centres, eg sustain and build on Cookstown's retail vigour in particular and drive forward opportunity sites such as Ann Street, Dungannon and in Maghera
- Look at town/village centre traffic management and get systems in place which work well: these (including free car-parking)
- Look at Maghera as a 'Gateway to Mid-Ulster' and at Aughnacloy as a main gateway to NI … and invest in the 'Gateway Entrances' to all local towns and villages
- Keep a focus on the villages
- Address dereliction wherever it happens and look at ideas such as 'pop-up shops'
- Maintain Council planting/flower schemes

What the Surveys Said

Three-quarters (76%) of those taking part in the Rural Survey felt that **future village renewal should be targeted at all villages** and not necessarily just those that are most deprived.

The other Surveys did not contain any questions specific to Town Centre Regeneration.

T3: Health and Education

Priorities for Going Forward

Bolster community health and prevention programmes and initiatives, improve the availability of/access to health and social care services and restore/revitalise the Mid-Ulster and South-Tyrone Hospitals. Recognise the significant role of un-paid caring. Maintain a strong focus on education at all levels and make better use of the existing schools estate to drive forward life-long learning across Mid-Ulster.

What the Consultation Events Told Us

What Has Worked Well?

- Number of very good working models (eg Surestart, EMU, CWSAN, Barnardos, Cookstown Disability Forum, The Hub, Hearty Lives, Cook-It, Walk to Health, Agewell, CHARIS, STEPS, Warm Homes, MARA,) as well as good partnership working in place
- There is a good range of good schools in place which 'see the wider picture': they are particularly good in terms of their 'in school' work re integrating ethnic minorities
- The Northern Regional and South-West Colleges do good work
- Mid-Ulster families' tradition of 'looking after their own' is a very significant 'caring asset'
- The Mid-Ulster Hospital and South Tyrone Hospital Minor Injuries Units are very good, though not everyone is aware of them
- Cookstown's reaction to the Westland closure threat was strong and well-led

What Hasn't Worked Particularly Well?

- Access to/engagement with the Health Service (Hospitals, Ambulance, some GPs and mental health) is not at all what it should be: Hospital/A&E provision is especially poor/isn't working due to the run-down of the Mid-Ulster and

South Tyrone Hospitals. Domiciliary/home-based care – which should be 'extra good' to compensate for other deficits in the health and care system – is not what it should be. Cookstown in particular suffers from not having a 'health and care hub'.
- The lack of shared areas/boundaries within Health and Education is not at all helpful: for example, Cookstown has always had to 'look north' for Health but 'south' for Education. This problem will persist in the new Mid-Ulster Council.
- There is limited/sporadic availability of respite care, Surestart coverage and pre-School provision across Mid-Ulster
- The closures (actual and threatened) of rural schools, distances/transport to schools generally and the poor use made of schools beyond school hours
- Too many Cookstown pupils have to travel outside the area to go to Secondary School
- Educational performance could be better
- The retraction of health services in particular reduces the local 'corporate skills set'
- There are ongoing issues re accessing/travelling to Antrim and Craigavon Area Hospitals

What are the Priorities Going Forward?

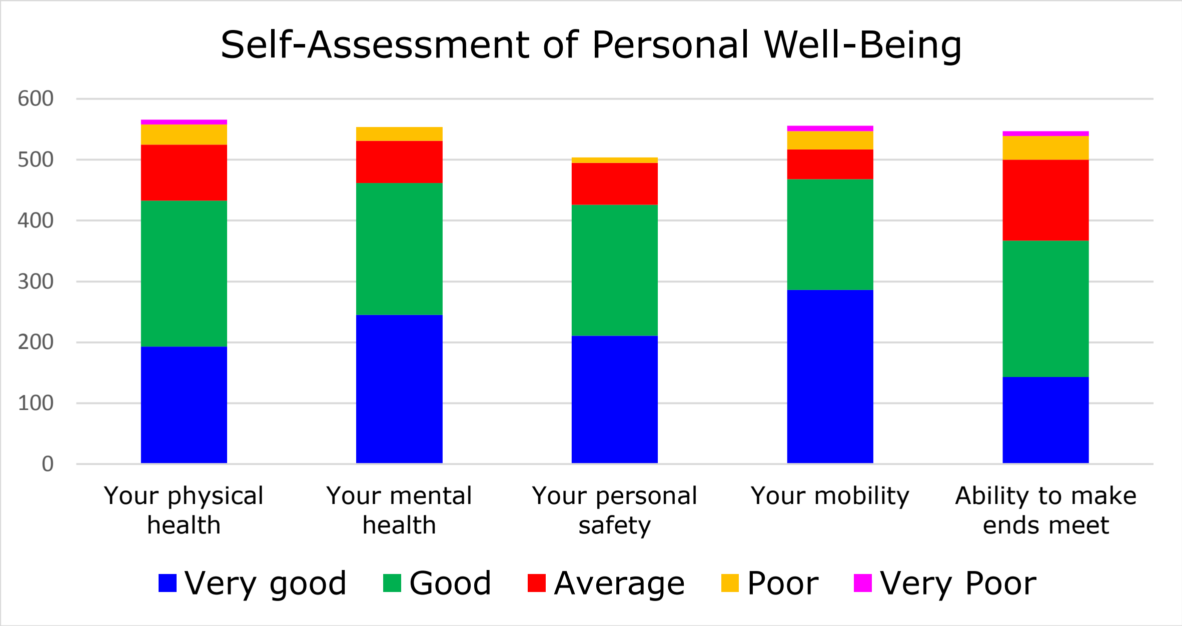
- Mid-Ulster needs to ratchet up the focus across the board on prevention/health improvement (eg via leisure, sport, arts, community activity), early intervention, personal development and education/awareness-raising (eg re drugs, addictions, healthy eating, domestic violence, mental health), community-based screening, respite and palliative care
- Improve access to health and care services (extend GP and Minor Injuries provision beyond 9-to-5, Monday-to-Friday, build up provision at the Mid-Ulster and South Tyrone Hospitals, dramatically improve Out-of-Hours/Ambulance/First Responder provision, retain Loane House and improve Respite Services): better transport should be part of this
- The new Mid-Ulster Council should prioritise Health and Education, for example helping address literacy/numeracy deficits and the damaging/wasteful culture of unnecessary and/or missed Health appointments
- Improve the availability of life-long learning (including nursery/pre-school) via using school buildings/resources beyond school hours and the potential of 'shared education' models
- Reduce the need for Cookstown Secondary pupils to travel outside the area
- Reflect the needs of our migrant communities
- Renew the focus on Apprenticeships and improve our 'foreign' language capacity,

What the Surveys Said

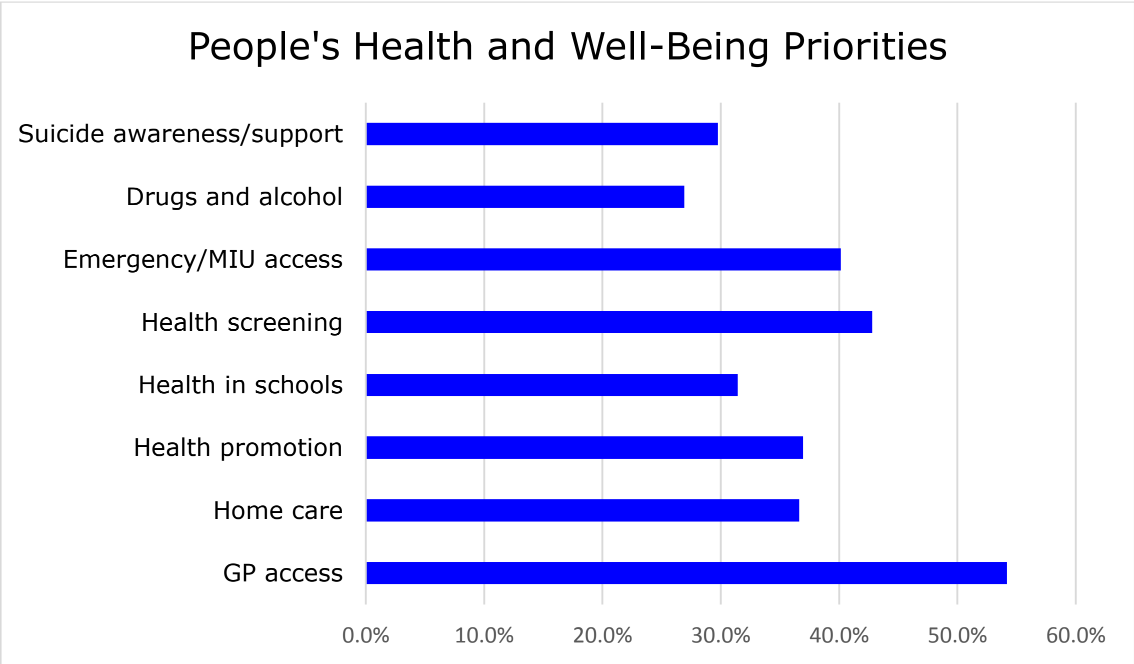
Unpaid caring for others is a significant activity in Mid-Ulster with six-people-in-ten (62%) providing regular help or care to someone who is elderly, sick or disabled.

People's self-assessment of their personal well-being meanwhile is largely Very Good or Good but significant minorities posted difficulties in the areas of physical and mental health status, in their personal safety and in their mobility. **The most**

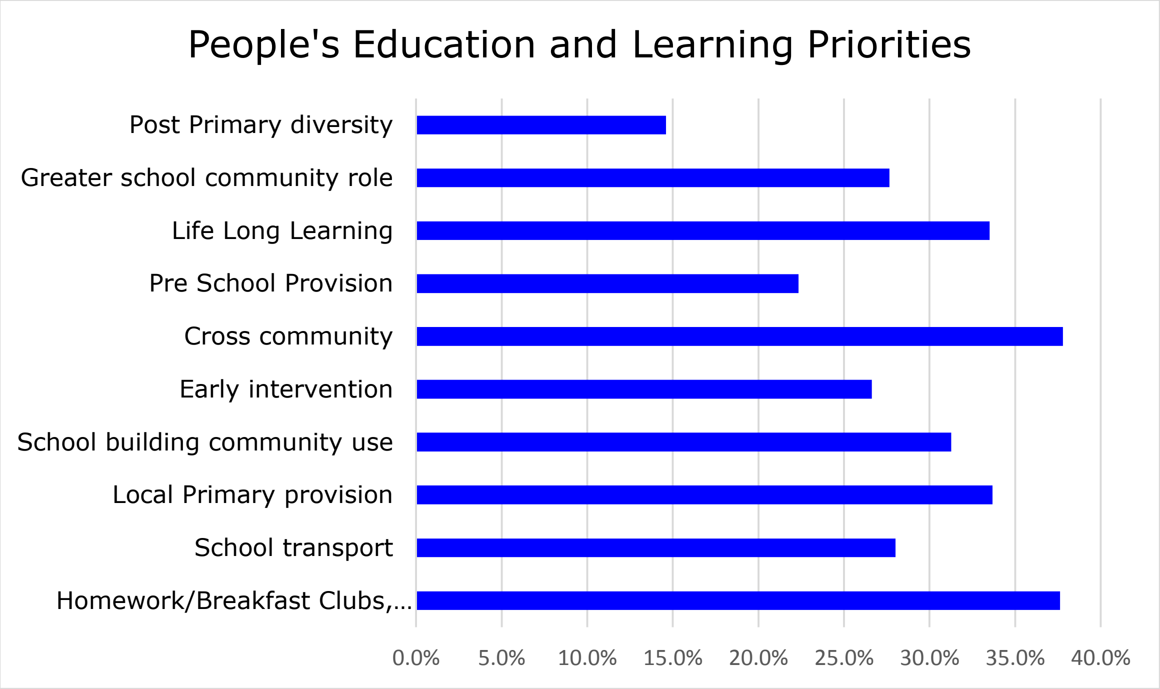
significant difficulties however appear to be in the area of making ends meet:



Leading on from this, there was significant agreement with a number of potential health and well-being priorities suggested by the questionnaire. More than half the respondents (54%) flagged up **greater access to GPs** as a priority whilst 40% or more prioritised **health screening** (43%) and **better access to minor injuries units/emergency care** (40%):



There was similar strong support for a number of education and learning priorities put forward, with eight of the ten options attracting the support of at least 25% of the respondents:



T4: Culture, Arts and Leisure

Priorities for Going Forward

The same type of Council support needs to be maintained by the new Council and a Mid-Ulster Arts/Culture Forum set up to improve integration and communication. Access to funding needs to be made much easier/less burdensome for community groups. Some imbalances in culture, arts and leisure ('CAL') provision across the new Council area should be addressed and the current variety of 'CAL' activities should be maintained.

What the Consultation Events Told Us

What Has Worked Well?

- Councils' support across these areas (eg via Leisure Centres, The Burnavon, MUSA, Fair Hill/other play areas, Davagh, Active Communities, Meadowbank, Moneymore, Ballyronan, Maghera, Dungannon Park, Irish Language support, Tobermore Driving Range, Ranfurly House/Hill of the O'Neills and the Draperstown Back Row) has been very good
- There are many good events/projects in place, such as the Bardic and Craic Theatres, Cookstown 100, the Continental Market, Lap the Lough, The Jungle,

Todds Leap, Glasgowbury, Scór, Somme events, An Carn and the Carleton Summer School

- There are also very many good local community sports/arts/leisure groups/clubs in place and working/delivering very well, particularly in the sports sector: these are also well distributed across Mid-Ulster and there is increasing evidence of GAA/soccer/rugby existing and thriving side-by-side
- The GAA is very strong and does good work at a number of levels
- Mid-Ulster enjoys a strong heritage base (An Carn, Argory, Ballinderry/Blackwater/Moyola Rivers, Beaghmore Stone Circles, Coalisland Canal, Lissan House, Lough Fea, Lough Neagh, Tullyhogue, Ulster Canal and Wellbrook) but we need to do more in recording our histories, traditions and bygone ways
- Existing Councils' support for Irish Language is good
- The Fivemiletown College model of opening its leisure assets to community use is very effective and should be sustained

What Hasn't Worked Particularly Well?

- Much more could/should be made of Lough Neagh generally and Ballyronan Marina in particular: other access points such as Brocagh, Traad and Washingbay should be developed
- Some of the public realm work in Dungannon town centre: surfaces, layouts and traffic arrangements are difficult
- Signage could be improved
- There is a lack of play provision in some rural areas/communities
- Mutual respect for cultures is sometimes lacking
- We still have a limited tourism delivery in Mid-Ulster
- Not everything is 'disability friendly'
- Magherafelt has no central civic theatre/arts centre
- The closure of the Rural College was a blow
- We could/should do more re Ulster-Scots

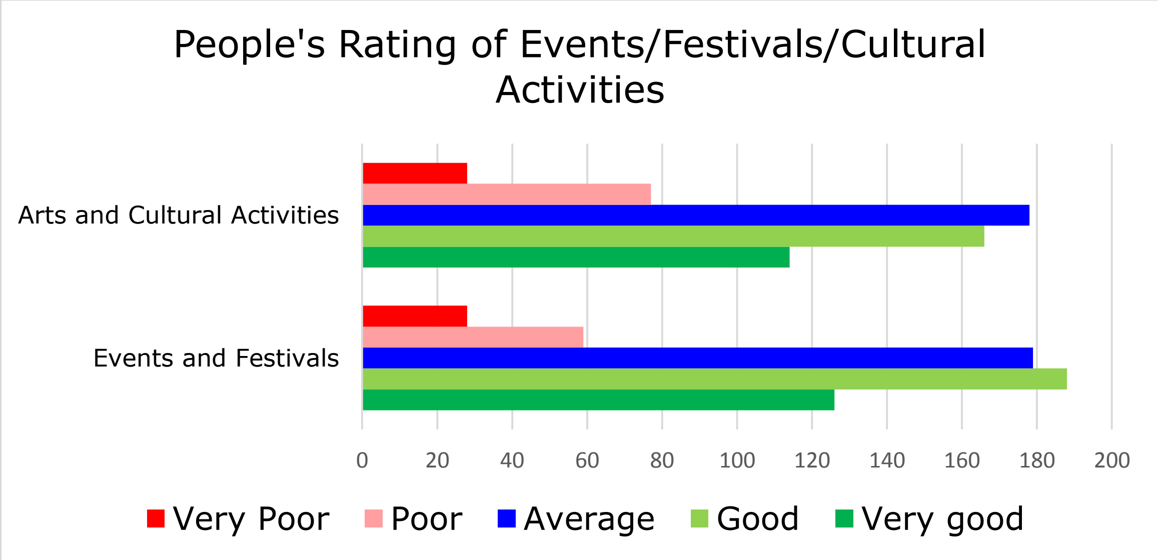
What are the Priorities Going Forward?

- The new Mid-Ulster Council should keep doing what the current Councils are/have been doing: we mustn't change what is working well - good facilities, small grants and hands-on help from empathetic, 'clued in' staff
- Set up a Forum for Arts/Culture providers and improve generally the communication re what's available and what's going on/happening: such a Forum should celebrate our great local cultural variety
- Provide locally-based training for volunteers and work to get more young people volunteering
- Put in place improved signage re places/facilities and create a joined-up Mid-Ulster Heritage Trail linking key sites and places
- Make funding for groups more accessible and less bureaucratic and make sure it's equitably distributed
- Revisit pricing strategies for Council facilities, for example broaden out the Greenvale Family Membership model
- Increase the amount of public art, especially in town centres
- Improve the quality and number of walkways, paths, greenways and open spaces
- Look at the provision of play parks/facilities in rural areas
- Make more use of Lough Neagh and the Sperrins

- Develop an Arts Centre in Magherafelt and a MUSA-type facility in Dungannon

What the Surveys Said

The vast majority of respondents felt that the provision of **events, festivals** and/or **cultural activities** was Good/Very Good or Average:



T5: Planning and Environment

Priorities for Going Forward

The new Mid-Ulster Council needs to get Planning right and maintain the current Councils' standards re waste management and recycling. A major litter education programme is essential as is a strategy re renewable energies generally. More social housing – possibly using existing empty buildings – and low-cost housing are needed as is investment in public transport.

What the Consultation Events Told Us

What Has Worked Well?

- Waste collection/management and street cleaning systems overall are very good and these levels of service need to be maintained by the new Mid-Ulster Council
- There are good links into and work within Schools re re-cycling
- Councils' work re biomass heat, dealing with derelict buildings and facilitating shop front upgrades has been very positive

- Councillors' involvement in Planning is good
- Regeneration work in towns and villages plus initiatives such as Christmas lighting and planting and flowers have all been very positive

What Hasn't Worked Particularly Well?

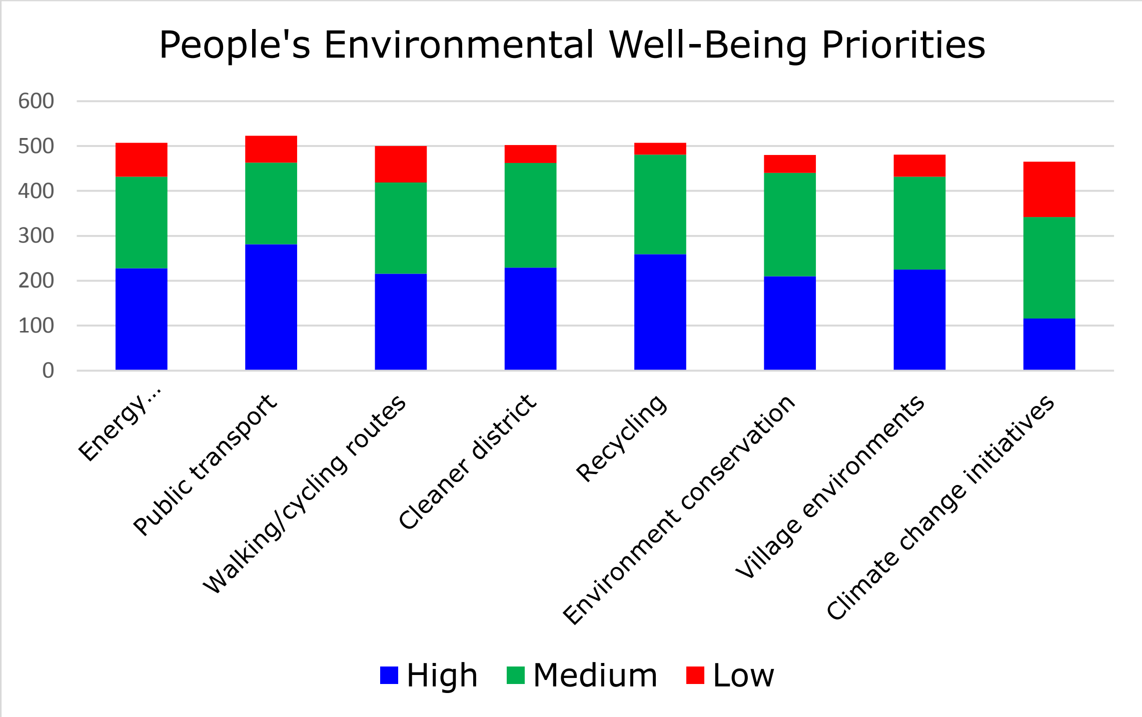
- Planning is still a vexed subject area: Area Plans are out-of-date, Planning Officers aren't familiar with their areas and the processes can be very slow
- Litter - especially in rural areas - , fly-tipping, dog-fouling and vacant/derelict buildings are all problems
- 'Promised projects' such as new PSNI stations, the Police College and by-passes have not been delivered
- Broadband and mobile phone coverage are very poor in too many areas
- Major concerns in some areas about the impact of wind-farms
- We don't save enough rain-water
- We need more clarity re future arrangements re Planning and new Building Regulations

What are the Priorities Going Forward?

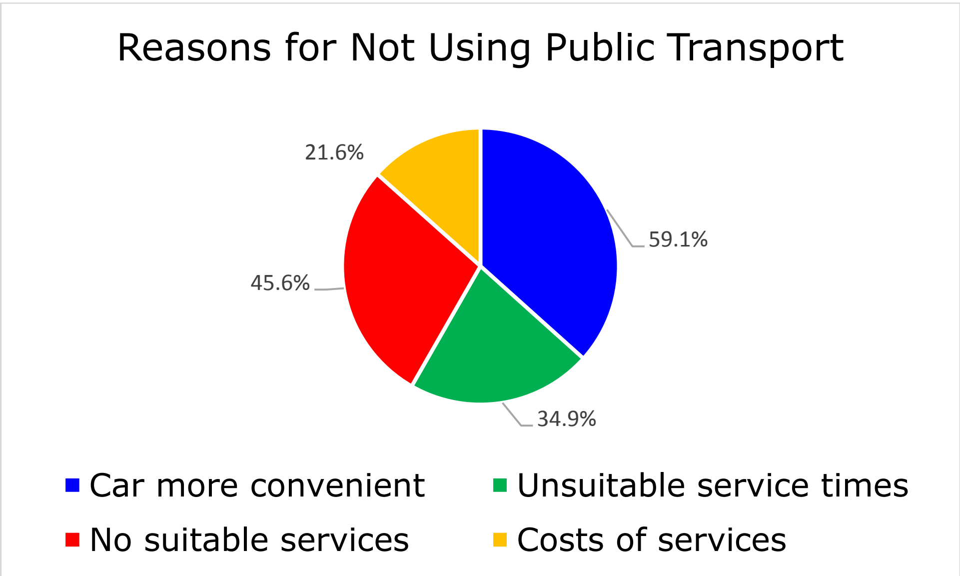
- Make sure we/the new Mid-Ulster Council get Planning 'right' and develop a Planning/Building Control synergy: Rural Planning needs to be based on the reality that most rural people are <u>not</u> farmers/connected to the land
- Maintain current waste management services at their current levels
- Improve public education/awareness re litter (particularly the amount generated by fast-food) and recycling
- We need to provide more social housing and low-cost housing and look at how derelict/empty rural houses might be re-used
- Need a Mid-Ulster Council service centre located in Cookstown
- If services are to be increasingly located in towns, then access to and parking at those services are key considerations (especially for rural people)
- Need clear strategies and consistency re wind turbines (some people are for them though more seem to be against them), fracking, use of bio-mass and solar panels
- Provision of footpaths and lighting where they are needed
- A winter gritting strategy is essential for rural communities

What the Surveys Said

A number of potential environmental well-being priorities put forward in the questionnaire were essentially seen as Medium-to-Low priorities by most respondents. As the graph below shows the only options seen as High Priority by (marginal) majorities of respondents were **public transport** and **recycling**:



Whilst public transport was seen as the highest priority, respondents' main reasons for not using it were as follows:



The main reasons for not using public transport are its **inconvenience relative to cars** and the **absence of suitable public transport services**.

T6: Good Relations, Peace and Community Safety

> **Priorities for Going Forward**
>
> The new Mid-Ulster Council should continue on with the type and style of previous Council support. Low key initiatives, funding that's easily accessed and good, empathetic staff are all central to this. It is vital that town centres and civic spaces/places are seen to be shared by all and to be welcoming to all. Ongoing work is also needed with Ethnic Minority and Single Identity communities as well as on 'the marking of territory' and silent sectarianism. 'Boy racers'/speeding and alcohol/drug abuse are major concerns as is night-time crime.

What the Consultation Events Told Us

What Has Worked Well?

- Councils have done well re Good Relations, with good, approachable/accessible staff and good programmes/initiatives
- Addressing issues in low key ways through local groups/initiatives is best and small grants are important in helping do this
- There's a good local community spirit in place
- Some good work has been done on flags and emblems
- Day-to-day activities such as farming and vintage rallies contribute 'naturally' to good relations
- Crime rates are low and policing has been well progressed with good work by Policing and Community Safety Partnerships
- Good work has been done by STEP, Agewell and inter-generational schemes
- CCTV is seen by some to provide very good 'reassurance value' … though others not so sure of its value

What Hasn't Worked Particularly Well?

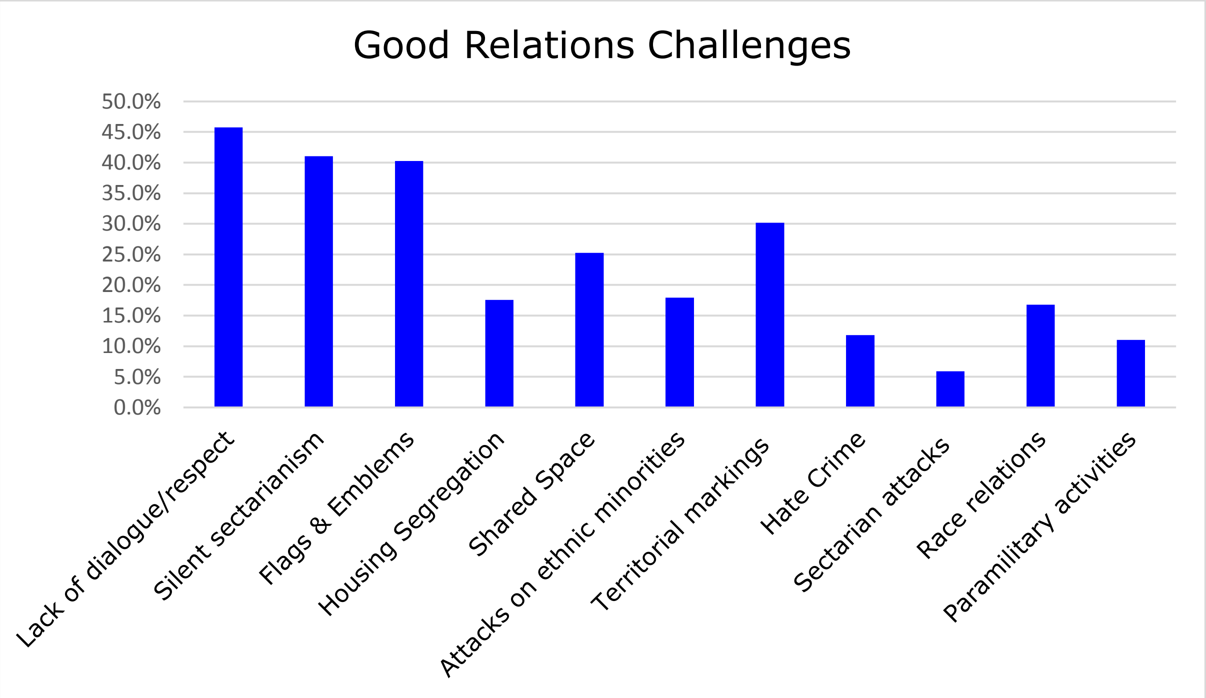
- It's difficult to access PEACE funding: the process is bureaucratic, it tends not to accommodate 'where people are actually at' and it is too often slow/delayed
- More and better leadership is needed from Stormont/the Assembly
- The profiles of Good Relations and Community Safety haven't been high enough
- People are increasingly afraid of crime and believe Police response levels are poor and that there has been a reduction in community policing visibility
- Funding at the community level lacks continuity
- Single identity areas/projects can be disadvantaged
- Poor road gritting in winter is a safety issue!
- Domestic violence remains an issue

What are the Priorities Going Forward?

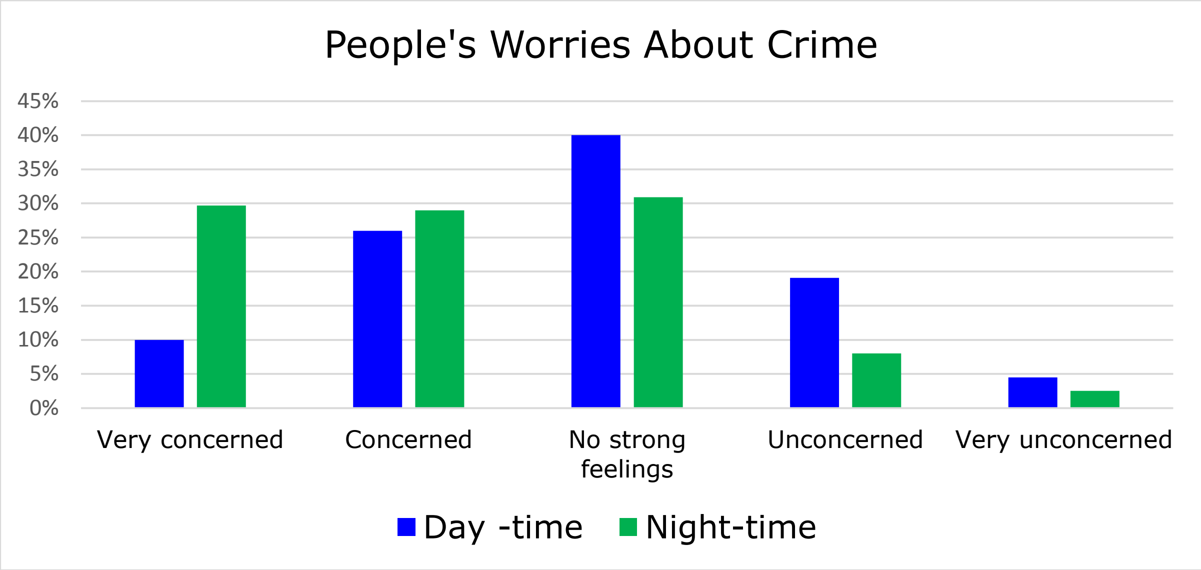
- Keep doing what the Councils have been doing, promote it well and get more people/groups involved
- Keep town/village centres and civic facilities such as The Burnavon as neutral/shared spaces and make sure public spaces are well lit
- Develop the focus on/work with ethnic minorities, with single identity communities and with victims
- Bring back Civic Weeks
- Get Primary Schools to work together
- Improve the amount/level/visibility of Community Policing
- Tackle the flags issue where it is a problem
- We need to recognise that peace-building is slow and long-term

What the Surveys Said

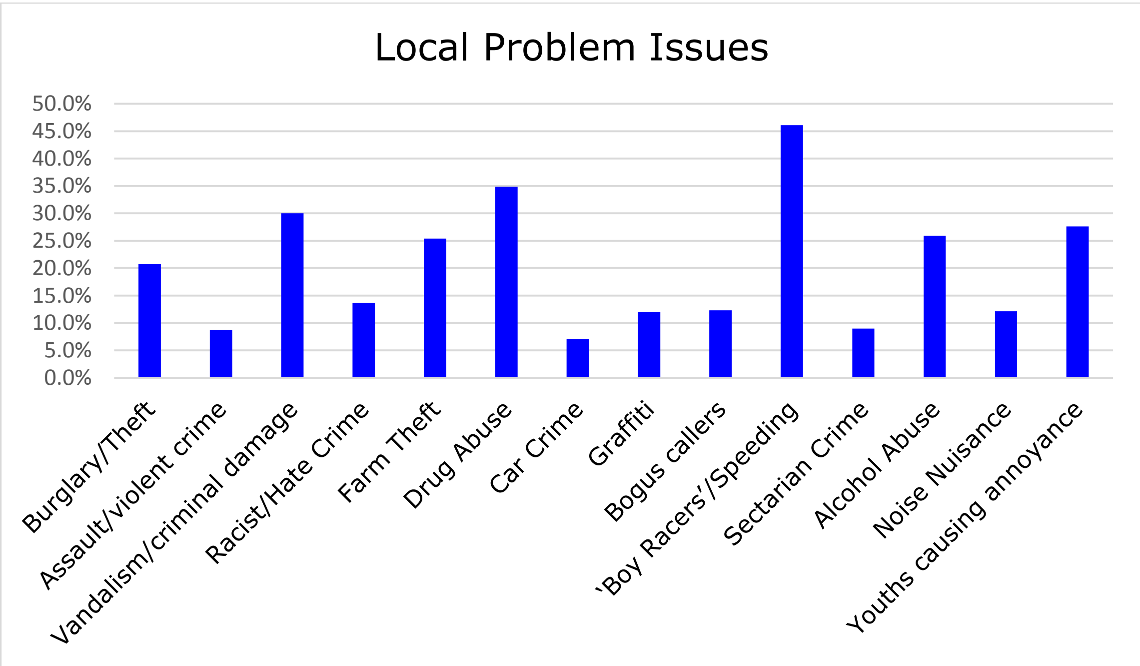
The main Good Relations challenges identified by respondents are in the areas of **'marking territory'** (ie flags, emblems and territorial markings**), lack of respect** and **silent sectarianism**. It is clear that respondents believe Mid-Ulster faces Good Relations issues that are both overt and covert.



There are significant levels of concern among respondents regarding the levels of crime in Mid-Ulster. There are, probably not unexpectedly, **higher levels of concern about night-time crime** as opposed to day-time crime:



Meanwhile there are a number of issues that respondents believe to be problematic in Mid-Ulster. Chief amongst these are **alcohol and drug abuse, 'boy racers'/speeding** (the largest single issue, identified by 46% of respondents)**, vandalism/criminal damage, youths causing annoyance** and **farm theft**:



T7: Social and Community Development

Priorities for Going Forward

Again it is seen as essential that the new Mid-Ulster Council should continue on with the type and style of the existing Councils' current/previous support. The use of the existing community infrastructure, small grants and good, empathetic staff are all central to this. The risk of groups/communities 'getting lost' in the big Council has to be avoided. Communication and collaboration within and between the community and statutory sectors have to be improved and traditional community capacity building should remain a priority. Work is also needed re giving young people a voice and providing more facilities and activities for them.

What the Consultation Events Told Us

What Has Worked Well?

- Small Grants and especially those from Councils are very effective: they ensure many local/community things/events/festivals actually happen and they help groups/communities to come together
- Council Community Services have been 'on the ball', accessible, supportive, flexible and have good staff who are willing to 'get their hands dirty'
- Mid-Ulster has a very good community group infrastructure in place and good links between/across a number of voluntary organisations
- A number of good, innovative community groups, projects and venues are in place, for example Pomeroy Forest, Rowan Tree Centre, Broughderg Centre and the Fivemiletown College facilities
- Council Volunteer Awards are important

What Hasn't Worked Particularly Well?

- Communication and information dissemination/sharing aren't what they could/should be
- It is difficult to get money/funding and it can be particularly difficult to get it for existing as opposed to new projects
- Emigration is damaging the social structure and strength of communities, especially rural ones
- Some groups/communities are getting 'left behind'
- Getting transport for rural people to town-based services is often problematic
- Bureaucracy and red tape continue to cause problems for groups
- Partnership working could be improved
- Facilities/resources for older people remain limited

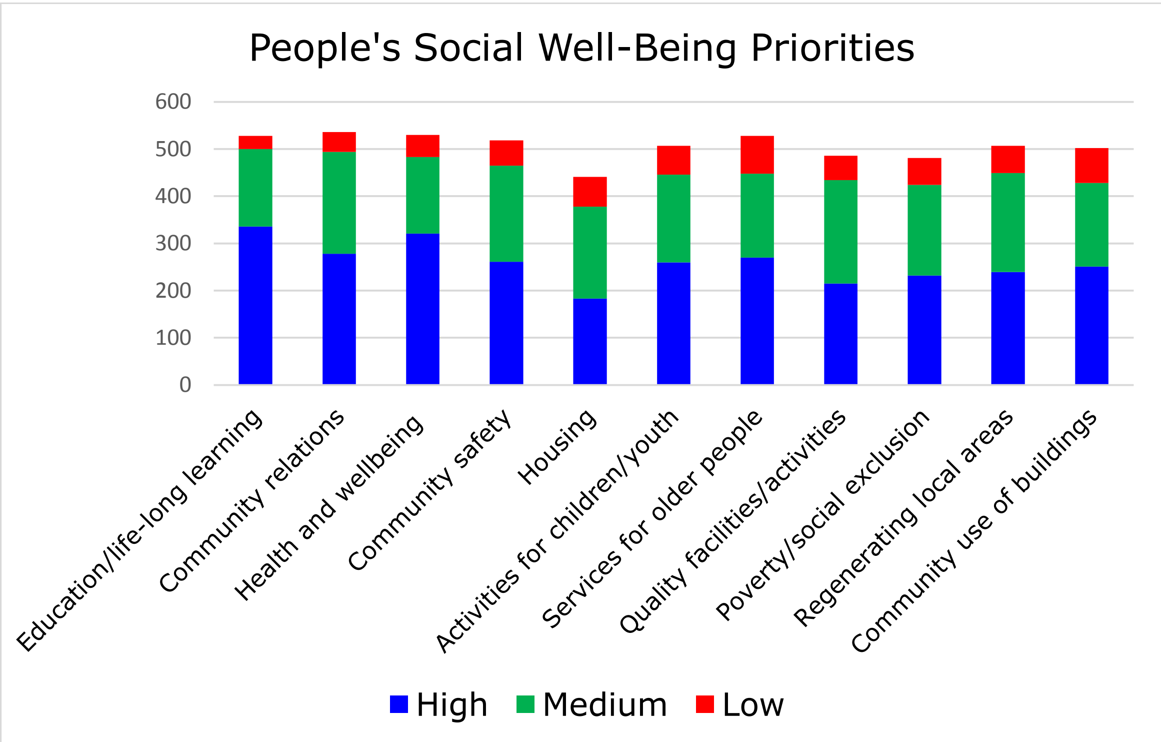
- The widespread poor Broadband/mobile phone coverage limit/restrict many things, both social and economic
- The quality of local roads - including poor winter gritting - limits many rural areas

What are the Priorities Going Forward?

- We need to maintain existing/past levels of Council support and in particular ensure that 'community hubs/centres' remain viable
- Keep working at communication/consultation/collaboration across the sector and with/within the statutory sector, including more and better joined-up working: make sure the new Council has a first-class website, Facebook etc in place and makes full use of them
- Community capacity building should remain a priority
- Address the risk of groups/communities 'getting lost' within the bigger Council and make sure the Clogher Valley isn't 'left out' of Mid-Ulster
- The bureaucracy/red tape involved in accessing support has to be reduced
- We need to see community development work as long-term and make sure we retain a functioning Community Network in Mid-Ulster
- Projects/facilities for young people and for older people are needed
- Maintain and develop this ('winter 2014')community planning model
- Go again with Neighbourhood Renewal
- Re-visit/update how deprivation/disadvantage/need are measured

What the Surveys Said

There are no 'stand out' priorities in terms of respondents' social well-being with all the suggested priorities scoring consistently as High or Medium priorities, though **education/life-long learning** and **health/well-being** are marginally 'ahead of the pack':



Youth

What the Consultation Events Told Us

What Has Worked Well?

- There are many good facilities - which young people often use as very effective venues for socialising - and projects (eg Breakthru) in place
- Christmas Lights, Leisure Centres, Continental Market and Hallow'een events are well-received

What Hasn't Worked Particularly Well?

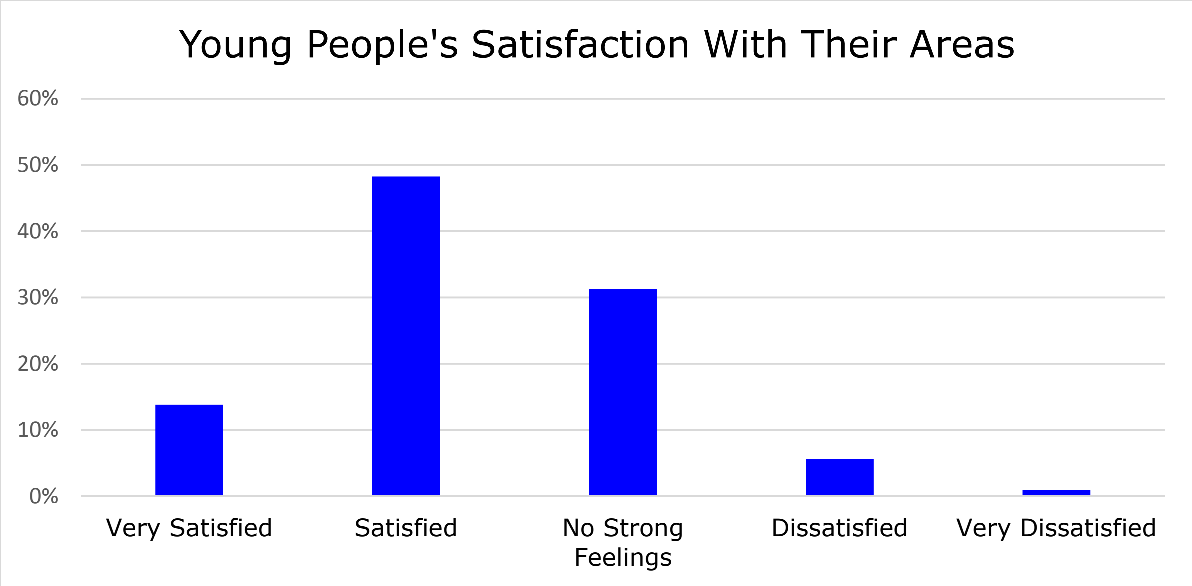
- Communication and information sharing and awareness of just what is happening could and should be improved
- Many Council facilities are good but are expensive to use – eg transport costs to get there followed by admission charges - and should have longer opening hours

What are the Priorities Going Forward?

- Mid-Ulster need places, indoor and outdoor, where young people can just 'hang out/chill out'
- Provide more festivals - and be aware that most of those currently in place are aimed at either very young children or adults - and deliver more and better joined-up working between Councils and Youth Service: most young people don't/can't distinguish between these two
- More free wi-fi availability
- Night-time activity that's not in bars
- Maintain existing facilities but add in more recreational facilities such as local 3G areas and good transport to those facilities

What the Surveys Said

Most respondents (62%) were Satisfied or Very Satisfied with their areas as places in which to live:

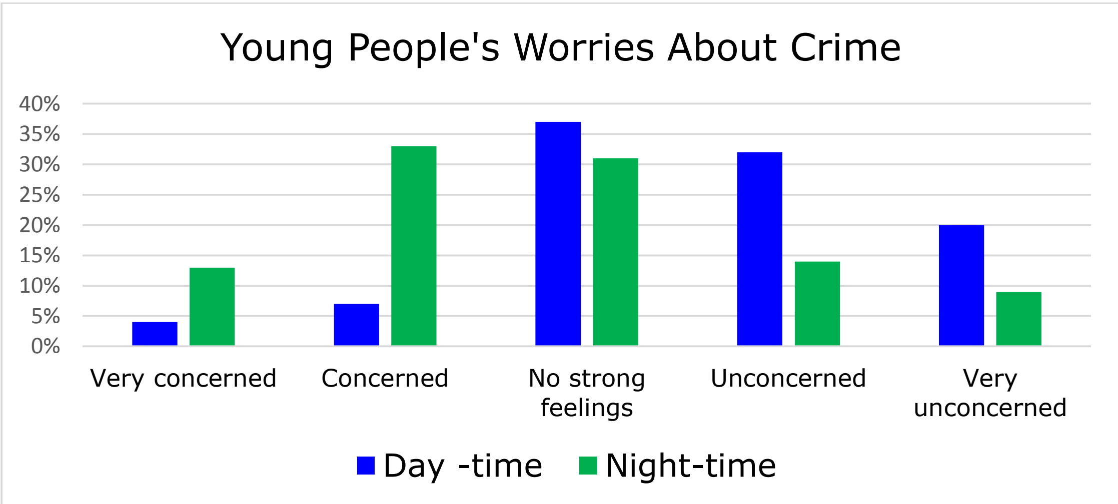


Six-young-people-in-ten (58%) however **feel they have no voice**, whilst 13% think they have a voice and 28% Don't Know if they have.

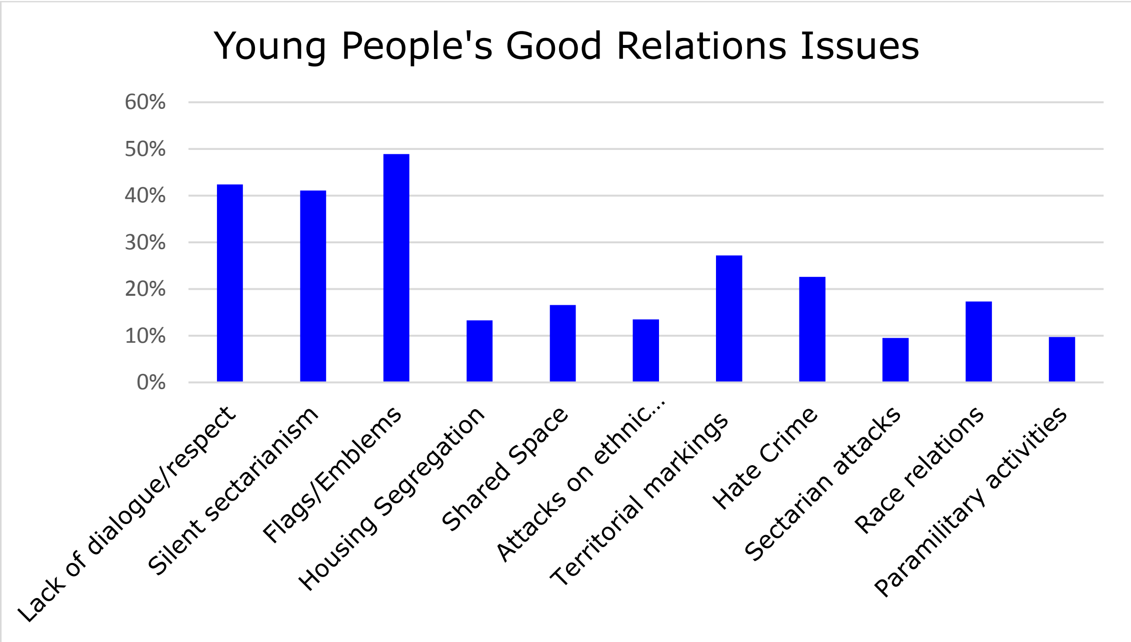
More than half (56%) believe **there aren't enough youth facilities and activities** in their area, with a quarter (26%) feeling there are enough facilities and nearly one-in-five (18%) offering 'Don't Know' as their response.

In terms of being interested in **volunteering to help with local community projects**, half the respondents (50%) were willing to do so, with just over a quarter (27%) not being willing and almost a quarter (23%) again offering a 'Don't Know' response.

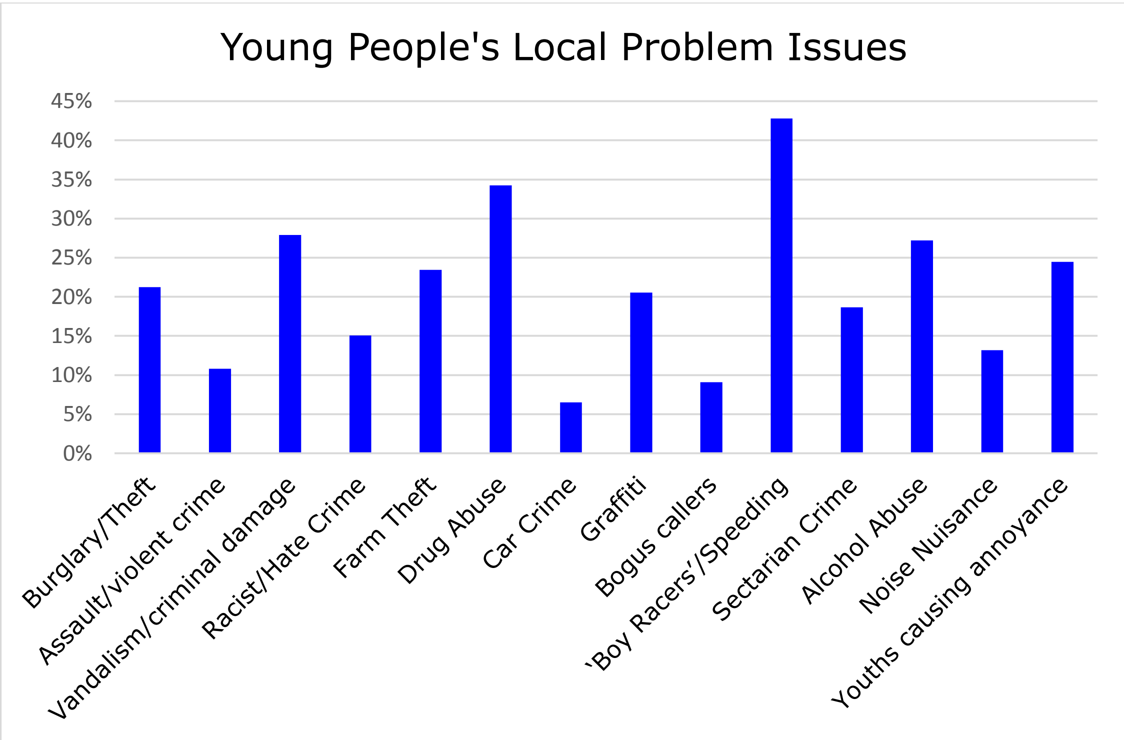
Just one-respondent-in-ten (11%) is Concerned or Very Concerned about day-time crime but the 'concerned' percentage soars to 46% in terms of **night-time crime**. It may be reasonable to assume that the night-time fears are linked in with young people's involvement in the night-time economy.



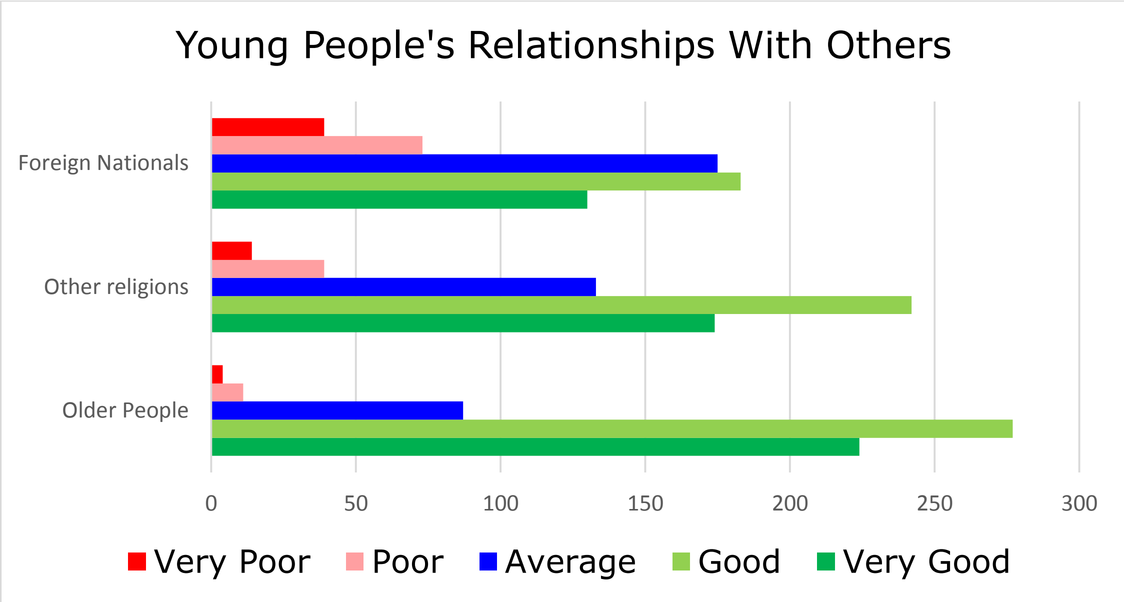
Young people's Good Relations issues tend to mirror those identified in the General Survey, ie in the areas of **'marking territory'** (flags, emblems and territorial markings)**, lack of respect** and **silent sectarianism**. Here too it is clear that respondents believe **Mid-Ulster faces Good Relations issues that are both overt and covert**.



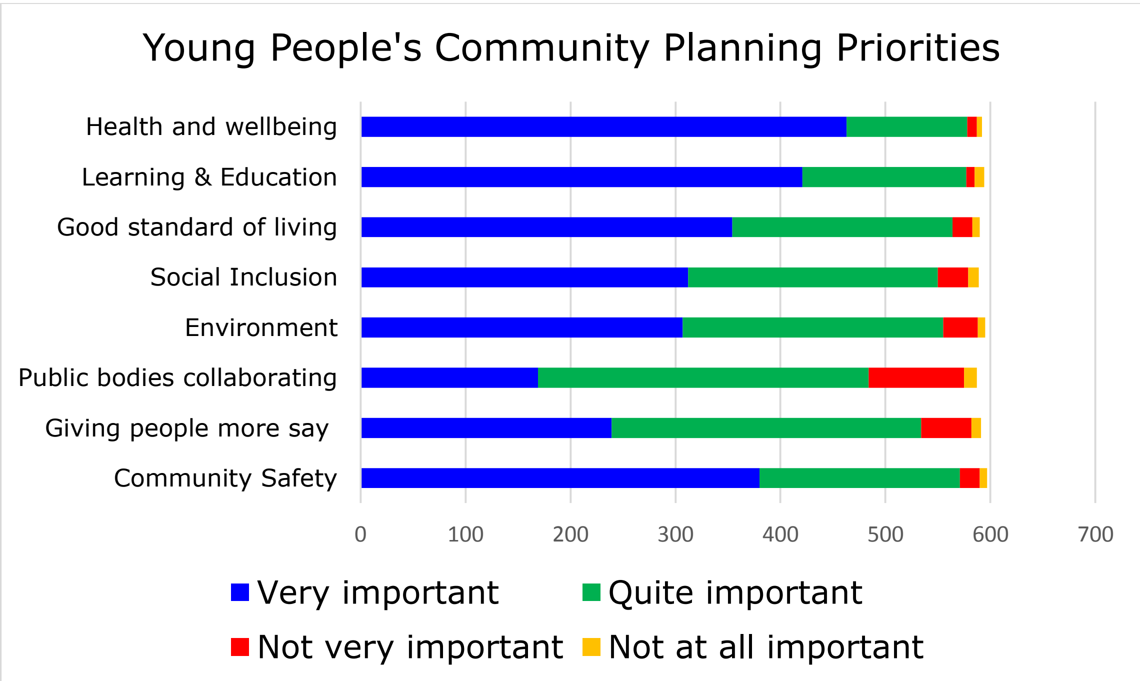
Similar correlations emerged when young people were asked to identify problems in their areas. Chief amongst these again are alcohol and **drug abuse, 'boy racers'/speeding** (again the largest single issue, identified by 43% of respondents)**, vandalism/criminal damage** and **youths causing annoyance**.



Young respondents believe their **relationships with others** are essentially Good or Very Good. This is particularly the case re **relationships with older people**:



All the possible community planning priorities put forward in the questionnaire were seen as Very Important or Quite Important by respondents. Within the options, **health and well-being** and **learning and education** attracted the highest levels of support whilst public bodies collaborating seems to have the least significance for young people:



People with Disabilities

What the Consultation Events Told Us

What Has Worked Well?

- Council offices/premises and sport/leisure facilities tend to be good/very accessible
- Several good initiatives such as Cookstown Disability Forum and Shop Mobility have been rolled out but more work is needed, for example more disabled parking spaces and such spaces always complete with 'dropped kerbs' beside them

What Hasn't Worked Particularly Well?

- Poor Broadband/mobile phone provision has major adverse impacts on people's lives
- A lot of business/activity/work still takes place on the inaccessible first/upper floors of buildings
- Health Trusts seem to be detached from people's/communities' real lives and access/transport to health services/facilities isn't good
- We need more engagement with other cultural communities
- House Adaptations can be very slow

What are the Priorities Going Forward?

- Improve Broadband availability
- We need more 'disability-specific' programmes, specific consultation re public realm schemes and a Mid-Ulster Council Disability Committee and Equality Officer
- Improve access/transport to health services/facilities
- More community policing is needed

What the Surveys Said

- The Survey didn't contain any questions specific to People with Disabilities.

Migrants

What the Consultation Events Told Us

What Has Worked Well?

- People here are largely good and friendly
- Availability of jobs and local Health and Education services
- Events like the Christmas Market

What Hasn't Worked Particularly Well?

- Housing can be segregated and sectarianism/racism can be apparent, resulting in some areas being seen as unsafe after dark
- Empty shops and traffic congestion in town centres
- Communication beyond English can be difficult/very limited

What are the Priorities Going Forward?

- Greater access to GP/Health services, housing and schools/pre-schools
- More neutral spaces/places

What the Surveys Said

- The Survey didn't contain any questions specific to Migrants

Comhairle Ceantair Lár Uladh
Mid Ulster District Council

Community Planning in Mid-Ulster: Report on November 2015 Consultation Events

1. Introduction and Background

This paper collates and summarises the discussions developed over three Community Planning Consultation Events held by the Mid-Ulster Council in Cookstown, Dungannon and Magherafelt on 17, 23 and 25 November 2015 respectively. The Events brought together a range of local Mid-Ulster stakeholders and aimed to hear feedback on the draft documents published as part of the Council's Community Planning process.

2. The Events Feedback

The feedback is set out below, first in terms of any general or strategic points that were made and then by Theme as follows:

- Rural Development
- Economic Development and Town Centre Regeneration
- Health and Education
- Culture, Arts and Leisure
- Planning and Environment
- Good Relations, Peace and Community Safety
- Social and Community Development

Cookstown 17 November

Strategic

- N/A

Rural Development

- More 'Brown Signs' are needed to help open up the Sperrins and Lough Neagh
- If the Ulster Canal were opened it will greatly increase the local tourism potential
- Lough Neagh needs to link into the Ulster Canal
- The Rural Development Programme has no provision for bed space development and yet this is what's needed to capitalise on local resources/assets and events like the Cookstown 100: many outside participants in local events are obliged to stay in Belfast hotels and travel

Economic Development and Town Centre Regeneration

- There needs to be a sustained, coordinated approach to sorting out Broadband: currently there are too many players involved, all doing their own wee bits
- The Ulster Canal has good potential
- A Mid Ulster Enterprise Zone is needed, possibly focussing on the Ballygawley Roundabout as a key strategic location
- Tourism NI figures show Mid Ulster is 'second from the bottom': we need to get a sustained focus on our area
- We need the infrastructure to support an hotel in Dungannon

Health and Education

- Disability (particularly learning disability) needs a greater focus with enhanced provision for people at all levels
- Greater focus is needed on 'End of Life' services
- Small, continuous health service cuts continually lead to long term closures e.g. the Westland Home and the South Tyrone Hospital
- Critical health-related issues to be faced include GP provision, waiting-lists and our two health Trusts not working together
- We badly need to re-define our health infrastructure and have a 'proper' hospital in Dungannon or Magherafelt
- Aging people with cancer have to travel distances for treatments which are only available in Belfast: need to decentralise some services outwards to local hospitals

Culture, Arts and Leisure

- N/A

Planning and Environment

- Getting Planning and area designations right will be important for Tourism

Good Relations, Peace and Community Safety

- N/A

Social and Community Development

- Accessible transport is a key issue particularly for elderly, disabled and rural people
- Need to ease the access/application processes for small grants: the bureaucracy has become over-whelming for small groups in particular
- There is an urgent need for a greater provision of social housing and mixed tenures to accommodate all needs - family, disability, single and homes for life
- Social housing providers need to be better regulated and work with NIHE as they are 'currently charging what they like'
- Private rented accommodation needs proper regulation
- Young people can rarely afford mortgages

Dungannon, 23 November

Strategic

- Q: What are the next steps for Council in developing the Community Plan?
- Q: How does the Council plan to get all the Statutory Agencies 'into the one room' to discuss local key issues?
- The 'Power of General Competence' will be a very powerful way of dealing with issues not dealt with by statutory agencies: we need to prepare a good robust scheme or plan now to be implemented later
- The Council should be the core 'enabler' of the Plan

Rural Development

- Need to make sure we capitalise on the potential opportunities under the new Rural Development Programme
- Broadband and mobile phone coverage remain unacceptably weak in rural areas

Economic Development and Town Centre Regeneration

- The road infrastructure improvements from Aughnacloy to Derry will help industrial growth and development in Mid-Ulster
- The Newry-to-Magherafelt corridor also requires attention
- Larger retail outlets are taking over from small town centres due to their provision of free car parking: town centres need free parking
- Too many traffic lights in Dungannon Town Centre
- Need to promote and support the provision of tourist accommodation within the Dungannon area: there are currently very few places to stay, even for one-or-two nights
- Poor Broadband and mobile phone coverage impact on businesses

Health and Education

- N/A

Culture, Arts and Leisure

- Greenways will be important for the Council area
- It is better to give sports funding to local sports clubs (which carry all overhead and staffing costs and make their projects work): money should not be thrown into more (Council) Leisure Centres
- Need to make more use of Parkanaur and Darvagh Forest … and develop a plan for our local forests generally
- Football pitches within Dungannon town are in poor state and not properly maintained: they give a poor impression to visiting teams
- The Milk Cup group went from pillar to post regarding funding as there seemed to be teething problems regarding who was doing grants
- Mid-Ulster Sports Arena should utilise the land to left hand side of entrance (maybe turn it into bicycle parking?)
- The former Dungannon and South Tyrone Council deserves credit for its work on the 'Earls legacy project'

Planning and Environment

- Public toilets are needed in Castlecaulfield
- The 'Coalisland Clay Pit property' has potential to be turned into a multi-use development by a private investor: proposals are currently with the Council's Planners

Good Relations, Peace and Community Safety

- N/A

Social and Community Development

- Access to funding remains vital for community and voluntary groups
- Dungannon may have better-developed approaches re the community and voluntary sector than have Cookstown or Magherafelt
- Community and voluntary groups need to have regular (quarterly?) updates re what's going on
- The Big Lottery is issuing a grant debit/credit card to do away with audit and monitoring
- It will be very important how the new Council interacts with the local community. Relationships with community/voluntary sector were good in the former Dungannon and South Tyrone Council and these should be maintained. Local community organisations need Council support now more than ever.
- Young people should be a priority area of focus

Magherafelt, 25 November

Strategic

- An Executive Partnership for Community Planning at the strategic level with all CEOs meeting up in one venue at same time is essential
- Q: What is the next step in terms of implementing the Community Plan (with all Statutory Agencies involved) and what are the timescales?

Rural Development

- The new Council now oversees the entire Western Shore of Lough Neagh and needs to make the most of that strategic opportunity

Economic Development and Town Centre Regeneration

- There is to be free car parking in Cookstown for the Christmas period but not in Dungannon or Magherafelt: there needs to be consistency here
- Should look at reopening the railway track from Antrim to Magherafelt to Cookstown
- Greenways present a major opportunity
- Broadband and mobile phone coverage remain poor due to a lack of masts to get good reception
- Need to challenge Tourism NI on the reality that Mid-Ulster is expected to self-market itself as a destination whilst the vast bulk of the associated overnight stays (which are what generate the tourism revenues) are in Belfast
- Need to improve our internet marketing re tourism
- Need to facilitate/enable the private sector to provide more tourist accommodation

Health and Education

- Mental health is a growing issue
- Need to ensure proper and effective co-ordination and collaboration between the Northern and Southern Health Trusts
- Health education/awareness-raising and prevention should be our core concerns going forward: we need to make greater use of local resources and facilities (parks, outdoor activities, walks, etc) to improve levels of well-being/physical health and to get our children away from IT/ICT/social media-based pass-times
- Centralisation of acute hospital care persists as an issue with essentially all majority surgery carried out in Belfast and a Minor Injuries Unit only in Magherafelt
- Ambulance response times remain poor and need to be improved

Culture, Arts and Leisure

- The Irish Language is not properly referenced in Community Plan
- Leisure Centre fees are expensive: there needs to discounts introduced for the like of GP Referrals
- Need more leisure/sports-based schemes/life coaching focusing on mental health issues
- More outdoor sports equipment ('green gyms' etc) is needed
- Need to look at opening up access to Magherafelt swimming pool

Planning and Environment

- N/A

Good Relations, Peace and Community Safety

- N/A

Social and Community Development

Issues Raised Across All Three Events

Strategic

- Need to explore the opportunities for greater cross border initiatives given the Mid-Ulster Council's boundaries
- The Council's online interface is very poor and needs to be modernised to bring it up to an adequate standard
- Local government's 'Power of Competence' legislation allows the Council to step in to meet a local need. This could be tested re priority issues such as social housing and could be a significant 'game-changer' in terms of the Community Planning agenda where Council is the lead statutory agency in coordinating and bringing together all other stakeholders. Could also be used to develop other projects and plans.

Rural Development

- Rural Development and Tourism need to be more integrated to factor in support for accommodation providers/provision as there is serious dearth of accommodation for visitors in rural areas and is important to attract and retain visitors there
- The Rural Development Programme seems to exclude small groups from applying due to criteria requirements
- Concerns about the decline in service provision in rural areas especially re banking facilities, health care etc

Economic Development and Town Centre Regeneration

- A Tourism Strategy should be integral to the Mid-Ulster Area Plan, highlighting the assets of the District such as Lough Neagh, the Sperrins, Clogher Valley, etc with links to Tourism NI in promoting natural resource tourism through heritage and archaeology such as the Hill of The O'Neill, Tullyhogue, Beaghmore etc. Activity-based tourism needs greater development given the natural resources of the area.
- Mid-Ulster's Tourism Strategy needs to align with Tourism NI and its new strategic focus on Themes and Experiences especially in light of developments with the new Heaney Centre
- There can be opportunities for Mid-Ulster re strategic road infrastructure developments, especially with the A4 and A5. The strategic location of the Ballygawley Roundabout and the confluence there of traffic from North, South, East and West make it an ideal location for a major Enterprise Zone.
- Broadband levels need to be improved. Domestic and business need to be over a 100 meg. There are differentials in in WiFi between Dungannon and Coalisland with former having 3G and the latter 4G.

Health and Education

- Not enough reference of Disability as a key issue to be addressed through Community Planning especially with a growing population of people with disabilities: need to factor in more dropped kerbs and access overall is a big agenda item
- Disability-focussed grant programmes are needed, such as the Lottery DRILL initiative (a model of good practice through engagement of beneficiary client groups)
- Concern about the centralisation of hospital services with no hospital provision now remaining within Mid-Ulster and people having to travel to Craigavon, Antrim, Erne, Altnaglevin, Coleraine and Belfast.
- Importance of preventative measures in health care and the potentially very powerful role of Councils' leisure centres, sporting facilities and other leisure amenities, parks, forests etc. Swimming in Magherafelt has become onerous for users in terms of the checks and details required for admission.
- Heath initiatives that involve parents and children are good models of working and can have greater health benefit outcomes.

Culture, Arts and Leisure

- The Community Planning agenda needs to take more cognisance of Irish Language Development and cultural initiatives. It lacks reference to the Irish Language community and voluntary sector's role in social and community development and needs to reference this much more. Social media could use more of the Irish Language medium.
- Greater recreational development of forests presents a good opportunity to encourage more outdoor play activities and health promotion links
- The Mid-Ulster Sports Arena has a good support infrastructure for the Milk Cup but could improve lighting for walkers and runners on the perimeter of the site

Planning and Environment

- Important to have greater investment in strategic infrastructure projects such as Greenways, Ulster Canal, re-instatement of railways (Antrim to Magherafelt line), road links and how these can contribute to greater health and wellbeing and their social, cultural and economic impacts
- Traffic management in Dungannon Town Centre needs a serious review
- The various stages of the Planning process need to be amended to make it more user friendly and responsive to local needs
- Needs to be some kind of strategy to tackle dereliction across the District as this is a major issue for the main towns and villages
- Roads Service needs to review its provision of car parking and there should be a standard parking levy regime across the District
- Council's new Planning powers should be used to ensure developers provide sufficient green/communal spaces

Good Relations, Peace and Community Safety

- The Peace III Earls Project is a positive development with significant investment for local infrastructure for both the public and community/voluntary sectors

Social and Community Development

- Small grants are vital to groups as they support a lot of voluntary activity and are equally important for local government in supporting civic participation
- Need for more investment in social housing, resolution of tensions between the social and private rented sectors, greater regulation of landlords and control of property speculators
- Need to address duplication/usurpation of roles vis-à-vis Housing Associations and the Housing Executive
- Library Service has an important role to play in social development and will transfer into the new Department of Communities
- Home Insulation grants delivered through Environmental Health were very problematic given the requirements to spend up to £10,000 and then claim the monies back but because they were targeted at low income households this was often not practical and needs to be rethought
- Concern about increasing rents in the private rented sector
- Young people not being able to afford the cost of housing in the areas where they grew up and have family ties and neighbours
- Needs to be greater provision of ESOL and more multi-agency approaches re supporting new-comers.

OXFORD ECONOMICS

Mid Ulster Socio Economic Profile

September 2014

A report prepared for Mid Ulster Council

OXFORD ECONOMICS

Executive summary 3

1. Introduction 10

Background to the study 10
Local Government Reform 10
Report structure 10

2. Macroeconomic overview: A new economic environment 11

Global overview: World economy strengthening; but not without risks 12
UK overview: Economy set to enjoy a healthy balanced expansion 14
Northern Ireland overview: A long road back with jobs at a premium 17
Conclusion 21

3. Mid-Ulster: Recent performance 23

Demography 23
The Mid Ulster Economy 25
Skills Profile 34
Wages 36
Housing 38
Business performance 39
Tourism 42
Deprivation 44
Conclusion 45

4. The outlook for Mid Ulster 47

Demography 47
Mid Ulster Economy 48
Conclusion 53

5. SWOT analysis 54

Executive summary

The financial crisis had a significant impact on the entire Northern Ireland economy, but the signs of recovery are beginning to become more apparent. In comparison to the strong growth experienced in Mid Ulster before the recession, the economic climate will be more challenging moving into the recovery phase. Subdued recovery will mean the Mid Ulster area will have a number of challenges to address in order to minimise the lasting legacy of the economic downturn.

This report discusses the recent economic trends in Mid Ulster and provides Oxford Economics baseline forecasts running to 2020. This work will provide a key evidence base upon which the council can best inform the economic development action plan for the Mid Ulster council area.

Key messages

- The Mid Ulster council area will be the seventh largest council area in Northern Ireland as of 2013, representing over 141,000 people
- Employment structure concentration and linkages in manufacturing, construction and agri-food sectors
- Future growth is more likely in economies which foster high skilled activity and strong export orientation
- Subdued job creation will lead to stubbornly high unemployment levels going forward
- Underdeveloped skill levels at both the lower and higher end of educational attainment within the area
- Second largest relative business stock in Northern Ireland with above average sectoral representation in production, construction and agricultural
- Business stock has been falling since 2009, indicating a challenging business climate
- Visitor levels to the area are relatively low, but high average spend indicates a strong case for development in tourism
- Mid Ulster currently produces 7.3% of Northern Ireland's total economic output
- Of the 3,000 jobs forecast to be created by 2020, approximately 60% will be in the agricultural, forestry & fishing and construction sectors
- Subdued employment growth will likely intensive the long term unemployed proportion in the council area

Mid Ulster's economic performance: past, present and future

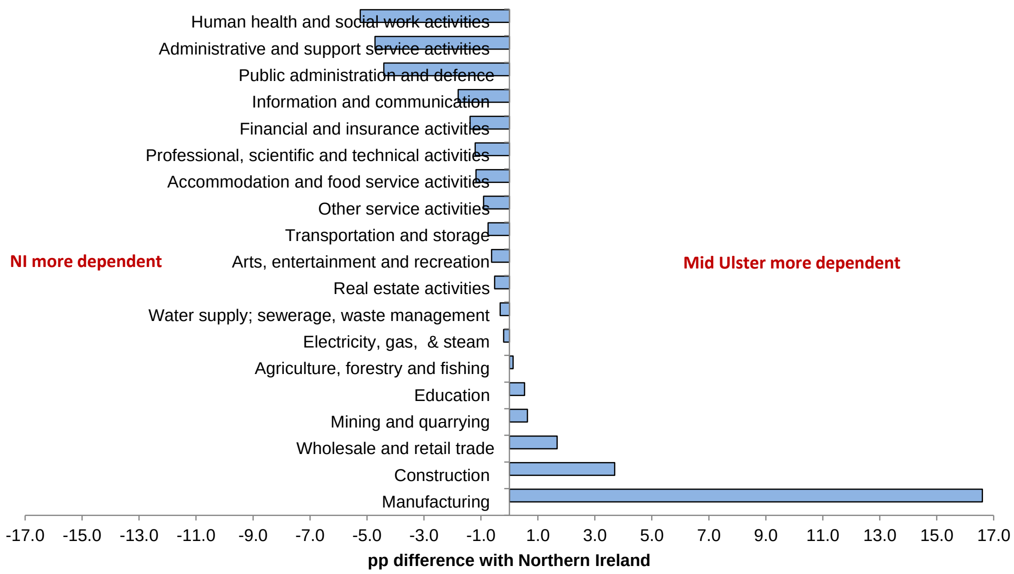
Large concentrations of manufacturing with linkages to other prominent sectors

Pre-recession employment growth in Mid Ulster was led by the manufacturing, construction and the wholesale & retail sectors of the economy. Job creation in the area as a result, was dependant on continued consumer and debt led demand within the local and regional area. Impressive job growth and low unemployment rates encouraged migration into Mid Ulster. These aspects collectively contributed towards Mid Ulster having the fastest growing population in Northern Ireland.

The Mid Ulster employment structure is heavily reliant on the manufacturing sector for employment and income. The manufacturing industry within Northern Ireland faces a challenging and competitive marketplace. However, this sector is generally characterised by added export potential, which can make up for weaknesses in domestic demand. Mid Ulster has numerous manufacturing based employment specialisms which have linkages and supply chain associations with the construction and agri-food sectors. Therefore in the absence of export opportunities there may well exist an over reliance on the domestic market recovery.

On the other hand employment in Mid Ulster is underrepresented in professional and high value added sectors. These sectors are highly export orientated and are therefore less exposed to current weaknesses in consumer, governmental and business demand.

Figure E1: Relative concentration of sectoral employment, Mid Ulster vs Northern Ireland, 2013



Source: DETI

Weak job growth in the large employment sectors

Looking forward to 2020, of the 3,000 jobs to be created, almost two thirds will originate from the agricultural forestry & fishing and construction sectors. Weak though employment growth may be - we expect employment levels to regain their 2008 peak this year. Unemployment levels will remain stubbornly high due to the poor employment growth and will remain significantly above the pre-recessionary lows.

Table E1: Change in total employment by sector, Mid Ulster, 2000-2020

Change in Employment	2000-2008		2008-2013		2013-2020	
	No. (000)	% growth	No. (000)	% growth	No. (000)	% growth
Agriculture, forestry and fishing	1.15	17.7%	-1.56	-20.4%	0.88	14.5%
Mining and quarrying	0.10	22.2%	0.10	18.4%	-0.05	-7.5%
Manufacturing	2.42	19.7%	0.74	5.0%	0.05	0.3%
Electricity, gas, & steam	0.00	0.0%	0.00	0.0%	0.00	0.0%
Water supply; sewerage, waste management	0.24	NA	-0.05	-19.8%	0.00	1.1%
Construction	3.27	61.3%	-1.49	-17.4%	0.98	13.9%
Wholesale and retail trade	2.37	29.4%	0.32	3.0%	-0.03	-0.2%
Transportation and storage	0.55	46.6%	-0.10	-5.5%	0.25	15.1%
Accommodation and food service activities	0.54	23.8%	-0.12	-4.3%	0.22	8.1%
Information and communication	0.16	54.9%	-0.06	-13.7%	0.09	22.6%
Financial and insurance activities	0.03	3.5%	-0.11	-13.5%	-0.02	-3.4%
Real estate activities	0.15	184.2%	0.00	-0.1%	0.05	20.3%
Professional, scientific and technical activities	0.46	44.0%	0.11	7.3%	0.35	21.5%
Administrative and support service activities	0.63	103.4%	-0.19	-15.2%	0.22	21.0%
Public administration and defence	-0.20	-12.2%	0.23	16.0%	-0.25	-14.8%
Education	0.28	5.7%	0.11	2.1%	-0.09	-1.8%
Human health and social work activities	1.03	20.3%	0.44	7.3%	0.08	1.2%
Arts, entertainment and recreation	0.33	45.0%	-0.07	-7.0%	0.17	17.4%
Other service activities	0.19	22.4%	-0.19	-18.4%	0.13	15.0%
Total	**13.7**	**26.3%**	**-1.9**	**-2.9%**	**3.0**	**4.7%**

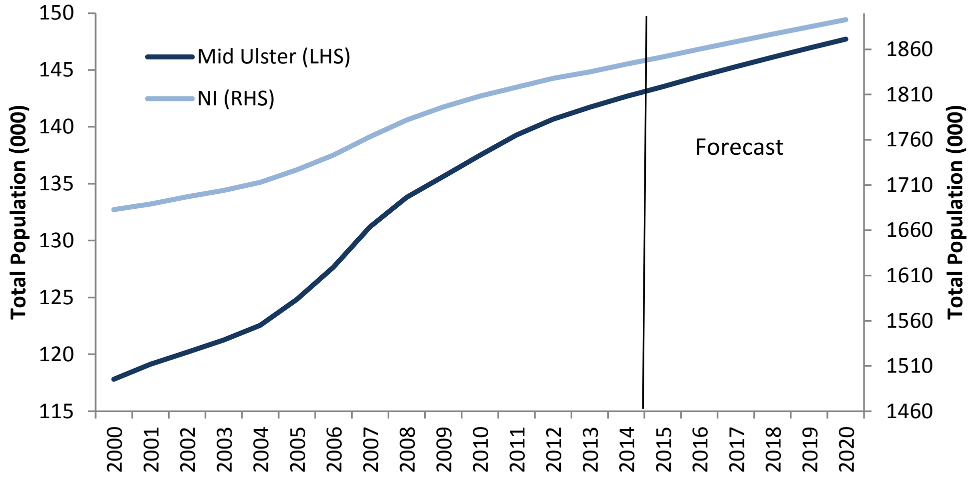
Source: Oxford Economics

Long term unemployment continues to be a pressing issue throughout Northern Ireland. The number of long term unemployed as a proportion of total unemployed was relatively low within Mid Ulster before the recession took hold. Recent job losses combined with poor levels of job creation throughout the forecast period will tend to exacerbate the trend of increasing levels of long term unemployed going forward.

Population growth is due to slow - but continue to outpace the NI average

Mid Ulster population growth (18.7%) between 2001 and 2013 was the highest among the new council areas and much larger than the regional average (8.3%). Looking forward to 2020, population growth is due to slow considerably; yet annual population growth is likely to remain above the Northern Ireland average rate of increase. We therefore expect the Mid Ulster population to reach 148,000 by 2020.

Figure E2: Total population, Mid Ulster and Northern Ireland, 2000-2020



Source: Oxford Economics

Wage growth to remain relatively weak

At the start of the century residence based earning were higher than work based within the Mid Ulster area. This would suggest that some measure of out commuting in search of higher value jobs was common place. Since 2007 both these wages measure have been broadly similar and we expect wages to increase moving forward. However resident based wages are forecast to remain weaker than the Northern Ireland average. Given the recovery so far has been characterised by that of poor 'real' wage growth, as a result of wage increases being out paced by inflation, it is uncertain whether living standards will see any improvement.

Large SME business community

Relative business stock numbers within Mid Ulster are the second highest in Northern Ireland. Most of Mid Ulster businesses operate within the production, construction and agricultural sectors. These sectors form a larger proportion of the area's business community than that commonly observed across Northern Ireland. Businesses within Mid Ulster are generally SME in structure; with turnover and employment size being low even in the regional context. Having a large number of smaller sized businesses is not necessarily a negative outcome. This business demographic is often capable of a more flexible approach to business generally. However they are more prone to difficulties on the way to becoming established. Since 2009 the number of businesses within the council area has been falling due to business death rates outnumbering that of births. This may indicate a difficult business environment with Mid Ulster in recent times.

Productivity below the regional average

Mid Ulster currently produces 7.3% of Northern Ireland's economic output. GVA per job in Mid Ulster was £32,700 in 2014, which was over £2,500 less than the Northern Ireland average equivalent. Mid Ulster's productivity compares poorly with that of Belfast (£42,900) which has higher concentrations of employment in high value added sectors.

Output growth in an area is driven by increases in either job growth or productivity. Given job growth is forecast to be weak in the remainder of the decade, productivity increases are the more likely to be achieve output gains. Increasing productivity (GVA per job) is most readily achieved by investing in the local skills, IT infrastructure and capital investment available to the business community.

Skill development needed at both at the high and low level

Skill levels are extremely important when attempting to create employment within any area. A highly skilled workforce helps to improve productivity and investment within the region. Job creations in developed nations tend to be more concentrated in sectors were higher skill sets are in demand. Low skill levels on the other hand will create/ worsen problems concerning long term unemployment and deprivation going forward.

Mid Ulster's skill sets are relatively weak at the extremes of the educational spectrum. Mid Ulster has amongst the highest proportion of residents with no qualifications of any council area within Northern Ireland. Equally, the proportion of residents with qualifications of NVQ4 or higher is below the regional average.

Educational attainment of school leavers is found to be more positive however; passing grades achieved at A-level and GCSE level were above the Northern Ireland average in both cases. These observations suggest an imbalance in the educational demographic of the council area. A working population which has high proportion of both unskilled and relatively poorly skilled will foster employability problems as economies become increasingly 'skills hungry'.

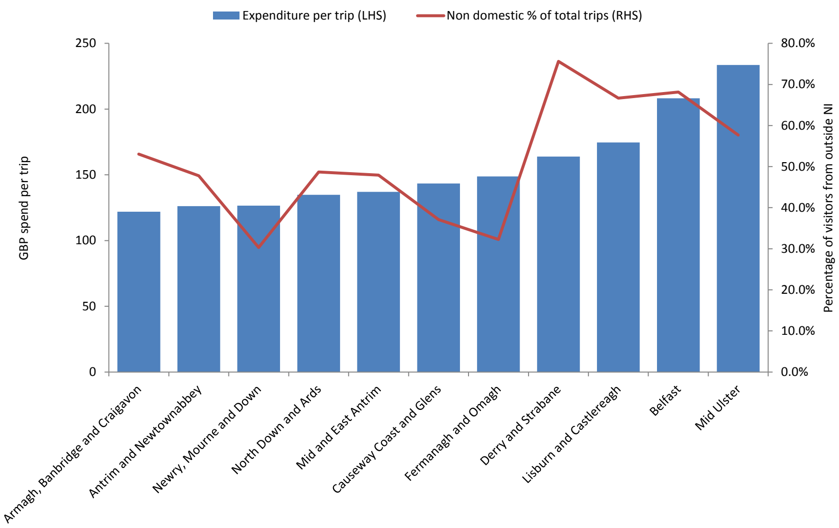
Housing market expected to recover slowly

Average house prices were lower than the regional average until 2005. Thereafter prices converged to the regional average and peaked in 2007, with the average house price within Mid Ulster costing in the region of £229,000 (slightly more expensive than the Northern Ireland figure). Since the decline in the market, Mid Ulster average house prices have remained below the regional average. Prices stablished within the council area as of 2013 and we forecast house prices to rise to £162,000 by 2020.

Tourism potential

As of 2011/12, Mid Ulster was the second least visited council area but had the highest spend per visit. Tourism expenditure within the area was boosted by high proportions of non-domestic visitors and above average visit duration. These findings suggest that tourism within Mid Ulster is an untapped resource which has the potential of contributing significantly to revenues within the area.

Figure E3: Expenditure per visit and proportion of visitors from outside NI, Council Districts, 2011-2012

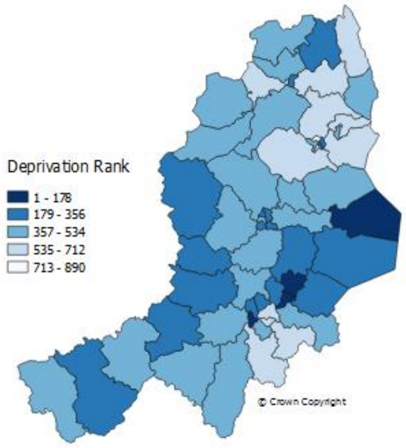


Source: NISRA

Deprivation context

The 2010 Northern Ireland Multiple Deprivation Measure ranks the old 26 council areas based on a number of indicators commonly used to capture deprivation and need within society. The Magherafelt area ranked as the least deprived area (26th) within Northern Ireland based on this broad measure, whereas Cookstown and Dungannon ranked 15th and 12th respectively. This suggests quite varied levels of overall deprivation within the Mid Ulster region – ranging from the affluent to those with quite defined need. When we compare deprivation dispersion at the more acute level, we identify the Dungannon area as having a higher concentration of wards ranked as more highly deprived. Although deprivation levels within the three constituting council areas of Mid Ulster are not overly high in the regional context - tackling small pockets of need can pose just as much of a challenge.

Figure 3.5: Deprivation ranking, Mid Ulster Super output area, 2010



Source: NISRA, Oxford Economics

1. Introduction

Background to the study

Oxford Economics was commissioned in April 2014 to carry out a socio-economic profile and economic forecast report for the Mid Ulster council area.

The report provides an analysis on the council area's current situation relative to regional and national trends, along with Oxford Economics forecasts of future performance to 2020. An analysis of the council area's sectoral specialisms and an evaluation of potential strengths, weaknesses, opportunities and threats are provided, in addition to an overview of the global, national (UK) and Northern Ireland (NI) economic environments. Social and economic indicators produced in the development of this report are fully consistent with Oxford Economics' local, regional, UK and global economic models.

Local Government Reform

As a result of the reform of local Government in Northern Ireland (formerly the Review of Public Administration), Cookstown, Dungannon and Magherafelt Councils will merge to form one council authority – Mid Ulster. Collectively throughout Northern Ireland, the 26 existing district councils will be replaced with 11 new, much larger councils. This process is due for completion by April 2015.

As a result of the government reform programme, a number of key functions will be transferred from central to local government. Therefore the new Mid Ulster council will have at its disposal increased responsibilities in the areas of planning, urban regeneration, tourism, housing, rural development and economic development.

To make best use of these new responsibilities it is important the Council has a good understanding of the local economy, the key trends, weaknesses, strengths and likely outlook. This report provides the first analysis of the new Council area.

Report structure

The report is structured as follows:

- Section 2 provides a summary of macro-economic trends at a global, UK and NI level;
- Section 3 discusses the recent economic performance of the Mid Ulster council area;
- Section 4 discusses the outlook for the Mid Ulster economy; and
- Section 5 outlines the strengths, weaknesses, opportunities and threats facing the Mid Ulster economy going forward.

2. Macroeconomic overview: A new economic environment

This section outlines the economic environment within which Mid Ulster currently sits. It sets out the recent international trends, followed by historic and future performance of the UK economy (including Northern Ireland). This section essentially shows how today's economy differs from that of the past ten years, and the subsequent implications for success in the future.

Key points:

- The recession brought unprecedented change to developed economies with the new economic environment becoming more reliant on export-led growth;
- The economic outlook has since improved, and among the advanced economies, long-term growth prospects still look strongest in the US;
- Relatively low inflation and interest rates at a global level are not likely to impact on the recovery, though rising oil prices are a cause for concern. Whilst supply is scarce, demand continues to rise; meaning the need to embrace alternative energy sources is becoming more important than ever;
- The UK experienced a deeper and longer recession than many developed economies. Although the Eurozone appears to have survived the currency crisis, any further escalation would risk stalling the UK recovery;
- Confidence has improved somewhat and consumer spending has helped drive the recovery to date – but wage growth has not kept up meaning that incomes will continue to be squeezed, even as the recovery gathers momentum. The labour market is likely to remain a key source of domestic risk;
- Many of the UK's key economic indicators are improving, though it is likely to be some time before this translates into higher household incomes;
- Economic growth in the UK will transition towards high value added exportable activities, away from consumer spending, which is what is currently driving the recovery;
- Northern Ireland suffered more than any UK region from recessionary effects and still faces many challenges;
- The Northern Ireland regional labour market recovery is expected to remain subdued, with job levels not forecast to return to their pre-recession peak before 2024. Labour market growth can no longer rely on the public services – instead, exportable service sectors must be the main driver of job creation; and

- The professional, scientific & technical, and administrative sectors are most likely to be the drivers of job creation. Consequently the economy in Northern Ireland will become increasingly skills hungry. These trends have significant implications for those with no or low skills, the unemployed youth and those in long-term unemployment or long-term inactive. As such there will be significant labour market challenges for policy makers to address, yet they are likely to have less public funding to help them do so. Wealth created by production sectors such as agriculture, construction and manufacturing will also be important, but will not be among the major job creating sectors.

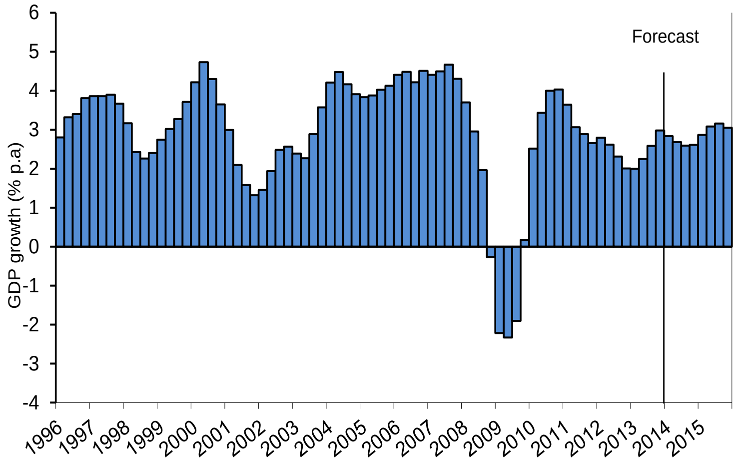
Global overview: World economy strengthening; but not without risks

Developed economies are building momentum and will drive the recovery in global growth

Pre-recession growth in the global economy was driven by access to cheap credit, low inflation and strong emerging market growth. In 2009, world GDP in real prices contracted by 1.6%; primarily as a result of an unwinding of debt and the subsequent impacts on global trade, confidence and asset values. Since then, the economic outlook has improved significantly, and the bad news updates we have grown accustomed to in recent years are becoming much less frequent. Global growth was patchy and uneven in 2013, and is estimated to have been 2.5% for the year. Growth is expected to firm to 2.7% this year, picking up to 3.0% in 2015 but the recovery will remain relatively moderate by historical standards. One reason for this is the slowdown in growth in the key emerging economies. China is forecast to grow around 7.4% this year, though this is much lower than in the previous decade – as the country shifts towards a less investment-intensive growth model.

Among the advanced economies, long-term growth prospects still look strongest in the US, with expected growth of 2.8% per annum between 2013 and 2022. In Japan, our long-term forecast remains for slow growth of around 1% per annum. Eurozone growth of 1.6% per annum is expected over the next decade, with some downside risks including the increasing danger of a slide into deflation. Overall, world growth is expected at 3.3% per annum from 2014-24, compared to 2.9% per annum from 2003-13. Some risks do remain; with weak GDP growth in the Eurozone in recent months providing a timely reminder of this. Nonetheless, the medium term outlook should remain positive overall.

Figure 2.1: GDP growth, World, 1996-2015

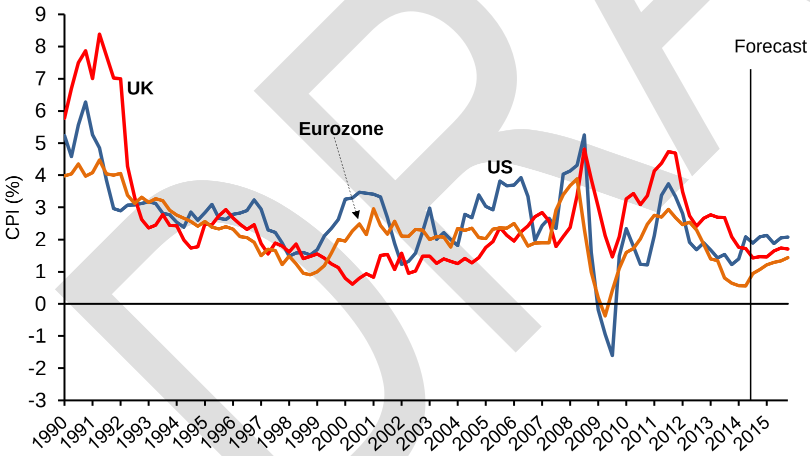


Source: Oxford Economics

Relatively low inflation and interest rates are not likely to impact on the recovery

In a global context, inflation is presenting less of a problem for future growth than it has previously. In the UK and US, consumer price inflation (CPI) is currently around 1.6%-1.9%, which is close to (but slightly below) the targets their central banks set. In the Eurozone, inflation is currently just 0.68% - meaning deflation is now more of a concern.

Figure 2.2: CPI inflation, Eurozone, UK and US, 1990-2015



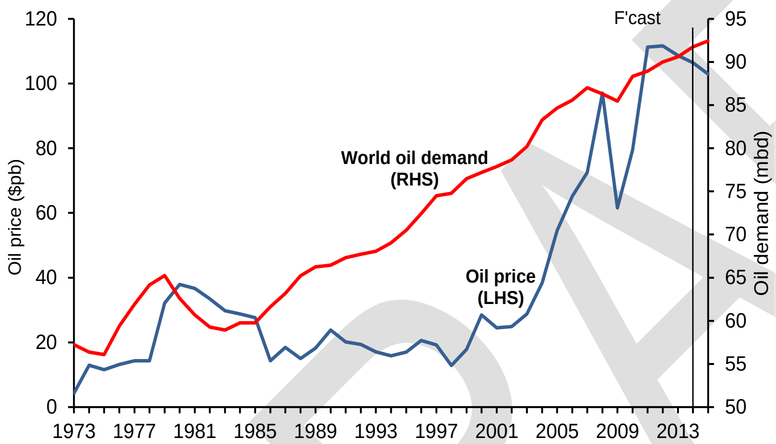
Source: Oxford Economics

Interest rates across these countries experienced a sharp decline following the recession as governments tried to stimulate demand – although until recently, growth has remained elusive. In the UK, the timing – and extent – of interest rate rises is the source of much speculation and debate. Our forecasts suggest that the Bank of England base rate could rise as soon as the end of this year.

Rising commodity prices, notably oil prices, continue to escalate, paving the way for alternative and renewable energy resources

Despite inflation not straying far from its targets in recent years, commodity price inflation has been more persistent. Food prices have remained stubbornly high. The main drivers of this are rapid population expansion in China and India – creating more demand for food, and poor harvests. Metal prices have also remained high, primarily due to strong Chinese investment in fixed assets and infrastructure. World oil prices continued to escalate on the back of consistently rising demand, peaking in mid-2008 at over $120 per barrel. World demand at this time was around 87 million barrels per day (mbd) (Figure 2.3), and our forecasts suggest this is likely to rise to 93 mbd by 2015. The reliance on oil – an ever diminishing resource – further highlights the need for continued investment in renewable energy sources.

Figure 2.3: Oil prices and demand, World, 1973-2015



Source: Oxford Economics

UK overview: Economy set to enjoy a healthy balanced expansion

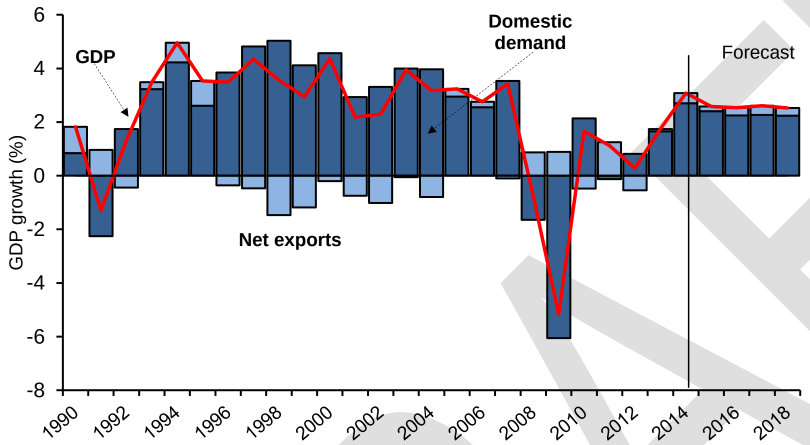
Following the recession; UK recovery still dependent on Eurozone growth

The UK experienced a deeper and longer downturn than many developed economies, with a contraction of 5.2% in 2009 (compared to 4.4% in the Eurozone). The UK officially emerged from recession in Q4 2009. Although the Eurozone appears to have survived the currency crisis, any further escalation would risk stalling the UK recovery, due to the strong trade links and the potential for spillovers into the UK banking system.

Output finally surpasses previous peak levels

The preliminary estimate of GDP for Q2 2014 confirmed that the UK economy has finally passed its previous peak level of output, after a gap of more than six years. Passing this milestone comes as something of a relief, though it should be remembered that most of the UK peers passed their pre-crisis peaks some time ago and that this recovery has been considerably slower than any other UK post-war cycle. Strong economic growth in the years leading up to the recession was supported by access to cheap finance and low interest rates, meaning growth was primarily debt-led. With many western economies now carrying significant debt burdens, and governments committing to cutbacks in spending patterns, this approach is no longer sustainable. As such, the UK should concentrate on improving export performance. Net exports have made small positive contributions to GDP growth since the recession, and given the protracted nature of the domestic recovery, the resilience of services exports is likely to have been a key factor in services employment surpassing its pre-crisis peak last year (see Figure 2.4).

Figure 2.4: Contributions to GDP, 1990-2020



Source: Oxford Economics

The key driver of export prospects tends to be the strength of demand in the markets in which the UK typically trades. On this basis, strong growth in the US is particularly good news for UK exporters – although it does emphasise further how the UK's close ties with the Eurozone present a risk.

Pressures remain on the consumer with household incomes squeezed

Stronger economic growth and a sustained improvement in the labour market, suggest that the Bank of England base interest rate could rise by the end of the year. We now expect the first rise to come in Q4 2014.

That said; the evidence in favour of a rate rise still looks fairly thin. The Bank has made it clear that an interest rate rise will be used only as a last resort to prevent another housing bubble. Although UK unemployment has fallen a long way in the last year, whether or not rates do rise this year will ultimately depend upon whether wage growth picks up or not. If it continues to lag, then the Bank will probably err on the side of caution and wait until next year.

The decade prior to the recession saw a significant build-up in household debt, most of which was used to finance the purchase of houses. The household debt-to-income ratio currently stands at 132%, approximately twenty-four percentage points below its 2009 peak but still considerably higher than the level at the start of the last decade. We expect the ratio to continue edging down, falling to around 130% in early 2015.

A rebalancing of the labour market

The labour market is a key source of domestic risk for the UK economy. Between 2008 and 2010, we estimate that annually, around 365,000 net jobs were lost, though employment levels recovered to their pre-recession peak of just over 32 million, by 2013. The recovery will continue at this pace in the short term – approximately 390,000 jobs per annum are forecast to be created between 2012 and 2016. Though this recovery phase may seem strong; employment growth over the next decade (0.6% per annum) will be slower than it was between 2000 and 2008 (1.0% per annum).

Most sectors experienced redundancies over the recession period of 2008-2012; especially in manufacturing, construction, retail and public administration (approximately 884,000 net job losses between these four sectors), although the health and education sectors provided some shelter – creating 460,000 jobs during the same period.

The UK's labour market has improved significantly in the last year. Recent labour market data have continued to surprise, with record levels of employment growth and unemployment continuing to fall rapidly. Furthermore, other indicators point to a general tightening of the labour market, with hours worked rising sharply and vacancies reaching their highest level since mid-2008. Despite this, redundancies will persist on two fronts; as jobs shift out of the public sector; and as the professional service sectors comprise an ever increasing share of total employment. Public expenditure cuts are likely to affect the public administration and education sectors in particular, with forecasts suggesting losses of 246,000 net jobs across these sectors during the next decade. Manufacturing employment is also expected to continue declining. The rebalancing of the labour market will see an exportable service sectors such as administrative and professional services, scientific/technical and retail driving job creation (Table 6.1). This transformation from 'factory to office' has been happening throughout the UK and other developed economies and will continue to characterise the UK labour market.

Table 2.1: Employment change by sector, UK, 1998-2024

Employment change (000)	1998-2008		2008-2012		2012-2014		2014-2024	
	No. (000)	% pa	No. (000)	% pa	No. (000)	% pa	No. (000)	% pa
Agriculture, forestry and fishing	-67	-1.6%	14	0.9%	-35	-4.4%	-33	-0.9%
Mining and quarrying	-12	-1.7%	11	4.0%	0	-0.1%	-17	-2.4%
Manufacturing	-1,448	-4.1%	-257	-2.4%	23	0.4%	-303	-1.2%
Electricity, gas and steam	-17	-1.8%	27	6.9%	5	2.1%	-14	-1.2%
Water supply; sewage and waste management	7	0.4%	22	3.0%	5	1.3%	-12	-0.6%
Construction	429	2.1%	-264	-3.0%	101	2.4%	289	1.3%
Wholesale and retail trade	176	0.4%	-202	-1.0%	87	0.9%	278	0.5%
Transportation and storage	195	1.4%	-5	-0.1%	23	0.8%	162	1.0%
Accommodation and food service activities	267	1.4%	-7	-0.1%	33	0.8%	196	0.9%
Information and communication	247	2.3%	7	0.1%	54	2.2%	236	1.7%
Financial and insurance activities	91	0.8%	-59	-1.3%	-2	-0.1%	10	0.1%
Real estate activities	192	5.3%	21	1.1%	95	9.1%	175	2.6%
Professional, scientific and technical activities	646	3.3%	192	2.0%	197	3.9%	563	1.9%
Administrative and support service activities	557	2.5%	17	0.2%	199	3.8%	506	1.7%
Public administration and defence	149	0.9%	-162	-2.4%	-50	-1.6%	-186	-1.3%
Education	571	2.5%	149	1.4%	50	0.9%	-61	-0.2%
Human health and social work activities	795	2.4%	312	2.0%	84	1.0%	69	0.2%
Arts, entertainment and recreation	226	3.0%	9	0.3%	56	3.1%	165	1.6%
Other service activities	151	1.8%	-83	-2.3%	32	1.8%	127	1.3%
Total	**3,155**	**1.0%**	**-260**	**-0.2%**	**958**	**1.5%**	**2,150**	**0.6%**

Source: Oxford Economics
Note: Red shading represents sectors with largest employment losses; blue shading represents sectors with largest employment gains

Northern Ireland overview: A long road back with jobs at a premium

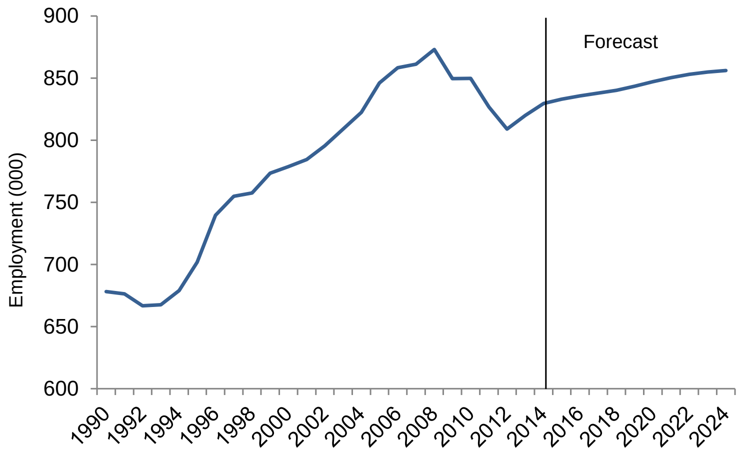
Labour market: A "jobless" recovery likely

From the turn of the century to the onset of the recession, employment levels in Northern Ireland increased every year – growing by close to 100,000 jobs between 2000 and 2008 alone (Figure 2.5), with the majority of sectors benefiting. Consumer and government spending provided major injections to the local economy, which in turn created more job opportunities and attracted migrants to the region.

However, the housing market correction, the subsequent rise in redundancies and general uncertainty has changed the economic landscape. Indeed Northern Ireland has probably suffered from the recession to a greater extent than any other UK region. Following the success of the previous decade, total employment in Northern Ireland fell by approximately 23,000 net jobs or 2.7% in just one year – between 2008 and 2009.

We expect a slow labour market recovery in Northern Ireland. Employment will grow by an average of just 0.3% per annum over the next decade – meaning it will not recover to its pre-recession peak until well beyond 2023. Put in context; the UK as a whole reached (and surpassed) its pre-recession level in 2013.

Figure 2.5: Total employment, Northern Ireland, 1990-2024



Source: DETI, Oxford Economics
Note: Assumes no change in policy (incl. Selective financial assistance)

Similar to trends in the UK overall, growth is likely to be concentrated in exportable sectors like professional and administration services (Table 2.2), offsetting job losses in manufacturing and the public services (particularly public administration and education). Public sector job losses, a result in part of the strict austerity packages implemented by the UK government, and the economic re-balancing in general, are likely to be more prevalent in Northern Ireland than elsewhere. This is a result of the current over-dependence on the public administration, education and health sectors as an employer. Northern Ireland currently has a higher share of public sector jobs as a percentage of total employment (close to a third) than any of the UK's other 11 regions. Moreover, public expenditure on capital projects is also subject to uncertainty, which will have adverse knock-on effects for the construction sector.

Table 2.2: Employment change by sector, Northern Ireland, 1998-2024

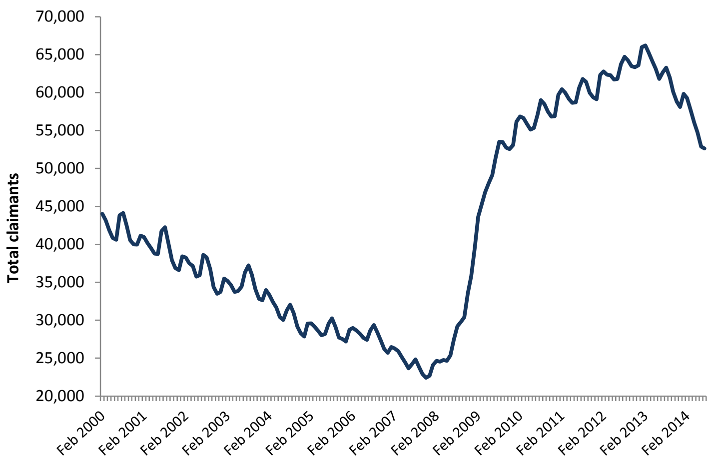
Employment change (000)	1998-2008		2008-2012		2012-2014		2014-2024	
	No. (000)	% pa	No. (000)	% pa	No. (000)	% pa	No. (000)	% pa
Agriculture, forestry and fishing	-1	-0.3%	-4	-2.3%	-2	-2.8%	0	0.1%
Mining and quarrying	0	1.2%	0	-5.5%	0	-1.9%	0	-1.9%
Manufacturing	-26	-2.4%	-12	-3.2%	3	1.7%	-7	-0.8%
Electricity, gas and steam	-1	-6.9%	0	3.9%	0	7.8%	0	-0.5%
Water supply; sewage and waste management	1	3.4%	0	-0.7%	0	-0.6%	0	-0.1%
Construction	19	3.3%	-19	-7.7%	2	2.2%	6	1.1%
Wholesale and retail trade	24	1.8%	-11	-1.8%	2	0.6%	2	0.1%
Transportation and storage	7	2.6%	-2	-2.0%	1	1.7%	3	1.0%
Accommodation and food service activities	9	1.9%	-3	-1.3%	1	1.3%	2	0.5%
Information and communication	6	3.9%	-2	-2.0%	2	4.2%	5	2.0%
Financial and insurance activities	6	3.2%	-1	-1.4%	-1	-2.2%	0	-0.1%
Real estate activities	4	10.5%	0	1.7%	1	4.8%	2	2.1%
Professional, scientific and technical activities	9	3.8%	-1	-1.0%	3	5.8%	6	1.7%
Administrative and support service activities	21	6.5%	-2	-1.1%	4	4.9%	10	1.8%
Public administration and defence	-2	-0.3%	-3	-1.3%	-2	-1.7%	-7	-1.3%
Education	7	1.0%	-2	-0.5%	1	0.6%	-2	-0.3%
Human health and social work activities	26	2.3%	-2	-0.4%	4	1.4%	2	0.2%
Arts, entertainment and recreation	4	2.3%	0	0.2%	1	2.2%	3	1.4%
Other service activities	2	1.2%	-1	-1.8%	2	4.3%	3	1.4%
Total	**115**	**1.4%**	**-64**	**-1.9%**	**21**	**1.3%**	**27**	**0.3%**

Source: DETI, Oxford Economics
Note: Red shading represents sectors with largest employment losses; blue shading represents sectors with largest employment gains

Significant challenges ahead

Unemployment in Northern Ireland remains much higher than pre-recession levels, and job creation is expected to be subdued for the foreseeable future (Figure 2.6). A further challenge exists in the mismatch between skills of the unemployed and those demanded by businesses. This is evident in the large number of job losses in construction and manufacturing. With jobs being created in nearly every sector of the economy at the start of the last decade, the claimant count fell from 44,018 in February 2000 to a low of 22,413 in November 2007. Since then however, it climbed back to a peak of 66,204 in February 2013 as job losses mounted between 2008 and 2009. There are signs of a modest improvement in employment figures – although these will not be enough to make up for the job losses experienced between 2008 and 2012.

Figure 2.6: Total claimants, Northern Ireland, Feb 2000-July 2014



Source: NOMIS

A legacy of unemployment

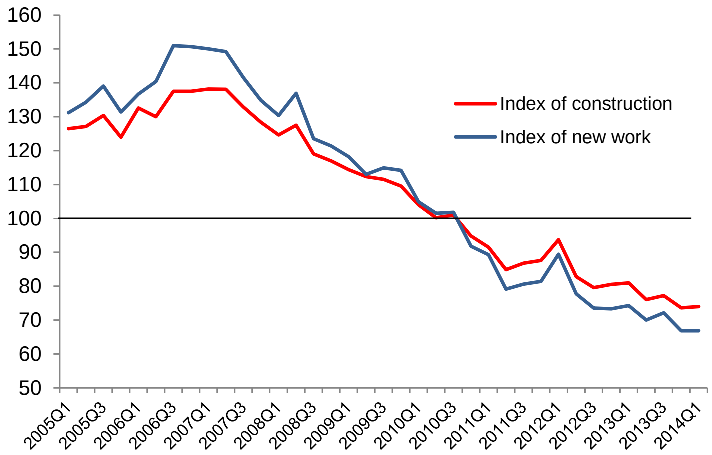
With jobs being created in nearly every sector of the economy at the start of the last decade, the claimant count fell from 44,400 in January 2000 to a low of 22,413 in November 2007. Since then however, it climbed as high as 66,204 by February 2013, almost trebling. The majority of job losses were experienced throughout 2008 and 2009 as redundancy announcements mounted. There are signs of a modest improvement. Given the subdued job market recovery in Northern Ireland, it is unlikely that many of those unemployed in Northern Ireland will be able to secure employment in the short-term, and at 52,628, the number of people claiming jobseeker's allowance is far above its pre-recession level.

The construction sector: a bleak outlook

The property boom after the turn of the century created an abundance of opportunities in the construction sector. However, it suffered the largest amount of recessionary job losses of any sector – 18,900 – between 2008 and 2012; all but cancelling out the construction jobs created during the decade prior (Table

2.2). The most recent Northern Ireland Index of Construction[1] has fallen steadily from a peak of 138.2 in Q1 2007 to a level of 74.0 in Q1 2014 (Figure 2.7). A lack of new work has been largely to blame for the job losses in the sector over recent times. Limited business investment, a return to more cautious lending practices by banks and more prudent capital spending by the public sector, combined with severely depressed demand for office space and property led to a consistent fall in the Index of New (construction) Work from a peak in Q1 2007 of 150.0 to a current level of 66.8 (Figure 2.7).

Figure 2.7: Indices of construction and new work, Northern Ireland, Q1 2005 – Q1 2014



Source: CSU

Although the UK and Northern Ireland are technically out of recession, the outlook for the construction sector remains one of slow recovery. This is a result of multiple factors: businesses continuing to hold back on spending; government cuts in capital expenditure (note: public expenditure on capital projects is subject to much uncertainty and it is logical to think the levels on offer pre-recession won't be realised again for some time); and commercial and residential property demand only now beginning to show signs of recovery. Job levels are likely to increase moderately over the next decade (6,000 increase in net jobs) but this is in stark contrast to the levels of the job creation up to 2008, and the job losses over the past 5-6 years.

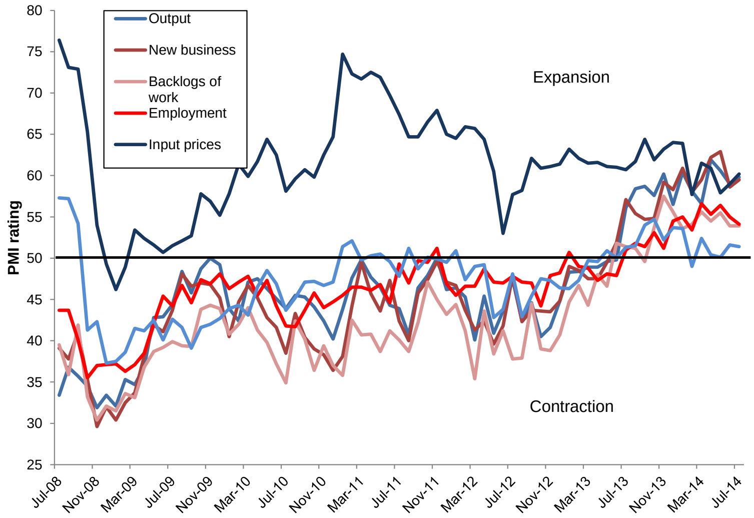
Encouraging signs in Purchasing Managers' Index

The results from the July 2014 Northern Ireland PMI reflects rising business confidence in light of improved economic growth prospects. Overall, 2013 was positive according to the PMI for both the UK and Northern Ireland, with recovery appearing to be now firmly "entrenched" according to all indicators. Businesses remain exposed to potential increases in interests rates, although it should be noted that "forward guidance" has now been dismissed given the fast

[1] A general measure of quarterly changes in the volume and value of construction output in Northern Ireland. http://www.csu.nisra.gov.uk/niconsq12014.pdf.

pace of the declining unemployment rate (as measured by ILO standards). Output and new orders were recorded at 59.8 and 59.5 respectively (where 50 or greater indicates growth) – slightly below the record high set in April. We expect a continuation of this strong performance over the next few months of data.

Figure 2.8: Purchasing Managers' Index, Northern Ireland, Jul 2008-Jul 2014



Source: Ulster Bank

Conclusion

Across the UK, public sector spending cuts have ushered in a new era; and although the UK labour market is undergoing a strong recovery, public administration will no longer be one of the larger sources of employment creation as it was in the decade before the recession. Instead, across the UK and Northern Ireland, we are likely to see a shift towards a more service-sector oriented economy. Growth will therefore be export-led and increasingly dependent on the private sector to compete in international markets.

The professional, scientific & technical, and administrative sectors are most likely to be the drivers of job creation. Consequently the economy in Northern Ireland will become increasingly skills hungry. These trends have significant implications for those with no or low skills, the unemployed youth and those in long-term unemployment or long-term inactive. As such there will be significant labour market issues for policy makers to address, yet they are likely to have less public funding to help them do so.

The preliminary estimate of GDP for Q2 2014 confirmed that the UK economy has finally passed its previous peak level of output, after a gap of more than six years. Passing this milestone comes as something of a relief, though it should be remembered that most of the UK peers passed their pre-crisis peaks some time ago and that this recovery has been considerably slower than any other UK post-war cycle. Whilst confidence has improved somewhat and consumer spending has helped drive the recovery to date – wage growth has not kept up meaning that incomes will continue to be squeezed, even as the recovery gathers momentum. The labour market suffered marked job losses over the course of the last six years, and is likely to remain a key source of domestic risk, as the labour market rebalances towards a more private sector, professional services driven economy. Our economic outlook for the UK shows that many indicators are showing strong improvement, though it is likely to be some time before this good news translates into higher household incomes. The recession is likely to leave a legacy of unemployment, with the number of almost 53,000 claimants well above pre-recession levels.

The challenge for Northern Ireland will be to facilitate and support future growth in the private sector, whilst ensuring that the correct skills and infrastructure are in place for businesses to expand and grow. There are also new industries emerging that may 'blur the lines' between manufacturing and services as well as growth in other sub-sectors that present opportunities such as new technology, care industries and tourism sectors.

3. Mid-Ulster: Recent performance

This section provides a discussion of Mid Ulster's recent performance. It covers recent trends in demography, the labour market, businesses, output and a range of social indicators.

Key findings

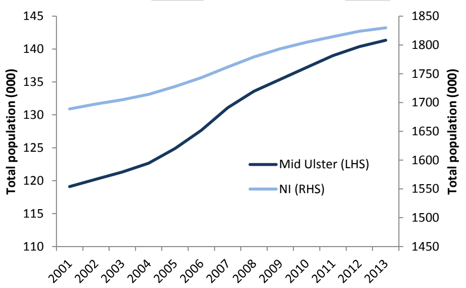
- The fastest growing new council area in terms of population;
- Significant employment structure concentration and linkages between manufacturing, construction and agrifood;
- Employment losses most prominent in construction and agriculture;
- Manufacturing has grown in job terms since 2000;
- Unemployment rate has doubled but seems to have peaked;
- Youth and long term unemployment could be an issue going forward;
- Underperformance at both ends of the educational spectrum;
- Businesses typically smaller in size and therefore may require more guidance and support to grow and open new markets.

Demography

The fastest growing council area

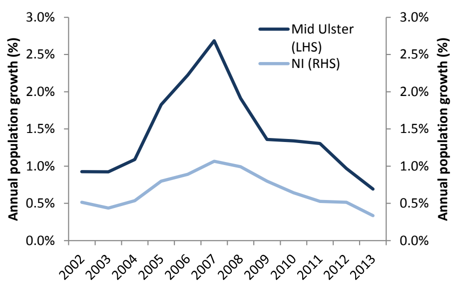
The new Mid Ulster council area will be the seventh largest local government district as of 2013 with just over 141,000 residents. Population growth has however outpaced the regional average over the last decade. Between 2001 and 2013, Mid-Ulster's population grew by 18.7%, compared to the NI average of 8.3% over the same period. This was the fastest rate of population growth experienced by any of the 11 new council areas.

Figure 3.1: Total population, Mid Ulster and Northern Ireland, 2001- 2013



Source: NISRA

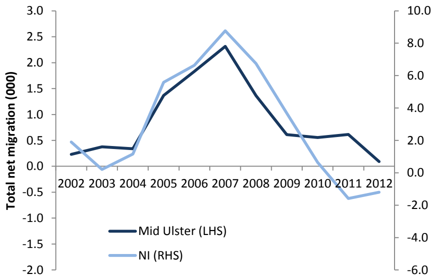
Figure 3.2: Annual population growth, Mid Ulster and Northern Ireland, 2002- 2013



Source: NISRA

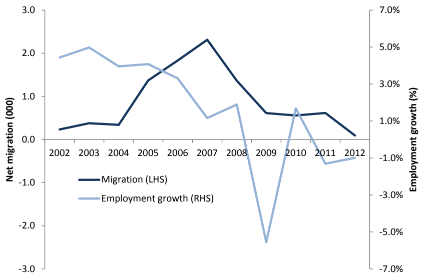
Above average population growth has been driven by strong natural increase (births minus deaths) alongside consistent net inflows of migration, especially during the pre-recession years (2005-2008). The Mid Ulster area received 2,300 migrants at its peak in 2007 (Figure 3.3), almost ten times the number seen in 2002. The strength of the labour market and employment opportunities are key reasons for such positive migration. Net in-migration in Mid Ulster fell sharply in response to the fall in employment levels. Interestingly, although employment contracted in three of the four years to 2012, net migration remained positive (albeit close to zero in 2012), signalling the council area is still an attractive area to live.

Figure 3.3: Total migration, Mid Ulster and Northern Ireland, 2002-2012



Source: NISRA

Figure 3.4: Migration vs employment growth, Mid Ulster, 2002 - 2012



Source: NISRA, Oxford Economics

Despite the strong population growth, the Mid Ulster council area is the 3rd least densely populated out of the 11 new local government districts, with 0.78 residents per hectare. This is just over half the Northern Ireland average. The only other areas which are less densely populated are Causeway Coast and Glens and Fermanagh and Omagh – both of which have significant rural identities.

Table 3.1: Population density, Northern Ireland local government districts, 2013

	Population density (usual residents per hectare)
Belfast	24.98
North Down and Ards	3.45
Lisburn and Castlereagh	2.72
Antrim and Newtownabbey	2.45
Armagh, Banbridge and Craigavon	1.51
Northern Ireland	1.35
Mid and East Antrim	1.30
Derry and Strabane	1.20
Newry, Mourne and Down	1.08
Mid Ulster	0.78
Causeway Coast and Glens	0.72
Fermanagh and Omagh	0.40

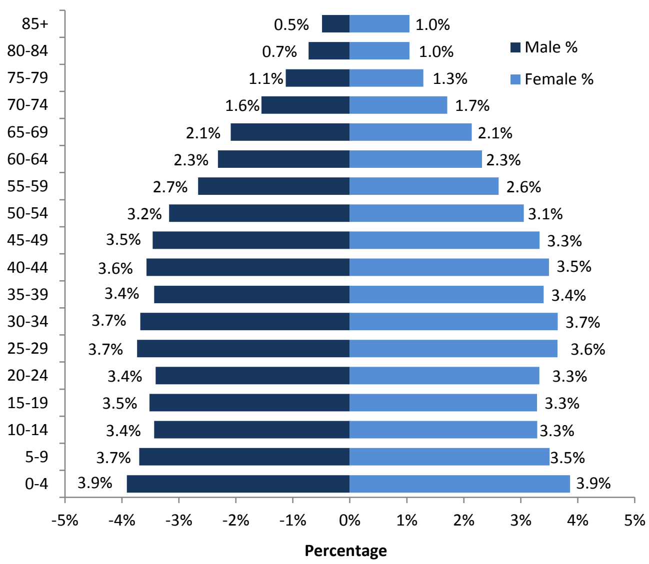
Source: NISRA

A more youth population

An analysis of Mid Ulster's age profile shows that the population has a larger proportion aged 0-15 than the NI average (23.1% vs 20.9%), and a lower proportion of those aged 65 and over (13.2% vs 15.3%). Mid Ulster's working age population as a proportion of the total population is very similar to the Northern Ireland average (63.7% and 63.8% respectively).

A relatively larger share of people aged below 16 suggests the council area has a potential large supply of future labour to draw on. These young people, when successfully placed in the local labour force, will contribute to economic growth and tax receipts for the area. Population age patterns are becoming increasingly important indicators for developed economies. Governments face the challenge of aging populations and the various implications this has for labour markets and public services going forward.

Figure 3.5: Age structure, Mid-Ulster, 2013



Source: NISRA

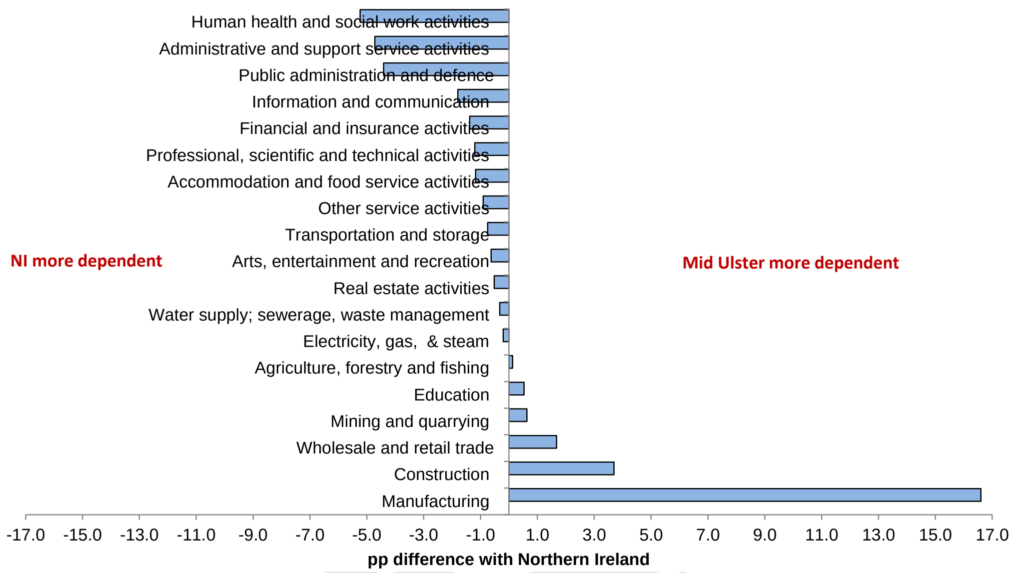
The Mid Ulster Economy

Sectoral employment concentration and specialisms

The employment structure of an economy can explain most of the trends experienced in its labour market. It can also dictate future growth potential. Figure 3.6 provides a comparative look at this structure by comparing the share of total employee jobs in each sector relative to the NI average. A positive percentage point (pp) difference indicates an employment sector where Mid Ulster has an above average share of jobs in that sector, while anything with a negative percentage point difference indicate sectors of the economy that provide a below average share of employment.

We find that the Mid Ulster economy is significantly more dependent on the manufacturing sector for employment than the Northern Ireland average. Manufacturing in Northern Ireland accounts for approximately 10% of total employment, however the proportion employed in this sector in Mid Ulster is over 2.5 times greater (27.4%). Typically high levels of manufacturing employment might be a cause for concern (from a job creation point of view) given the employment in the sector has been falling in Northern Ireland (it is important to note however that manufacturing offers tremendous exporting opportunities and therefore offers potential for external demand to fuel growth in the local economy). However as discussed later in the report, the sector has enjoyed net job creation since 2000.

Figure 3.6: Relative concentration of sectoral employment, Mid-Ulster vs Northern Ireland, 2013



Source: DETI

Furthermore, we find that Mid Ulster is also disproportionally dependent on the construction and 'wholesale and retail' sectors for employment. These sectors have been strongly impacted by the recession and face ongoing challenges going forward. The construction sector was one of the most severely impacted industries because of its close ties with the banking credit crisis and the subsequent fall in the property market. The continued uncertainty in the economy, coupled with low levels of business investment, will likely hamper growth in construction.

Additionally mining and quarrying which is a relatively significant employer within Mid Ulster has close supply linkages with the construction sector, and will therefore amplify the impact of falls in demand.

The retail sector faces the challenge of weak consumer confidence resulting from increased debt burdens, falling real wages, a subdued housing market, more realistic lending practices by banks and higher levels of unemployment.

Employment in higher value added sectors, such as information and communication and the professional and technical activities are not as prominent in Mid Ulster compared to Northern Ireland on average. These sectors are viewed as the most likely to provide higher salaries and employment growth moving forward.

Table 3.2 shows Mid Ulster's employment specialisms ranked using location quotients. Only sectors which employ over 250 employees at the regional level were included. This measure is useful as it provides a way of quantifying how concentrated particular niches of industry sectors are compared to Northern Ireland as a whole. Mid Ulster's manufacturing sector have strong specialisms in the production of general and special purpose machinery, in addition to the manufacture of products which directly supply the construction and agricultural sectors. We also find the manufacture and wholesale of produce which falls within the broader agri-food sector are specialisms in Mid Ulster.

Table 3.2: Employment specialisms (minimum 250 person employment in NI criteria), Mid Ulster council area, 2011

Sector name	LQ
Manufacture of other special-purpose machinery n.e.c.	**12.92**
Manufacture of other general-purpose machinery n.e.c.	**10.87**
Manufacture of machinery for mining, quarrying and construction	**8.60**
Manufacture of other pumps and compressors	**8.19**
Wholesale of meat and meat products	**7.93**
Production of meat and poultry meat products	**6.76**
Manufacture of concrete products for construction purposes	**5.93**
Manufacture of office and shop furniture	**5.57**
Manufacture of electricity distribution and control apparatus	**5.18**
Processing and preserving of meat	**5.08**
Manufacture of kitchen furniture	**5.04**
Manufacture of other builders' carpentry and joinery	**5.00**
Processing and preserving of poultry meat	**4.12**
Manufacture of other furniture	**3.89**
Manufacture of metal structures and parts of structures	**3.77**
Manufacture of agricultural and forestry machinery	**3.71**
Operation of gravel and sand pits; mining of clays and kaolin	**3.66**
Manufacture of lifting and handling equipment	**3.62**
Site preparation	**3.59**
Manufacture of bodies (coachwork) for motor vehicles; manufacture of trailers and semi-trailers	**3.38**

Source: NISRA

Employment specialisms within Mid Ulster are strongly associated with the most prominent employing sectors in the economy – namely supplying bespoke machinery for the manufacturing and construction sectors. It is therefore likely that future job creations in these specialisms are sensitive to the rate of recovery in these industries (unless they can find export markets to drive demand).

Given current pressure on the drivers of economic growth, we expect economies that are more export orientated to enjoy the fastest growth:

- Consumer spending is still limited by high levels of unemployment (discussed below), normal lending practices and subdued real wage growth;
- Government spending is limited from austerity measures that are still in place following the recent recession;

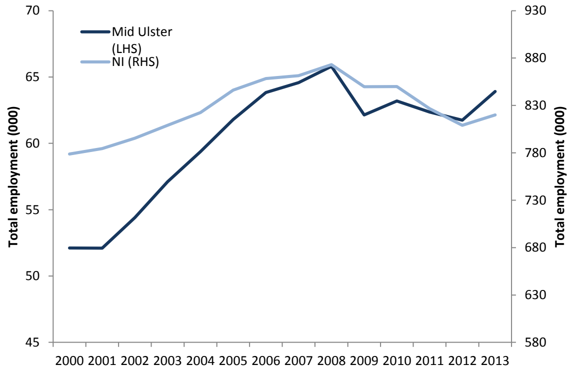
- Private investment by business has been subdued as private sector confidence remains low. Despite having record levels of cash, the private sector across most developed economies continue to postpone investment decisions which could create jobs and raise productivity; and
- That leaves the balance of trade (the difference between imports and exports) to drive growth.

A number of Mid Ulster specialisms exhibit export potential in foreign markets, thereby contributing to economic growth via the balance of trade path. Demand from non-domestic markets would also help alleviate weakness in demand at home.

Total employment growth

From 2000 to 2008 the Mid Ulster's economy grew by over 13,700 jobs to peak at 65,800. This represented over 25% growth in jobs in just 8 years and as noted earlier, coincided with significant positive net migration into the council area.

Figure 3.7: Total employment, Mid Ulster and Northern Ireland, 2000-2013



Source: Oxford Economics

Figure 3.8: Total employment vs resident employment rate, Mid Ulster, 2000-2013

Source: Oxford Economics

Between 2000 and 2008, job growth was driven by the construction, manufacturing and wholesale and retail sectors, accounting for nearly 60% of total net job creation (Table 3.3). The only sector which saw job destruction during the same period was the public administration and defence sector, with 200 job losses. Employment sector growth within the real estate sector saw the largest proportional increase - facilitating the buoyant housing market growth during the period.

The Mid Ulster area's employment levels fell by 6% (3,700 jobs) in 2009, following the onset of the recession. Job losses were most common in the agricultural and construction industry, which collectively lost some 3,000 jobs from the local economy between 2008 and 2013. However, large employing sectors such as manufacturing and retail proved resilient and were able to recover pre-recession levels of employment by 2013. Despite the recent recovery, employment levels have yet to return to their pre-recession peak.

Table 3.3: Change in total employment by sector, Mid Ulster, 2000-2013

Change in Employment	2000-2008		2008-2013	
	No. (000)	% growth	No. (000)	% growth
Agriculture, forestry and fishing	1.15	17.7%	-1.56	-20.4%
Mining and quarrying	0.10	22.2%	0.10	18.4%
Manufacturing	2.42	19.7%	0.74	5.0%
Electricity, gas, & steam	0.00	0.0%	0.00	0.0%
Water supply; sewerage, waste management	0.24	NA	-0.05	-19.8%
Construction	3.27	61.3%	-1.49	-17.4%
Wholesale and retail trade	2.37	29.4%	0.32	3.0%
Transportation and storage	0.55	46.6%	-0.10	-5.5%
Accommodation and food service activities	0.54	23.8%	-0.12	-4.3%
Information and communication	0.16	54.9%	-0.06	-13.7%
Financial and insurance activities	0.03	3.5%	-0.11	-13.5%
Real estate activities	0.15	184.2%	0.00	-0.1%
Professional, scientific and technical activities	0.46	44.0%	0.11	7.3%
Administrative and support service activities	0.63	103.4%	-0.19	-15.2%
Public administration and defence	-0.20	-12.2%	0.23	16.0%
Education	0.28	5.7%	0.11	2.1%
Human health and social work activities	1.03	20.3%	0.44	7.3%
Arts, entertainment and recreation	0.33	45.0%	-0.07	-7.0%
Other service activities	0.19	22.4%	-0.19	-18.4%
Total	**13.7**	**26.3%**	**-1.9**	**-2.9%**

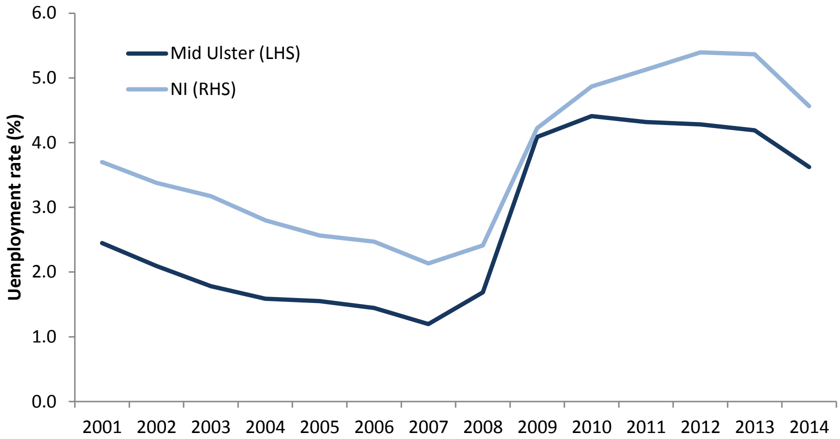
Source: Oxford Economics

Unemployment

Figure 3.9 plots the unemployment rate in Mid Ulster in comparison to Northern Ireland from 2001 to 2014. It can be seen that the Mid Ulster area has historically outperformed the regional claimant unemployment rate. In the aftermath of the financial crisis however, claimant count numbers tripled in Mid Ulster, leading to the overall unemployment rate reaching the Northern Ireland average in 2009.

As highlighted earlier, some of Mid Ulster's most prominent employment sectors have proven resilient to further job losses throughout the recession. This has helped turn around the rise in the unemployment rate. However the rate remains significantly above pre-recession levels. To put this in context, for the claimant unemployment rate to return to pre-recession levels we would need to get 2,500 of the unemployed into work.

Figure 3.9: Claimant unemployment rate, Mid Ulster and Northern Ireland, 2001-2014



Source: Oxford Economics

Long term unemployment

Long term unemployment can be a difficult problem for policy makers to address. Academic findings support the theory that the longer a person finds themselves unemployed the more difficult it is to secure work in the future. By definition, the long term unemployed are those who have been unemployed for 12 months or longer. Northern Ireland as a region currently has a higher proportion of people in long term unemployment (33.9%) than the national UK figure (30.5%).

Figure 3.10: Long term unemployment as a % of total unemployment, Mid Ulster and comparators, 2005 - 2014

Source: Nomis

Mid Ulster historically has enjoyed low rates of long term unemployment relative to the Northern Ireland and UK average. In 2010 however, long term unemployment converged sharply towards the NI average. Between 2008 and 2010, the number of people classified as long term unemployed increased by over 600% in Mid Ulster. Shortly after however the long term unemployment ratio temporary fell as a consequence of fresh job losses and higher numbers of short term unemployed. The long term unemployed figure has remained stubbornly high and as of 2014, nearly 800 people find themselves out of work for over a year and claiming unemployment benefit. As overall unemployment has begun to fall, the proportion of long term unemployed has been steadily increasing. As of 2014 the long term unemployed as a proportion of total unemployed had risen to 28% (Figure 3.10).

The rising proportion of long term unemployed is an issue for the Mid Ulster area as well as the region as a whole. The longer a person finds themselves out of the labour force, the more their skill set deteriorates over time. Eventually when the demand for labour does improve, it invariably will be the more short term unemployed who are most likely to take openings. This explains the current trend of rising long term unemployment; since headline unemployment has begun to fall – the long term unemployed grows as a proportion of the total. Recent national trends show that job growth is concentrated in the sectors of the economy were high level skill sets are in demand. These skill sets invariably do not match those of the long term unemployed. Instead these new employment opportunities are better aligned with well-educated/ recently trained individuals who as a result find themselves unemployed for a shorter duration.

This mismatch between the skills of the long-term unemployed and those being demanded by employers is likely to become increasingly problematic for policy makers.

Occupational unemployment

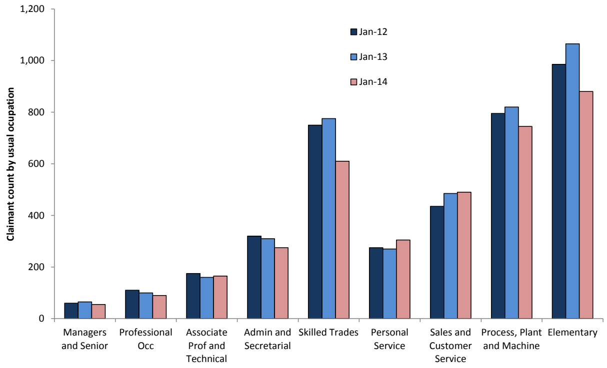
As identified previously the majority of job losses resulting from the recession originated from the agricultural and construction sector between 2008 and 2013. As such it is unsurprising that claimants are largely from the elementary, process, plant & machinery and skilled trade occupational backgrounds (Figure 3.11). Claimants from these backgrounds make up the largest unemployment groupings and have been on the increase until recently.

Sales and customer service roles have become more exposed to unemployment pressure, possibly resulting from weakened consumer spending following the recession. Whereas occupations such as managers, senior officials, technical and professional occupations have in the large remained insulated from job cuts.

Consequently, the bulk of the unemployed are typically from lower value added and skilled occupations. Therefore future employment opportunities for many will be limited to lower value activity in the economy (as discussed later, these are areas unlikely to experience much job creation).

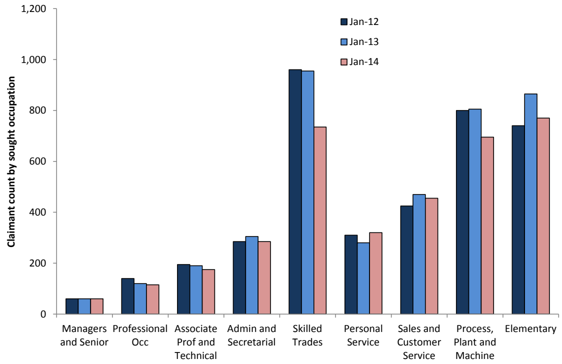
Figure 3.12 shows the most commonly sought occupation by claimants in Mid Ulster. As is commonly observed, there is a natural desire for the unemployed to use the transitional period as an opportunity to move into a more lucrative occupation. However the most sought after occupations by the claimants in Mid Ulster continue to be the ones associated with the construction, manufacturing and agriculture sectors. On balance the occupational aspirations of the unemployed are unlikely to match job creation in the economy. A mismatch between skills being supplied and the skills demanded is therefore likely to exist in the future. This could force more of the unemployed into long term unemployment with the associated social repercussions.

Figure 3.11: Claimant count by usual occupation, Mid Ulster, Jan 2012-Jan 2014



Source: Nomis

Figure 3.12: Claimant count by sought occupation, Mid Ulster, Jan 2012- Jan 2014

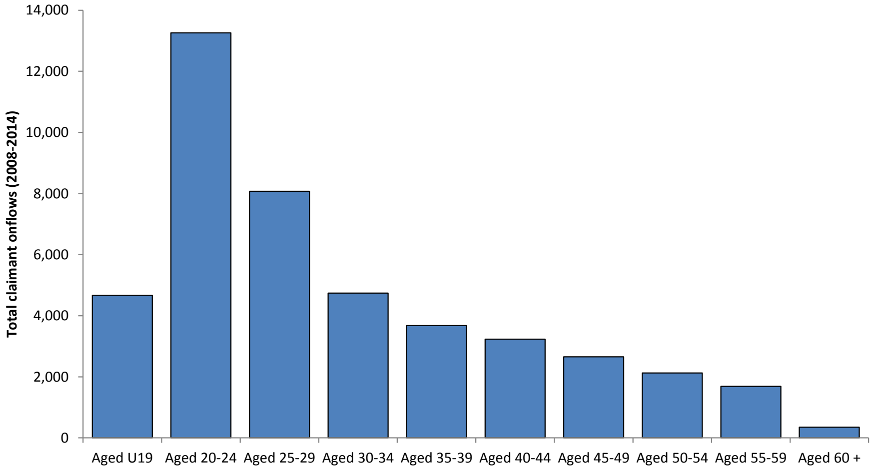


Source: Nomis

It is clearly important that individuals upskill and understand the value of education in an increasingly skills hungry economy which competes internationally on quality rather than cost. However there is a real risk that given the scale of youth unemployment (Figure 3.13), this could in turn lead to disillusionment with the returns of education.

The trend of the youth unemployment is well documented nationally and is very much present within Mid Ulster also. Of all new claimant on-flows recorded from 2008 to 2014, those aged 24 and under accounted for over 40%. In an environment of limited job growth and low business confidence generally, employers have been hiring experienced staff when the opportunity arises to the detriment of young people in the labour force. This helps create the environment wherein a number of society's ongoing social problems become more prevalent. As school leavers and graduates enter the labour market they find it increasingly can find it difficult to find opportunities which meet theirs aspirations. The risk therefore exists of the creation of a cycle of inactivity and social exclusion generally. Recent history has shown that the combination of unemployment and low skills only exacerbates problems facing youth migration, house prices, poverty and crime in any particular region.

Figure 3.13: Claimant count by age, Mid-Ulster, Jan 2008 – Jan 2014

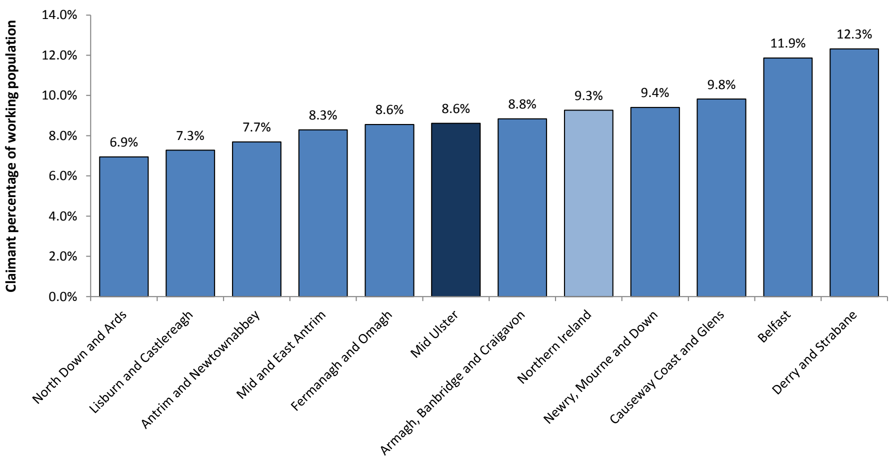


Source: Nomis

The Employment and Support Allowance benefit has now replaced incapacity benefit and income support paid on the grounds of incapacity. Reassessments started gradually from October 2010, with full national implementation coming into effect between 2011 and 2014. Due to this transitional phase it is only recently that we have figures available from which comment on the proportion of the working population that are incapable of contributing economically within Mid Ulster.

The Mid Ulster council area rate of incapacity as a proportion of the working age population (8.6%) is below the Northern Ireland average (9.3%). It is important for a local economy to have a relatively healthy and able workforce to meet the demand for labour from employers and thereby contributing to the economic well-being of the region.

Figure 3.14: Employment and Support Allowance (ESA) claimants as a percentage of working population, Northern Ireland, 2014



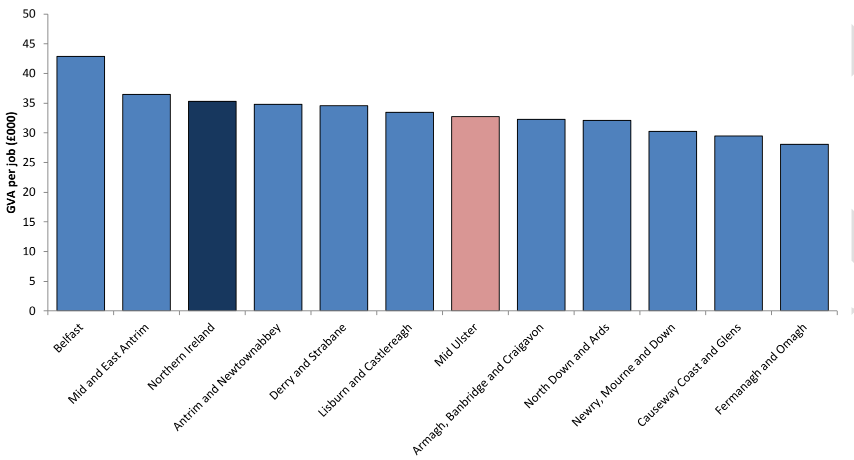
Source: DSD

Gross Value Added

Gross Value Added (GVA) is a measure of the value of goods and services produced in an economy. In 2014, Mid Ulster's GVA was £2.2bn, which accounted for 7.3% of all the output produced in Northern Ireland that year.

In the absence of job growth, improvements in productivity are the only way to increase economic output in an economy. Productivity is measured by output (GVA) per job and according to this measure Belfast has the highest productivity in Northern Ireland, with an average economic output per job of £43,000. Mid Ulster's productivity (£32,700) on the other hand is lower than the Northern Ireland average (£35,300) – see Figure 3.15. The differences in regional productivity are the result of geographical concentrations of employment in high value added sectors such as Information and communication and financial roles. Belfast has much higher concentrations of this job types in general.

Figure 3.15: GVA per job, Northern Ireland council areas, 2014



Source: Oxford Economics

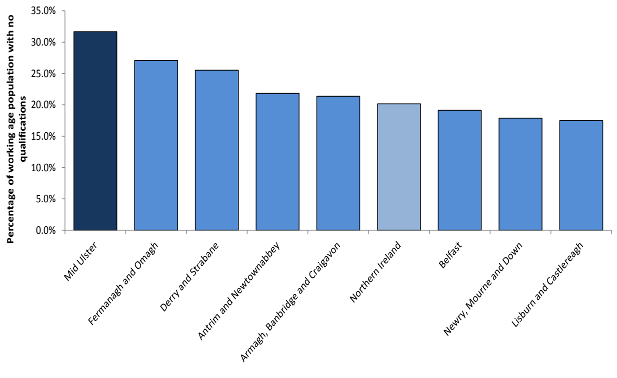
Skills Profile

Qualification attainment

When seeking to improve employability and productivity within the workforce, it is important to develop skills at all levels. Improving the skill sets of those with no formal qualifications has been shown to enhance employability prospects, whilst also addressing associated issues such as poverty and social exclusion.

Data published by the Department of Enterprise Trade and Investment (DETI) shows that the Mid Ulster council area has the highest average proportion of its working age population with no qualifications (31.6%) compared to any other council area within Northern Ireland. In order to reduce the proportion of the working population with no qualifications to that of the Northern Ireland average, Mid Ulster would be required to up-skill 11% of the working population (10,300 people), or to match the best performing council area (17.5%), just over 12,700 of the working age population would need to undertake training or study.

Figure 3.16: Percentage of working age population with no qualifications, Northern Ireland council areas, 2010-2012 average

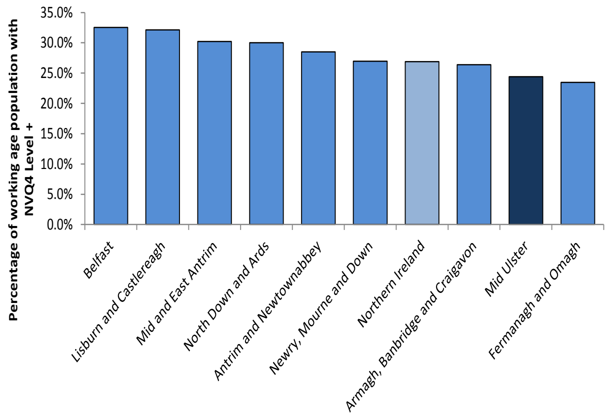


Source: DETI

Note: Based on available data during 2010-2012 period concerning predecessor council areas

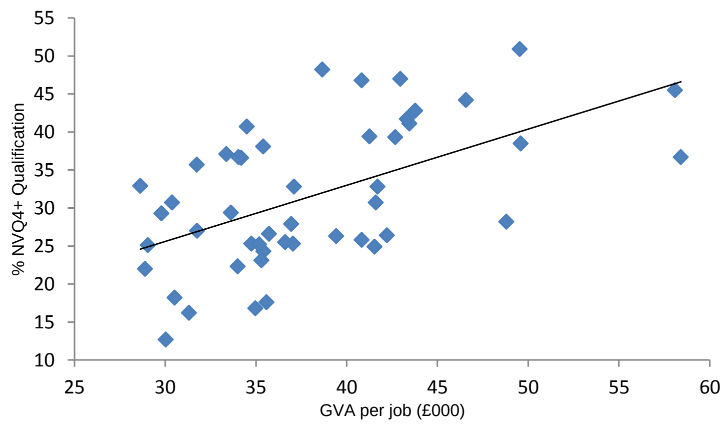
Note: Data unavailable for certain local government district and therefore omitted

Figure 3.17: Percentage of working age population with NVQ level 4 + qualifications, Northern Ireland council areas, 2010-2012 average



A more highly educated workforce allows for increased export potential, productivity growth and helps attract investment into the area from higher value added enterprises (Figure 3.18). Economic growth is expected be concentrated in these higher value added activities, which require more capital and skills and less labour than traditional industries. The Northern Ireland economy will therefore become more demanding for a skilled and productive labour force going forward.

Figure 3.18: Qualification attainment vs average productivity, UK local authorities, 2013



Source: Nomis, Oxford Economics

The proportion of the working age population with qualifications of NVQ level 4 or above in the Mid Ulster council area is 24.4%, lower than the Northern Ireland average of 26.9%, and therefore significantly lagging behind the more highly qualified labour forces available to council areas such as Belfast, which has

32.5% of its working population achieving higher educational attainment. In order for Mid Ulster to close the gap with the Northern Ireland average the stock of degree holders would be required to increase by 10%; likewise to match the top performing council area, graduate levels would be required to increase by one third.

However, NVQ level 2-3 are both above the NI average

Interestingly despite the poor performance at both ends of the education spectrum, recent education publications (2012/13) have shown that school leavers within the Mid Ulster area are performing at a level above the Northern Ireland average attainment. At the GCSE qualification level, just over 64% of Mid Ulster's council area school leavers earn 5 GCSE grades A*-C including English and Maths, and rates just above the Northern Ireland average of 62%.

In addition, approximately 57% of school leavers within Mid Ulster receive at least 2 or more A-levels with grades A*-E – compared to 55% of pupils in Northern Ireland overall. This may reflect the minimum requirement of local employers, but it is important the Council understands:

- If there are barriers stopping residents moving on to higher education; or
- The poor NVQ 4 performance is product of brain drain from the local economy.

Figure 3.19: Percentage of school leavers with 2 or more A levels (A*-E), Northern Ireland council areas, 2012/13

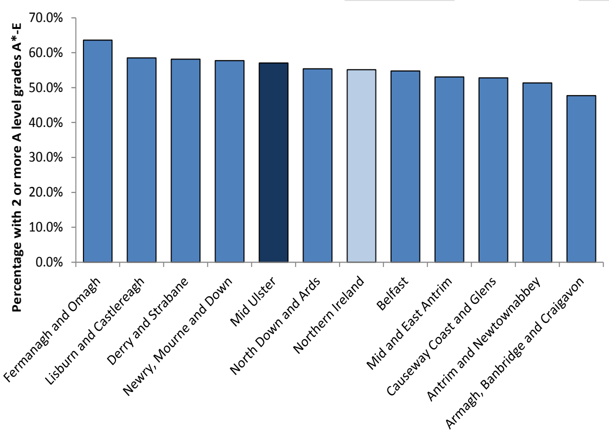
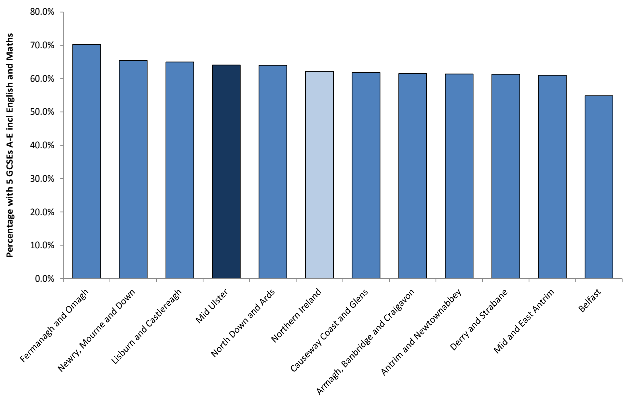


Figure 3.20: Percentage of school leavers with 5 GCSEs(A*-C) inc English and Maths, Northern Ireland council areas, 2012/13

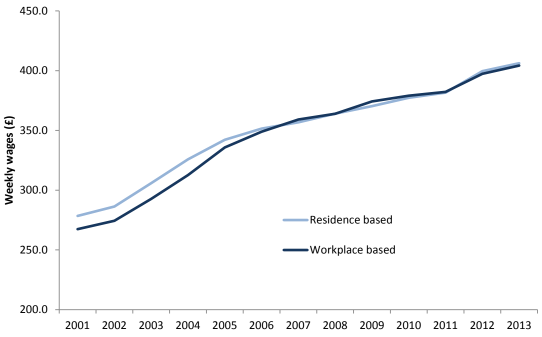


Source: DENI

Wages

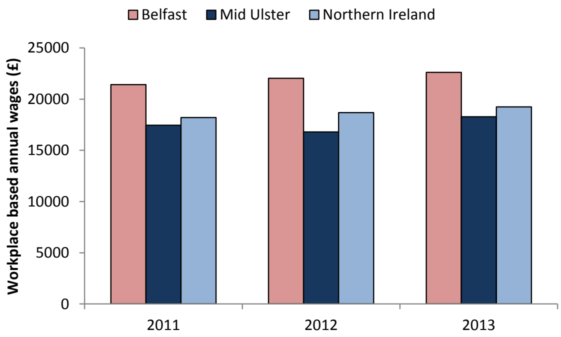
Up until 2008, both work and resident based earnings had been increasing steadily because of the pre-recession tightness in the labour market. Low levels of unemployment meant wages were bid upwards in order to secure scare resources. Wage growth has since been growing at a slower rate and both residence and work based wages have converged over the period. Recessions generally have the effect of reducing wage settlements as a means of avoiding redundancies or a reduction in working hours. Before the downturn residence based earnings had outpaced work based, suggesting there had been a high degree of out-commuting for employment in higher value added and better paid jobs.

Figure 3.21: Workplace vs resident wages, Mid-Ulster, 2001-2013



Source: Oxford Economics

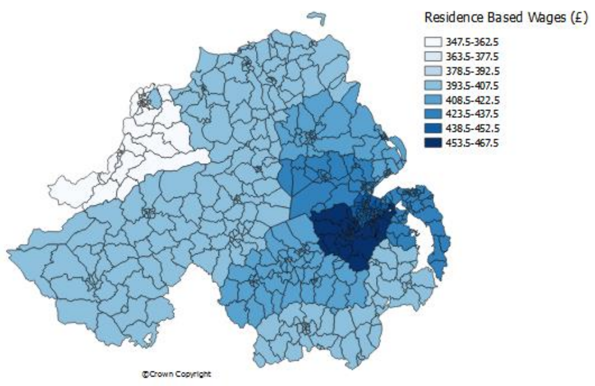
Figure 3.22: Workplace based wages, Northern Ireland, 2011-2013



Source: Nomis

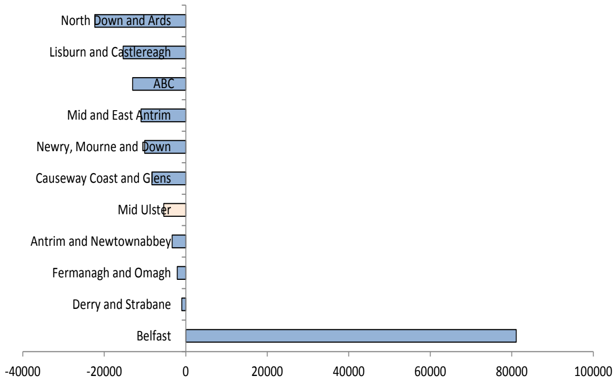
More recently, Mid Ulster had the 5th lowest weekly residence based wage of the 11 new council areas - 5% lower than the Northern Ireland weekly average of £427 (Figure 3.23). Work based wages in Mid Ulster are also found to be under the Northern Ireland average – see Figure 3.22. Given that both resident and work based wages in Mid Ulster have been broadly similar this would suggest commuting out of the area has not been as common in recent years. The 2011 census data shows that the Mid Ulster area has relatively small levels of out commuting. Council areas such as Lisburn and Castlereagh and North Down and Ards for example, are more ideally located to access the more productive value added jobs available in the Belfast region.

Figure 3.23: Residence-based weekly wage, Northern Ireland, 2013



Source: Oxford Economics

Figure 3.24: Net commuting, Northern Ireland councils, 2011



Source: NISRA

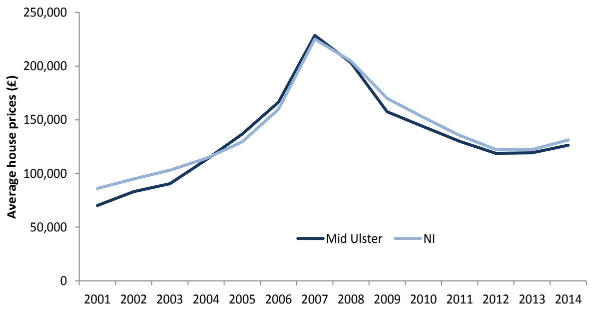
Housing

House prices vs NI

Northern Ireland house prices experienced some of the fastest UK regional growth during the property boom. Mid Ulster property prices have been lower than the Northern Ireland average until the housing market boom gathered pace. From 2004, Mid Ulster house prices converged to the regional average price and followed it thereafter to peak in 2007. Pre-recession employment growth, consumer confidence and cheap credit encouraged the significant property investment nationwide. The apparent over-valuation in the Northern Ireland market was fuelled by high levels of buy-to-let purchases.

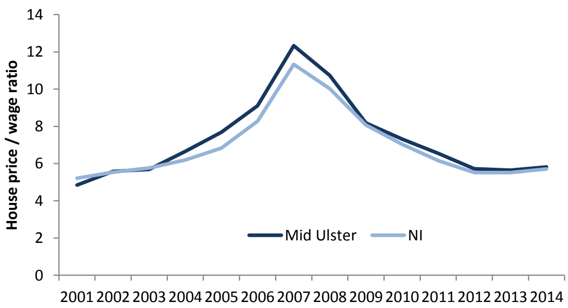
Mid Ulster average house price peaked at £228,700 in 2007, marginally higher than the regional average price of £225,200. After the onset of the global financial crisis, and the subsequent market revaluations, average house prices in Mid Ulster fell by 48% on average between 2007 and 2012 (Figure 3.25). Data suggests the markets decline has bottomed out as of 2013 with the recovery expected to be slower than elsewhere in the UK.

Figure 3.25: Average house prices, Mid-Ulster and Northern Ireland, 2001-2014



Source: Oxford Economics

Figure 3.26: Housing affordability, Mid-Ulster and Northern Ireland, 2001-2014



Source: Oxford Economics

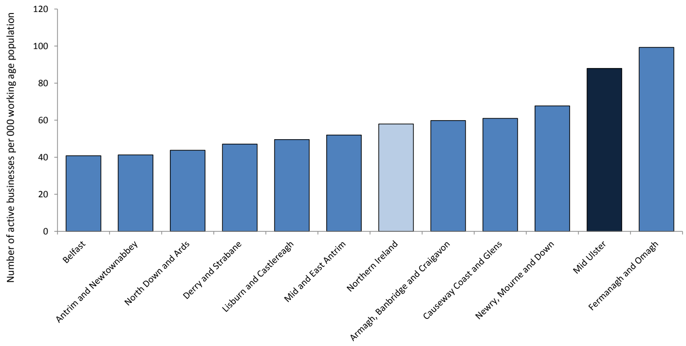
Income multiples used to determine levels of borrowing historically were 3-3.5 times for a single income mortgage (2.5-2.75 times for joint incomes). During the housing boom these ratios were pushed upwards due to overly generous mortgage provisions. The ratio of house prices to earnings in Mid Ulster rose above the Northern Ireland average in 2004 and peaked in 2007, with the ratio of 12.3. Post 2008, housing affordability improved drastically due to the fall in property prices, reaching a price/ income ratio of 5.6 in 2013.

Business performance

Business stock

As of the 2014, there were 7,915 active VAT/PAYE registered businesses in the Mid Ulster council area (11.7% of the Northern Ireland total). Since 2009 this number has reduced by approximately 5% or almost 415 businesses. The number of active businesses in the Mid Ulster council area per 1,000 working population is significantly larger than the Northern Ireland average (88 and 58 businesses respectively).

Figure 3.27: Active VAT/PAYE businesses per 1,000 working age population, Northern Ireland, 2014

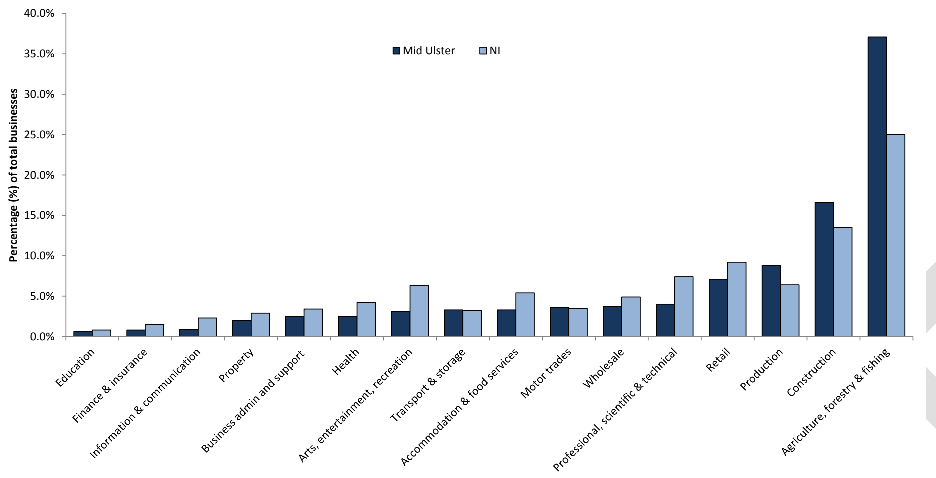


Source: DETI

Figure 3.28 shows the industrial sector split of Mid Ulster's businesses in comparison to that of Northern Ireland. We find the majority of the council area's businesses are in the production, construction and agricultural, forestry and fishing sectors. These three sectors account for almost two thirds of the all businesses within Mid Ulster, whereas the same sectors represent 45% of businesses in Northern Ireland on average.

While business activity and subsequent employment is aided by FDI, it is important to acknowledge that Northern Ireland is reliant on indigenous business growth. Recent DETI figures (2014) suggest that on average 97% of businesses within Northern Ireland are domestically owned. Therefore it is important the Mid Ulster area continues to foster entrepreneurial activity by providing a well-educated workforce with the right skill sets whilst maintaining a business friendly environment.

Figure 3.28: Percentage of businesses by industry sector, Mid-Ulster and NI, 2014

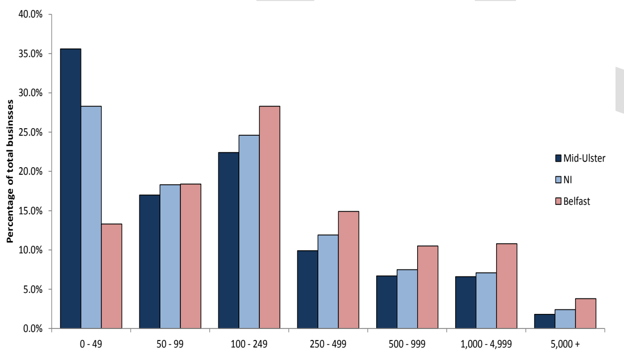


Source: DETI

Business Size

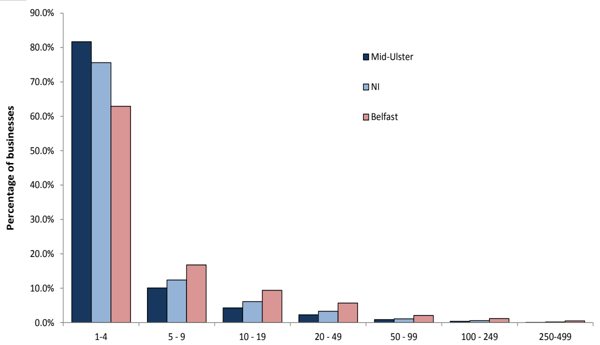
Mid Ulster has on balance smaller firm sizes that the regional average. This holds true for both employment and turnover. Given the proportion of SMEs within Mid Ulster, the Council should ensure there is enough support to help them grow and open new markets (SME can often lack the managerial and key business skills of larger firms).

Figure 3.29: Registered business by turnover band (£000s), Northern Ireland and Mid-Ulster, 2014



Source: DETI

Figure 3.30: Registered business by employment size band, Northern Ireland and ABC, 2014

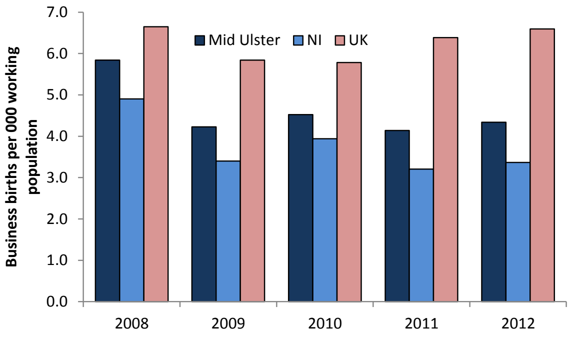


Source: DETI

Business births and deaths

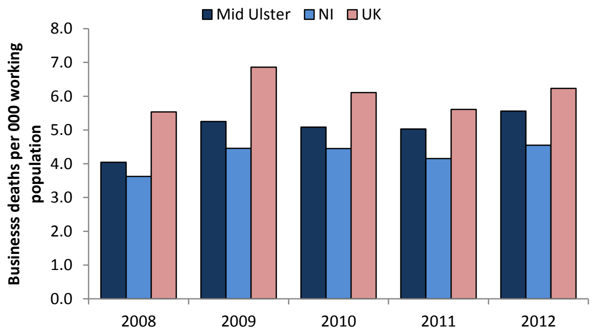
During 2012, there was an additional 390 new businesses created within Mid Ulster. This is likened to the creation of just over 4 businesses per 1,000 of the working age population that year. Business creation rates in Mid Ulster have consistently outperformed that of Northern Ireland since 2008, but has struggled to achieve business birth rates on par with the UK average. A healthy business birth rate in the area provides new jobs and wealth in the local community, whilst also encouraging the growth of a range supporting service firms.

Figure 3.31: Business births per 1,000 working age population, Mid Ulster, NI and UK, 2008-2012



Source: DETI

Figure 3.32: Business deaths per 1,000 working age population, Mid Ulster, NI and UK, 2008-2012

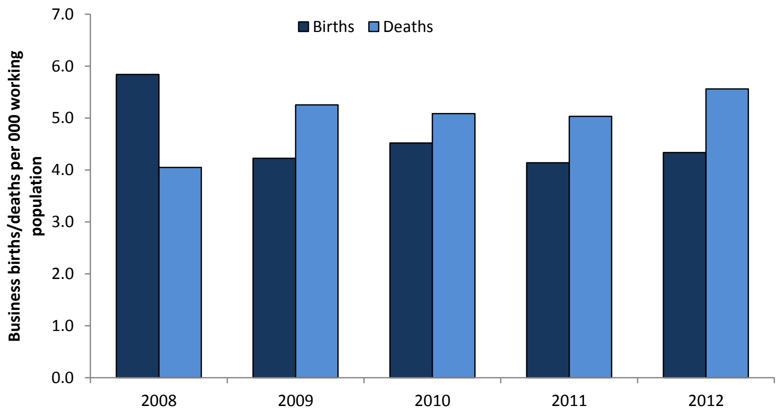


Source: DETI

In 2012 there were 500 business deaths in Mid Ulster. These business closures amount to 9.4% of total business closures in Northern Ireland that year and represents the closure of 6 businesses for every thousand of Mid Ulster's working age population. This figure is marginally higher than the NI level (4.5) and less than the UK equivalent (6.2). Business deaths should be viewed in context of the overall business environment. Therefore having a small number of business deaths does not necessarily conclude the 'ideal' business environment, nor does high rates inevitably mean there is a problem in the economy. An efficient economy with a thriving entrepreneurial spirit creates the environment wherein people with effective business plans can source the necessary capital and trade in a timely manner. Similarly those businesses which are no longer competitive due to inefficiency will be put out of business by market forces. This is a process which is essential in order for capital and labour to be distributed to the more productive areas of the economy.

Since 2009 business deaths have out-numbered births consistently. These factors combined ensure business stock within the Mid Ulster area has been falling in recent times. A falling business stock will have implications for employment and wage growth going forward.

Figure 3.33: Business births vs business deaths per 1,000 working age population, Mid-Ulster, 2008-2012



Source: DETI

Tourism

Mid Ulster tourism indicators

Mid Ulster was the second least visited council area based on tourist visits in 2011/2012, accounting for 3% of all visits in Northern Ireland. Expenditure amounted to £32m or 5% of the Northern Ireland total. Mid Ulster did however have the highest average trip duration (5 days) and spend by visitors (£234).

Table 3.4: Estimated average visits and expenditure to Northern Ireland in 2011-12

LGD	Trips (000s)	Nights (000s)	Expenditure (m)
Belfast	1114	3867	232
Causeway Coast and Glens	795	2655	114
Newry, Mourne and Down	482	1772	61
Fermanagh and Omagh	316	919	47
North Down and Ards	267	1051	36
Derry and Strabane	238	897	39
Antrim and Newtownabbey	222	712	28
Mid and East Antrim	219	554	30
Armagh, Banbridge and Craigavon	164	578	20
Mid Ulster	**137**	**690**	**32**
Lisburn and Castlereagh	126	513	22

Source: NISRA

In 2011/12, approximately half of all trips to Northern Ireland were by visitors from outside the country. These people in general have longer average stays (4.8 days vs 2.1 days by domestic visitors) and spend more during their time in the country - £230 per trip vs £93 per trip (475 million compared to 186 million generated from domestic visitors). Fifty eight percent of all visitors to Mid Ulster that year were from outside of Northern Ireland and these visitors contributed to over 80% of total tourism expenditure in the area (Table 3.5). Average trip duration (7.4 days) to Mid Ulster by this grouping was longer than any other council area and average spend was also the highest (£341).

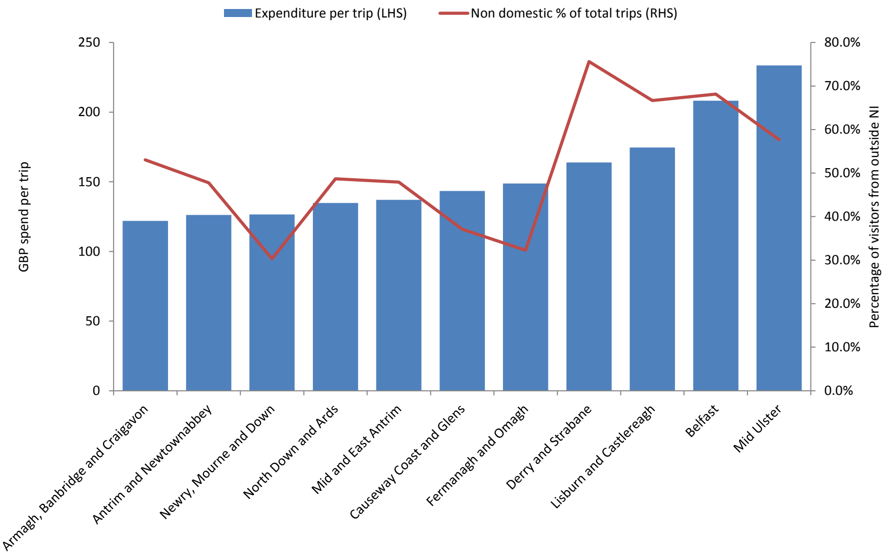
Table 3.5: Estimated average visits and expenditure to Northern Ireland by visitors from outside NI, Northern Ireland, 2011-12

LGD	Trips (000s)	Nights (000s)	Expenditure (m)
Belfast	759	3397	197
Causeway Coast and Glens	295	1334	60
Derry and Strabane	180	778	33
Newry, Mourne and Down	146	803	31
North Down and Ards	130	714	27
Antrim and Newtownabbey	106	537	22
Mid and East Antrim	105	396	20
Fermanagh and Omagh	102	529	24
Armagh, Banbridge and Craigavon	87	405	14
Lisburn and Castlereagh	84	465	20
Mid Ulster	**79**	**582**	**27**

Source: NISRA

As illustrated in Figure 3.34 - the four council areas which generate the most expenditure per visit are the same as those which attract a higher proportion of visitors from outside Northern Ireland. Stay duration in Mid Ulster, by persons from outside Northern Ireland contribute towards the highest expenditure per trip of any council area that year.

Figure 3.34: Expenditure per visit and proportion of visitors from outside NI, Council Districts, 2011-2012



Source: NISRA

Deprivation

Deprivation scores

Deprivation can be a particularly difficult variable to quantify as it can be spatially acute and can apply to a number of aspects which effect any given persons quality of life. The Northern Ireland Multiple Deprivation Measure was updated in 2010 and provides an official measure of spatial deprivation from which to draw conclusions. The overall multiple deprivation measure is weighted according to a number of groupings which aim to capture the majority of indicators of deprivation:

- Income deprivation
- Employment deprivation
- Health deprivation and disability
- Education, skills and training deprivation
- Proximity to services
- Living environment
- Crime and disorder

The Mid Ulster area exhibits varying degrees of deprivation. The Magherfelt area ranked as the least deprived council authority (26th) in Northern Ireland according to the overall extent score. Cookstown and Dungannon ranked 15th and 12th respectively. This would suggest a significant disparity within the new council area in terms of levels of deprivation.

Table 3.6: Multiple deprivation measure ranking, NI Local Government Districts, 2010

	Extent score Rank	Income score Rank	Employment score Rank
Cookstown	15	18	22
Dungannon	12	11	12
Magherafelt	26	21	21

Source: NISRA

Deprivation rankings at the electoral ward level allow significant concentrations of deprivation within local government districts to be identified. None of the three government districts have significant concentrations of wards in the most or least deprived ranking extremes, which suggest deprivation is not widely spread within the Mid Ulster area. Unsurprising, Dungannon (with the higher deprivation extent score of the three areas) has the higher proportion of wards appearing in the top quarter of most deprived wards, whereas Magherafelt has the higher proportion of its wards being ranking in the least deprived quartile.

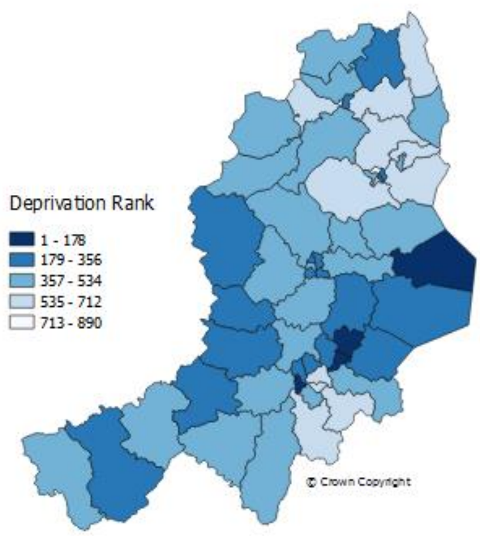
Table 2.7: Deprivation ward dispersion, NI Local Government Districts, 2010

	Ward number	Ward % most deprived (Lower quartile)	Wards % least deprived (Upper quartile)
Cookstown	16	13%	0%
Dungannon	22	18%	9%
Magherafelt	16	6%	13%

Source: NISRA

The super output area level provides a more detailed examination of deprivation extent with the Mid Ulster area. The overall picture is similar to that see at the ward level; a wide dispersion of deprivation which varies considerably based on location.

Figure 3.35: Deprivation ranking, Mid Ulster Super Output area, 2010



Source: Oxford Economics

Conclusion

The analysis has shown that the Mid Ulster economy is heavily reliant on the manufacturing, construction and agri food sectors for jobs and businesses. An analysis of employment concentration at detailed sub-sector shows the linkages that exist between these three broad sectors of the economy. Consequently the health of one sector has an impact on the others through supply chain spending and downstream demand.

The economy has performed relatively well in recent times. The labour market has been tight enough to attract migrants and result in the fastest rate of population growth in the region. Despite this, employment levels remain below peak levels and unemployment is significantly above pre-recession lows. An analysis of the unemployed raises some concerns around youth and long-term unemployment. It also suggests that most of the unemployed are better equipped to work in sectors of the economy that have struggled recently (even though manufacturing has grown).

Future growth will depend on exports, skills and job creation. Mid Ulster underperforms at both ends of the educational attainment spectrum, while its businesses tend to be smaller than average. These factors could add to the challenges of securing faster growth and creating enough jobs to force unemployment levels back to pre-recession levels. However manufacturing has a large footprint in the Mid Ulster economy and it offers a fantastic opportunity for external trade and demand.

4. The outlook for Mid Ulster

This section presents Oxford Economics baseline forecasts for the Mid Ulster economy. It assumes a business as usual approach and therefore does not include any planned or proposed developments and strategies.

Key findings

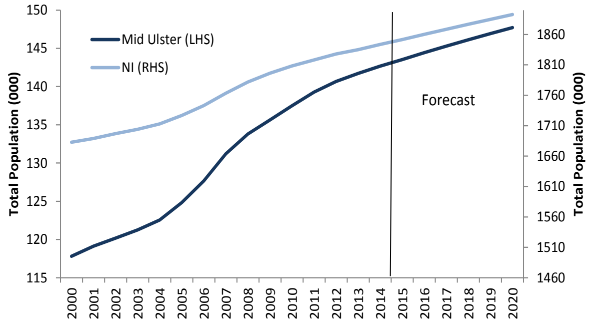
- Population growth to slow as net migration turns negative;
- Labour market relatively subdued with only 3,000 net additional jobs by 2020;
- Unemployment to remain above pre-recession lows;
- Growth sectors of the economy underrepresented and likely to require different infrastructure and skills to the more traditional sectors; and
- Wages to remain below the regional average.

Demography

Population growth

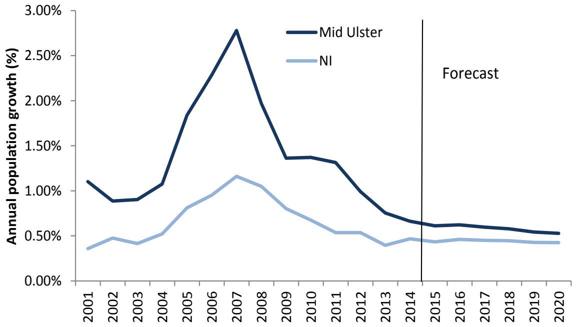
Population growth is set to continue during the forecast period, increasing by 3.5% to reach almost 150,000 people by 2020. However figure 4.2 shows how annual population growth is set to slow over the forecast period. Despite this, it will grow faster than the regional average.

Figure 4.1: Total population, Mid Ulster and Northern Ireland, 2000-2020



Source: Oxford Economics

Figure 4.2: Annual population growth, Mid Ulster and Northern Ireland, 2001-2020

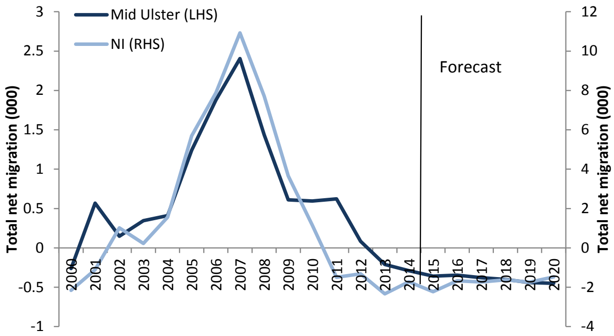


Source: Oxford Economics

Migration

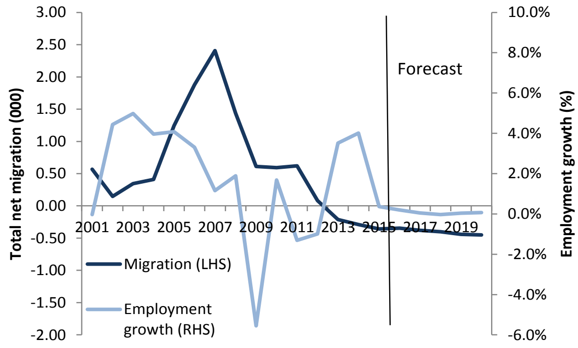
In contrast to the positive net migration experienced over the last decade, we forecast consistent net out-migration. This is in response to the subdued labour market and lack of net job creation over the forecast period.

Figure 4.3: Total net migration, Mid Ulster and Northern Ireland, 2000-2020



Source: Oxford Economics

Figure 4.4: Migration vs employment growth, Mid Ulster, 2001-2020



Source: Oxford Economics

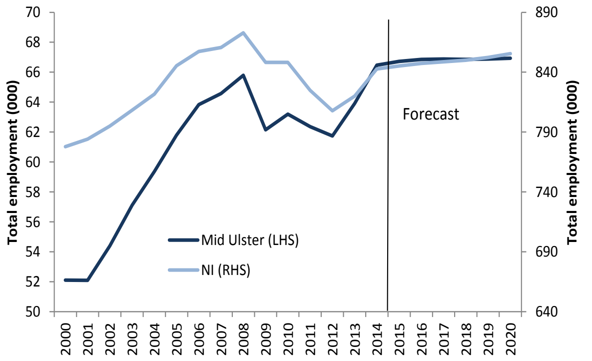
Mid Ulster Economy

Employment

Employment levels are forecast to be relatively static over the forecast period, increasing by just over half a percent between 2014 and 2020. Employment growth in Mid Ulster is expected to increase by just over 3,000 jobs by 2020. Employment levels will have therefore recovered losses made during the post-recession period but are not expected to make significant gains before the end of the decade. Consequently Mid Ulster is expected to underperform relative the Northern Ireland average rate of employment growth (1.5%).

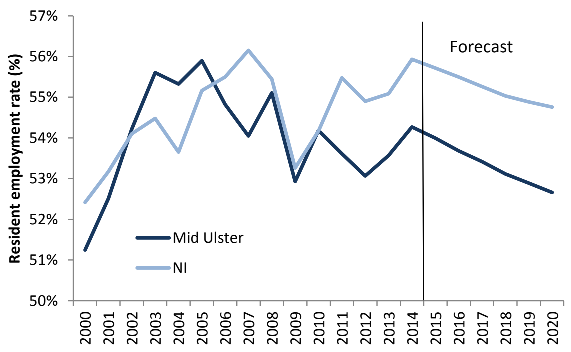
Resident employment as a proportion of working populations in Northern Ireland and Mid Ulster is predicted to fall in the short term as population growth outpaces job creation. Mid Ulster's employment rate is forecast to remain under the Northern Ireland average throughout the forecast period as a consequence of weak employment growth.

Figure 4.5: Total employment, Mid Ulster and Northern Ireland, 2000-2020



Source: Oxford Economics

Figure 4.6:Resident Employment, Mid Ulster and Northern Ireland, 2000-2020



Source: Oxford Economics

Construction and agriculture are expected to provide the majority of new jobs (almost 1,900 jobs) throughout the forecast period. However, these gains fall short of completely compensating for the job losses originating from these same sectors between 2008 and 2013. The majority of sectors will experience some small increases in job creation with the exception of the public sector which will continue to struggle under austerity measures.

Manufacturing, as the most prominent export orientated employing sector will experience negligible job growth over the period to 2020. Professional services and information and communication, are expected to have the largest proportional increase in employment growth of any sector within the period.

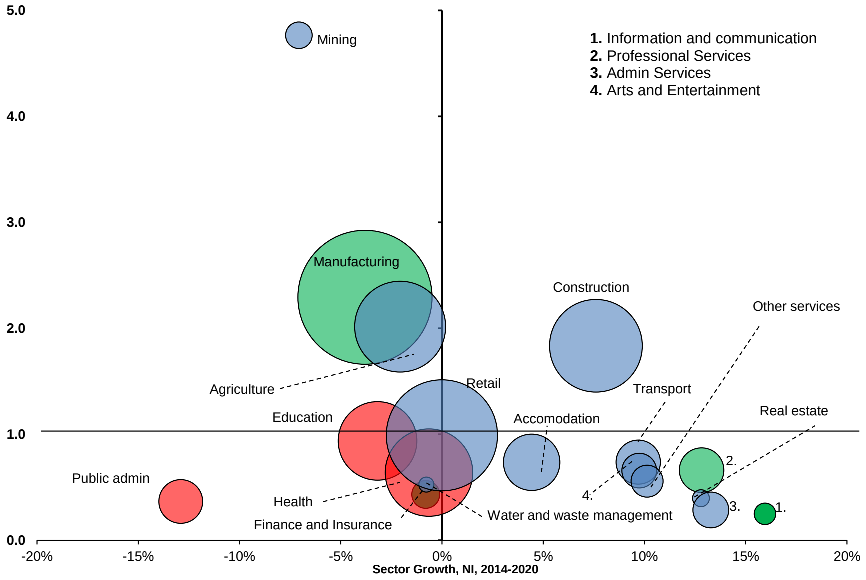
Table 4.1: Change in total employment by sector, Mid Ulster, 2013-2020

Change in Employment	2013-2020	
	No. (000)	% growth
Agriculture, forestry and fishing	0.88	14.5%
Mining and quarrying	-0.05	-7.5%
Manufacturing	0.05	0.3%
Electricity, gas, & steam	0.00	-
Water supply; sewerage, waste management	0.00	1.1%
Construction	0.98	13.9%
Wholesale and retail trade	-0.03	-0.2%
Transportation and storage	0.25	15.1%
Accommodation and food service activities	0.22	8.1%
Information and communication	0.09	22.6%
Financial and insurance activities	-0.02	-3.4%
Real estate activities	0.05	20.3%
Professional, scientific and technical activities	0.35	21.5%
Administrative and support service activities	0.22	21.0%
Public administration and defence	-0.25	-14.8%
Education	-0.09	-1.8%
Human health and social work activities	0.08	1.2%
Arts, entertainment and recreation	0.17	17.4%
Other service activities	0.13	15.0%
Total	**3.02**	**4.7%**

Source: Oxford Economics

Figure 4.7 plots a measure of Mid Ulster's reliance on employment sectors against expected growth over the next decade. Location quotients (LQ) describe an economy's degree of specialisation relative to the Northern Ireland average. A value greater than 1 indicates that Mid Ulster is more specialised in a particular sector than the Northern Ireland average. Any 'bubble' located in the top of the chart indicates an LQ of greater than 1 (e.g. Mining). Furthermore, if employment in that sector is forecast to decline between 2014 and 2020 in Northern Ireland, the bubble will be located in the left hand side of the chart (e.g. mining); and vice versa. The size of each bubble relative to the others shows the relative volume of employment in each sector in 2014 (I.e. more in manufacturing than in construction). Red denotes public services; and green denotes sectors with predominantly exportable goods or services. The number and size of the bubbles in the top right quarter of the chart indicate the sectors in which Mid Ulster is most dependent for employment and which are also expected to expand across the Northern Ireland economy.

Figure: 4.7: Sectors in Mid Ulster vs Northern Ireland growth rate, LQ and employment, 2014-2020



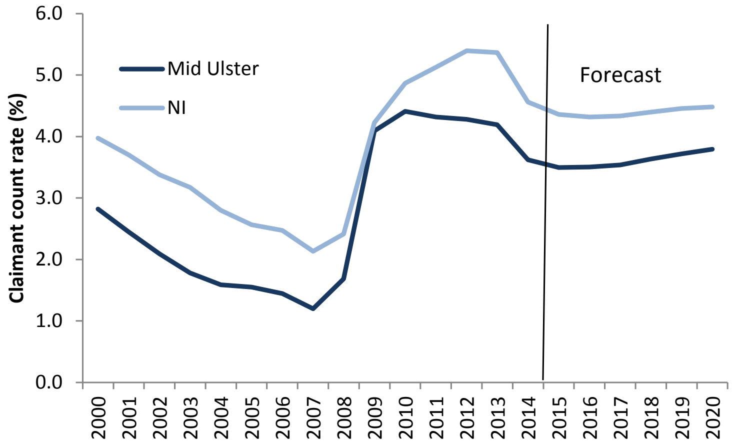
Source: Oxford Economics

As Figure 4.7 shows, most of the growth sectors in Mid Ulster account for smaller shares of employment than the Northern Ireland average. On the other hand, manufacturing, the largest employer is expected to contract. The relative sizes and concentration of growth suggest the Council may need to consider how land is currently used, zoned and planned. The growth sectors of the economy are likely to require very different infrastructure to the more traditional parts of the economy. In addition they will demand highly skilled individuals which the analysis in the previous section showed were relatively underrepresented in the economy, and particularly so in the stock of the unemployed.

Unemployment

Unemployment in Mid Ulster in expected to remain stable at 3.5% until 2020, substantially above the pre-recession rate of under 2%. It is however below the Northern Ireland average.

Figure 4.8: Claimant unemployment rate, Mid Ulster and Northern Ireland, 2000-2020

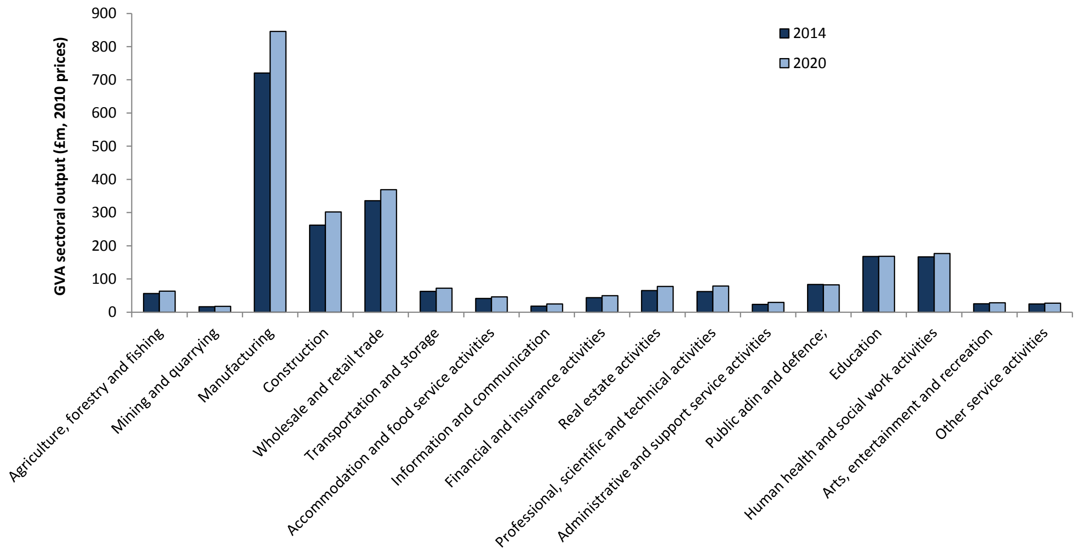


Source: Oxford Economics

Gross Value Added

The value of goods and services produced in mid Ulster is expected to rise by £283m by 2020. Most sectors will see some additional output value growth by 2020, with manufacturing GVA growth accounting for almost 45% of the total increase.

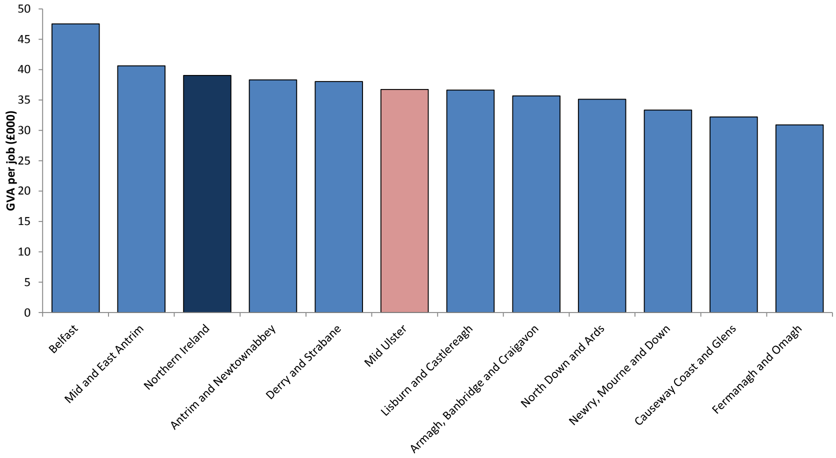
Figure 4.9: GVA output, Mid Ulster industry sectors, 2014-2020



Source: Oxford Economics

In terms of productivity (GVA per job), Mid Ulster is forecast to overtake Lisburn and Castlereagh, as the 6th most productive council area. Mid Ulster will still however remain beneath the Northern Ireland productivity average by over £2,000 per job.

Figure 4.10: GVA per job, Northern Ireland council areas, 2020



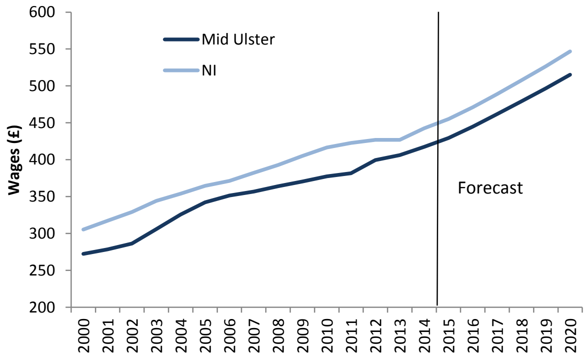
Source: Oxford Economics

Wages

Resident based wages in Mid Ulster are predicted to increase by 23% by the end of the decade, a similar rate to that expected for the Northern Ireland average. Consequently resident wages will remain below the regional average over the forecast period.

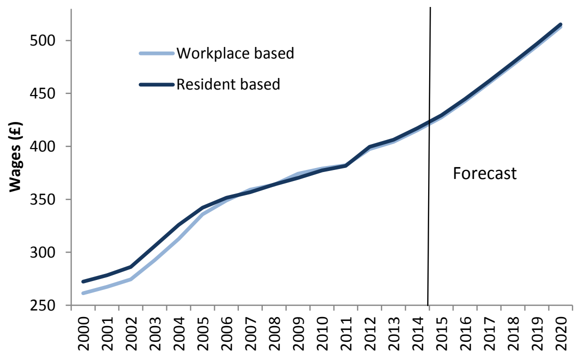
Differences in work based and resident based wages are expected to be fairly stable going forward with resident based wages slightly above workplace based wages.

Figure 4.11: Resident based wages (weekly), Mid Ulster and Northern Ireland, 2000-2020



Source: Oxford Economics

Figure 4.12: Work based vs resident based wages (weekly), Mid Ulster, 2000-2020



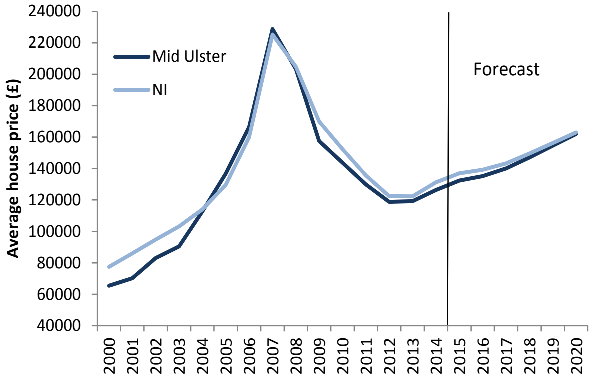
Source: Oxford Economics

House prices

Average house prices in Mid Ulster are forecast to increase by approximately 28% between 2014 and 2020 to reach £162,000; which will be a slightly faster than the regional average (24%). However, housing affordability is expected to worsen relative to the Northern Ireland average over the forecast period (Figure

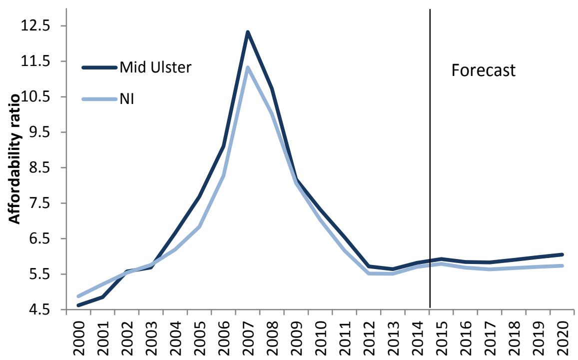
4.14). Affordability - as an income multiple of house price – is expected to increase from 5.8 in 2014 to 6.0 by 2020.

Figure 4.13: Average house prices, Mid-Ulster and Northern Ireland, 2000-2020



Source: Oxford Economics

Figure 4.14: Housing affordability, Mid-Ulster and Northern Ireland, 2000-2020



Source: Oxford Economics

Conclusion

The outlook is relatively subdued. We expect employment levels to remain broadly unchanged from 2014 to 2020 which means unemployment is expected to rise only slightly over the period.

The spare capacity in the labour market and low level of wages are therefore likely to translate through into negative net migration which in turn will slow population growth.

The areas of the economy showing signs of growth are typically underrepresented (in job terms), relative to the regional average. In addition they tend to be those sectors that require highly skilled individuals and appropriate infrastructure to operate and compete globally. Therefore the Council may find that there is an increasingly larger share of business start-ups looking for well-connected office accommodation and highly skilled individuals.

5. SWOT analysis

The preceding analysis regarding Mid Ulster's recent and future economic performance has highlighted the council area's strengths, weaknesses, opportunities and threats. All of these aspects are outlined in the below table:

Strengths	**Weaknesses**
■ Relatively young population ■ Manufacturing specialisms exhibit export potential ■ Unemployment levels low relative to NI average ■ Strong vocational level educational attainment ■ Strong entrepreneurial culture ■ Strong tourism spend per visit	■ Under-represented in high value added growth sectors ■ Economy dependent on the strength of construction, manufacturing and agrifood ■ Over-reliance on sectors driven by consumer confidence ■ Resident employment falling from before the recession took hold ■ Long term unemployed rising ■ High levels of youth unemployment ■ Below NI average productivity levels ■ Low wages (implications for out-migration and house affordability) ■ Poor performance at both ends of the educational spectrum.
Opportunities	**Threats**
■ Increased planning and economic development powers resulting from local government reform ■ Specialist manufacturing shows potential for export growth ■ Tourism visits relatively low compared to other areas ■ Growth expected in higher value added sectors	■ Broad deprivation mix within the council area ■ Austerity measures nationwide ■ Potential skill mismatch between the unemployed and that demanded by business ■ Areas most prominent employment sector (manufacturing) show weak job growth potential ■ Falling business stock ■ Smaller businesses may be more difficult to grow

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Mid Ulster District Council Consultancy Support for Social, Economic and Environmental Data Analysis

A report prepared for Mid Ulster District Council

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Contents

Executive summary **1**
- Social regeneration 1
- Community safety and good relations 2
- Health 2
- Education 2
- Economic regeneration 3
- Built Environment and Spatial Planning. 3
- Cross cutting themes and future gazing 3

1 Introduction **4**
- 1.1 About Oxford Economics 4
- 1.2 Background 4
- 1.3 Mid Ulster's DEA boundaries 5

2 Social Regeneration **9**
- 2.1 Age structure 9
- 2.2 Commuting 11
- 2.1 Income support 11
- 2.2 Deprivation 11
- 2.3 Social health and well-being 13
- 2.4 Summary 14

3 Community Safety and Good Relations **15**
- 3.1 Crime 15
- 3.2 Road Safety 19
- 3.3 Summary 20

4 Health **21**
- 4.1 Long-term limiting illness 22
- 4.2 Carers within the community 24
- 4.3 Deaths and cause 26
- 4.4 Health services 28
- 4.5 Summary 30

5 Education **31**
- 5.1 Skill level attainment 31
- 5.2 School leavers and Further Education 34
- 5.3 Educational need 35

5.4 Summary 36

6 Economic Regeneration 37

6.1 The economic context 37
6.2 Employment rate 41
6.3 Unemployment 41
6.4 Summary 44

7 Built Environment and spatial planning 45

7.1 Home ownership 45
7.2 Vacancy rates 47
7.3 Housing 48
7.4 Public transport 51
7.5 Proximity to services 52
7.6 Summary 53

8 SWOT 54

9 Cross cutting themes 57

9.1 Improving delivery of public services 57
9.2 Underperformance and knock-on impacts 57
9.3 The role of skills and education 60
9.4 Looking forward 61

10 Bibliography 63

Executive summary

The Mid Ulster community plan has the objective of improving the delivery of public services to the council area's residents. Given the newly appointed boundaries of the council area, it has never been more important that the council members have a clear picture of the area's attributes in order to target resources most effectively. To help achieve these aims six pillars or themes have been identified – each chosen to represent the challenges and opportunities facing communities. It is hoped that strongly evidence based resource management can deliver lasting improvements for local people. Consequently Oxford Economics were commissioned by Mid Ulster District Council to help analyse published data held by the council under the six pillars:

- Social Regeneration;
- Community Safety & Good Relations;
- Health;
- Education;
- Economic Regeneration; and
- Built Environment and Spatial Planning.

We make no judgement on the appropriateness of the data to measure performance under each pillar. Instead we have analysed the statistics that were provided. The commentary that follows provides an overview of our findings.

Social regeneration

Mid Ulster has a relatively young demographic but official projections show that the share of people aged 65+ will rise from 14% to 21%. Though there are already some wards with relatively high shares of residents aged 65+ (mainly in Cookstown and Clogher Valley) which means there could be diverging needs across wards in Mid Ulster. For example Sandholes and Tullagh may require much more support from a health and accessibility point of view, whereas other wards may rely more on children services and education. At present how Mid Ulster compares favourably to other council areas in relation to common indicators of social and physical well-being in society. We discuss health in more detail later.

The Mid Ulster area exhibits varying degrees of deprivation. Indeed, almost 90% of Torrent's wards are in the top 50% most deprived in Northern Ireland, compared none in Moyola. Deprivation can result in or cause real challenges for social regeneration. Deprivation is typically not the product or cause of one issues, it normally involves a wide range of issues. For example Torrent and Cookstown are the most deprived DEAs in Mid Ulster. Both had a higher proportion of wards suffering with significant child poverty when compared to the council average and also had a higher proportion of wards with poor post primary attendance. In addition while the share of income benefit claimants in Mid Ulster is on balance below the regional average, Torrent does have notably higher levels of claimants.

Community safety and good relations

Mid Ulster performs relative well from a community safety and good relations point of view. Though there are areas were targeted intervention could be needed:

- Mid Ulster as a whole enjoys low levels of recorded crim. Indeed all DEAs have enjoyed falls over the past two years (with the exception of Carntogher). Though these high level statistics mask variations at a DEA and ward level. Torrent for example has suffered from significant increases in anti-social behaviour. Furthermore violent crime increased throughout Mid Ulster, and it forms a greater share of total crime than compared to the regional average.
- In addition while Mid Ulster's road safety record has been among the best in Northern Ireland, there are wards with exceptionally high causality rates.

Health

Long term illness in communities continues to create challenges for services. The proportion of Mid Ulster residents suffering from limiting long term illness is below the regional average and has fallen by a larger amount than any other local authority between 2001 and 2011. However considering recent population increases, the percentage increase in the number of long term sick has been on par with the Northern Ireland average. Unpaid carers have increased in number throughout Mid Ulster; however there proportions and growth have not exceeded the regional average in general.

Disease death rates in Mid Ulster are amongst some of the worst in Northern Ireland. Improvements have been observed but not to the same extent as seen regionally. Deaths resulting from disease amongst Mid Ulster DEAs have been equally unimpressive; yet a selection of DEAs have made meaningful strides towards improvement.

Education

The proportion of those with no qualifications in Mid Ulster was found to be higher than the regional average. This pattern is mirrored in all the DEAs within the council area, though improvements have been evident over the last decade. Similarly, educational attainment at NVQ level 4 has been below average within the council area. The Cookstown area continued to underperform and most DEAs failed to experience the proportion improvements observed at the regional level. On a positive note, school leaver performance has been encouraging and engagement in further education is historically high.

Economic regeneration

Due in part to the council area's employment structure, job creation is expected to remain subdued in the medium term. Mid Ulster employment levels remain comparatively strong, in the regional context; however the Torrent and Cookstown areas continue to struggle in this regard.

Mid Ulster unemployment levels have historically been lower than the regional joblessness figures. However local job losses have meant that overall unemployment is now much more in line with the Northern Ireland level; and some DEAs have joblessness in excess of the regional level.

The fact that young people's share of the unemployed has risen is worrying, given the potential knock on impacts it can have on social cohesion, disillusionment with returns to education, crime, long-term unemployment, and out-migration

Built Environment and Spatial Planning.

Owner occupied housing is more common in Mid Ulster than in Northern Ireland generally. Mid Ulster home owners are also less likely to be highly leveraged in the purchase of their home on average. Unsurprisingly, renting is less common within the council area – with Dungannon being the only exception. Mid Ulster house prices are above the regional average and are growing at a faster rate. Social housing as a share to Mid Ulster households has been on the decline despite signs to increasing demand.

Public transport is used to a lesser extent in Mid Ulster than seen elsewhere within Northern Ireland, prompting questions about service availability. Access to services indicators show significant room for improvement in order to achieve the standards enjoyed by communities elsewhere in Northern Ireland.

Cross cutting themes and future gazing

There are strong relationships between variables in this report both within and across pillars. Consequently improvements in one area will invariably have positive knock on impacts in others. We show a handful of examples in the main body of this report. We note however that education and skills could have a particularly important role in the performance of others pillars.

Over the next 10 years official and Oxford Economics projections suggest a few broad trends for Mid Ulster. These trends could put pressures on certain pillars of the Community Plan. For example an aging population is likely to have implications for the Health pillar while a subdued labour market could push up antisocial behaviour, crime and deprivation which impact a number pillars in this study. Though austerity measures will mean future policy and Government intervention will likely have to be more effective with less funding which adds a further challenge to the Council.

1 Introduction

1.1 About Oxford Economics

Oxford Economics was founded in 1981 as a commercial venture with Oxford University's business college to provide economic forecasting and modelling to UK companies and financial institutions expanding abroad. Since then, we have become one of the world's foremost independent global advisory firms, providing reports, forecasts and analytical tools on 200 countries, 100 industrial sectors and over 3,000 cities. Our best-of-class global economic and industry models and analytical tools give us an unparalleled ability to forecast external market trends and assess their economic, social and business impact.

Headquartered in Oxford, England, with regional centres in London, New York, and Singapore, Oxford Economics has offices across the globe in Belfast, Chicago, Dubai, Miami, Milan, Paris, Philadelphia, San Francisco, and Washington DC. We employ over 130 full-time people, including more than 90 professional economists, industry experts and business editors—one of the largest teams of macroeconomists and thought leadership specialists. Our global team is highly skilled in a full range of research techniques and thought leadership capabilities, from econometric modelling, scenario framing, and economic impact analysis to market surveys, case studies, expert panels, and web analytics. Underpinning our in-house expertise is a contributor network of over 500 economists, analysts and journalists around the world and our heritage with Oxford University and the academic community.

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1.2 Background

In September 2014, Oxford Economics were commissioned by Mid Ulster District Council to facilitate consultancy support for social, economic and environmental data analysis.

The overarching aim of this project is to provide a comprehensive analysis of data collated for the Cookstown, Dungannon and Magherafelt Councils – and making relevant comparisons at DEA, Council, and regional level. This will help identify strengths, weaknesses, opportunities and threats, and the aspects in which Mid Ulster is performing well / poorly. **Note: Throughout, 'local' refers to Mid Ulster and 'regional' refers to Northern Ireland.**

To facilitate this analysis, the Council have provided a wide range of publicly available ward level data for each of the three current Councils. This report draws from data covering the following "pillars":

- Social Regeneration;
- Community Safety & Good Relations;
- Health;
- Education;
- Economic Regeneration; and
- Built Environment and Spatial Planning.

1.3 Mid Ulster's DEA boundaries

District Electoral Area[1] ("DEA") boundaries are yet to be formally agreed, as far as we understand. For the purpose of elections to Mid Ulster Council, its current 54 constituent wards will be split into seven DEAs, each containing between five and nine wards. The wards of Mid Ulster are subdivisions of the Council area, used primarily for statistics and elections. Wards are used to create constituencies for local government authorities, the Northern Ireland Assembly and the House of Commons of the United Kingdom.

For the purposes of this report we use the boundary definitions in the table below – as agreed with Mid Ulster Council.

Whilst population is quite evenly spread across each of the DEAs in Table 1.1, Dungannon, Cookstown and Magherafelt are more densely populated, given they are the three major urban centres in the Council area. Pockets of deprivation are found in Cookstown, Dungannon and Torrent. Generally this mirrors the trend seen across Northern Ireland – with the most deprived areas being in built up parts of major urban centres like Belfast and Derry.

[1] A detailed map of Mid Ulster, its wards and DEAs can be found here: http://www.deac-ni.org/index/current-review-of-district-electoral-areas/final_mid_ulster__300dpi_a2_.pdf

Table1.1: Mid Ulster DEAs/ Wards at a glance

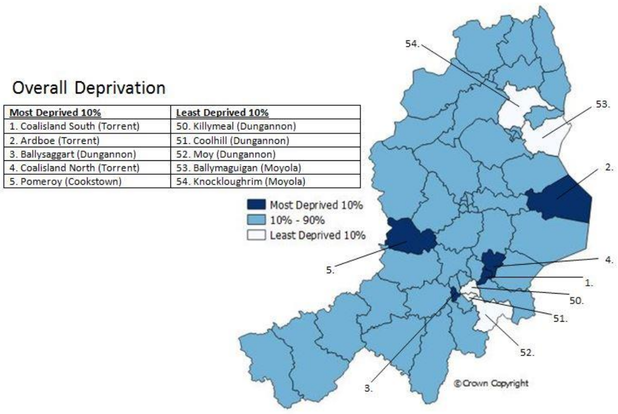
DEA	Wards	Population (2012)	Population density (per km^2)	Deprivation rank (1 being most deprived)
Carntogher	Lower Glenshane	3,019	37	418
	Swatragh	3,097	45	397
	Upperlands	2,355	63	218
	Gulladuff	2,669	73	429
	Valley	2,743	75	392
	Maghera	2,690	1,416	140
Magherafelt	Lecumpher	2,629	40	425
	Glebe	3,247	1,705	400
	Town Parks West	2,255	1,386	330
	Town Parks East	3,126	2,673	288
	Lissan	1,966	27	310
	Moneymore	2,572	117	268
	The Loup	2,776	46	280
Torrent	Ardboe	2,411	39	75
	Stewartstown	1,935	45	158
	Killycolpy	2,454	26	165
	Altmore	2,574	42	219
	Donaghmore	2,467	89	369
	Coalisland South	2,630	641	30
	Coalisland North	3,287	298	91
	Coalisland West and Newmills	2,745	298	241
	Washing Bay	2,794	68	201
Clogher Valley	Fivemiletown	2,201	28	312
	Clogher	2,286	22	253
	Augher	2,247	31	366
	Ballygawley	2,551	45	226
	Castlecaulfield	2,663	68	384
	Aughnacloy	2,605	37	278
	Caledon	2,345	29	313
Moyola	Draperstown	2,956	56	345
	Tobermore	2,594	43	301
	Knockloughrim	2,724	66	452
	Castledawson	3,336	227	348
	Bellaghy	2,652	94	323
	Ballymaguigan	2,640	65	451
Cookstown	Dunnamore	2,236	23	151
	Pomeroy	2,247	58	115
	Oaklands	2,145	41	378
	Coagh	2,069	71	283
	Oldtown	2,466	3,019	169
	Tullagh	2,298	2,128	257
	Gortalowry	3,001	1,626	220
	Killymoon	2,015	1,062	149
	Newbuildings	2,289	1,074	195
	Sandholes	1,775	44	340
Dungannon	Drumglass	2,359	500	127
	Mullaghmore	2,560	637	225
	Ballysaggart	2,661	1,043	87
	Moygashel	2,229	370	353
	Coolhill	3,020	1,304	439
	Killymeal	3,033	498	430
	Killyman	2,609	74	381
	Moy	3,068	115	445
	Benburb	2,813	68	396

Source: NISRA.

Note: Shading refers to the ten highest and lowest wards among all Mid Ulster DEAs, with red being the highest ten in a given category. Ward deprivation sourced from the Northern Ireland multiple deprivation measure 2010.

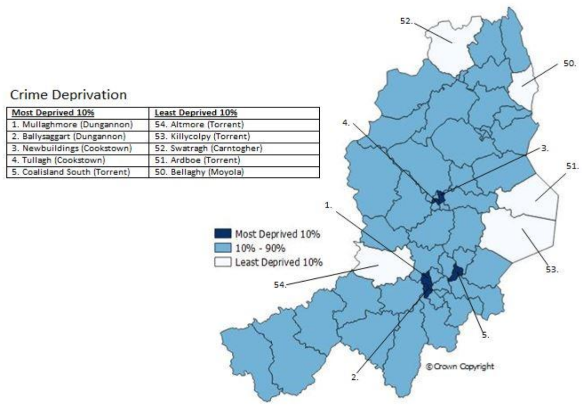
The maps below highlight the areas which are in the most deprived 10% and least deprived 10% in Mid Ulster. Deprivation is a key indicator of the quality of life in an area. Typically areas in Northern Ireland with low deprivation are characteristic of high economic activity rates, relatively high wages and skill levels. The most notable pockets of deprivation are in the Torrent and Dungannon DEAs. For example; across a number of deprivation measures, Torrent and Ballysaggart are among the worst performing. However, wards in Moyola DEA are consistently among the least deprived 10% in Mid Ulster.

Figure 1.1: Overall Multiple deprivation outlier areas, Mid Ulster, 2010



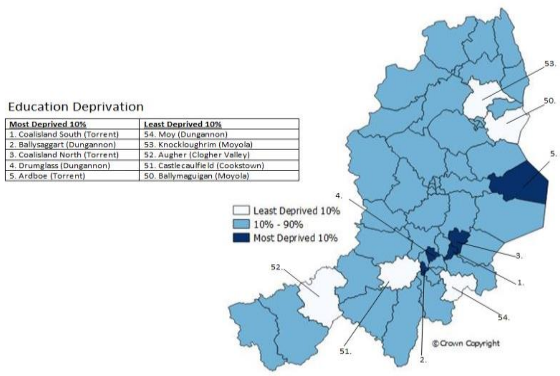
Source: NIMDM, Oxford Economics

Figure 1.2: Crime and Disorder deprivation outlier areas, Mid Ulster, 2010



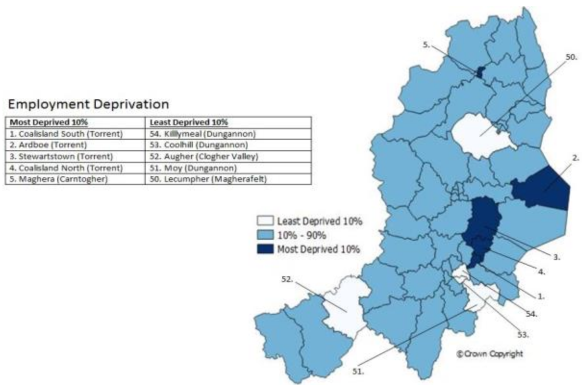
Source: NIMDM, Oxford Economics

Figure 1.3: Education and Skills deprivation outlier areas, Mid Ulster, 2010



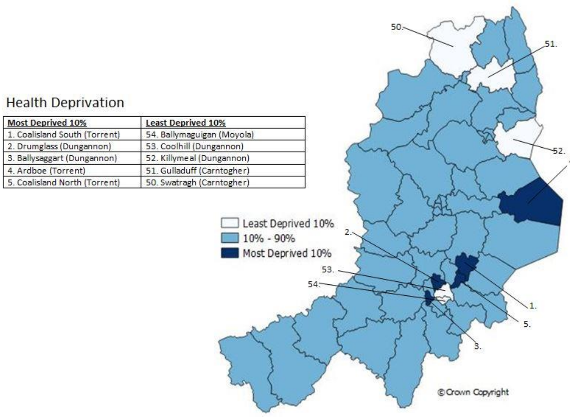
Source: NIMDM, Oxford Economics

Figure 1.4: Employment deprivation outlier areas, Mid Ulster, 2010



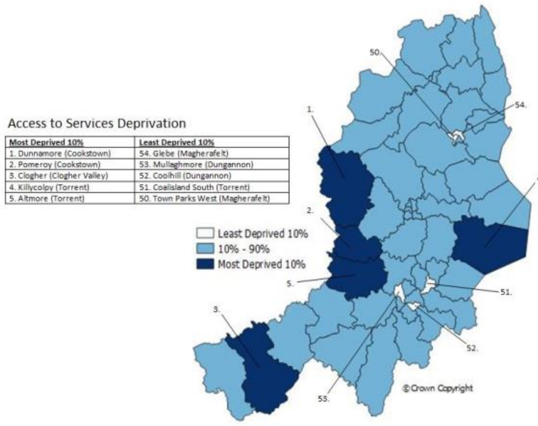
Source: NIMDM, Oxford Economics

Figure 1.5: Health and Disability deprivation outlier areas, Mid Ulster, 2010



Source: NIMDM, Oxford Economics

Figure 1.6: Proximity to Services deprivation outlier areas, Mid Ulster, 2010



Source: NIMDM, Oxford Economics

2 Social Regeneration

The analysis in this section and in the following five; covers variables that have been selected by Mid Ulster Council representatives. We have not made any judgement on whether they are the best variables to measure the six pillars.

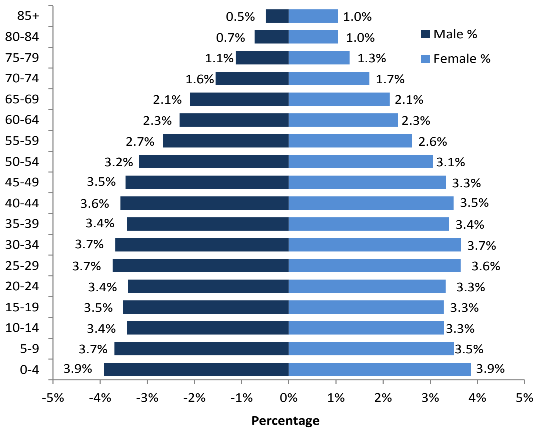
Key findings

- Mid Ulster's population is younger than the Northern Ireland average, though official projections show that the share of people aged 65+ will rise from 14% to 21% - which will have consequences for services and work patterns;
- There are some wards with relatively high shares of residents aged 65+ (mainly in Cookstown and Clogher Valley);
- The share of income benefit claimants is on balance below the regional average, however Torrent does have notably higher levels of claimants;
- Indeed, almost 90% of Torrent's wards are in the top 50% most deprived in Northern Ireland, compared none in Moyola;
- Torrent and Cookstown were identified as among the most deprived DEAs in Mid Ulster. Both had a higher proportion of wards suffering with significant child poverty when compared to the council average. and a higher proportion of wards with poor post primary attendance compared to the council average;
- The Moyola area was the least deprived DEA within Mid Ulster; with most of its wards being concentrated in the less deprived region of the NI deprivation rankings. Torrent was the most deprived based on this measure and the Dungannon DEA exhibited the largest range in observed deprivation; and
- Mid Ulster compares favourably to other council areas in relation to common indicators of social and physical well-being in society. Though its wider performance on health indicators are more mixed.

2.1 Age structure

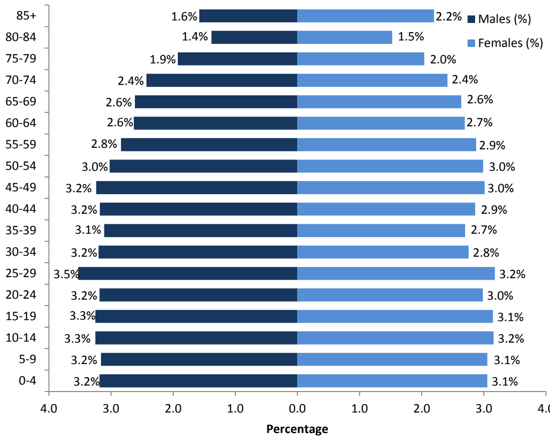
Mid Ulster's population structure has a working age demographic similar in proportion to the Northern Ireland average – with 64% of all residents aged between 16 and 64 (Figure 2.1). The differences only become apparent when we analyse the tails of the council area's age distribution. Mid Ulster has a higher proportion of younger people (0-15) and a lower proportion of older people (65+) than the regional average – 23% compared to 21% and 13% compared to 15% respectively.

Figure 2.1: Age structure, Mid Ulster, 2013



Source: NISRA

Figure 2.2: Projected age structure, Mid Ulster, 2037



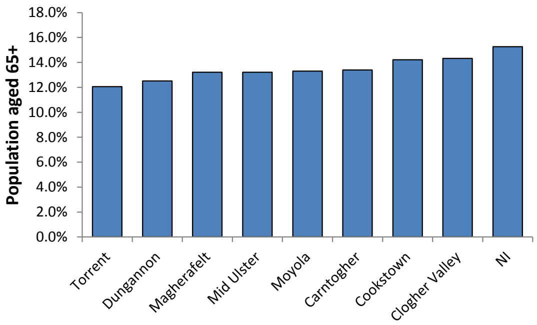
Source: NISRA

NISRA based projections have estimated that Mid Ulster's working age population will fall and the proportion of elderly within the community will increase from 13% to 21% by 2037. The projections however predict that although the Mid Ulster population is expected to age, the overall age structure is to remain younger than the regional proportions.

Mid Ulster DEAs proportion of elderly residents are below the Northern Ireland average...

Figure 2.3 illustrates the proportion of the population aged 65 and over within Mid Ulster. As noted previously Northern Ireland as a whole has a higher proportion of elderly people compared to Mid Ulster. All DEAs within the council area have lower proportions of older people compared to the regional share; though Cookstown and Clogher Valley have the closest share of elderly to that the regional average (see Table 2.1).

Figure 2.3: Percentage of population aged 65+, Mid Ulster DEAs, 2013



Source: NISRA

Table 2.1: Population over 65+, Mid Ulster Ward Outliers, 2013

		Wards	Rank
Highest	18.4%	Sandholes (Cookstown)	1
	18.1%	Tullagh (Cookstown)	2
	17.6%	Fivemiletown (Clogher Valley)	3
Lowest	10.1%	Coolhill (Dungannon)	52
	9.9%	Washing Bay (Torrent)	53
	9.3%	Gortalowry (Cookstown)	54

Source: NISRA

All Mid Ulster DEAs had lower proportions of residents aged 65 or over compared to the Northern Ireland average, though there are some wards with higher shares.

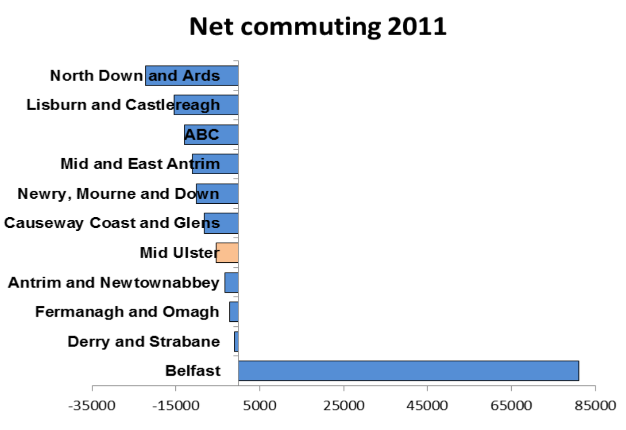
2.2 Commuting

Mid Ulster's net commuting stood at almost -5,500 as per the last census. Commuting is the product of many different factors, but the key ones are access to jobs and wages. At the start of the century residence based earning in Mid Ulster were higher than work based earnings, suggesting that residents who travelled outside the economy for work could enjoy higher wages. However both measures are now broadly similar which could explain the relatively low levels of net out commuting.

2.1 Income support

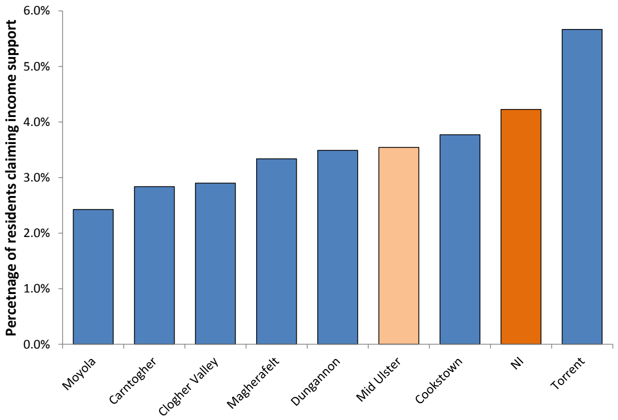
Income support claimants vary throughout the Mid Ulster council area. This benefit can act as an indicator of low income and living standards within communities. Mid Ulster's proportion of residents claiming this benefit was just over 3% in 2012. In comparison the regional figure was slightly larger at just over 4%. Mid Ulster's DEAs proportion of income support claimants were all below the regional average with the exception of Torrent which had nearly 6% of all residents claiming the benefit (Figure 2.5).

Figure 2.4: Net inward/outward commuting Northern Ireland District Councils, 2011



Source: NISRA

Figure 2.5: Percentage of residents claiming income support, Mid Ulster DEAs, 2012



Source: NISRA

2.2 Deprivation

As noted in our socio-economic report for the Council, the Mid Ulster area exhibits varying degrees of deprivation. The Magherafelt area ranks as the least deprived council authority (26th) in Northern Ireland according to the overall extent score. Cookstown and Dungannon ranked 15th and 12th respectively. As table 2.2 shows there is a significant disparity within the new council area in terms of levels of deprivation.

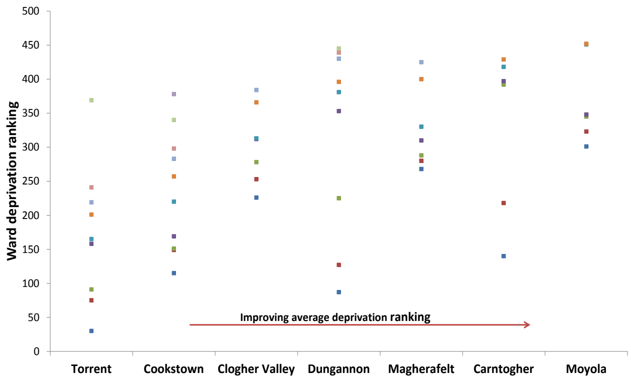
Table 2.2: Multiple deprivation measure ranking (1 being the most deprived), NI Local Government Districts, 2010

	Extent score Rank	Income score Rank	Employment score Rank
Cookstown	15	18	22
Dungannon	12	11	12
Magherafelt	26	21	21

Source: NISRA

The overall multiple deprivation measure is a cumulative deprivation indicator which incorporates seven domains including employment, health, crime, etc for all areas within Northern Ireland. Each ward is given a rank from 1 to 582, were 1 is the most deprived and 582 is the least deprived. In order to construct an approximation of deprivation according to DEA, the ranks of each ward within DEAs were averaged to create Figure 2.6. From this we can highlight more clearly the DEAs were deprivation is more evident and its concentration. The DEA with the highest average deprivation rank was Torrent and the least deprived was Moyola according to this measure. Almost 90% of Torrent's wards are located in the top 50% most deprived in Northern Ireland, whereas Moyola has none.

Figure 2.6: Average DEA deprivation ranking and ward spread, Mid Ulster, 2010



Source: NISRA

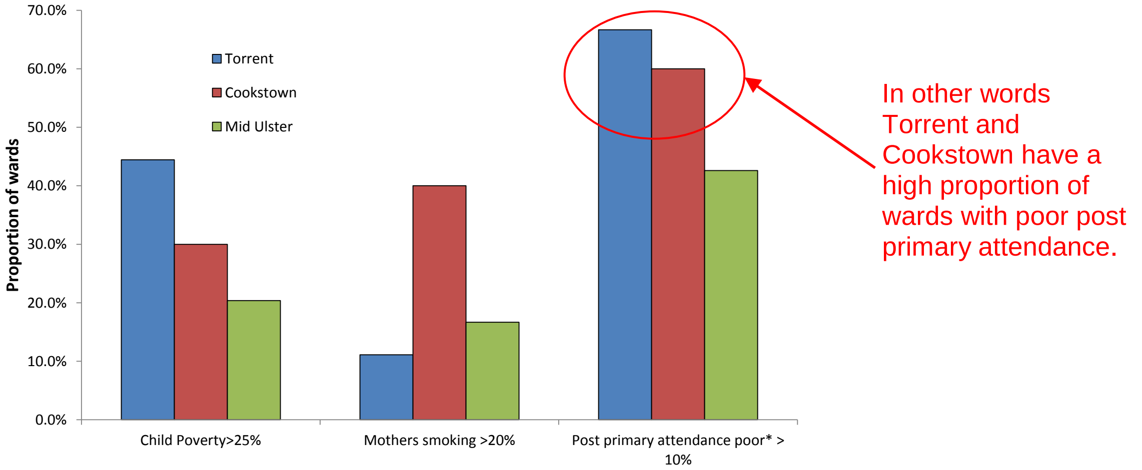
Table 2.3: Proportion of wards in the NI top 50% most deprived, Mid Ulster DEAs, 2010

	Wards deprived (top 50 percent)
Torrent	88.9%
Cookstown	70.0%
Magherafelt	42.9%
Clogher Valley	42.9%
Carntogher	33.3%
Dungannon	33.3%
Moyola	0.0%

Source: NISRA

Deprivation has an impact on all members of society and no more so than the young. Figure 2.7 shows a selection of indicators which are commonly believed to have the ability to negatively impact a young person's future. In the majority of cases the most deprived DEAs have higher instances of each indicator when compared to the council average.

Figure 2.7: Social indicators of young people's well-being, Mid Ulster area comparison, 2011 and 2013



Source: NISRA, CYPSP

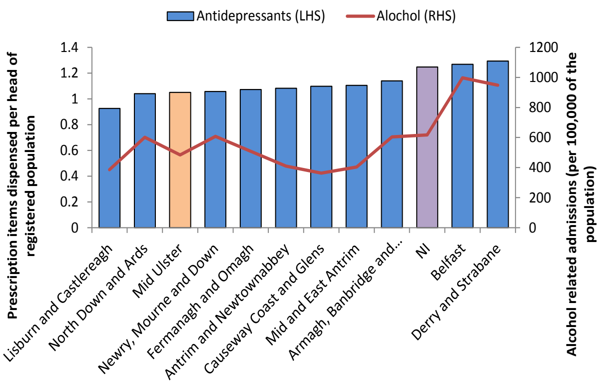
*Note: Poor attendance equates to less than 85% of total term time attended

> *Torrent and Cookstown* were identified as among the *most deprived* DEAs in Mid Ulster. Both these DEAs had a higher proportion of wards suffering with significant child poverty when compared to the council average. Both these DEAs had a higher proportion of wards with poor post primary attendance when compared to the council average.

2.3 Social health and well-being

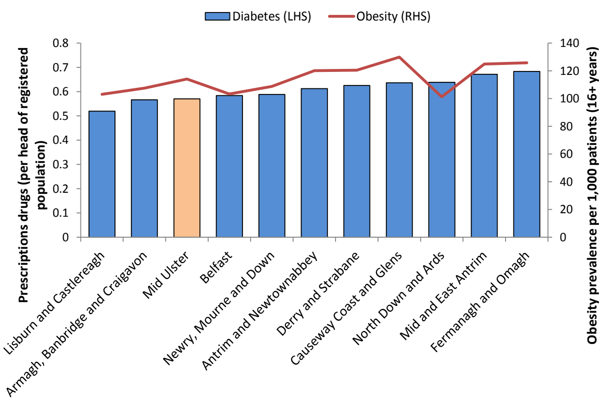
Although we discuss health data in detail later in this report, it is useful to consider medical well-being and mental health impacts on the quality of life within communities. Figure 2.8 presents data on prescriptions dispensed for antidepressants and alcohol related hospital admissions. Both provide proxy measures for gauging emotional/ mental health. Figure 2.9 better describes physical health. In both instances Mid Ulster compares favourably to other areas within Northern Ireland. As discussed in section 4 Mid Ulster has a mixed performance when we consider health indicators. It has one of the lowest shares of people with long-term limiting illness, though it has the highest share of deaths resulting from disease.

Figure 2.8: Prescriptions dispensed for antidepressants vs alcohol related hospital admissions, Northern Ireland Council areas, 2011-2013



Source: NINIS

Figure2.9: Prescriptions dispensed for diabetes vs obesity prevalence, Northern Ireland Council areas, 2013/14



Source: NINIS

Mid Ulster compares favourably to other council areas in relation to common indicators of social and physical well-being in society. Though its wider performance on health indicators are more mixed.

2.4 Summary

Mid Ulster has a relatively young demographic but official projections show that the share of people aged 65+ will rise from 14% to 21%. Though there are already some wards with relatively high shares of residents aged 65+ (mainly in Cookstown and Clogher Valley) which means there could be diverging needs across wards in Mid Ulster. For example Sandholes and Tullagh may require much more support from a health and accessibility point of view, whereas other wards may rely more on children services and education. At present how Mid Ulster compares favourably to other council areas in relation to common indicators of social and physical well-being in society. We discuss health in more detail later. The Mid Ulster area exhibits varying degrees of deprivation. Indeed, almost 90% of Torrent's wards are in the top 50% most deprived in Northern Ireland, compared none in Moyola. Deprivation can result in or cause real challenges for social regeneration. Deprivation is typically not the product or cause of one issues, it normally involves a wide range of issues. For example Torrent and Cookstown are the most deprived DEAs in Mid Ulster. Both had a higher proportion of wards suffering with significant child poverty when compared to the council average and also had a higher proportion of wards with poor post primary attendance. In addition while the share of income benefit claimants in Mid Ulster is on balance below the regional average, Torrent does have notably higher levels of claimants.

3 Community Safety and Good Relations

Key findings

- Mid Ulster as a whole has low levels of recorded crime relative to the regional average;
- However, the prevalence of criminal behaviour varies greatly throughout the council area (with Dungannon and Cookstown suffering from the highest levels);
- Recorded crime fell in all DEAs, with the exception of Carntogher, which saw a 10% increase over two years;
- Violent crime increased throughout Mid Ulster;
- Torrent has suffered from significant increases in anti-social behavior;
- Violent crime forms a greater share of total crime in Mid Ulster than that of the region in general;
- Hate crime is less common, but when it does take place, the sectarian motivation is as prevalent as elsewhere in Northern Ireland
- Road causalities rates in Mid Ulster are lower than the regional average. However there are wards with exceptionally high causality rates.

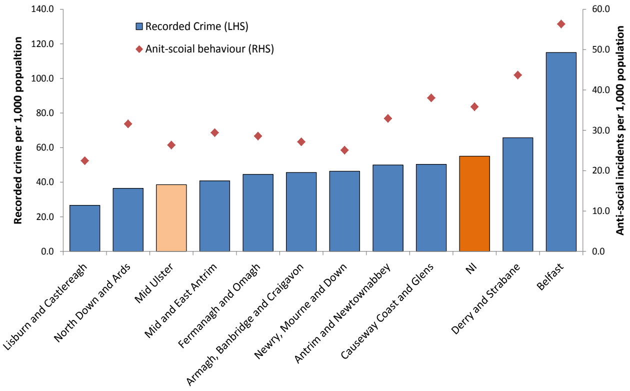
3.1 Crime

Crime has a detrimental impact on people and communities throughout society. Crime prevalence will inevitably have far reaching implications in a number of areas; ranging from increased policing budgets, quality of life indicators and business performance.

Mid Ulster's recorded crime levels are relatively low compared to the Northern Ireland average...

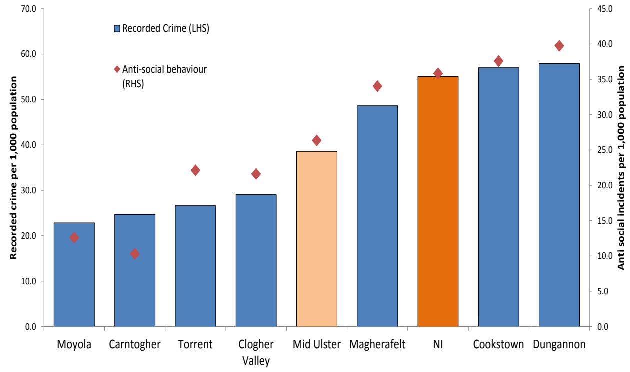
Crime levels in Northern Ireland are more concentrated in the local authorities which are dominated by urban concentrations (Belfast etc.). Official statistics show that Mid Ulster's recorded crime levels are relatively low compared to the Northern Ireland average. The regional average rate of recorded criminal incidents in 2012 was 55 crimes per 1,000 of the population. Mid Ulster's equivalent figure was 39 recorded incidents (Figure 3.1).

Figure 3.1: Recorded Crime and anti-social behaviour, Northern Ireland, 2012



Source: NISRA

Figure 3.2: Recorded Crime and anti-social behaviour, Mid Ulster DEAs, 2012



Source: NISRA

Anti-social behaviour demonstrates a clear relationship with an areas overall prevalence of criminal activity. This pattern holds true in Mid Ulster, were recorded anti-social behaviour occurrences within the council area rank among the lowest recorded of the 11 new council areas.

On the other hand, crime levels within Mid Ulster vary greatly. Criminal activity was most common in the DEAs of Dungannon and Cookstown (2012), where relative crime levels were larger than the NI average and equalled 58 and 57 crimes per 1,000 of the population respectively (Figure 3.2). Equally, anti-social behaviour was more common in these areas and was above the regional average. The worst performing DEAs have similar concentrations in a number of criminal activity categories; however the Dungannon area had both greater overall levels and variation in criminal activity engagement overall (Figure 3.5).

Cookstown and Dungannon generally have the highest crime rates...

> Mid Ulster as a whole has low recorded crime relative to the regional average. However, the prevalence of criminal behaviour varies greatly throughout the council area.

The dashboard in Table 3.1 illustrates via a colour spectrum the areas which have the highest crime rates by category. Once again we can draw out that Cookstown and Dungannon generally have the highest crime rates in most categories. Between 2010 and 2012 there were observed reductions in recorded crime across most categories - with some notable exceptions. Overall recorded crime fell in all DEAs, with the exception of Carntogher, which saw a 10% increase over the two year period. Violent crime increased throughout Mid Ulster and the Torrent area suffered from significant increases in anti-social behaviour.

Table 3.1: Crime rate dashboard (per 000), Mid Ulster DEAs, 2010-2012

	Carntogher	Moyola	Magherafelt	Cookstown	Torrent	Dungannon	Clogher Valley
Recorded Crime (2012)	24.7	22.8	48.6	57.0	26.6	57.9	29.1
% change of Recorded Crime (2010-2012)	10.5%	-12.7%	-7.1%	-8.1%	-11.7%	-13.8%	-12.6%
Criminal Damage (2012)	6.0	3.8	12.7	11.9	4.7	11.3	6.1
% change Criminal Damage (2010-2012)	1.0%	-49.2%	-26.3%	-26.3%	-21.6%	-29.6%	-14.2%
Antisocial Behaviour (2012)	10.3	12.6	34.0	37.6	22.1	39.8	21.6
% change Antisocial Behaviour (2010-2012)	-38.5%	-36.6%	-34.2%	-18.7%	25.6%	0.0%	15.9%
Violence against the Person including sexual offences and robbery (2012)	10.3	8.3	20.1	24.5	10.9	19.1	6.5
% change Violence against the Person (2010-2012)	25.9%	15.6%	3.9%	16.5%	19.8%	2.6%	7.8%
Robbery Burglary and Theft 2012	1.9	2.9	1.8	2.6	6.4	19.4	13.3
% change Robbery Burglary and Theft (2010-2012)	-15.8%	22.5%	-40.4%	20.4%	-30.5%	-27.2%	-25.1%

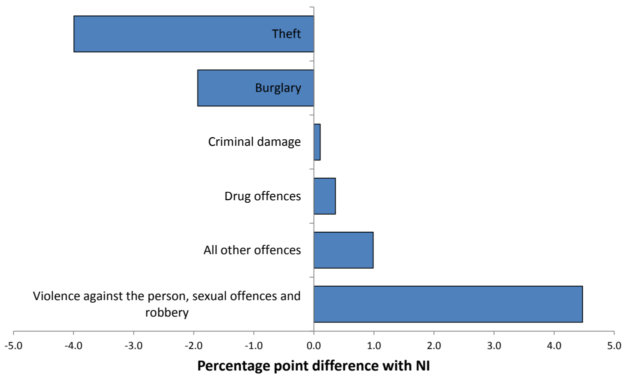
Source: NISRA

Note: Shading refers to intensity of crime among the seven DEAs with red being the highest in a given category

Figure 3.3 further draws out these trends by describing the types of criminal behaviour which are more common in Mid Ulster compared to that of Northern Ireland generally. Categories on the right of the graph describe criminal activities which form a higher proportion of total crime in Mid Ulster than typically observed in Northern Ireland. We can draw from this that theft and burglary is less prevalent within Mid Ulster (forming less of a share of total crime than observed regionally); however violent crime is seen to be more of any issue – having a five percentage point greater share of total crime than the NI average.

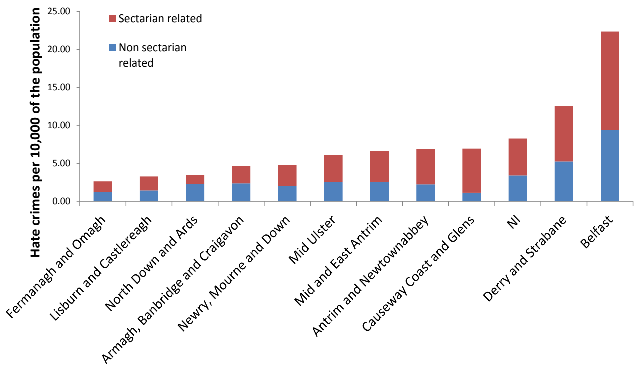
Mid Ulster suffers from higher levels of violent crime than the regional average...

Figure 3.3: Criminal incident concentration, Mid Ulster, 2012



Source: NISRA

Figure 3.4: Hate crimes and motivation, Northern Ireland District Councils, 2012



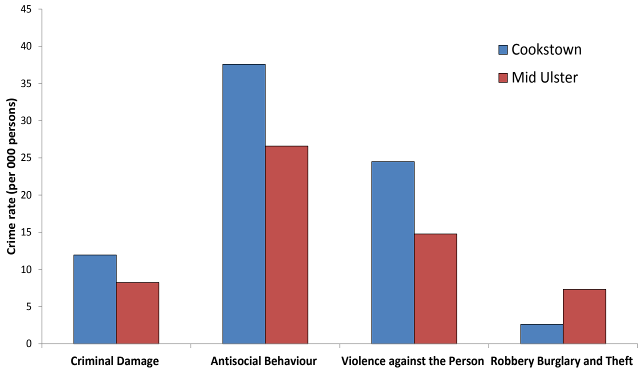
Source: NISRA

> Violent crime forms a greater share of total crime in Mid Ulster than that of the region in general.

Hate crime less common in Mid Ulster than in Northern Ireland generally...

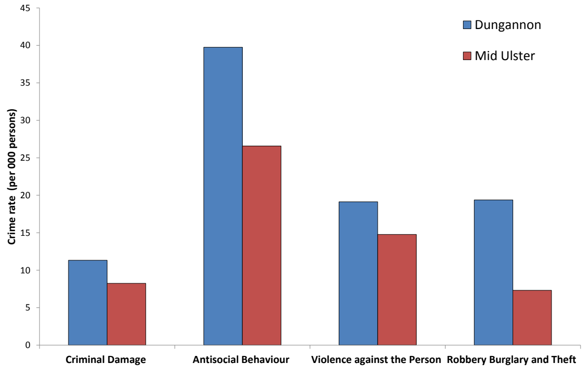
Hate crime was found to be less common in Mid Ulster than in Northern Ireland on average in 2012 – with 6.1 crimes per 10,000 population compared to 8.3 recorded regionally (Figure 3.4). Although overall hate crime occurs more infrequently within the council area, sectarian motivated incidents make up the same proportion of total hate crime as we observe at the regional level (approximately 60 percent).

Figure 3.5: Criminal incident concentration, Cookstown vs Mid Ulster, 2012



Source: NISRA

Figure 3.5: Criminal incident concentration, Dungannon vs Mid Ulster, 2012

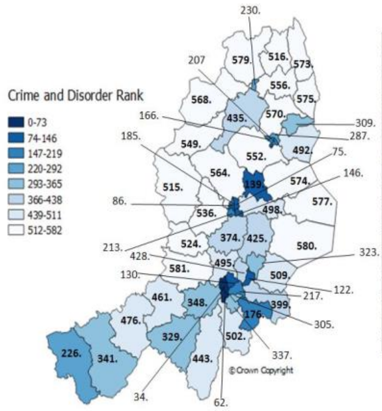


Source: NISRA

Recent figures indicate the hate crime is less common in the council area, but when it does take place, the sectarian motivation is as prevalent as elsewhere in Northern Ireland. The Cookstown and Dungannon DEAs have the highest rates of crime in most categories.

Based on the Northern Ireland multiple deprivation measure (2010), Mid Ulster had only four electoral ward areas appearing in the top 100 most criminally deprived wards in Northern Ireland; Mullaghmore (34th most deprived in NI), Ballysaggart (62nd), New Buildings (75th) and Tullagh (86th).

Figure 3.6: Crime and Disorder Rank, Mid Ulster, 2010



Mullaghmore	34	Coalisland West and Newmills	428
Ballysaggart	62	Tobermore	435
Newbuildings	75	Caledon	443
Tullagh	86	Ballygawley	461
Coalisland South	122	Augher	476
Drumglass	130	Ballymaguigan	492
Moneymore	139	Donaghmore	495
Killymoon	146	Coagh	498
Town Parks East	166	Benburb	502
Moy	176	Washing Bay	509
Oldtown	185	Dunnamore	515
Town Parks West	207	Upperlands	516
Gortalowry	213	Pomeroy	524
Killymeal	217	Oaklands	536
Fivemiletown	226	Draperstown	549
Maghera	230	Lecumpher	552
Glebe	287	Gulladuff	556
Coolhill	305	Lissan	564
Castledawson	309	Lower Glenshane	568
Coalisland North	323	Knockcloghrim	570
Aughnacloy	329	Valley	573
Moygashel	337	The Loop	574
Clogher	341	Bellaghy	575
Castlecaulfield	348	Ardboe	577
Sandholes	374	Swatragh	579
Killyman	399	Killycolpy	580
Stewartstown	425	Altmore	581

Source: Source: NIMDM, Oxford Economics

Table 3.2: Recorded crime rates (incidents per 1,000), Mid Ulster Ward outliers, 2012

		Wards	Rank
Highest	143.0	Mullaghmore (Dungannon)	1
	138.5	Newbuildings (Cookstown)	2
	99.8	Town Parks West (Magherafelt)	3
Lowest	11.2	Lissan (Magherafelt)	52
	9.9	Lower Glenshane (Carntogher)	53
	9.5	Ardboe (Torrent)	54

Source: NISRA

The 2012 data on recorded crime shows Mullaghmore is again the worst performing ward in Mid Ulster. Newbuildings and Town Parks West make up the three wards suffering the highest levels of recorded crime in the Council area that year.

The difference in incident rates demonstrates the large variation in criminal activity throughout the council area. Though there is little evidence to suggest crime and disorder is widely spread throughout Mid Ulster.

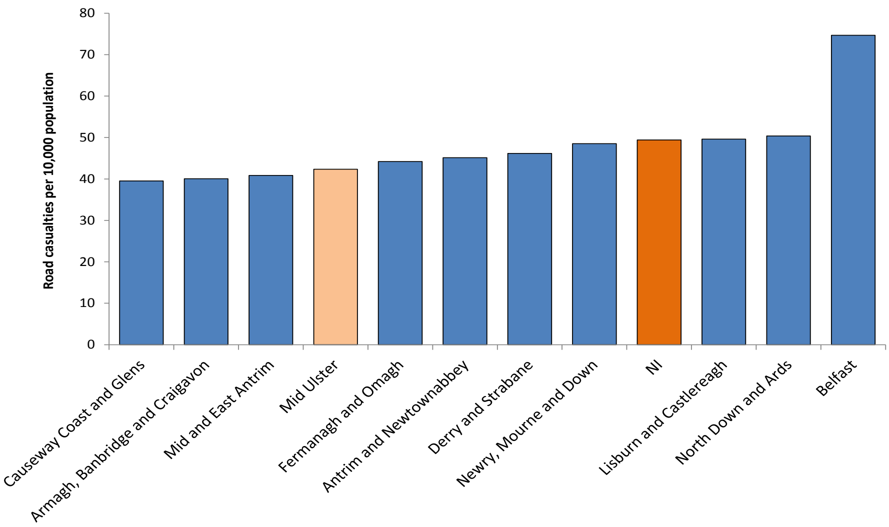
3.2 Road Safety

Mid Ulster's roads are relatively safe in the regional context...

Mid Ulster's roads are relatively safe in the regional context. General road safety has been moving in the right direction, with Northern Ireland road casualty statistics falling by 5% between 2004 and 2012. Over the same timeframe Mid Ulster performed even better – with road casualties plummeting by over 28%.

Improvements in road safety was apparent in all three of Mid Ulster's old local authority areas (Cookstown, Dungannon and Magherafelt) and the council area's road causality rate (per 10,000 of the population) was lower than that of the regional average in 2012 (42 causalities compared to 49). Mid Ulster therefore had the fourth safest roads of all the new local authority areas in Northern Ireland that year.

Figure 3.7: Road Casualties per 10,000, Northern Ireland District Councils, 2012

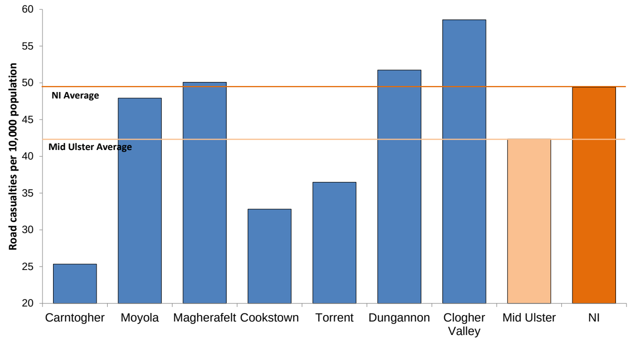


Source: NISRA

Note: Due to boundary transforms/ unavailability of data both Belfast and Lisburn and Castlereagh are approximations

At the DEA level there was larger variation in road safety results throughout Mid Ulster. The majority of Mid Ulster DEAs recorded less road casualties relative to the NI average with the exception of Magherafelt, Dungannon and Clogher Valley (Figure 3.8).

Figure 3.8: Road Casualties per 10,000, Mid Ulster DEAs, 2012



Source: NISRA

Table 3.3: Road Casualties per 10,000, Mid Ulster Ward outliers, 2012

		Wards	Rank
Highest	130.3	Killyman (Dungannon)	1
	105.1	Castlecaulfield (Clogher Valley)	2
	98.1	Caledon (Clogher Valley)	3
Lowest	4.1	Killycolpy (Torrent)	52
	3.7	Maghera (Carntogher)	53
	0.0	Valley (Carntogher))	54

Source: NISRA

Road causalities rates in Mid Ulster were found to be lower than the regional average. However there is evidence of road safety hotspots in the areas of Magherafelt, Dungannon and Clogher Valley

Some wards are suffering from exceptionally high levels of road casualty rates...

At a ward level, there are pockets of exceptionally high rates of road casualties per 10,000 of the population. Killyman in Dungannon recorded a rate of 130.3, some three times the Mid Ulster average. Castlecaufield and Caledon (both in Clogher Valley) were also notably high (see Table 3.3 for the three highest and the three lowest wards).

3.3 Summary

Mid Ulster performs relative well from a community safety and good relations point of view. Though there are areas were targeted intervention could be needed:

- Mid Ulster as a whole enjoys low levels of recorded crim. Indeed all DEAs have enjoyed falls over the past two years (with the exception of Carntogher). Though these high level statistics mask variations at a DEA and ward level. Torrent for example has suffered from significant increases in anti-social behaviour. Furthermore violent crime increased throughout Mid Ulster, and it forms a greater share of total crime than compared to the regional average.
- In addition while Mid Ulster's road safety record has been among the best in Northern Ireland, there are wards with exceptionally high causality rates.

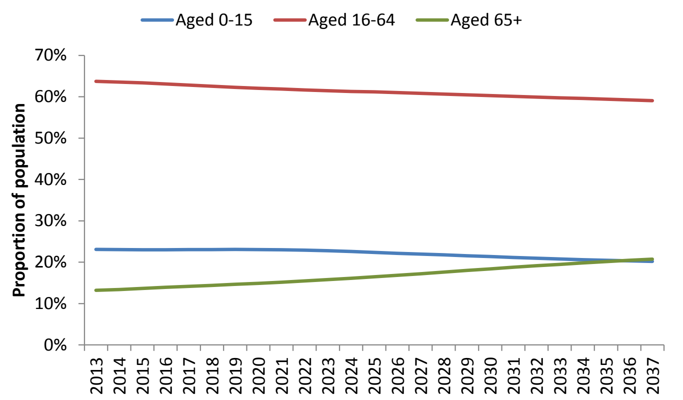
4 Health

Key findings

- The share of Mid Ulster's population diagnosed with long term limiting illness has fallen by more than any other council area;
- Cookstown is the only DEA within Mid Ulster to have resident proportions of limiting long term ill greater than the regional average;
- Overall numbers with limiting long-term illness are increasing in line with the regional average due to population growth;
- Mid Ulster has fewer residents performing caring roles than elsewhere in Northern Ireland, however the number of carers is on the increase;
- Mid Ulster deaths caused by common disease types is the largest in Northern Ireland and improvements have been slower than the regional average;
- All Mid Ulster DEAs experienced disease related deaths in excess of the Northern Ireland average;
- Ambulance response times have been consistently higher than average in Mid Ulster, though they have improved over the last decade.
- Residents have on average further to travel to reach a hospital. The additional travel time is dependent on the severity of the medical emergency, due to the proximity of minor injury units within the council area; and
- Hospitals located within Mid Ulster show higher occupancy rates compared to the regional average. In addition average patient length of stay is longer than the Northern Ireland average.

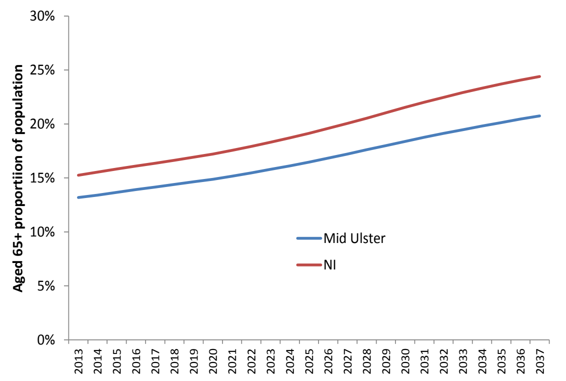
Demographics play an important role when understanding overall health outcomes within communities. Mid Ulster's population has a slightly higher proportion of younger people and lower proportion of elderly, compared to the regional average. Northern Ireland like most developed economies faces an aging population, and Mid Ulster is no different (see Figure 4.1). As noted earlier NISRA projects the proportion of residents aged 65 and over to increase from 13% in 2013 to 21% in 2037. However, the pace of this change is anticipated to be slower than that of the Northern Ireland trend (Figure 4.2).

Figure 4.1: Population age structure projections, Mid Ulster, 2013–2037



Source: NISRA

Figure 4.2: Population aged 65+: Mid Ulster and Northern Ireland, 2013 - 2037



Source: NISRA

Like Northern Ireland, Mid Ulster faces an aging population. However the pace of this change is expected to be slower than that observed in Northern Ireland on average.

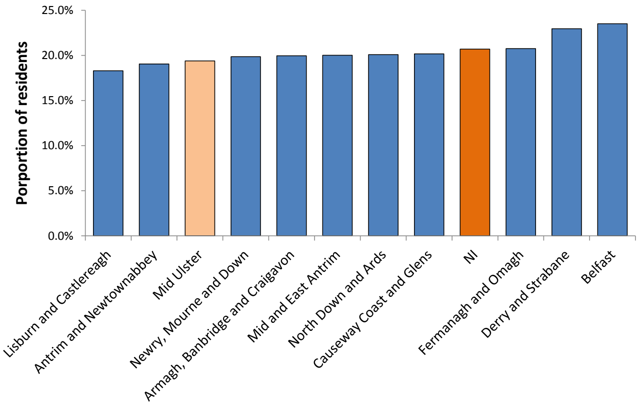
4.1 Long-term limiting illness

As well as impacting a person's quality of life, limiting long term health issues within a population adversely affects the local economy by limiting the capacity of the labour market. As per the last census, Mid Ulster had a marginally lower proportion of residents suffering from limiting long term illness than the regional average (19% compared to 21%).

Mid Ulster has amongst the lowest share of population with a long-term limiting illness...

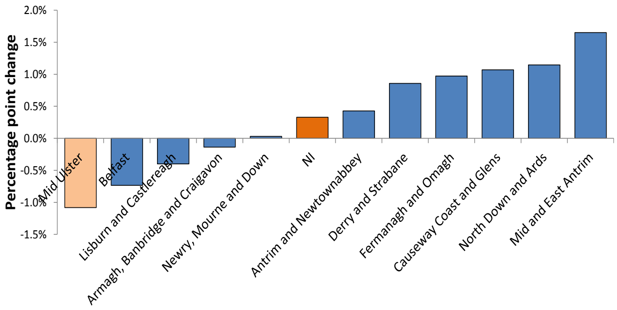
Between 2001 and 2011, the number suffering from long term illness increased by just over 9% regionally (driven by growing a population) and by a similar percentage in Mid Ulster. However, the proportional change over the same period shows that Mid Ulster's share of residents suffering from limiting long term illness has fallen by a greater extent than any other council area within the region (Figure 4.4). This pattern was aided by both strong population growth and migration into the area.

Figure 4.3: Percentage of people with a long-term limiting illness, Northern Ireland District Councils, 2011



Source: NISRA

Figure 4.4: Change in the proportion of residents with limiting long term illness, Northern Ireland, 2001-2011



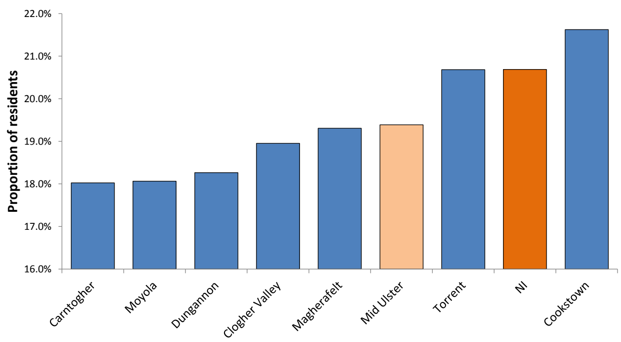
Source: NISRA

> The share of Mid Ulster's population diagnosed with long term limiting illness has fallen by more than any other council area.

Despite the strong performance at Council level, the prevalence of limiting long term illness varies by DEA. In five of the seven Mid Ulster DEAs, long term illness is less common than the regional average. Cookstown bucks this trend however, with almost 22% of residents suffering from a long term illness in 2011 (Figure 4.5). All Mid Ulster DEAs managed to reduce the proportion of long term illness within their communities between 2001 and 2011. The stand out area was Dungannon; which saw a reduction in the proportion of long term health issues of almost four percentage points.

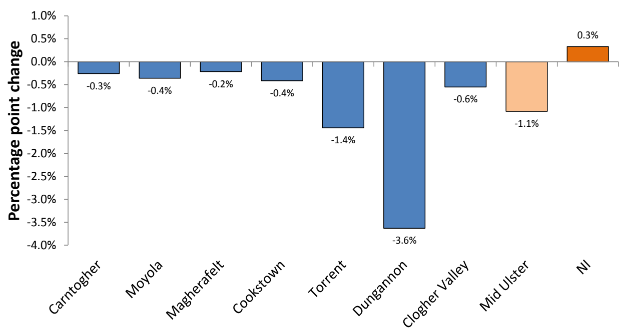
All Mid Ulster DEAs managed to reduce the proportion of long term illness within their communities between 2001 and 2011...

Figure 4.5: Percentage of people with a long-term limiting illness, Mid Ulster DEAs, 2011



Source: NISRA

Figure 4.6: Change in the proportion of residents with limiting long term illness, Mid Ulster DEAs, 2001-2011

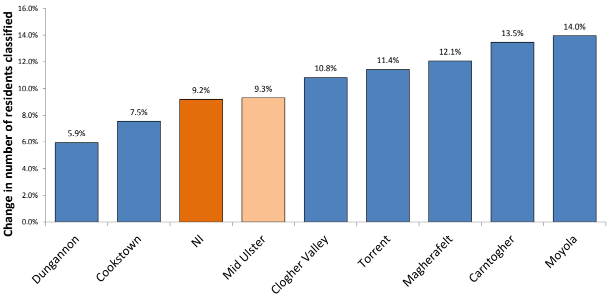


Source: NISRA

Cookstown is the only DEA within Mid Ulster to have resident proportions of limiting long term ill greater than the regional average.

It is important to highlight that although proportionally long term limiting health problems are falling, in absolute terms, long term health issues continue to exert pressure on communities (Figure 4.7). Proportional falls have not been strong enough to overcome the population growth contribution. As a result, Mid Ulster experienced a 9% increase in the number of people diagnosed with long term health problems between 2001 and 2011, which is slightly larger than the Northern Ireland average increase.

Figure 4.7: Percentage change in number of people with long term limiting illness, Mid Ulster DEAs, 2001-2011



Source: NISRA

Table 4.1: Long term limiting illness, Mid Ulster Ward outliers, 2011

		Wards	Rank
Highest	25.9%	Tullagh (Cookstown)	1
	24.5%	Coagh (Cookstown)	2
	24.5%	Coalisland South (Torrent)	3
Lowest	15.9%	Benburb (Dungannon)	52
	15.9%	Lower Glenshane (Carntogher)	53
	14.1%	Coolhill (Dungannon)	54

Source: NISRA

Although the proportion of those classified as long term ill may be on the decline in Mid Ulster, overall numbers are increasing in line with the regional average due to strong population growth.

Again, there is a large difference across wards. Tullagh with a long-term limiting illness rate of 25.9% is nearly 12 percentage points higher than Coolhill with the lowest rate in Mid Ulster.

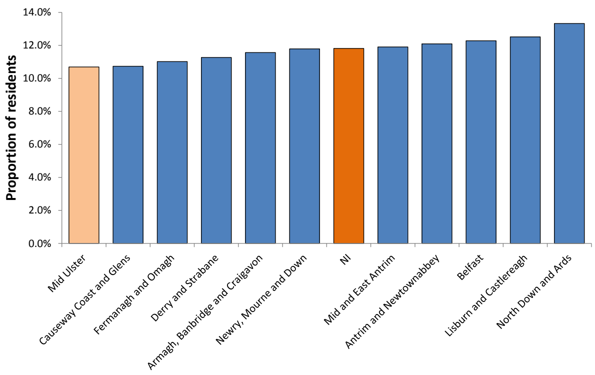
4.2 Carers within the community

Carers are defined in this section as members of the population who provide unpaid care for family, friends or neighbours to some degree. Mid Ulster in 2011 had one of the lowest proportions of residents performing caring roles than any other local authority in Northern Ireland (Figure 4.8), with just over 10% of the local population helping dependents. Besides from the council area's overall health condition and support structure, this indicator would be highly sensitive to the population's age demographic. Mid Ulster's population currently has a lower share of those aged over 65 and this may in turn contribute to lower proportions of carers within society (NISRA 2013).

The numbers of carers within Mid Ulster have increased by 20 percent over a ten year period...

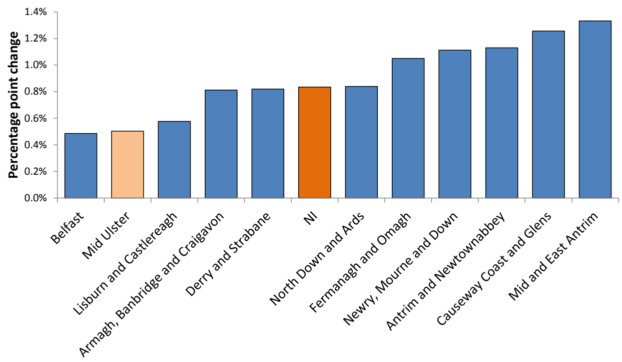
Given the aging population it is unsurprising that the proportion of local communities which have found it necessary to care for others has increased throughout Northern Ireland and this will likely increase going forward (Figure 4.9).

Figure 4.8: Percentage of residents providing unpaid care, Northern Ireland District Councils, 2011



Source: NISRA

Figure 4.9: Change in the proportion of unpaid carers, Northern Ireland, 2001-2011

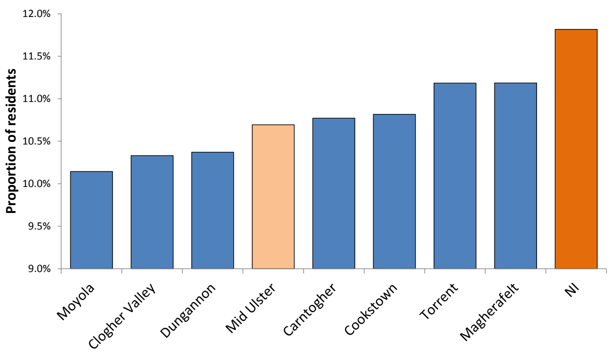


Source: NISRA

The Mid Ulster council area is less reliant on residents performing caring roles than elsewhere in Northern Ireland. The proportion of people performing these roles none the less is on the increase.

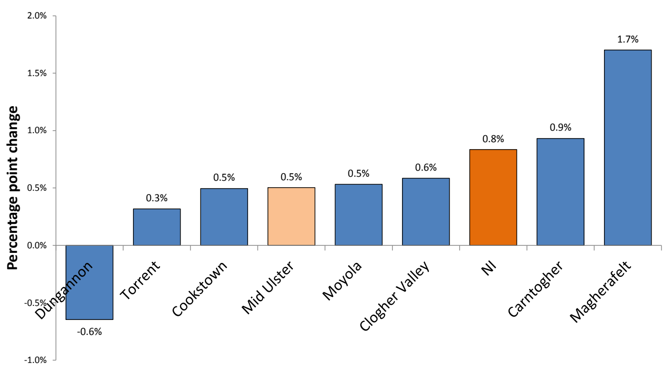
DEAs within Mid Ulster were fairly similar in the degree of dependency on carers; typically in the range of 10% to 11% of the community performed such caring roles. This variation among DEAs did not exceed the Northern Ireland average on any occasion (Figure 4.10). Between 2001 and 2011 all Mid Ulster DEAs experienced increases in the proportion of carers in the community with the exception of Dungannon, which saw the proportion of carers fall slightly (Figure 4.11). Overall, the number of carers within Mid Ulster had increased by over 20% from 2001 to 2011, which was larger than the Northern Ireland increase of 16%

Figure 4.10: Percentage of residents providing unpaid care, Mid Ulster DEAs, 2011



Source: NISRA

Figure 4.11: Change in the proportion of carers, Mid Ulster DEAs, 2001-2011



Source: NISRA

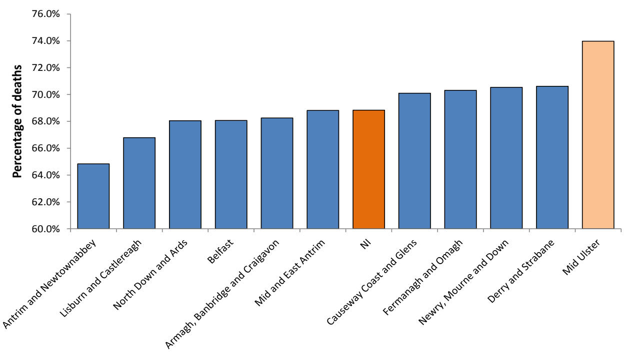
All Mid Ulster DEAs had lower proportions of residents performing caring roles than the regional average. The Magherafelt DEA saw the largest increase in carers numbers over the ten year sample.

4.3 Deaths and cause

Mid Ulster had the highest proportion of deaths resulting from the main disease types (cancer, circulatory, respiratory) of any local authority in Northern Ireland (Figure 4.12). In 2012, 74% of all deaths in Mid Ulster were the result of such unnatural causes, whereas the regional average was only 69%. Between 2002 and 2012, prominent disease death rates have been falling throughout the region, reflecting improved health care and awareness (Figure 4.13). However the rate of improvement in Mid Ulster (six percentage points) was weaker than the regional average, which enjoyed from an eight percentage point proportional decrease in disease death rates.

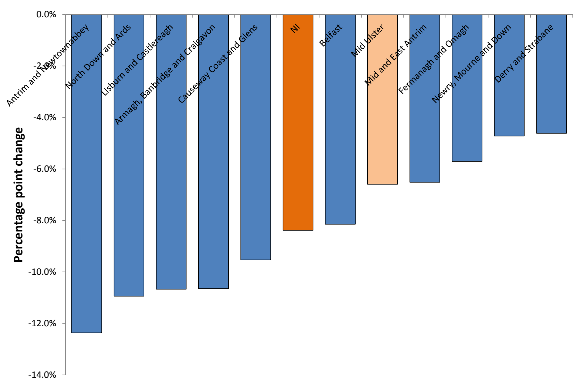
Mid Ulster has the highest proportion of deaths resulting from the main disease types...

Figure 4.12: Percentage of deaths resulting from disease, Northern Ireland District Councils, 2012



Source: NISRA

Figure 4.13: Change in proportion of deaths caused by disease, Northern Ireland District Councils, 2002-2012



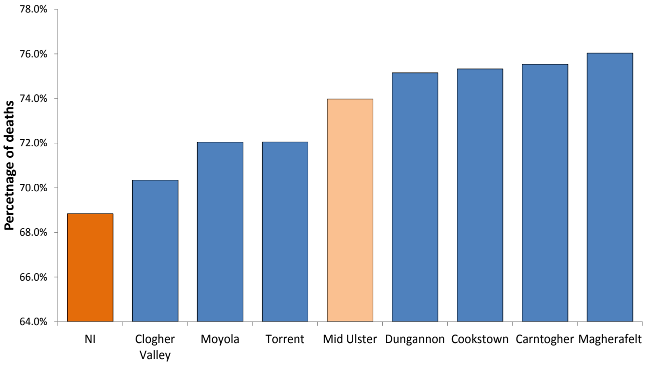
Source: NISRA

Mid Ulster deaths caused by common disease types is the largest in Northern Ireland and improvements have been slower than the regional average.

Mid Ulster DEAs all rank above the regional average in terms of the proportion of deaths resulting from disease. The worst performing in 2012 was Magherafelt where over three quarters of all deaths resulted from the main disease types. Similar to the trend at the council level, the proportion of deaths due to disease have fallen between 2002 and 2012 among all seven DEAs. The degree of improvement in disease prevention/ survival varied greatly throughout the council area however; with a number of DEAs both outperforming and underperforming the regional average improvement. Clogher Valley reduced the proportion of deaths due to disease by 12 percentage points, whereas Moyola achieved a modest two percentage point reduction over the same time frame.

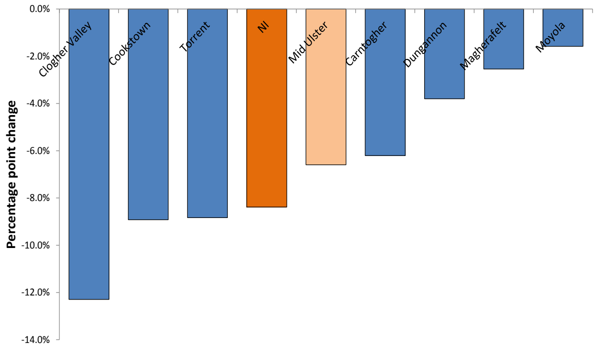
All Mid Ulster DEAs suffer from high levels of death due to disease...

Figure 4.14: Percentage of deaths resulting from disease, Mid Ulster DEAs, 2012



Source: NISRA

Figure 4.15: Change in proportion of deaths caused by disease, Mid Ulster DEAs, 2002-2012



Source: NISRA

All Mid Ulster DEAs experienced disease related deaths in excess of the Northern Ireland average. Over the last decade improvements have been most prominent in Clogher Valley and least so in Moyola.

Table 4.2: Deaths due to cause type dashboard, Mid Ulster DEA, 2012

	Malignant Neoplasms	Circulatory Diseases	Respiratory Diseases	Other
Magherafelt	23.1%	36.4%	16.5%	24.0%
Carntogher	24.5%	29.8%	21.3%	24.5%
Cookstown	23.4%	34.4%	17.5%	24.7%
Dungannon	32.5%	31.4%	11.2%	24.9%
Mid Ulster	26.5%	31.5%	16.0%	26.0%
Northern Ireland	28.0%	27.1%	13.7%	31.2%

Source: NISRA

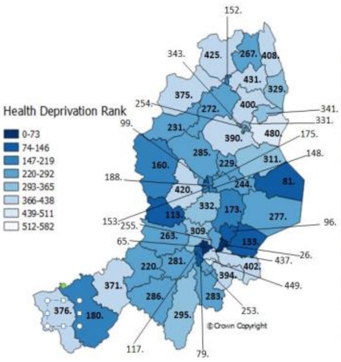
Note: Shading refers to prevalence of specific disease related death among the selected DEAs, Mid Ulster and the region.

Recent data highlights that circulatory and respiratory related deaths are common within Mid Ulster. The Dungannon DEA had particular instances of cancer (malignant neoplasms) related deaths in comparison to the rest of the council area

The Northern Ireland multiple deprivation measure (2010) ranks six of Mid Ulster's 54 wards among the top 100 worst performing areas for general health deprivation in the region: Coalisland South (26th), Drumglass (65th), Ballysaggart (79th), Ardboe (81st), Coalisland North (96th) and Oldtown (99th).

Based on this measure we can observe a broad spread of health deprivation throughout the council area. There were seven Mid Ulster wards ranked in the top 20 percent of health deprived wards, whereas only Ballymaguigan featured in the 20 percent least health deprived Northern Ireland rankings. This suggests a generally leaning towards poor health throughout the Mid Ulster area.

Figure 4.16: Health deprivation rank, Mid Ulster, 2010



Coalisland South	26	Killycolpy	277
Drumglass	65	Castlecaulfield	281
Ballysaggart	79	Benburb	283
Ardboe	81	Lissan	285
Coalisland North	96	Aughnacloy	286
Oldtown	99	Caledon	295
Pomeroy	113	Donaghmore	309
Mullaghmore	117	The Loop	311
Washing Bay	133	Bellaghy	329
Killymoon	148	Glebe	331
Maghera	152	Sandholes	332
Gortalowry	153	Castledawson	341
Dunnamore	160	Town Parks West	343
Stewartstown	173	Augher	371
Newbuildings	175	Lower Glenshane	375
Clogher	180	Fivemiletown	376
Tullagh	188	Lecumpher	390
Ballygawley	220	Moy	394
Moneymore	229	Knockcloghrim	400
Draperstown	231	Killyman	402
Coagh	244	Valley	408
Moygashel	253	Oaklands	420
Town Parks East	254	Swatragh	425
Coalisland West and Newmills	255	Gulladuff	431
Altmore	263	Killymeal	437
Upperlands	267	Coolhill	449
Tobermore	272	Ballymaguigan	480

Source: NIMDM, Oxford Economics

Figure 4.3: Proportion of deaths resulting from disease, Mid Ulster Ward outliers, 2012

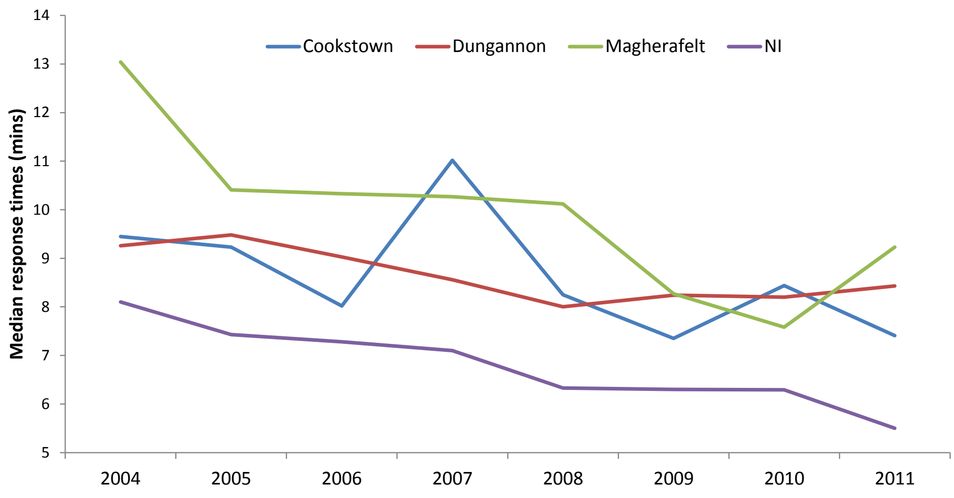
		Wards	Rank
Highest	94.7%	Coalisland West & Newmills (Torrent)	1
	88.9%	Oaklands (Cookstown)	2
	88.9%	Lecumpher (Magherafelt)	3
Lowest	57.1%	Ardboe (Torrent)	52
	57.1%	Oldtown (Cookstown)	53
	53.8%	Bellaghy (Moyola)	54

Source: NISRA

4.4 Health services

The quality of health care within an area depends on the speed and capacity of services to respond to health emergencies. Ambulance response times within Mid Ulster have historically been higher than that of the Northern Ireland average. In 2004, the Magherafelt local authority's median emergency response time was the highest in the Mid Ulster area – taking approximately 60% longer than the regional median of just over eight minutes. Since then ambulance response times throughout Northern Ireland and Mid Ulster have been reducing steadily (Figure 4.17).

Figure 4.17: Ambulance response times, Mid Ulster, 2004 – 2011



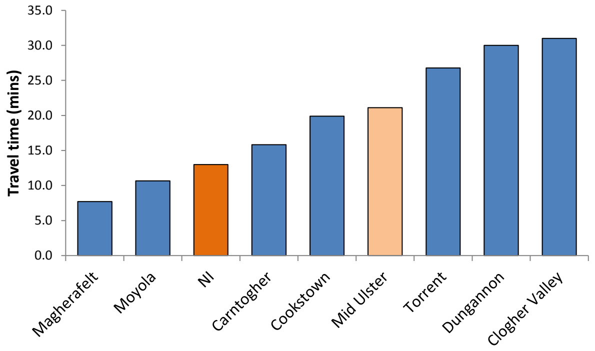
Source: NISRA

Longer ambulance response times are likely to be heavily influenced by the rural make-up of the Mid Ulster area, but also the geographical dispersion of hospitals which serve the local community. The Mid Ulster area utilises a number of hospitals located throughout the Northern and Southern Health trusts in Northern Ireland:

- Mid Ulster Hospital;
- Antrim Hospital;
- South Tyrone Hospital; and
- Craigavon area Hospital.

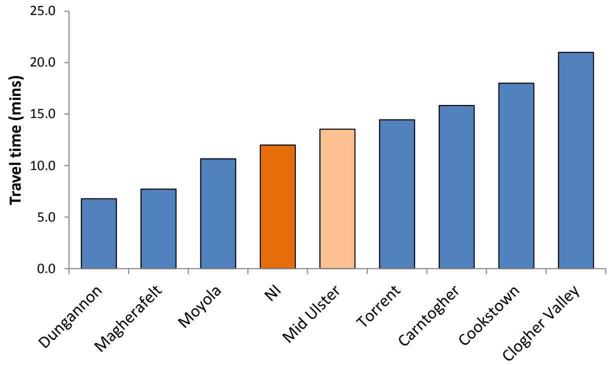
The nature of the medical emergency will directly impact the time taken to reach hospital as some only offer minor injury capabilities. Figure 4.18 and 4.19 show the average travel time to hospital throughout Mid Ulster depending on the severity of the health condition requiring treatment. In both instances the travel time taken to reach a hospital within Mid Ulster is higher than the regional average. The contrast between the Mid Ulster and regional average proximity to hospital services is less severe where minor injuries are solely concerned. However the Mid Ulster travel time to a hospital with major injury treatment capabilities is over eight minutes longer than the Northern Ireland average.

Figure 4.18: Average travel time to nearest hospital (excluding minor injury units), Mid Ulster



Source: NISRA

Figure 4.19: Average travel time to nearest hospital (including minor injury units), Mid Ulster

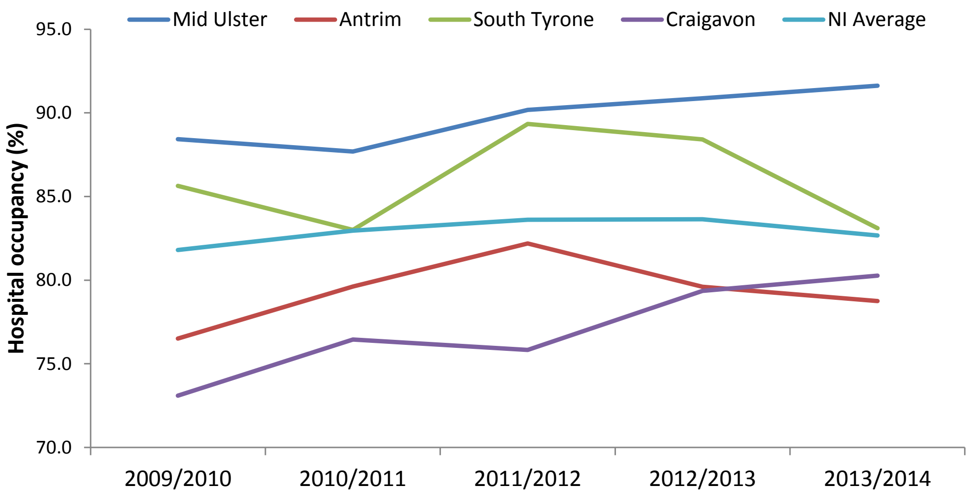


Source: NISRA

> Mid Ulster residents have further to travel on average in order to reach a hospital. The additional travel time is dependent on the severity of the medical emergency, due to the proximity of minor injury units within the council area.

Average hospital bed occupancies indicate that the Mid Ulster and South Tyrone hospitals have been operating at higher capacities than the regional average between 2009 and 2014 (Figure 4.20). Moreover these hospitals are the most accessible to the Mid Ulster community in terms of proximity of service. There exists wide ranging differences in the average patient lengths of stay in the four Mid Ulster catchment hospitals. In each of the last five years the Mid Ulster and South Tyrone sites have had average patient stays well in advance of the Northern Ireland average, which have in turn contributed to higher occupancy rates. Average patient length of stay in these hospitals was over three times that of the regional average in 2013/2014.

Figure 4.20: Hospital occupancy, Mid Ulster catchment, 2009 - 2014



Source: DHSSPSNI

Hospitals located within Mid Ulster show higher occupancy rates compared to the regional average. Patient average lengths of stay were also found to be excess of the Northern Ireland average.

4.5 Summary

Long term illness in communities continues to create challenges for services. The proportion of Mid Ulster residents suffering from limiting long term illness is below the regional average and has fallen by a larger amount than any other local authority between 2001 and 2011. However considering recent population increases, the percentage increase in the number of long term sick has been on par with the Northern Ireland average. Unpaid carers have increased in number throughout Mid Ulster; however there proportions and growth have not exceeded the regional average in general.

Disease death rates in Mid Ulster are amongst some of the worst in Northern Ireland. Improvements have been observed but not to the same extent as seen regionally. Deaths resulting from disease amongst Mid Ulster DEAs have been equally unimpressive; yet a selection of DEAs have made meaningful strides towards improvement.

5 Education

Key findings

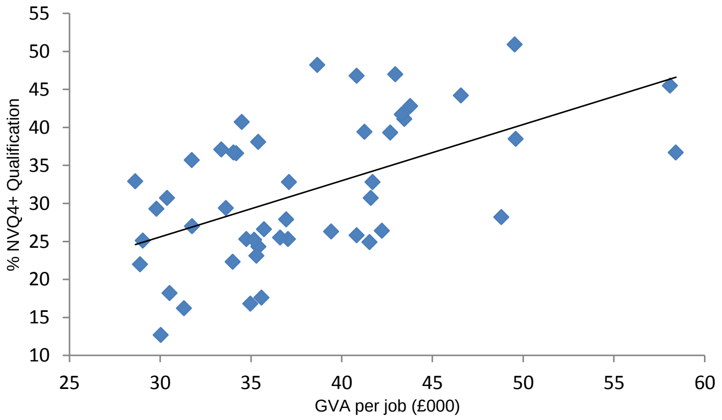
- Mid Ulster is underperforming at both ends of the educational spectrum;
- Recent census data shows that Mid Ulster's proportion of residents with no qualifications is above the regional average;
- All Mid Ulster DEAs have above average proportions of residents with no qualifications. However these shares are reducing more quickly than the regional trend;
- Mid Ulster further education enrolment rates are now above the Northern Ireland average;
- The share of Mid Ulster residents with higher level qualifications is below the regional average. Moreover, the gap has widened over the last decade; and
- On a positive note, school leaver performance has been encouraging and engagement in further education is historically high.

5.1 Skill level attainment

In our September 2014 report "Mid Ulster socio-economic profile" we noted that when seeking to improve employability and productivity within the workforce, it is important to develop skills at all levels. Improving the skill sets of those with no formal qualifications has been shown to enhance employment prospects, whilst also addressing associated issues such as poverty and social exclusion.

The stock of highly skilled individuals matters for local economies and local places. There is a strong relationship between educational attainment and average productivity (see Figure 5.1). Skills also fuel innovation and R&D. Furthermore well-educated parents also demand / seek out good schools and educational providers for their children resulting in a virtuous circle.

Figure 5.1: Qualification attainment vs average productivity, UK local authorities, 2013



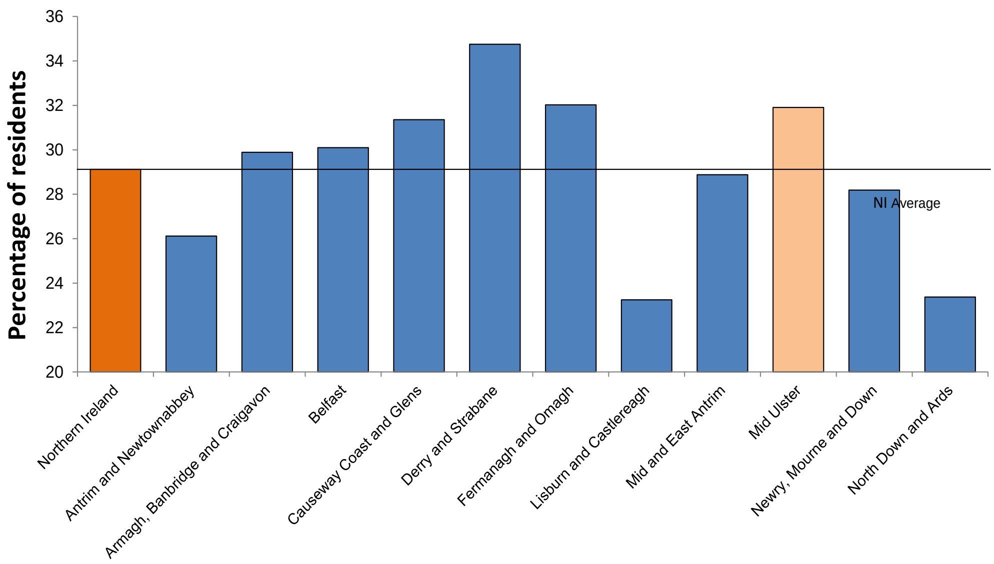
Source: Nomis, Oxford Economics

Mid Ulster underperforming at both ends of the educational spectrum...

Educational attainment is linked with productivity and prosperity within local authority areas.

Our assessment of qualification attainment in the September 2014 socio-economics analysis concluded that Mid Ulster is underperforming at both ends of the educational spectrum. The Mid Ulster council area has one of the highest average proportions of working age population with no qualifications in 2011 (32% compared to 29% for the regional average).

Figure 5.2: Percentage of residents aged 16+ with no qualifications Northern Ireland District Councils, 2011



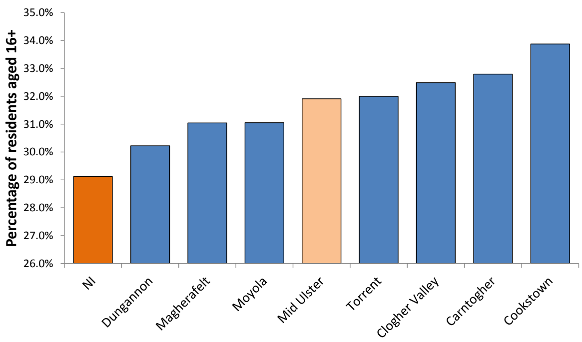
Source: NINIS

Recent census data shows that Mid Ulster's proportion of residents with no qualifications is above the regional average

Mid Ulster proportions of residents with no qualifications have been falling faster than the region as a whole...

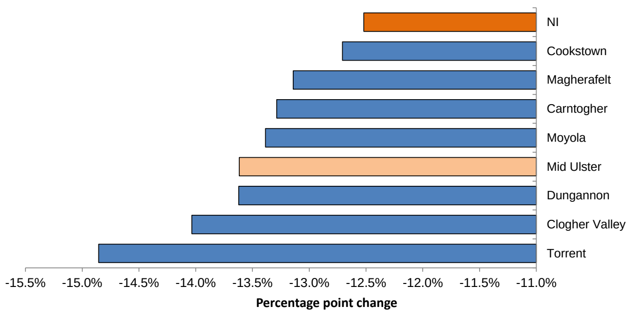
Underperformance is a feature across all DEAs in Mid Ulster. Dungannon was the best performing DEA within Mid Ulster with 30.2% of residents with no qualifications, but this was still 1.1 percentage points higher than the NI average. Cookstown had the largest proportion at nearly 34% with no qualifications. In order to put these figures in perspective; to achieve the regional average Cookstown would need to encourage some 825 residents over the age of 16 to gain a qualification, whereas Dungannon would be required to encourage just over 200.

Figure 5.3: Percentage of residents aged 16+ with no qualifications Mid Ulster DEAs, 2011



Source: NINIS

Figure 5.4: Change in the proportion of residents aged 16+ with no qualifications, Mid Ulster DEAs, 2001-2011



Source: NINIS

From 2001 to 2011 the share of workforce with no qualifications fell by around 12.5 percentage points in Northern Ireland reflecting the increasingly skills hungry nature of the modern developed economy. Over the same period the share of residents with no qualifications has improved across all DEAs in Mid Ulster. Indeed, each Mid Ulster DEA narrowed the gap with the regional average over this decade, most notably Torrent which experienced a reduction in the proportion of unqualified of nearly 15 percentage points.

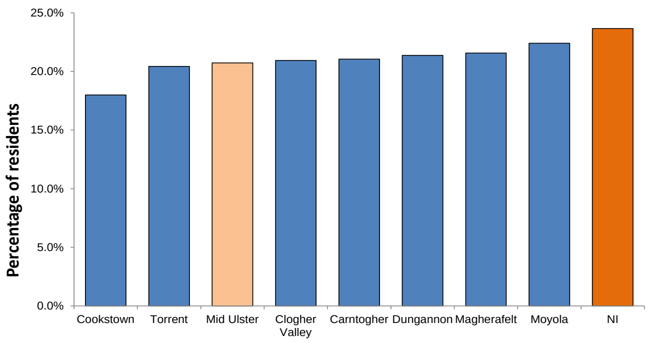
Mid Ulster residents educated to NVQ4+ is below the regional average...

All Mid Ulster DEA have above average proportions of residents with no qualifications. However these shares are reducing more quickly than the regional trend.

In addition, the proportion of the 2011 Mid Ulster working age population qualified to NVQ level 4 or above was 20.7%, lower than the Northern Ireland average of 23.6%, and therefore significantly lagging behind the more highly qualified labour forces available to council areas such as Belfast, which has 26% of its working population achieving higher educational attainment.

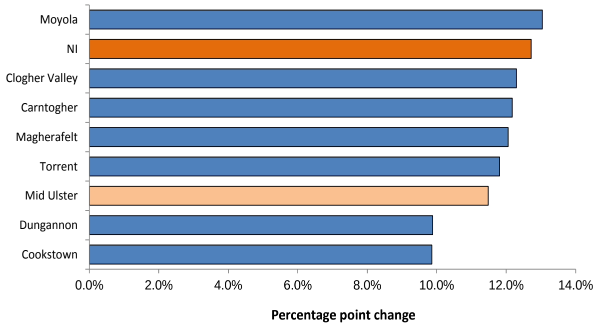
Likewise all Mid Ulster DEAs underperformed against the regional average in 2011. Cookstown was again the worst performing DEA in Mid Ulster with only 18% qualified to level 4 or above compared to the Council average of 20.7% and the regional average of 23.6%.

Figure 5.5: Percentage of residents aged 16+ with Level 4+ qualifications Mid Ulster DEAs, 2011



Source: NINIS

Figure 5.6: Change in the proportion of residents aged 16+ with Level 4+ qualifications Mid Ulster DEAs, 2001-2011



Source: NINIS

Whereas the share of Northern Ireland's labour force qualified to level 4 or above grew by 12.7 percentage points over the decade to 2011, Mid Ulster only experienced an 11.5 percentage point increase. With exception of Moyola, the gap between Mid Ulster DEAs and the regional average continues to widen.

The share of Mid Ulster residents with higher level qualifications is below the regional average. Moreover, the gap has widened over the last decade

5.2 School leavers and Further Education

As noted in our September report, despite the poor performance at both ends of the educational scale, recent publications have shown that school leavers within the Mid Ulster area are performing at a level above the Northern Ireland average attainment.

School leavers within the area are performing at a level above the Northern Ireland average...

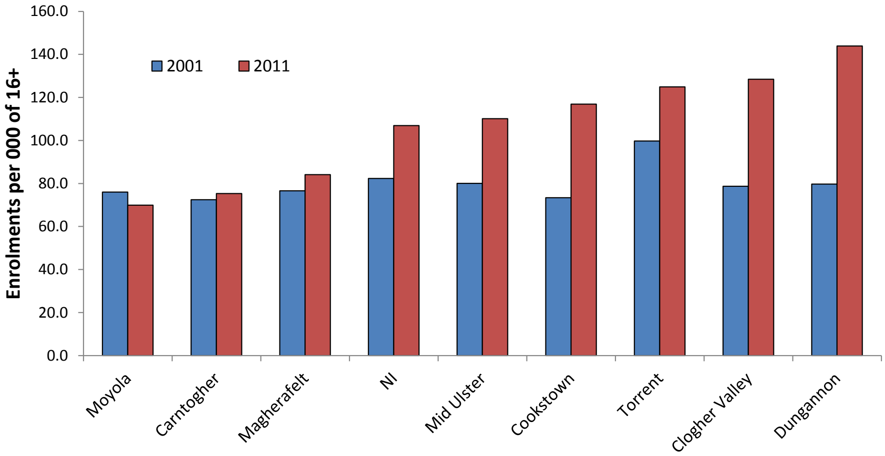
At the GCSE qualification level, just over 64% of Mid Ulster's council area school leavers earn 5 GCSE grades A*-C including English and Maths, and rates just above the Northern Ireland average of 62%.

In addition, approximately 57% of school leavers within Mid Ulster receive at least 2 or more A-levels with grades A*-E – compared to 55% of pupils in Northern Ireland overall. This may reflect the minimum requirement of local employers, but it is important the Council understands:

- If there are barriers stopping residents moving on to higher education; or
- If university students are not returning to the economy once they graduate.

The figure below shows that 2011 enrolments in Further Education were higher in Mid Ulster than in the decade previous. This may be partly due to the lack of a Higher Education institution; leaving some to choose whether to leave the area (thereby reducing the population), or alternatively some may choose to substitute Higher Education for Further Education.

Figure 5.7: Enrolments into further education per 1000 people Mid Ulster DEAs, 2001 and 2011



Source: NINIS

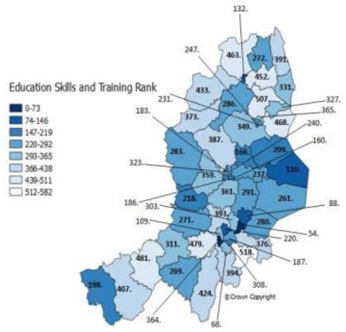
Mid Ulster further education enrolment rates are now above the Northern Ireland average. The Moyola area was the only DEA to observe a relative declines in enrolment rates; whereas Dungannon saw the largest increase

The most important factor however is the type and quality of classes (unfortunately we don't currently have data on this). Further Education institutions cater for a range of qualification levels and subjects. Consequently high enrolment numbers could reflect a high demand for courses designed to reengage people with education, rather than preparing individuals to meet the demands of local businesses.

5.3 Educational need

Given the analysis above it is not surprising that some wards in Mid Ulster are amongst the worst performing in the Education, Skills and Training deprivation domain of the NI Multiple Deprivation Measure (NIMDM). This education based domain accounts for 15% of the overall NIMDM score. Three wards are ranked within the worst 100 in Northern Ireland, namely Coalisland South (54th most deprived), Ballysaggart (68th) and Coalisland North (88th).

Figure 5.8: Education Skills and Training Deprivation Rank, Mid Ulster, 2010



Coalisland South	54	Coalisland West and Newmills	303
Ballysaggart	68	Moygashel	308
Coalisland North	88	Ballygawley	311
Drumglass	109	Tullagh	323
Ardboe	110	Castledawson	327
Maghera	132	Bellaghy	331
Killymoon	160	Lecumpher	349
Moneymore	166	Oaklands	359
Oldtown	183	Sandholes	361
Gortalowry	186	Mullaghmore	364
Coolhill	187	Glebe	365
Fivemiletown	198	Draperstown	373
The Loop	209	Killyman	376
Pomeroy	218	Lissan	387
Killymeal	220	Valley	391
Town Parks East	231	Donaghmore	393
Coagh	237	Benburb	394
Newbuildings	240	Clogher	407
Town Parks West	247	Caledon	424
Killycolpy	261	Lower Glenshane	433
Aughnacloy	269	Gulladuff	452
Altmore	271	Swatragh	463
Upperlands	272	Ballymaguigan	468
Washing Bay	280	Castlecaulfield	479
Dunnamore	283	Augher	481
Tobermore	286	Knockcloghrim	507
Stewartstown	291	Moy	518

Source: NIMDM, Oxford Economics

Table 5.1: Proportion of residents with no qualifications, Mid Ulster ward outliers, 2011

		Wards	Rank
Highest	39.4%	Killymoon (Cookstown)	1
	38.1%	Fivelmiletown (Clogher Valley)	2
	38.1%	Ardboe (Torrent)	3
Lowest	27.0%	Washingbay (Torrent)	52
	26.8%	Moy (Dungannon)	53
	26.5%	Killymeal (Dungannon)	54

Source: NISRA

5.4 Summary

The proportion of those with no qualifications in Mid Ulster was found to be higher than the regional average. This pattern is mirrored in all the DEAs within the council area, though improvements have been evident over the last decade. Similarly, educational attainment at NVQ level 4 has been below average within the council area. The Cookstown area continued to underperform and most DEAs failed to experience the proportion improvements observed at the regional level. On a positive note, school leaver performance has been encouraging and engagement in further education is historically high.

6 Economic Regeneration

Key findings

- Mid Ulster's employment structure highlights the local economy's reliance on manufacturing, agriculture and construction. The outlook for these sectors will heavily influence job creation within the council area;
- Sectors expected to grow in Northern Ireland are relatively underrepresented in Mid Ulster;
- The Mid Ulster employment rate has proved more resilient than the regional average during the last decade;
- Torrent and Cookstown have continued to struggle to connect to the labour market and create jobs;
- Unemployment levels in Dungannon and Torrent remain quite high in comparison to elsewhere in Mid Ulster; and
- The Torrent and Carntogher areas have however shown signs of persistently high youth employment – though Mid Ulster performs better than Northern Ireland on average; and
- Youth unemployment has serious implications for social cohesion, as young people have become increasingly disillusioned with returns to education in the wake of the recession.

6.1 The economic context

We forecast subdued jobs growth in Mid Ulster to 2020. The higher value added sectors (professional services, information technology etc.) are expected to contribute the largest percentage growth in job creation over the next six years. Although the construction sector is expected to grow, the jobs created are unlikely to compensate for those lost during the recessionary period.

Table 6.1: Sectoral growth across NI, 2000-2020

Change in Employment	2000-2008		2008-2014		2014-2020	
	No. (000)	% growth	No. (000)	% growth	No. (000)	% growth
Agriculture, forestry and fishing	1.15	18%	-0.45	-6%	-0.23	-3%
Mining and quarrying	0.10	22%	0.09	17%	-0.04	-7%
Manufacturing	2.42	20%	1.02	7%	-0.23	-1%
Electricity, gas, & steam	0.00	0%	0.00	0%	0.00	0%
Water supply; sewerage, waste management	0.24	N/A*	-0.04	-18%	0.00	-1%
Construction	3.27	61%	-1.08	-13%	0.57	8%
Wholesale and retail trade	2.37	29%	0.36	3%	-0.07	-1%
Transportation and storage	0.55	47%	-0.03	-2%	0.18	11%
Accommodation and food service activities	0.54	24%	-0.02	-1%	0.11	4%
Information and communication	0.16	55%	-0.04	-10%	0.07	17%
Financial and insurance activities	0.03	4%	-0.10	-13%	-0.02	-4%
Real estate activities	0.15	184%	0.01	6%	0.03	13%
Professional, scientific and technical activities	0.46	44%	0.24	16%	0.21	12%
Administrative and support service activities	0.63	103%	-0.12	-10%	0.15	13%
Public administration and defence	-0.20	-12%	0.20	14%	-0.22	-13%
Education	0.28	6%	0.20	4%	-0.18	-3%
Human health and social work activities	1.03	20%	0.58	10%	-0.06	-1%
Arts, entertainment and recreation	0.33	45%	0.00	0%	0.10	9%
Other service activities	0.19	22%	-0.15	-15%	0.09	10%
Total	**13.7**	**26.3%**	**0.7**	**1.0%**	**0.5**	**0.7%**

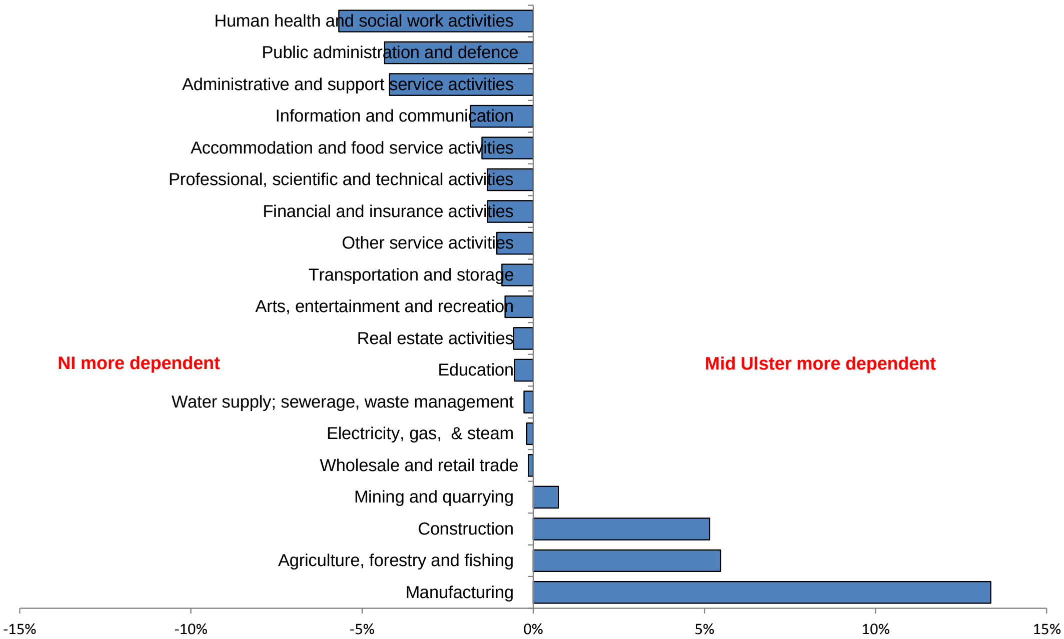
Source: Oxford Economics

Note: Green shading denotes highest performing and purples the lowest performing sectors

The subdued employment picture is somewhat explained by the area's employment structure. Manufacturing, agriculture and construction are all well represented employing sectors within the economy which are not expected to grow significantly. Low value added manufacturing has been in decline for some time and the future of the sector will rely heavily on the ability to remain specialised and highly skilled (though elements of agrifood will likely retain low value added employment and could continue to thrive).

Construction has been heavily impacted by the recession and employment in the sector is yet to fully recover. The fastest growing sectors within the economy are invariably those which are service related and exportable. These sectors are currently underrepresented as employers in Mid Ulster (compared to the regional average).

Figure 6.1: Relative concentration of sectoral employment, Mid-Ulster vs NI, 2014



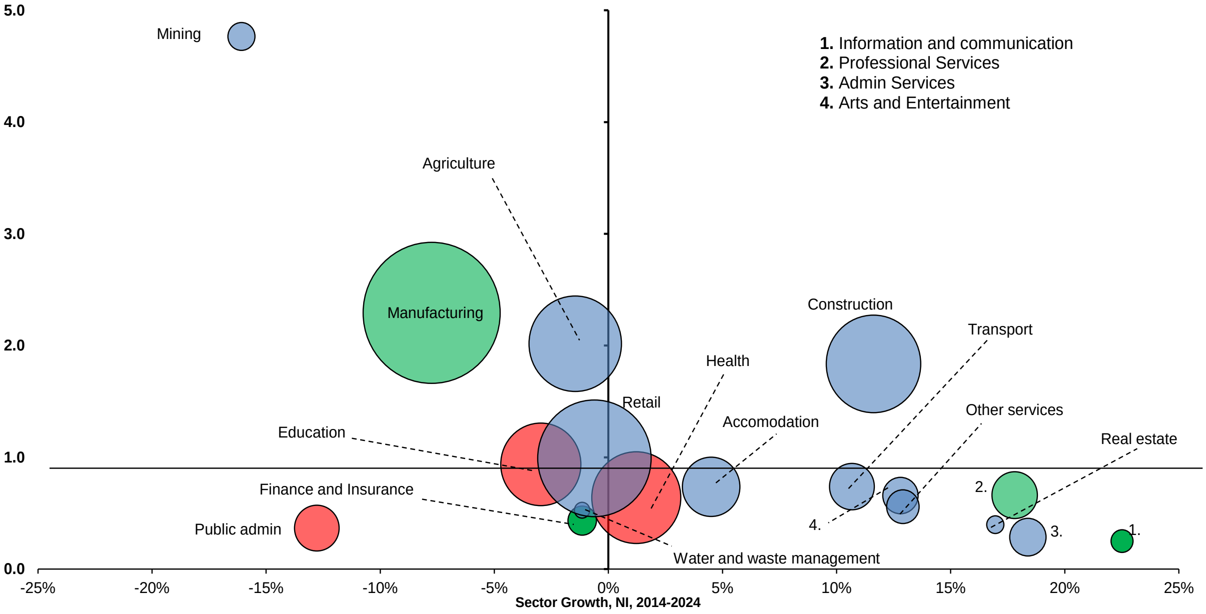
Source: NOMIS, Oxford Economics

Compared to the regional employment structure, Mid Ulster is more reliant on manufacturing, agriculture and construction. The outlook for these sectors will heavily influence job creation within the council area

Subdued employment growth partial resulting from Mid Ulster's employment structure...

Figure 6.2 plots a measure of Mid Ulster's reliance on employment sectors against expected growth over the next decade. Location quotients (LQ) describe an economy's degree of specialisation relative to the regional average. A value greater than 1 indicates that Mid Ulster is more specialised in a particular sector than the Northern Ireland average. Any 'bubble' located in the top of the chart indicates an LQ of greater than 1 (e.g. construction). Furthermore, if employment in that sector is forecast to decline between 2014 and 2030 in Northern Ireland, the bubble will be located in the left hand side of the chart (e.g. manufacturing); and vice versa. The size of each bubble relative to the others shows the relative volume of employment in each sector in 2014 (I.e. more in manufacturing than in agriculture). Red denotes public services; and green denotes sectors with predominantly exportable goods or services. The number and size of the bubbles in the top right quarter of the chart indicate the sectors in which Mid Ulster is most dependent for employment and which are also expected to expand across the Northern Ireland economy. There is very view sectors located in this advantageous pane of the chart. In fact the fastest growing sectors within the economy are invariably underrepresented within the area (LQ less than one) and currently employ small numbers.

Figure 6.2: Sectors in Mid Ulster vs Northern Ireland growth rate, LQ and employment, 2014-2024

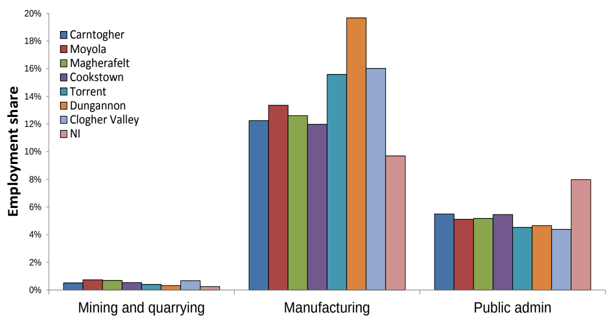


Note: Y-axis represents the concentration of that specific sector in Mid Ulster relative to NI; over 1 is more concentrated than NI whilst below 1 is less concentrated.
Green represents an exportable sector whilst red represents public sector employment.
The size of the circle represents how many people are in employment in Mid Ulster in that sector.

> The majority of Northern Ireland's projected growth sectors are either; underrepresented in Mid Ulster compared to the region, or have a small employment presence currently

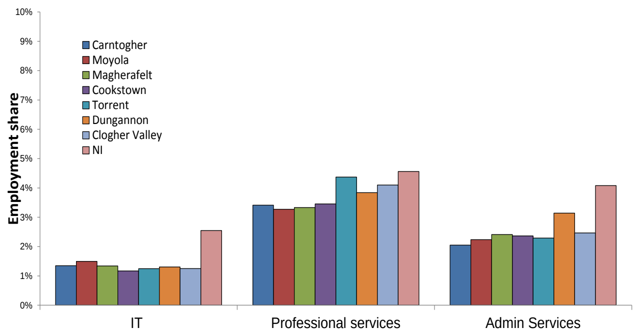
Mid Ulster's DEAs are all underrepresented in the employment sectors which are expected to grow most over the next decade (IT, professional services and admin services). Figure 6.4 illustrates that the proportion of residents employed in these sectors from each DEA is less than that of the regional equivalent. Employment in these sectors can be described as "high value", in that they require well trained employees and are increasing productive. As well as offering improved job creation, these roles usually offer improved wages which can have spill over impacts elsewhere in the local economy.

Figure 6.3: Sectoral Employment in NI's Top 3 Shrinking Sectors, Mid Ulster DEAs vs NI, 2011



Source: NISRA

Figure 6.4: Sectoral Employment in NI's Top 3 Growth Sectors, Mid Ulster DEAs vs NI, 2011

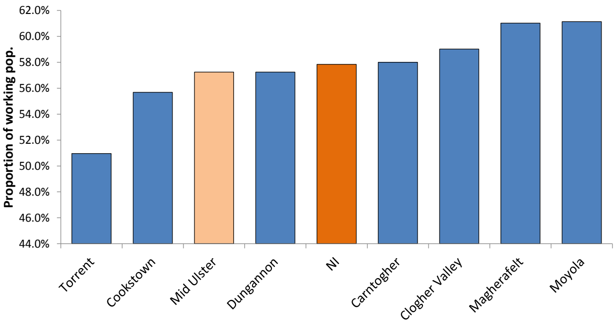


Source: NISRA

6.2 Employment rate

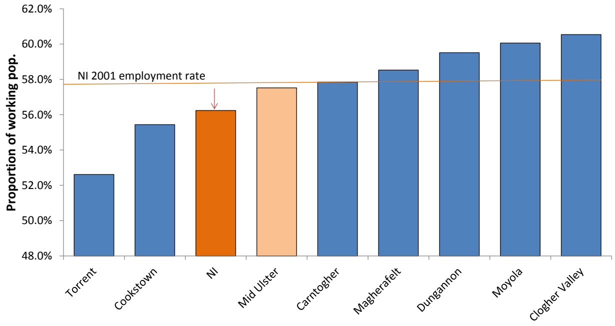
Mid Ulster's employment rate in 2011 was marginally larger than the regional average (57% compared to 56%). The majority of the council area's DEAs outperformed the Northern Ireland average employment rate with the exception of Torrent and Cookstown. From Figure 6.6 it can be seen that Mid Ulster's above average employment rate in 2011 was less to do with its own performance but more to do with the poor performance of the region in comparison during the previous ten year period. Mid Ulster's employment rate remained relatively unchanged in 2011 compared to that of 2001, whereas the Northern Ireland equivalent was almost two percent lower. Strong employment rate growth in areas such as Dungannon and Torrent, were matched by declines elsewhere (Magherfelt and Moyola), which led to the overall council area realising little net gain.

Figure 6.5: Employment rate, Mid Ulster DEAs, 2001



Source: NISRA

Figure 6.6: Employment rate, Mid Ulster DEAs, 2011



Source: NISRA

The Mid Ulster employment rate has proved more resilient than the regional average during the last decade. However, Torrent and Cookstown have continued to struggle to connect to the labour market.

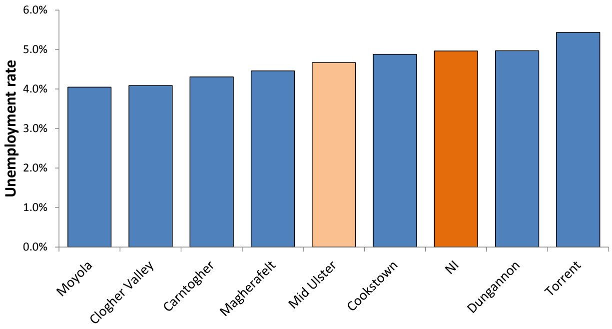
6.3 Unemployment

Higher unemployment rates concentrated in Dungannon and Torrent...

Mid Ulster's unemployment rate was lower than the regional average in 2011. However, unemployment has become more prominent across Northern Ireland since the recession and subdued job growth has been slow to compensate. Mid Ulster's overall unemployment rate increase between 2001 and 2011 was larger than that experienced in Northern Ireland. As a result, areas such as Dungannon and Torrent now find themselves with unemployment rates which are above the regional average.

The wards with the highest unemployment rates invariably appear to be concentrated in Dungannon and Torrent, whereas lowest rates are more widely spread in DEA location (Table 6.2).

Figure 6.7: Unemployment rate Mid Ulster DEAs, 2011



Source: NISRA

Table 6.2: Unemployment, Mid Ulster Ward outliers, 2011

		Wards	Rank
Highest	8.3%	Coalisland South (Torrent)	1
	7.0%	Ballysaggart (Dungannon)	2
	6.8%	Drumglass (Dungannon)	3
Lowest	3.0%	Coagh (Cookstown)	52
	2.7%	Lissan (Magherafelt)	53
	2.6%	Oaklands (Cookstown)	54

Source: NISRA

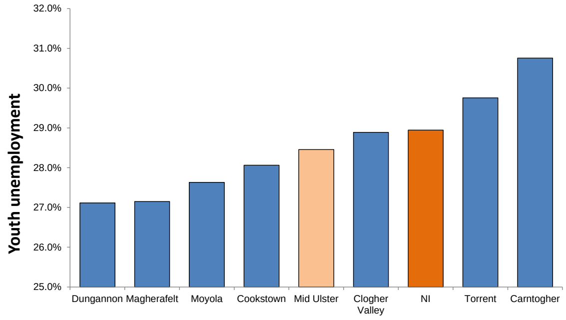
Dungannon and Torrent's unemployment levels remains poor in comparison to elsewhere in Mid Ulster

Youth unemployment remains a problematic issue in the challenging environment of limited job creation and a 'skill hungry' labour market. In order to avoid a future of social exclusion and long term unemployment the next generation must be helped to make their first steps in the labour market. As a result of the recession, youth unemployment (16-24 year olds) as a proportion of total unemployment has increased throughout Northern Ireland. Between 2001 and 2011, the percentage of younger people in the Mid Ulster unemployed increased from 27 to 29 percent of the total. Despite this increase the council area's youth unemployment rate remained below the Northern Ireland average.

Youth unemployment above the regional average in Torrent and Carntogher...

It would appear that with limited job opportunities and businesses wishing to retain more experienced labour, young people have borne the brunt of the recession. The proportion of youth unemployment has increased in most of Mid Ulster's DEAs in the last decade, with the exception of Cookstown and Dungannon, which recorded slight reductions. The Torrent and Carntogher areas were the only two DEAs which had youth unemployment above the regional average with rates of 30 and 31 percent respectively (Figure 6.8). Youth unemployment tends to be spatial varied throughout the council area, for example Cookstown has wards which are among the highest and lowest ranked in terms of youth unemployment – see Table 6.3.

Figure 6.8: Proportion youth unemployment of total, Mid Ulster DEAs, 2011



Source: NISRA

Table 6.3: Youth Unemployment, Mid Ulster Ward outliers, 2011

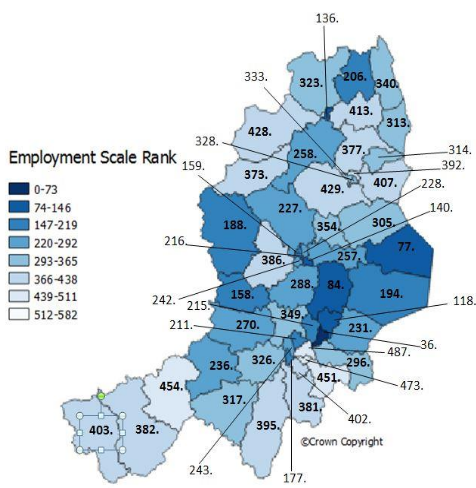
		Wards	Rank
Highest	46.3%	Dunnamore (Cookstown)	1
	45.2%	Lecumpher (Magherafelt)	2
	42.5%	Oaklands (Cookstown)	3
Lowest	19.8%	Tullagh (Cookstown)	52
	18.3%	Draperstown (Moyola)	53
	15.9%	Moneymore (Magherfelt)	54

Source: NISRA

> Youth unemployment has become more prominent throughout Northern Ireland, but to a lesser extent within Mid Ulster. The Torrent and Carntogher areas have however shown signs of persistently high youth employment

The Northern Ireland Multiple Deprivation Measure (NIMDM) employment scale ranking accounts for 25% of the overall measure of deprivation given its importance to economic prosperity. Based on this measure we observe there is significant dispersion of employment deprivation throughout the Mid Ulster. As of the 2010 measure, there were three Mid Ulster wards appearing in the top 100 most deprived. (Coalisland – 36th, Ardboe – 77th, Stewartstown -84th) and only one ward in the 100 least deprived (Killymeal – 487th).

Figure 6.9: Employment Scale Deprivation Rank, Mid Ulster, 2010



Coalisland South	36	Bellaghy	313
Ardboe	77	Castledawson	314
Stewartstown	84	Aughnacloy	317
Coalisland North	118	Swatragh	323
Maghera	136	Castlecaulfield	326
Killymoon	140	Town Parks East	328
Pomeroy	158	Town Parks West	333
Oldtown	159	Valley	340
Ballysaggart	177	Donaghmore	349
Dunnamore	188	Moneymore	354
Killycolpy	194	Draperstown	373
Upperlands	206	Knockcloghrim	377
Drumglass	211	Benburb	381
Coalisland West and Newmills	215	Clogher	382
Tullagh	216	Oaklands	386
Lissan	227	Glebe	392
Newbuildings	228	Caledon	395
Washing Bay	231	Moygashel	402
Ballygawley	236	Fivemiletown	403
Gortalowry	242	Ballymaguigan	407
Mullaghmore	243	Gulladuff	413
Coagh	257	Lower Glenshane	428
Tobermore	258	Lecumpher	429
Altmore	270	Moy	451
Sandholes	288	Augher	454
Killyman	296	Coolhill	473
The Loop	305	Killymeal	487

Source: NIMDM, Oxford Economics

6.4 Summary

Due in part to the council area's employment structure, job creation is expected to remain subdued in the medium term. Mid Ulster employment levels remain comparatively strong, in the regional context; however the Torrent and Cookstown areas continue to struggle in this regard.

Mid Ulster unemployment levels have historically been lower than the regional joblessness figures. However local job losses have meant that overall unemployment is now much more in line with the Northern Ireland level; and some DEAs have joblessness in excess of the regional level.

The fact that young people's share of the unemployed has risen is worrying, given the potential knock on impacts it can have on social cohesion, disillusionment with returns to education, crime, long-term unemployment, out-migration, etc. We discuss this in more detail later.

> Social housing leases and overall share of total households have been on the decline regionally and to an even greater extent in Mid Ulster

7 Built Environment and spatial planning

Key findings

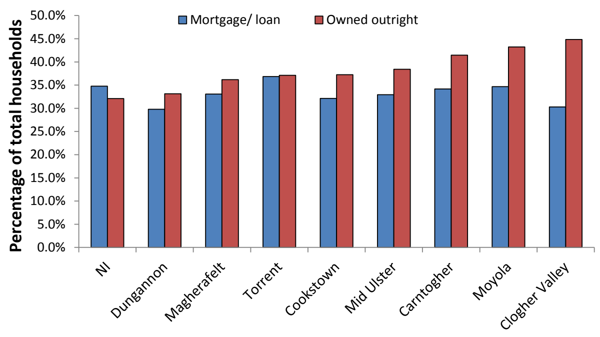
- Home ownership is more common in Mid Ulster than in Northern Ireland on average. Dungannon is the only DEA in Mid Ulster where this is not the case;
- Renting is therefore less common in Mid Ulster than Northern Ireland;
- Dwellings tend to have a higher rate of utilization in Mid Ulster; with Clogher Valley being the only DEA to have a higher vacancy rate than Northern Ireland overall;
- As of 2011, Mid Ulster house price growth has outpaced that of the Northern Ireland average. Dungannon house prices growth has failed to keep pace with the council average;
- Social housing as a share of total households have been on the decline in Northern Ireland and to a greater extent, in Mid Ulster;
- Mid Ulster's workforce are generally less likely to using public transport to travel to work. The pattern is equally as likely if the persons have no access to their own vehicle, suggesting a problem with accessibility; and
- Access to services indicators show significant room for improvement relative to the rest of Northern Ireland.

7.1 Home ownership

Home ownership and housing availability has historically played an important role within communities. The Mid Ulster area's ratio of the owner occupied households was 71 percent in 2011. In comparison the regional average was 67 percent in the same year. Not only was home ownership more common in Mid Ulster but owner occupied households were less likely to be debt financed. At the regional level, owner occupied housing which was bought outright made up 48 percent of the total; in Mid Ulster this figure was closer to 54 percent.

All DEAs in Mid Ulster had higher proportions of owned outright occupied households compared to those financed by debt. Clogher Valley had the highest proportion of non-mortgage owned households, 60 percent of the DEAs owner occupied dwellings were owned outright.

Figure 7.1: Owner occupied housing, Mid Ulster DEAs, 2011



Source: NISRA

Table 7.1: Proportion of mortgage financed owner occupied households, Mid Ulster Ward outliers, 2011

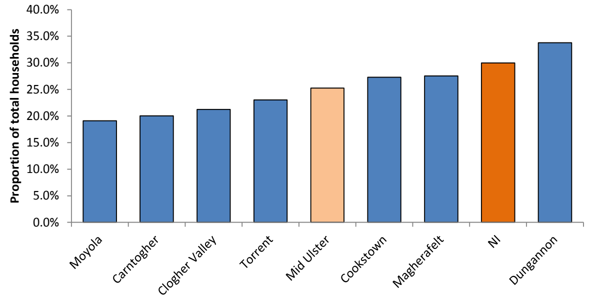
		Ward	Rank
Highest	45.1%	Washing Bay (Torrent)	1
	40.1%	Ardboe (Torrent)	2
	39.8%	Killyman (Dungannon)	3
Lowest	24.3%	Newbuildings (Cookstown)	52
	22.7%	Ballysaggart (Dungannon)	53
	22.0%	Fivemiletown (Clogher Valley)	54

Owner occupied homes were found to be more common in Mid Ulster than in Northern Ireland on average. Dungannon was the only Mid Ulster DEA wherein household owner occupation was under the regional average. Owner occupied debt financing was found to be less common throughout Mid Ulster

Renting is a less common form of accommodation type in Mid Ulster when compared to Northern Ireland on average. As of the last census (2011), a quarter of all households within the Mid Ulster area were rented. In comparison, 30 percent of total households within Northern Ireland availed of rented accommodation. At the Mid Ulster DEA level, six of the seven areas had renting proportions lower than the Northern Ireland average. The exception was Dungannon, which had a third of households residing within rented accommodation (Figure 7.2).

Observed levels of renting can result from a number of factors. The economic environment has a strong contribution when potential home owners consider their first steps onto the housing ladder. The ability to secure a mortgage has become more difficult in the wake of the credit crisis and subsequent recession. Employment growth and job security are increasingly fragile and can thereby influence long term financial decision making.

Figure 7.2: Rented households, Mid Ulster DEAs, 2011



Source: NISRA

Table 7.2: Proportion of rented households, Mid Ulster Ward outliers, 2011

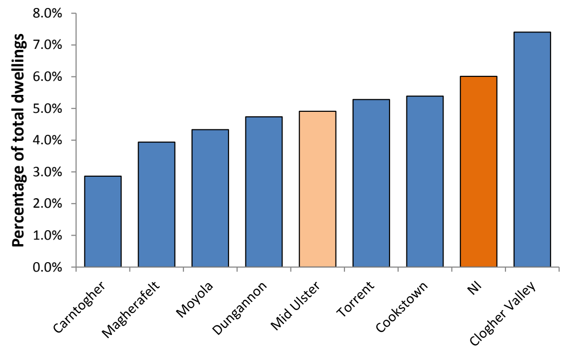
		Ward	Rank
Highest	57.5%	Ballysaggart (Dungannon)	1
	44.0%	Drumglass (Dungannon)	2
	43.9%	Coalisland South (Torrent)	3
Lowest	8.9%	Oaklands (Cookstown)	52
	7.8%	Dunnamore (Cookstown)	53
	7.3%	Lower Glenshane (Carntogher)	54

Renting tenures are less common in Mid Ulster compared to the regional pattern. Dungannon was the only DEA area to have above average households availing of rented accommodation

7.2 Vacancy rates

Limited housing development combined with population increases has created an ever increasing demand for housing nationwide. It is therefore important to consider the capacity needs within the housing stock to meet future requirements. Mid Ulster has below average proportions of vacant dwelling within its housing stock, with just under five percent of total dwellings unoccupied. The only Mid Ulster DEA to have above average vacancy rates (six percent) was Clogher Valley, with almost eight percent of dwelling having no usual residents.

Figure 7.3, Vacant dwelling, Mid Ulster DEAs, 2011



Source: NISRA

Table 7.3: Proportion of vacant dwellings, Mid Ulster Ward outliers, 2011

		Wards	Rank
Highest	12.1%	Augher (Clogher Valley)	1
	10.6%	Aughnacloy (Clogher Valley)	2
	8.5%	Pomeroy (Cookstown)	3
Lowest	2.4%	Lissan (Magheraflet)	52
	1.8%	Swatragh (Carntogher)	53
	1.4%	Town Parks East (Magheraflet)	54

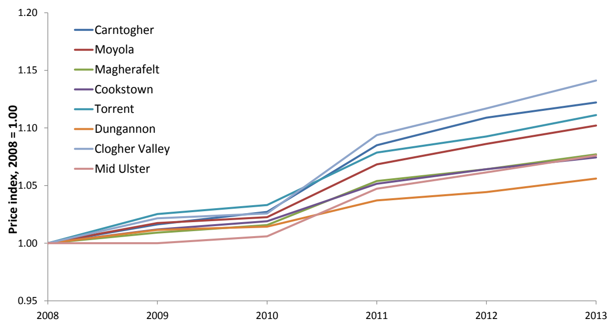
Dwellings tend to have a higher rate of utilization within Mid Ulster; with Clogher Valley being the only DEA to have above vacancies above the regional average

7.3 Housing

House prices fell sharply following the financial crisis. However, Mid Ulster average house prices remained marginally above the regional average in 2008/09, yet growth remained subdued. Prices only began to increase in earnest in 2011 and ever since the pace of house value growth has outpaced the Northern Ireland average (Figure 7.5).

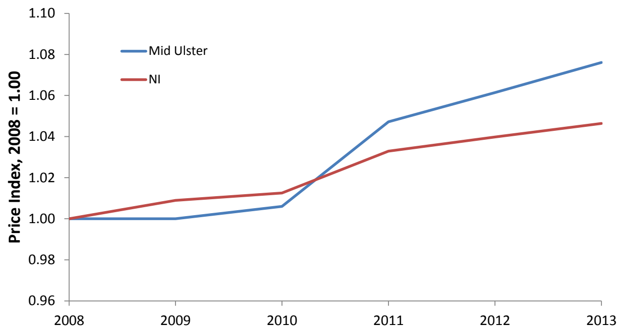
House price recovery has not been evenly distributed among the council's various DEAs. The Dungannon area has underperformed the Mid Ulster average house price rate of growth since 2011. As of 2013, the areas with the highest and lowest average house price were Magherafelt and Carntogher (£131,164 and £121,539 respectively). House values within Mid Ulster remain strong in the regional context, the Northern Ireland average house price was £120,828 in the same year.

Figure 7.4: Average house prices, Mid Ulster DEAs, 2008-2013



Source: NISRA

Figure 7.5: Average house prices, Mid Ulster and Northern Ireland, 2008-2013



Source: NISRA

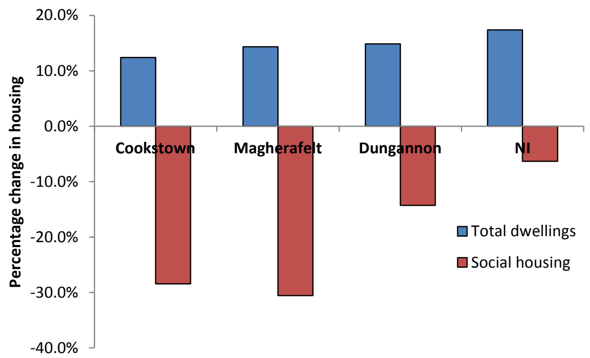
As of 2011, Mid Ulster house price growth has outpaced that of the Northern Ireland average. Dungannon house prices growth has failed to keep pace with the council average

Strong growth in house prices can be an indicator of buoyant demand and/or restricted supply within the Mid Ulster area. All three constituting local authorities within Mid Ulster experienced an increase in dwelling numbers between 2001 and 2011. However, Mid Ulster's increase in household numbers was marginally less than that of the Northern Ireland average (17.4%) throughout the period (Figure 7.6). The Dungannon area saw the largest expansion in household numbers within Mid Ulster with a 15 percent increase.

Over the same period social housing tenures within Mid Ulster have reduced significantly and fallen more sharply than the regional trend. Between 2001 and

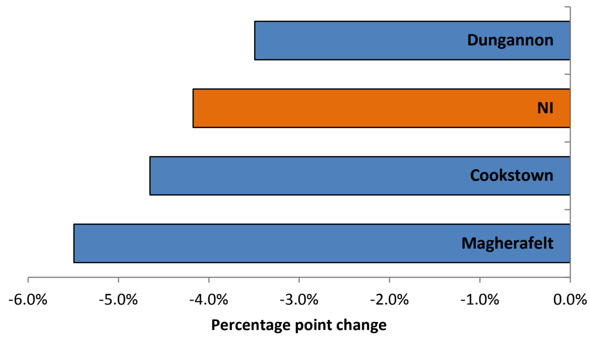
2011, social housing tenures within Northern Ireland had reduced by over six percent. The Dungannon area's social housing contracted least within Mid Ulster - however its percentage decline was still over twice that of the regions. Figure 7.7 shows the percentage point change in the proportion of social housing tenures within Mid Ulster. The Dungannon area's share of social housing was found to have fallen by a lesser degree than the regional average decline using this measure. Never-the-less, overall social housing has been on the decline to a greater extent in Mid Ulster to that experienced in Northern Ireland on average.

Figure 7.6: Household growth, Mid Ulster, 2001-2011



Source: NISRA

Figure 7.7: Social housing proportion of total households, Mid Ulster, 2001-2011

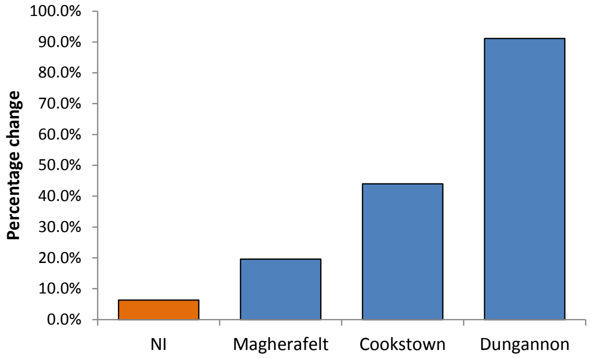


Source: NISRA

> Social housing leases and overall share of total households have been on the decline regionally and to an even greater extent in Mid Ulster

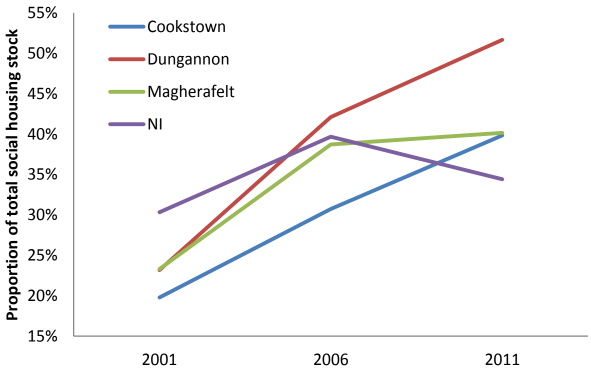
Demand for social housing has been on the increase throughout Northern Ireland. Northern Ireland social renting waiting list application and transfer data have shown that requests for this form of housing type has increased by over six percent between 2001 and 2011. Social housing applications and transfer requests within Mid Ulster were found to far exceed the regional demand over the same ten year period. The Dungannon area had by far the largest increase in demand for social housing. Applications within the Dungannon area grew by over 90 percent between 2001 and 2011 and were double that of the Cookstown and Magherafelt waiting lists. By way of an example, the current social housing uptake in the Dungannon authority would be required to expand by over 50 percent in order to clear the waiting list as of 2011.

Figure 7.8: Social housing waiting list demand, Mid Ulster, 2001- 2011



Source: NISRA

Figure 7.9: Social housing waiting list as a proportion current dwelling stock, Mid Ulster, 2001-2011

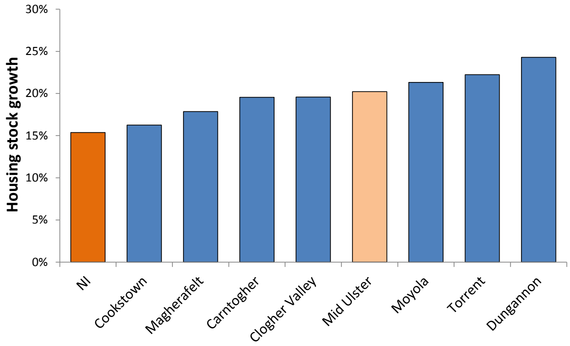


Source: NISRA

> Mid Ulster's increase in demand for social housing has far exceeded that of the Northern Ireland average. The Dungannon area's waiting list is particularly large in comparison to current social housing tenures provisions

The overall housing stock within Mid Ulster grew by 20% between 2001 and 2011, which was stronger than the regional housing stock increase (15%). At a DEA level, all seven areas experienced housing development in excess of the regional average growth. The Dungannon DEA benefited from the largest growth in housing stock by realising a 24% increase in total housing numbers. Unsurprising, there is a strong relationship between demand and supply for housing. The Mid Ulster council area's population increase has been among the strongest in Northern Ireland since the turn of the century. As a consequence the requirement for homes fuelled the corresponding increase in housing stock development throughout the Mid Ulster area (Figure 7.11). Future projected population growth combined with reductions in average household sizes will necessitate provisions for future housing development. Planning for such an eventuality must encompass current capacity restraints already highlighted by infrastructure providers.

Figure 7.10: Housing stock growth, Mid Ulster, 2001-2011



Source: NISRA

Figure 7.11: Population and housing stock growth, Mid Ulster, 2001-2011

Source: NISRA

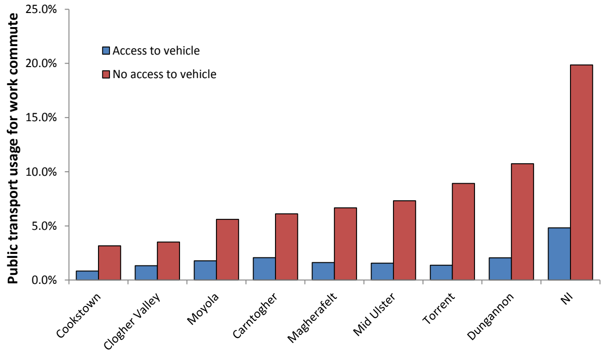
- Mid Ulster house prices have proved resilient in the regional context; with strong population growth spurring housing growth locally.
- Given expressed capacity restraints and population projections, further development in infrastructure would be required in order to facilitate continued housing development.
- Social housing availability has been declining despite increasing demand among the community prompting concerns for the vulnerable.

7.4 Public transport

Public transport usage is becoming increasing important in the light of increasing traffic congestion and environmental concerns. Increased adoption of public transportation will invariably be influenced by characteristics including; availability, cost, public attitudes, work patterns and location. As of 2013, Mid Ulster was the third most sparsely populated council area in Northern Ireland, with a population density of 0.78 residents per hectare. The rural profile of the area will undoubtedly present challenges when attempting to maintain consistent good quality access to services. Figure 7.6 shows the proportion of public transport usage among the employed, depending on whether they belong to a household which has access to a vehicle.

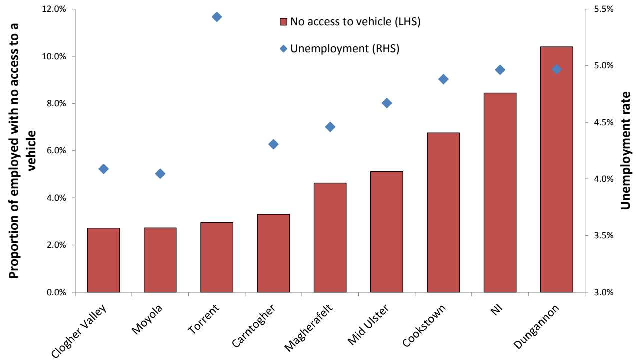
Public transport usage for commuting purposes is well below average within Mid Ulster. Northern Ireland average usage of public transport for those with access to their own vehicle is poor at just under five percent, though this is still higher than the Mid Ulster average of two percent. Given car ownership levels and attitudes this result may be somewhat unsurprising. However the disparity between Mid Ulster and the regional average is similar for commuters who do not have access to their own transportation. On average regionally, a fifth of the employed with no access to a car would find themselves using public transport to commute. Within Mid Ulster this proportion is almost two thirds smaller at 7 percent. These results suggest that public transport is under developed and/ or underutilised within the Mid Ulster area.

Figure 7.6: Proportion of employed using public transport to commute to work, Mid-Ulster DEAs, 2011



Source: NISRA

Figure 7.7: Proportion of employed with no access to a vehicle and unemployment, Mid Ulster DEAs, 2011



Source: NISRA

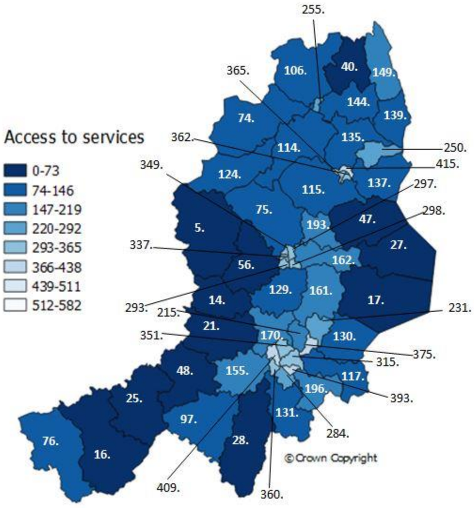
In comparison to the regional average, Mid Ulster's employed are generally less likely to using public transport to travel to work. The pattern is equally as likely if the persons have no access to their own vehicle, suggesting a problem with accessibility

Improving an area public transport facilities can be an important factor when attempting to increase the labour forces reach for employment opportunity. The more a community is restrained geographically the more difficult to address unemployment (Figure 7.7).

7.5 Proximity to services

Proximity to services contributes ten percent to the overall deprivation rank of an area. Whereas this is a relatively small contribution to the overall deprivation rank - it is a category were the council area performs particularly poorly given its rural profile. Mid Ulster has 16 wards ranked in the top 100 most deprived wards according to access to services, with Dunnamore ranked 5th most deprived in Northern Ireland based on this measure.

Figure 7.8: Access to services deprivation rank, Mid Ulster, 2010



Dunnamore	5	Gulladuff	144
Pomeroy	14	Valley	149
Clogher	16	Castlecaulfield	155
Killycolpy	17	Stewartstown	161
Altmore	21	Coagh	162
Augher	25	Donaghmore	170
Ardboe	27	Moneymore	193
Caledon	28	Moy	196
Upperlands	40	Coalisland West and Newmills	215
The Loop	47	Coalisland North	231
Ballygawley	48	Castledawson	250
Oaklands	56	Maghera	255
Lower Glenshane	74	Moygashel	284
Lissan	75	Gortalowry	293
Fivemiletown	76	Newbuildings	297
Aughnacloy	97	Killymoon	298
Swatragh	106	Killymeal	315
Tobermore	114	Tullagh	337
Lecumpher	115	Oldtown	349
Killyman	117	Drumglass	351
Draperstown	124	Ballysaggart	360
Sandholes	129	Town Parks East	362
Washing Bay	130	Town Parks West	365
Benburb	131	Coalisland South	376
Knockcloghrim	135	Coolhill	393
Ballymaguigan	137	Mullaghmore	409
Bellaghy	139	Glebe	415

Source: NIMDM, Oxford Economics

7.6 Summary

Owner occupied housing is more common in Mid Ulster than in Northern Ireland generally. Mid Ulster home owners are also less likely to be highly leveraged in the purchase of their home on average. Unsurprisingly, renting is less common within the council area – with Dungannon being the only exception. Mid Ulster house prices are above the regional average and are growing at a faster rate. Social housing as a share to Mid Ulster households has been on the decline despite signs to increasing demand.

Public transport is used to a lesser extent in Mid Ulster than seen elsewhere within Northern Ireland, prompting questions about service availability. Access to services indicators show significant room for improvement in order to achieve the standards enjoyed by communities elsewhere in Northern Ireland.

8 SWOT

Our September 2014 report set out a SWOT analysis for Mid Ulster. In this section we try to expand on this using the additional data analysis in the preceding sections.

Strengths

Mid Ulster	Local insights
■ Relatively young population ■ Proportion of residents suffering from limiting long term illness below the regional average/ falling more quickly than other council areas ■ Manufacturing specialisms exhibit export potential ■ Unemployment levels low relative to NI average ■ Strong vocational level educational attainment ■ Strong entrepreneurial culture ■ Strong tourism spend per visit ■ Positive school leaver performance and further education engagement ■ Owner occupied housing more common in Mid Ulster and less reliant on debt financing ■ House price growth has outpaced that of the region ■ Low overall crime rates	■ Decline in the proportion of residents suffering from long term illness in all DEAs; Dungannon's proportion reducing markedly ■ DEA proportions of residents with no qualifications falling faster than the NI average ■ Employment rates have fared better than the Northern Ireland average post-recession ■ Moyola's higher education attainment proportions improved more strongly than the regional equivalent ■ Clogher Valley has the highest share of owned outright owner occupied housing within the council area ■ Dungannon's share of long term sick has fell by the greatest extent within Mid Ulster

Weaknesses

Mid Ulster	Local insights
■ Under-represented in high value added growth sectors ■ Economy dependent on the strength of construction, manufacturing and agrifood ■ Over-reliance on sectors driven by consumer confidence ■ Resident employment falling from before the	■ High Crime levels in Cookstown and Dungannon; with violent crime a particular concern ■ Torrent and Cookstown employments rates continue to underperform ■ Torrent unemployment ■ Torrent and Carntogher high levels of youth

Mid Ulster	Local insights
recession took hold ■ Long term unemployment rising ■ High levels of youth unemployment ■ Below NI average productivity levels ■ Low wages (implications for out-migration and house affordability) ■ Poor performance at both ends of the educational spectrum ■ Disease death rates amongst the worst in NI ■ Access to services ■ Above average ambulance response times and travel times to hospital	unemployment ■ Cookstown's proportion of residents suffering from limiting long term illness above the Northern Ireland average ■ Cookstown areas education attainment ranks poorly within Mid Ulster, and show least signs of improvement ■ Torrent rates highest among Mid Ulster DEA in terms of general deprivation ■ Dungannon's house price increase have lagged behind other areas within Mid Ulster ■ Road causality hotspots in Dungannon and Clogher Valley

Opportunities

Mid Ulster	Local insights
■ Increased planning and economic development powers resulting from local government reform ■ Specialist manufacturing shows potential for export growth ■ Tourism visits relatively low compared to other areas ■ Growth expected in higher value added sectors ■ Proportional change in the percentage of residents with no qualification has fallen by a larger extent than NI ■ Lower proportions of residents providing unpaid care ■ Above average housing stock increase	■ Relatively small levels of out commuting for work purposes ■ A number of DEAs have made significant strides in lowering disease death rates ■ Clogher Valley was the only DEA within Mid Ulster to have vacant dwelling above the regional average

Threats

Mid Ulster	Local insights
▪ Broad deprivation mix within the council area ▪ Austerity measures nationwide ▪ Potential skill mismatch between the unemployed and that demanded by business ▪ Areas most prominent employment sector (manufacturing) show weak job growth potential ▪ Falling business stock ▪ Smaller businesses may be more difficult to grow ▪ Higher education attainment proportion improvements are slower than that of the region on average (widening the gap in higher skills) ▪ The proportion of dwellings without usual residents is below average indicating a supply issue ▪ Above average fall in the share of social housing	▪ Hate crime low, yet sectarian motivated proportions are similar to the regional average ▪ Increasing numbers of people suffering from long term illness ▪ Large variation in deprivation throughout the council area ▪ Cookstown and Clogher Valley have the highest proportions of residents aged over 65 ▪ Councils rural profile and low public transport usage combine to impact access to services ▪ All Mid Ulster DEA have below regional average proportions of residents skilled to NVQ4+ level ▪ Aging population (but at a slower rate than the region as a whole) ▪ Above average hospital occupancy rates ▪ Excessive social housing demand in Dungannon

9 Cross cutting themes

9.1 Improving delivery of public services

The Mid Ulster community plan has the objective of improving the delivery of public services to the council area's residents. Given the newly appointed boundaries of the council area, it has never been more important that the council members have a clear picture of the area's attributes in order to target resources most effectively. To help achieve these aims six pillars or themes have been identified – each chosen to represent the challenges and opportunities facing communities. It is hoped that strongly evidence based resource management can deliver lasting improvements for local people.

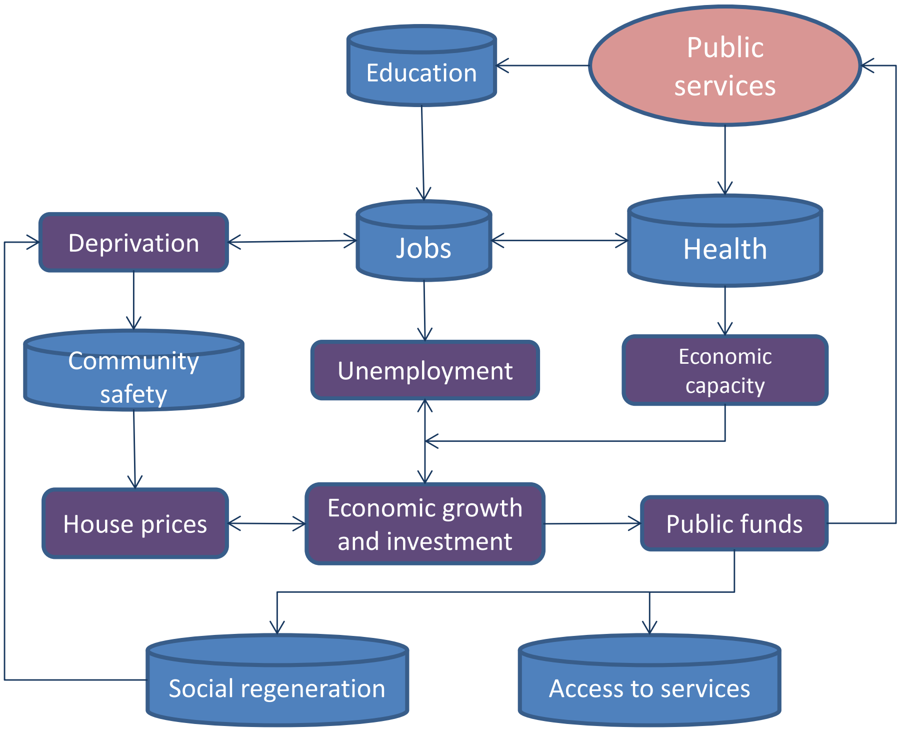
9.2 Underperformance and knock-on impacts

It is often tempting for policy makers to try to improve conditions by spreading limited resources thinly over all areas of perceived need. However perceived issues (the various variables that make up the pillars in the community plan) are invariably linked in such a way that improvements in one area will invariably have positive knock on impacts in others. Likewise areas of need in one variable often suffer from need in others.

Figure 9.1 provides an overarching framework for thinking about these linkages. For example at the individual and community level, education levels can determine the likelihood of someone being in employment, unemployed or inactive. The evidence across the UK is strikingly consistent. The higher the level of skills or education the greater the likelihood the person will engage with the labour market, and the greater the likelihood they will be employed.

In turn, as the proportion of residents employed rises, the less deprivation an area will have, the more attractive it becomes for investment and indigenous growth, and so the greater the likelihood of additional job creation.

Figure: 9.1: Interdependence and the pillars



Source: Oxford Economics

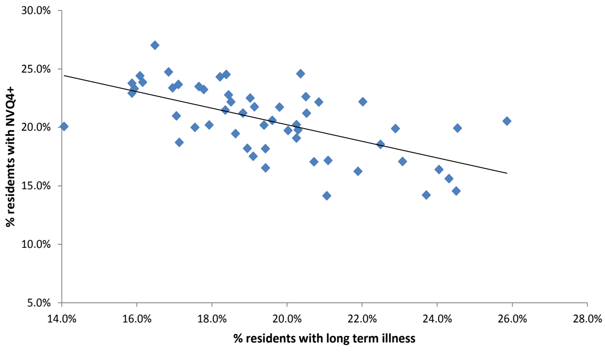
A comprehensive review of these linkages can help determine the strength of their positive spill over effects, as well potential return to the community resulting from any investment. That is outside the scope of this study, but we can still provide some evidence on the relationships between key variables.

We have already noted that education can improve labour market conditions, however there are a number of knock on benefits. People in work generally have improved life style opportunities which in turn improve general health results. Such relationships are however not self-contained. For example an improving job market may give more people the possibility of better health outcomes, but equally, improvements in health help create an environment were working people can contribute more effectively towards the economy. In order to demonstrate this; correlations have been constructed between a number of variables closely associated with pillar themes. Figures 9.2 to 9.7 were created using Mid Ulster ward data for 2011. Even using this small sample the reader can clearly identify relationships between key indicators of note:

- Poor education is associated with poor health result (Figure 9.2 – 9.3);
- Poor health is associated poor employment rates (Figure 9.4);
- Higher unemployment is associated with increased crime rates (Figure 9.5);
- Higher crime rates are associated with lower house prices (Figure 9.6); and

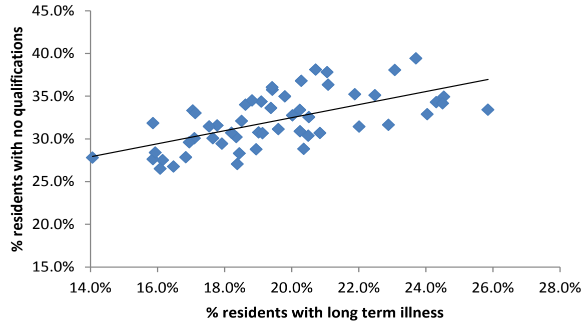
- Higher employability is associated with improved skills/ education (Figure 9.7).

Figure 9.2: Skills and poor health, Mid Ulster wards, 2011 (correlation: -0.62)



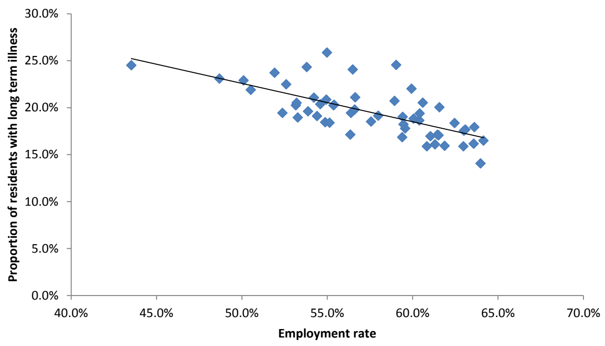
Source: NISRA

Figure 9.3: Skills absence and poor health, Mid Ulster wards, 2011 (correlation: 0.62)



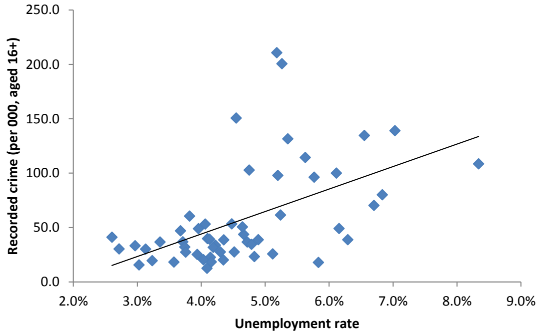
Source: NISRA

Figure 9.4: Poor health and employability, Mid Ulster wards, 2011 (correlation: -0.69)



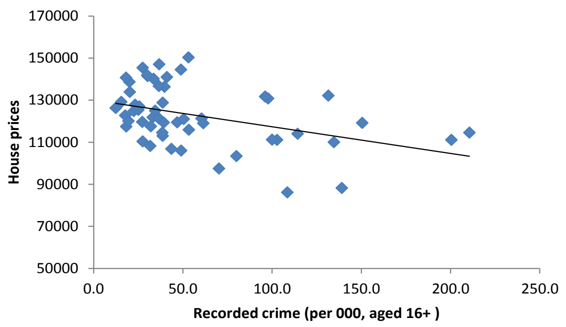
Source: NISRA

Figure 9.5:Crime and unemployment, Mid Ulster wards, 2011 (correlation: 0.53)



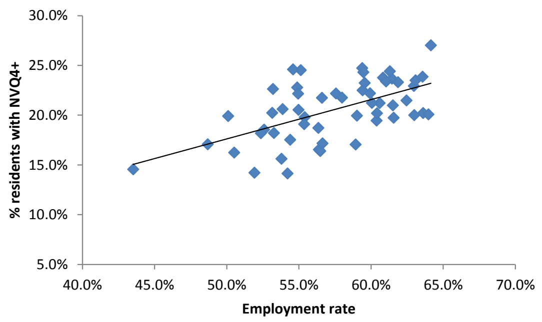
Source: NISRA

Figure 9.6: Recorded crime and house prices, Mid Ulster wards, 2011 (correlation: -0.41)



Source: NISRA

Figure 9.7: Employment and skill levels, Mid Ulster wards, 2011 (correlation: 0.58)



Source: NISRA

A number of these associations are strongly supported throughout academia. Poor health in most European countries is found to be an important determinant for those striving to enter and maintain paid employment (Schuring et al, 2007). Improved employment possibilities can in turn ease deprivation and associated crime levels. This is a desirable outcome, as high crime rates are found to negatively impact property prices, regardless of crime type (Ceccato and Wilhelmsson, 2011). Improving property prices can then have significant positive impacts on private consumption throughout local economies (Girouard and Blondal, 2001).

These findings reinforce a central thread; improved skill levels will improve employability, which will improve health and deprivation outcomes. These improvements will feed back into the local economy through a healthier labour market and increased economic growth and consumer confidence.

9.3 The role of skills and education

A number of the themes discussed have the ability to reinforce each other when the economy is performing well. To a lesser extent this is the case regarding education. Education is an important starting point within society as it trains individuals in the skills that are required by the economy. There is strong evidence that higher quality skill sets within populations are strongly related to earnings and economic growth (Hanushek and Woessmann, 2008).

This relationship is becoming increasing important as developed economies become ever more skills orientated. Additionally, education plays a foundational role in reinforcing society’s values. Educational bodies perform a role quite different from the family dynamic, in that status is earned rather than ascribed at birth. This proves to be an important mechanism for preparing individuals for a future role in society. Social exclusion and unemployment are therefore more likely when levels of education are lacking. These factors combine and inevitably contribute to higher crime levels within communities.

General health levels within communities are also impacted by economic and educational conditions. There is a well-documented association between education and health (Ross and Wu, 1995). The better educated among society are less likely to suffer from economic hardship, and in turn this is found to significantly improve health. Individuals with improved educational attainment generally have a greater sense of control over their lives, which is reflected in healthy lifestyle choices.

Not only is education a prominent issue for those wishing to upskill the current labour force, but equally it can impact the current stock of highly skilled people within communities. Well educated people are more likely to seek out quality educational bodies for their children. It is therefore important to maintain high standards in educational bodies to avoid migration of highly skilled people out of the area for this reason.

Collectively these factors impact upon levels of social deprivation within communities. The pillars influence on quality of life is amplified given their interdependent relationships. Inevitability areas which are weak in one indicator struggle in others, resulting in a vicious cycle from which only policy intervention can assuage. Education is arguable one of the fundamentals, which forms a prerequisite for successful communities.

By way of an example, the DEA of Torrent is among the weaker performing localities within Mid Ulster in terms of general educational attainment. Parallel to this the area suffers; consistently weak employment rates, high unemployment, poor health, high concentrations of deprivation and an increasing propensity for social unrest. Moyola on the other hand, has made stronger progress up skilling residents and the opposite relationships holds true in many instances. The strength of the association between skill levels and social indicators would seem to be well established in the area.

9.4 Looking forward

Over the next 10 years official and Oxford Economics projections suggest a few broad trends for Mid Ulster:

- An aging population;
- Slower job creation;
- Falling resident employment rates;
- Higher unemployment rates than before the 2008 crisis;
- An increasingly skills hungry economy; and
- Tighter public spending.

These trends could put pressures on certain pillars of the Community Plan. The aging population is likely to push up demand for health care and manifest itself in more health issues. It could also result in a growing number of carers that Mid Ulster has traditionally had a low number of.

Slower job creation will result in falling resident employment rates and higher than experienced unemployment rates (relative to the record lows pre-2008). Given the relationships between unemployment and antisocial behaviour, crime and deprivation, the subdued labour market could make it difficult to tackle already poor performing areas. Furthermore the increasingly skills hungry economy will make it harder to reengage the long-term unemployed with work which could exacerbate challenges that face the new Council.

Young people have borne the brunt of rising unemployment and the longer these individuals remain out of work the more feasible it is that antisocial behaviour could rise. There is also a risk that young people could become disillusioned with the returns to education given the lack of job opportunities. However given the high skilled sectors of the economy are likely to drive growth, young people should be investing in skills like never before. This is particularly important for the Community Plan and for policy development, given the relationship between skills and health, deprivation, employment, unemployment, inactivity and wages.

Finally austerity measures will mean future policy and Government intervention will likely have to be more effective with less funding which adds a further challenge to the Council.

It is outside the scope of this analysis to assess how each of the variables or pillars could change in the future. To do this we would need to tie an analysis of our forecasts with the objectives of current and future policy. Given the respective Councils are merging in April 2015, and future policy is still being developed, discussed and agreed, such a forward looking exercise may be possible later in the year.

10 Bibliography

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