



# Commissioning Prospectus

Affordable Social and Intermediate Housing  
for Social Housing Development Programme  
Period (2022/23 - 2024/25)

**Housing**  
Executive

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# Introduction

This year marked the 50th anniversary of the Housing Executive, it has also been one of the most challenging years since its formation in 1971. COVID-19 has forced us to adapt our services over a remarkably short period of time enabling our workforce to work remotely to ensure we continue to deliver a service to our customers.

Northern Ireland is now starting to see a pathway out of the COVID-19 pandemic and we believe that housing will play a key role in assisting individuals, households, communities and the economy to recover from the pandemic.

At this time, there is a pressing need to reform how social housing is delivered in Northern Ireland so that we can build on the successes of the past 50 years. The Minister for Communities' statement of November 2020 on the revitalisation of our organisation offers the key to a future that will deliver additional, better, more energy efficient and more appropriate homes to those in need and, as a bonus, it also provides the prospect of creating new jobs and skills training that will boost the economy.

# Overview and Purpose

This is the sixth annual Housing Executive Commissioning Prospectus (the Prospectus) which continues to provide a strategic overview of housing need and demand in Northern Ireland (NI). It also provides Housing Associations and other stakeholders with the information they require to make informed decisions about where to search for land and property to deliver new affordable social and intermediate housing.

This year's Prospectus is timely as it follows the November 2020 Minister's statement which gave a commitment to build and allocate more social homes to meet growing need, reintroduce ring-fencing and to revitalise the Housing Executive. The Department for Communities (DfC) has also commenced the preparation of a new Housing Supply Strategy, recognising that a different approach to delivering more housing is needed with a focus on the whole system and the importance of collaborative working and partnership between stakeholders. The Prospectus is an important document in setting



out unmet need across Northern Ireland, to assist and facilitate the development of social homes where they are needed. More information on the Minister's Statement and the Housing Executive's Revitalisation Programme can be found in the Housing Investment Plans (HIPs), which can be found [here](#).

The Prospectus sets out the key priorities and locations for affordable housing (social rented and intermediate housing) in Northern Ireland, also broken down for each Local Government District (LGD) and within the context of Community Planning. Feedback received from local stakeholders is taken into account and helps to form a complete analysis.

Three Regional Place Shaping teams cover Belfast, South and North Housing Executive Regions, these are aligned to LGDs. Place Shaping teams are responsible for supporting Housing Associations in delivering social and affordable schemes against the Strategic Guidelines and the needs identified in this Prospectus.

The Prospectus is updated and published annually. However, it is important that Housing Associations and other interested stakeholders discuss specific proposals and any queries with the relevant Head of Place Shaping (see Contacts).

# Programme Commissioning and Formulation

The strategic identification of affordable social and intermediate housing need set out in the Prospectus has been developed from the recommendations of the Social Housing Development Programme (SHDP) Delivery Strategy.

The Housing Executive will roll forward the SHDP for the next three year period (2022/23 to 2024/25). The 2022 Bidding Round, already concluded, will produce a new draft SHDP for approval by DfC. This Prospectus will facilitate the ongoing site searches by Housing Associations in preparation for subsequent year's bidding round.

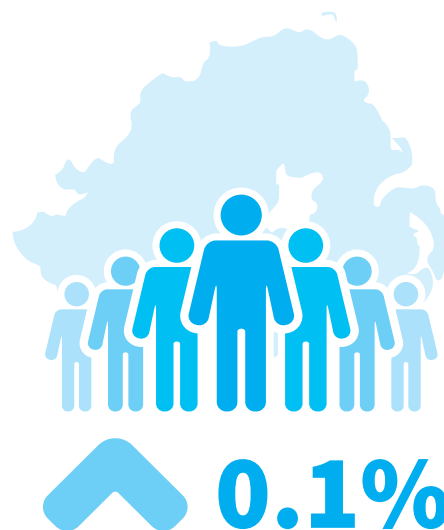
# Northern Ireland Housing Requirements

## Context

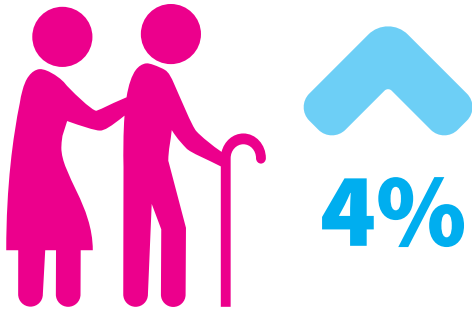
The demographic of Northern Ireland continues to change. Northern Ireland Statistics and Research Agency (NISRA) estimate the population of Northern Ireland to be 1,895,510 (30 June 2020).

NISRA statistics (for the period mid-2019 to mid-2020) show that natural change (births minus deaths) accounted for all growth over the last year, net migration for Northern Ireland was negative for the first time since mid-2013. NISRA reports that impacts such as a higher than average excess death rate, restrictions on travel due to COVID-19, and the EU Exit have all contributed to this lower population growth.

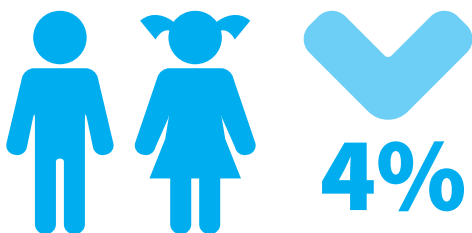
NISRA 2016 based household projections show that the average household size is steadily decreasing, reducing from 2.57 in 2021 to 2.46 in 2031. This long term trend towards smaller households and a greater number of older person households will result in a sustained demand for smaller, often bespoke accommodation.



NI Population 1,895,510  
This is an increase of 1,800 people or 0.1% between mid-2019 and mid-2020, the lowest population growth since 1999

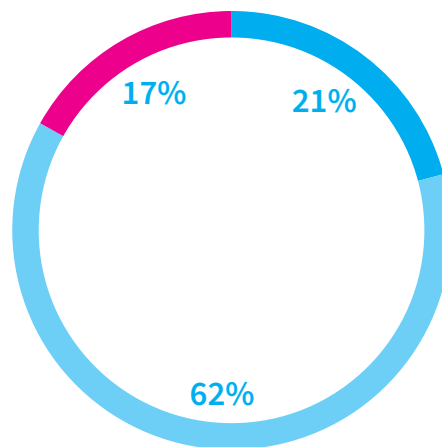


The population continues to age, NISRA statistics show the proportion of the population aged 65 years and over was 17% in mid-2020 compared to 13% in mid-1995

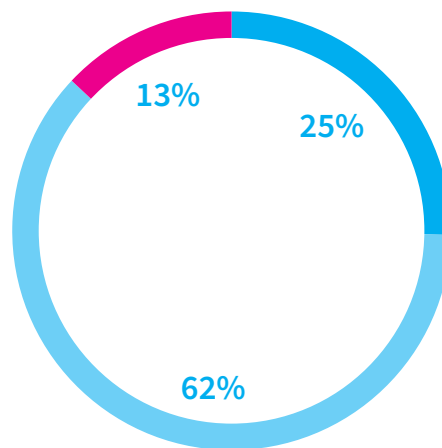


The proportion of the population aged 0 to 15 years is by contrast decreasing (21% in mid-2020 from 25% in mid-1995)

### NISRA Mid-Year Population Estimates June 2020



### NISRA Mid-Year Population Estimates June 1995



■ 0-15 ■ 16-64 ■ 65+

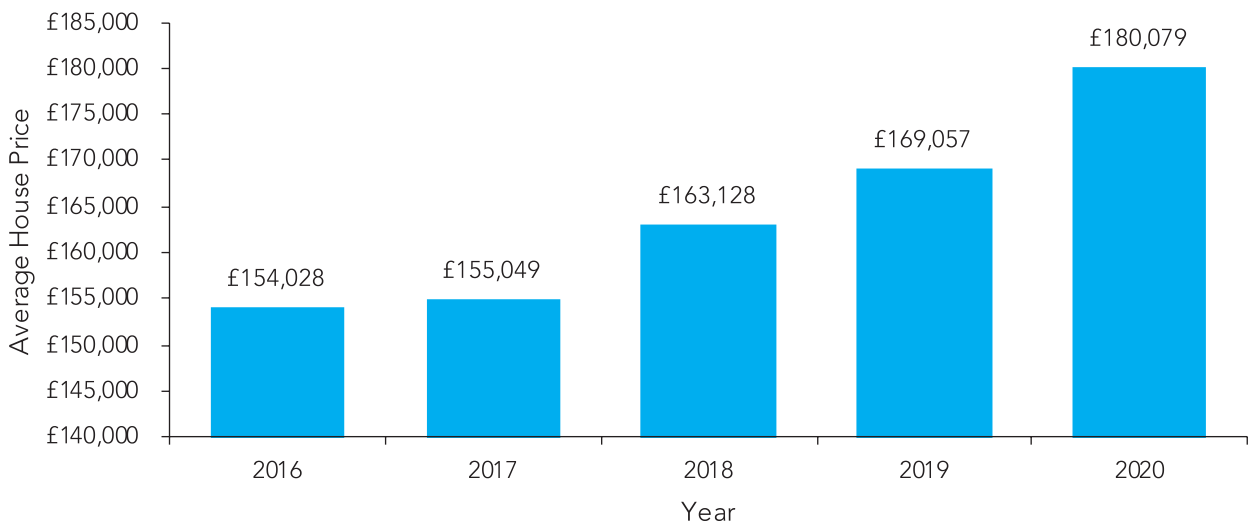
# Housing Market Analysis (across tenures)

## Owner Occupation

Prior to the COVID-19 pandemic in March 2020, the Northern Ireland Housing market had gained

momentum with sustained demand and average house price increases year on year. Contrary to expectations the housing market continues to be buoyed, with Ulster University indicating that the average house price in 2020 was £180,079. Sales and pricing both increased during the second quarter of 2021, consumer confidence continues to improve in line with the wider economic recovery. While there are signs of a potential moderation in activity, in the short-term the owner occupied market is expected to remain buoyant.

## NI Average House Price



Source: Ulster University

Commentators have suggested that the market has been boosted by support measures such as the stamp duty holiday, the government guaranteed mortgage schemes and continued low interest rates. Homeworking will also have driven the market to some extent with people who could afford to, often seeking larger properties with room to provide for an office space outside of shared living spaces such as the kitchen. This desire for larger properties has also driven a shift to an

increased demand being reported for properties in rural locations, as larger properties in some rural areas can be more affordable, particularly when located away from the main population centres. This, along with the increased likelihood of homeworking becoming the 'new normal', and daily commutes to work becoming a thing of the past, has made the possibility of rural living more attractive.

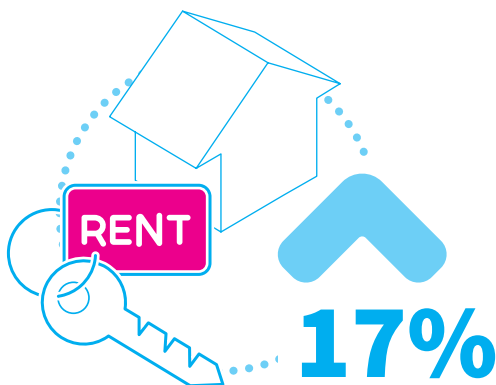


The stamp duty holiday ended in September 2021, however the variety of government guaranteed mortgage schemes available since April 2021, to those who have saved a 5% deposit, remains good news for first time buyers.

Younger first timer buyers in particular however continue to find the housing market challenging with lower priced and affordable homes still in short supply or snapped up by the buy to let market.

## Private Rental

Prior to the COVID-19 pandemic, the private rented sector remained strong and buoyant. The complete closure of the market during the early stages of the pandemic resulted in a reduction in transactions however towards the end of 2020 there were signs of recovery. Transactions were reported to be on the increase again with numbers returning to relatively normal levels, albeit still down on pre pandemic figures. (Source: Performance of the Private Rental Market in NI H2 2020).



The average rent for NI in quarter 4 2020 was £653, up 17% on the same quarter in 2015 (£556)

In quarter 4, 2020, the average rent in NI was £653, up 17% on the same quarter in 2015 (£556). Whilst these figures indicate that the private rental sector remains a healthy and sustainable market, the continued rise in rents also suggests supply of private rental is not meeting demand.

The DfC Minister’s statement in November 2020 reported that the private rented sector in NI is now similar in size to the social rented sector. It provides housing to a diverse group of households including a growing number of families with children, who could be asked to leave their homes with as little as 4 weeks’ notice. The statement acknowledges that there has not been enough social new build in recent years to cope with waiting list demand and that for many the unsecure tenancy options in the Private Rented sector have been the only choice.

Many of these households, unable to access social housing due to the historic underinvestment, have come to rely on the private rented sector with the support of Local Housing Allowance. There is an increasing risk that these same households will no longer be able to access the private rented sector if private rents continue to increase at the same rate as above or if there are future changes to local housing allowance benefits. As a result, the need for more social and affordable homes across NI may increase.

To address this, the Minister in her statement advised that along with plans to increase supply of social housing, there would be plans to expand the rental options, including the introduction of intermediate rent (discussed later in this report). The aim of this is to provide ‘an additional supply of good quality, well managed and maintained homes which are affordable for lower income people and families’.

## Social Housing

The social housing share of the market in 2001 was 21.9%, by 2019/20 it was just 10% according to the DfC’s Northern Ireland Housing Statistics. Tenants leaving social housing during the housing market boom and buying their own homes as well as the increased reliance on the private rented sector for those unable to access social housing over the same period are some of the reasons for this shift in tenure profile.

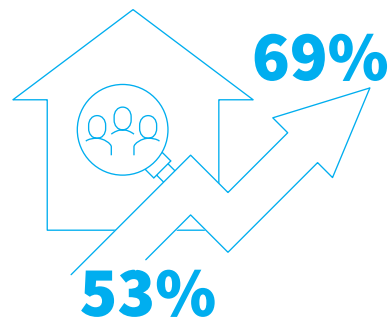
Affordability issues in the private rented sector have been somewhat mitigated by the Local Housing Allowance, but rent increases in recent years and the relatively insecure nature of the private rented sector has resulted in many people seeking the more secure and more affordable social sector. This, along with continued difficulties that many face accessing home ownership, is causing the social waiting list to rise to historically high levels.



Social housing waiting lists have increased by 12% from 39,993 in June 2011 to 44,985 in June 2021

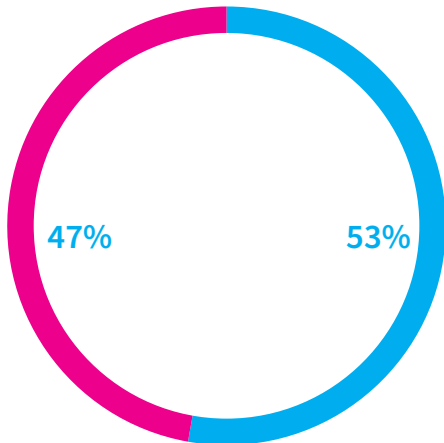
As the dynamic of the private rented market evolves, social housing new build is becoming an ever more important tenure option. Social housing waiting lists have increased by 12% from 39,993 in June 2011 to 44,985 in June 2021. It is important

however to note that the percentage of applicants on the waiting list in Housing Stress (30+points) has increased significantly. In June 2011, applicants in housing stress represented 53% of the total waiting list (21,123), by June 2021 this figure had risen to 69% (30,926). This is in part due to the historic under investment in social new build, lack of affordable private homes for ownership and, increasingly, a lack of affordable private rental.

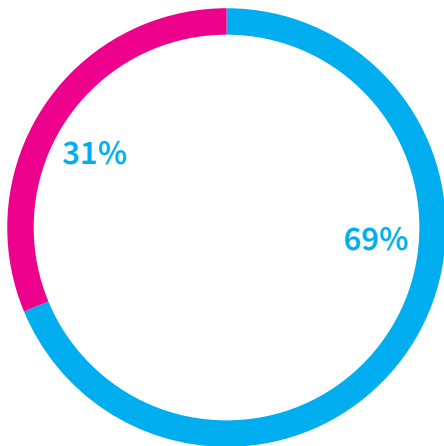


In June 2011, applicants in housing stress represented 53% of the total waiting list (21,123), by June 2021 this figure had risen to 69% (30,926)

## Waiting List June 2011

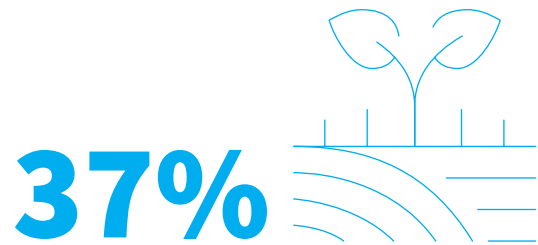


## Waiting List June 2021



■ % HS ■ % Non HS

It is recognised that rural areas have unique issues which require different approaches. In line with NISRAs default urban/rural definition, the Housing Executive considers rural areas to include **‘all settlements with a population below 5,000 and the open countryside’**, and based on this:



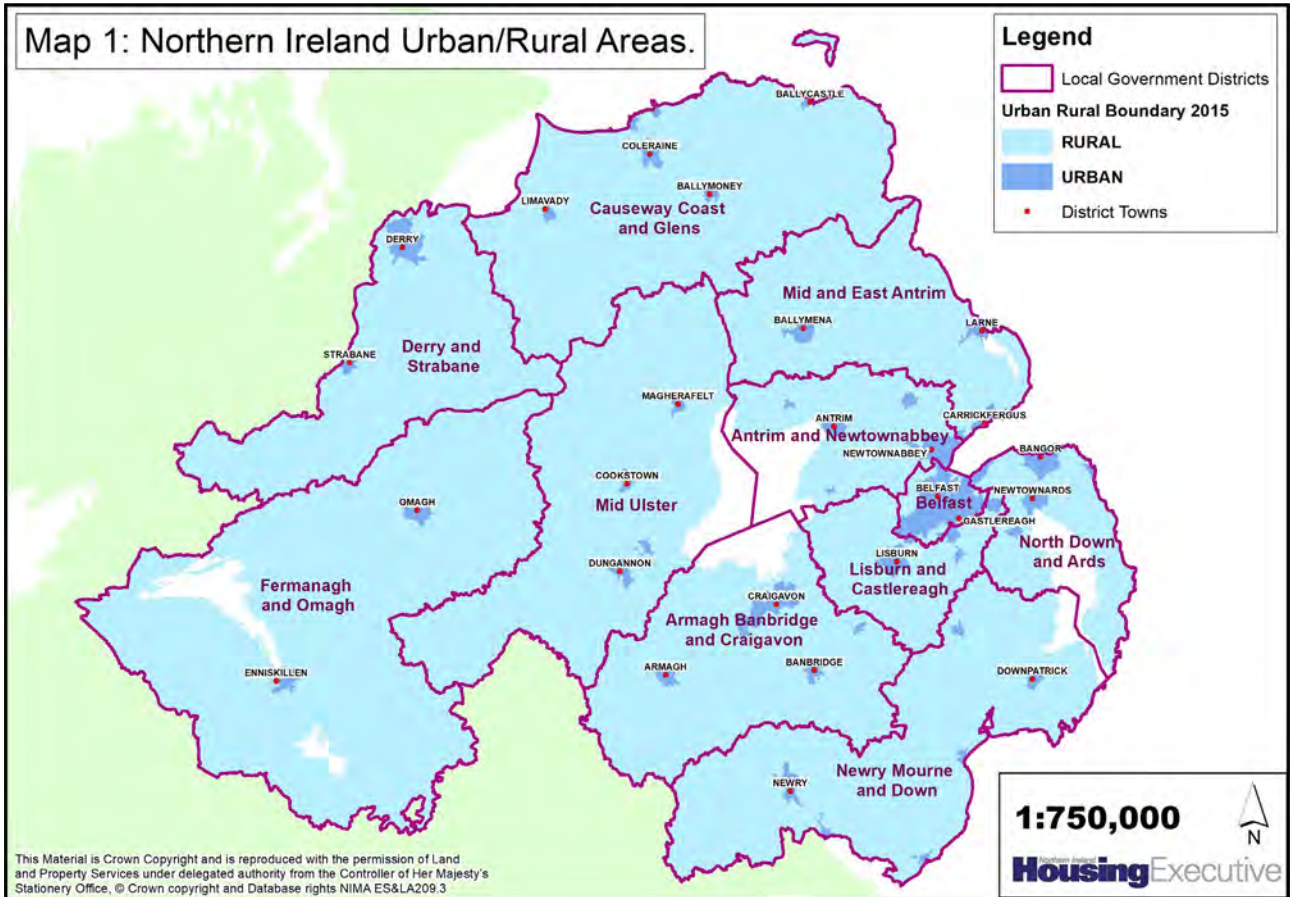
667,000 people (37% of the total population of NI) live in rural areas



Rural applicants comprise 14% of the total waiting list for social housing at 31st March 2021



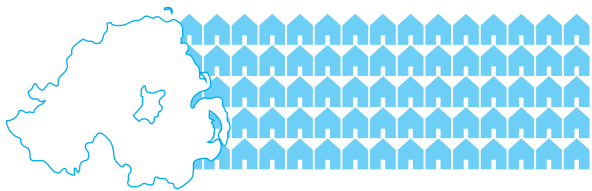
The proportion of social housing stock in rural areas (7%) remains significantly lower than in urban areas (18%)



# Social Housing Need & Strategic Guideline Requirements

## General Needs Housing (Urban & Rural NI)

The Housing Executive has the responsibility to assess social housing need (the 1981 Housing Order) and currently produces the Social Housing Needs Assessment (HNA) for each of the 11 LGD's. HNAs are undertaken, reviewed and updated annually, taking account of a wide range of supply and demand issues in order to identify requirements for the provision of new social housing across NI. HNAs also offer the basis for supporting Housing Associations' social housing development proposals, to facilitate their eventual inclusion in the Social Housing Development Programme (SHDP). The current five year projected need for NI is 20,255 (2021-2026). The districts with greatest projected need are Belfast City and Derry & Strabane, followed by Newry, Mourne & Down, Lisburn & Castlereagh and Causeway Coast & Glens.



# 20,255

The current five year projected need for NI is 20,255 (2021-2026)

**Table 1: Projected Housing Need 2021-26 by Local Government District (LGD)**

LGD	Projected Need 2021-26
Antrim & Newtownabbey	1,019
Ards & North Down	1,068
Armagh City, Banbridge & Craigavon	820
Belfast	6,125
Causeway Coast & Glens	1,347
Derry City & Strabane	4,126
Fermanagh & Omagh	637
Lisburn & Castlereagh	1,576
Mid & East Antrim	984
Mid Ulster	780
Newry, Mourne & Down	1,773
<b>Northern Ireland Total</b>	<b>20,255</b>

Further to this, the Housing Executive is committed to ensuring that housing need is targeted equitably throughout Northern Ireland and has developed Strategic Guidelines to distribute the new build social housing requirement against the available annual budget and targets set by the DfC at an LGD level over the three years of the Social Housing Development Programme (SHDP).

The Strategic Guidelines seek to direct the delivery of the SHDP based on an objective assessment of social housing need 'intensified' to reflect median levels of points and waiting times. The current SHDP is formulated on the basis of the following targets for each of the three years and strategic categories (includes any confirmed supported housing and Traveller units).

2022/23  
**1,950**  
TOTAL UNITS

2023/24  
**2,000**  
TOTAL UNITS

2024/25  
**2,050**  
TOTAL UNITS

Table 2 details the Social Housing Strategic Guideline Requirements for the next three years for each LGD, by Urban and Rural classifications.

**Table 2: Social Housing Strategic Guideline Requirement (2022/23 – 2024/25)**

Local Government District	Strategic Group		
	Urban Target Requirement	Rural Target Requirement	Total Target Requirement
<b>2022/23 1,950 Total Units</b>			
Belfast	531	0	531
Lisburn & Castlereagh	143	16	159
Antrim & Newtownabbey	111	7	118
Causeway Coast & Glens	71	32	103
Derry & Strabane	435	32	467
Mid & East Antrim	80	21	101
Ards & North Down	83	11	94
Armagh, Banbridge & Craigavon	55	5	60
Fermanagh & Omagh	35	10	45
Mid Ulster	46	25	71
Newry, Mourne & Down	107	94	201
	<b>1,697</b>	<b>253</b>	<b>1,950</b>
<b>2023/24 2,000 Total Units</b>			
Belfast	545	0	545
Lisburn & Castlereagh	147	16	163
Antrim & Newtownabbey	114	7	121
Causeway Coast & Glens	73	33	106
Derry & Strabane	447	33	480
Mid & East Antrim	82	21	103
Ards & North Down	85	11	96

*Tables continues*



Local Government District	Strategic Group		
	Urban Target Requirement	Rural Target Requirement	Total Target Requirement
Armagh, Banbridge & Craigavon	56	5	61
Fermanagh & Omagh	36	11	47
Mid Ulster	47	25	72
Newry, Mourne & Down	109	97	206
	<b>1,741</b>	<b>259</b>	<b>2,000</b>
<b>2024/25 2,050 Total Units</b>			
Belfast	558	0	558
Lisburn & Castlereagh	150	16	166
Antrim & Newtownabbey	117	7	124
Causeway Coast & Glens	75	34	109
Derry & Strabane	458	34	492
Mid & East Antrim	85	22	107
Ards & North Down	87	11	98
Armagh, Banbridge & Craigavon	58	5	63
Fermanagh & Omagh	37	11	48
Mid Ulster	48	26	74
Newry, Mourne & Down	112	99	211
	<b>1,785</b>	<b>265</b>	<b>2,050</b>

While Housing Associations are encouraged to develop proposals to meet the identified housing need in specific locations, the Housing Executive adopts a flexible cross-boundary approach which considers proposals based on need from across housing need/settlement and Council boundaries where appropriate. The Housing Executive is open to discussions with Housing Associations on whether available development sites could meet need in adjacent / neighbouring locations.

Schemes proposed by Housing Associations in locations with ongoing regeneration strategies and/or community/cross community issues, should take into account the local consultation carried out with those communities and discuss with the Housing Executive as part of the scheme approval process.

## Rural Housing

There can be particular challenges in securing the delivery of social housing in rural areas. These issues are considered in the Housing Executive's Rural Strategy which sets out a tailored approach to identifying rural housing need across NI and working with Housing Association partners to address this need.

In 2020/21, the Housing Executive reviewed the Rural Strategy to take account of the changing policy context for rural regeneration and housing development and to maximise opportunities for future partnership working.

In the 2021-2025 Rural Strategy & Action Plan, the Housing Executive remain focused on enabling the provision of affordable homes that meet the needs of rural communities. In order to do this, we have a number of actions which include:

- Working with rural communities to promote our range of housing services in order to help identify those in need of a social or intermediate home;
- Highlighting those priority rural areas where there is consistent unmet need for new housing in the Prospectus;
- Engaging with Housing Associations to ensure that the 3 year Social Housing Development Programme includes an equitable proportion of rural new build schemes;
- Supporting Housing Associations with the identification of land in rural areas with potential for housing development; and
- Promoting the increasing need for intermediate housing in rural areas as part of mixed tenure schemes.

Public consultation on the Housing Executive's 'Reaching Rural', Rural Strategy 2021-25 concluded on 30th September 2021. Feedback will be considered and the Strategy will be updated for submission to the Housing Executive's Board for final sign off. The Strategy will subsequently be published on the Housing Executive's website. Information on rural housing needs in general can be obtained by contacting the Housing Executive's Rural Unit or the relevant Regional Place Shaping Team.

## Shared Future Demand and Regeneration

The Office of the First Minister/Deputy First Minister (OFMDFM) strategy 'Together: Building a United Community' (TBUC) outlines a vision of *"a united community, based on equality of opportunity, the desirability of good relations and reconciliation"*.

The Shared Housing Programme is a key component of the NI Executive's commitment to building a shared society, which is crucial to addressing segregation in social housing areas. Having initially supported the delivery of 10 Shared Housing schemes under the TBUC programme, the Housing Executive continues to work with DfC to bring forward up to 200 new Shared Housing units annually through the SHDP under the 'Housing for All' programme.

The development of shared housing neighbourhoods also presents clear opportunities to act as a catalyst to regenerate and reshape communities, making them attractive and sustainable places where people want to live.

**1,480** 

As at June 2021, the Shared Housing Programme supported 45 schemes in total with 1,480 units (483 units across the 10 TBUC schemes and 997 units across the 35 Housing for All schemes)

### Supported Housing Need

The aim of the Supporting People Programme in Northern Ireland is to provide housing support services to vulnerable people, to enable them to live as independently as possible in the community.

The Housing Executive's Supporting People Unit funds high quality, cost effective and reliable housing support services. Some services are co-funded with partners such as the Health Trusts and the Probation Board.

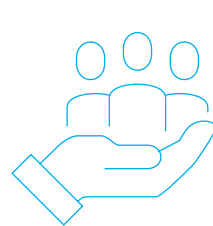
Supporting People have three broad objectives which are to:

- achieve a better quality of life for vulnerable people to live more independently and maintain their tenancies;
- provide housing related support to prevent problems that can often lead to hospitalisation, institutional care or homelessness; and
- help smooth the transition to independent living for those leaving an institutionalised environment.

The Supporting People programme is delivered under four main themes:

- Disability (including mental health);
- Homelessness (including women at risk of domestic violence and people with drug and alcohol problems);
- Young People (including care leavers); and
- Older People (including sheltered and housing with care provision).

Any new or additional opportunities identified by Housing Associations for potential supported housing should, in the first instance, be discussed with the local Head of Place Shaping and the Supporting People Assistant Director. Supporting People can be contacted via [supporting.people@nihe.gov.uk](mailto:supporting.people@nihe.gov.uk).

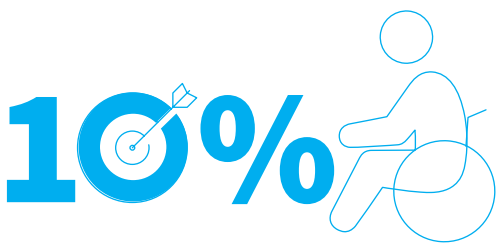


**SUPPORTING**  
**19,000**  
vulnerable people

The Supporting People programme currently supports over 19,000 vulnerable people, across 15 primary client groups, providing 857 housing support services delivered by 84 service providers in accommodation based and floating support services

## Wheelchair Housing Need

The Housing Executive works closely with DfC to increase the supply of wheelchair accessible accommodation in Northern Ireland.



An annual target has been set for generic wheelchair unit provision within the SHDP at 10%, for the end of the Programme for Government period in 2021/22

Part of this work includes the annual assessment of the potential requirement for generic accessible social housing which is provided for each LGD. Housing Associations should seek to incorporate generic and flexibly designed units to address identified wheelchair accessible housing needs.

Generic wheelchair designs are included within the Housing Association Guide and aim to address the housing needs of most wheelchair users. The number of true bespoke wheelchair accommodation units should therefore be significantly reduced.

Bespoke solutions for social housing applicants with Complex Needs are addressed directly through the Housing Executive’s Complex Needs

Case Management process and are therefore not identified in this Prospectus.

The Housing Need Assessment is used to assess potential demand from wheelchair users and the need for accessible units. Table 3 details the generic wheelchair accommodation requirements at March 2021 by LGD.

**Table 3: Wheelchair Needs Assessment as at March 2021**

Local Government District	5 Year Wheelchair Needs Assessment
Antrim and Newtownabbey	42
Ards and North Down	123
Armagh, Banbridge and Craigavon	68
Belfast	63
Causeway Coast and Glens	59
Derry City and Strabane	42
Fermanagh and Omagh	22
Lisburn and Castlereagh City	44
Mid Ulster	23
Mid and East Antrim	35
Newry, Mourne and Down	94
<b>Total</b>	<b>703</b>

Housing Associations are encouraged to include generic wheelchair units within all suitable schemes and seek support for these from the Regional Place Shaping Teams when discussing specific housing mixes.

## Irish Travellers Accommodation

Irish Traveller schemes are defined as follows:

- **Group Housing:** Residential housing development with additional facilities and amenities specifically designed to accommodate extended families on a permanent basis.
- **Serviced Site:** Site for a range of managed accommodation (chalets, trailers and caravans) where Traveller families have a permanent base to park their caravan or erect a structure as defined within the Caravans Act; where electricity, water and sewerage are provided and where other facilities such as communal or individual amenity buildings must be provided.
- **Transit Site:** A permanently operational facility with similar facilities to serviced sites where Travellers may park their caravans on a temporary basis (up to a maximum of 3 months) and where electricity, water and sewerage services are provided. Transit sites are not intended for use as a permanent lease for an individual household.

Housing Association input is generally only required in the provision of Group Housing while Serviced Sites and Transit Sites are provided and managed by the Housing Executive.

The Housing Executive has conducted research into Traveller accommodation in NI since 2002 which has helped inform the development and provision of Traveller accommodation throughout this period.

The [4th Travellers Accommodation Survey 2018-19](#) was completed in January 2020 and published on the Housing Executive's website in June 2020. It has been used to inform the Irish Travellers Accommodation Strategy 2021-2026.

The Housing Executive's [Irish Travellers Accommodation Strategy 2021-26](#) was approved by the Housing Executive Board and launched

in July 2021. The Strategy has four objectives and 12 key actions and will guide the Housing Executive's strategic direction on the provision of accommodation for Irish Travellers. An annual update detailing progress of the Strategy will be produced to demonstrate the outcomes achieved.

## Affordability - Intermediate Housing and Demand

### Intermediate Housing Options

DfC defines affordable housing as:

**'Social rented housing, Intermediate housing for sale, or Intermediate housing for rent that is provided outside of the general market, for those whose needs are not met by the market. Affordable housing which is funded by Government must remain affordable or alternatively there must be provision for the public subsidy to be repaid or recycled in the provision of new affordable housing'.**

This definition has been adopted by the Strategic Planning Policy Statement.

Currently in NI, the primary form of intermediate housing is shared ownership, provided through a Housing Association (e.g. Co-Ownership Housing Association). Shared ownership housing helps eligible households who can afford a small mortgage, but are not able to afford to buy a property outright. The property is acquired using part mortgage/finance by the householder and part social renting from the Housing Association. The proportion of property ownership and renting can vary depending on householder circumstances and preferences. The current eligibility criterion for shared ownership is set out on the Co-

Ownership website at [Co-Ownership criteria | Shared Ownership NI | Co-Ownership](#) and FairShare website at [Eligibility | FairShare Shared Ownership Northern Ireland](#)

Co-Ownership Housing Association in NI also manage a government backed Rent to Own scheme. This scheme gives people an opportunity to move into a new build home initially as a private tenant with the option to purchase the property at a later date. Currently, tenants can live in the property for a maximum of three years under a fixed tenancy agreement before either buying the property or moving home. The eligibility criterion for the Rent to Own scheme are available on the Co-Ownership website at [Rent to Own criteria | Rent to Own Northern Ireland | Co-Ownership](#)

### Intermediate Housing Demand

The Strategic Planning Policy Statement sets out that Housing Needs Assessment or Housing Market Analysis, which are carried out by the Housing Executive, will provide the evidence base for Councils on affordable housing need. These will inform both the LDP process and the consideration of individual development proposals. As outlined above, affordable housing includes both social housing and intermediate housing (for sale or rent).

In respect of intermediate housing, the Housing Executive has developed a new assessment of intermediate housing need, as contained in the Strategic Housing Market Analysis (SHMA) reports, which better aligns with DfC’s new definition of affordable housing. This method estimates demand for both shared ownership and intermediate rent (the current method is based on shared ownership only). Similar to the current method, it uses household projection figures and income data, however also includes contextual, cross tenure housing market information. As the SHMAs are being prepared in two phases, there will be a

transitional period this year.

The new SHMA method is being reported for Antrim & Newtownabbey, Ards & North Down, Belfast, Derry City & Strabane and Lisburn & Castlereagh; with the current assessment of shared ownership being used for the remaining council areas until the second phase is complete.

Table 4 details the annual intermediate housing requirement for the 10 year period 2020 to 2030. This assessment is reviewed and updated on an annual basis.

**Table 4: Intermediate Demand between 2020 and 2030**

Local Government District	Intermediate Need
Antrim and Newtownabbey	600
Ards and North Down	700
Armagh, Banbridge and Craigavon	2,140
Belfast	1,400
Causeway Coast and Glens	510
Derry City and Strabane	500
Fermanagh and Omagh	630
Lisburn and Castlereagh City	1,400
Mid Ulster	620
Mid and East Antrim	1,350
Newry, Mourne and Down	1,410

Housing Associations are also encouraged to carry out their own research into the market and should discuss possible locations for future affordable housing schemes with the local Place Shaping teams.



# Individual Local Government District Analysis

The following sections have been prepared by the respective Regional Place Shaping teams to provide

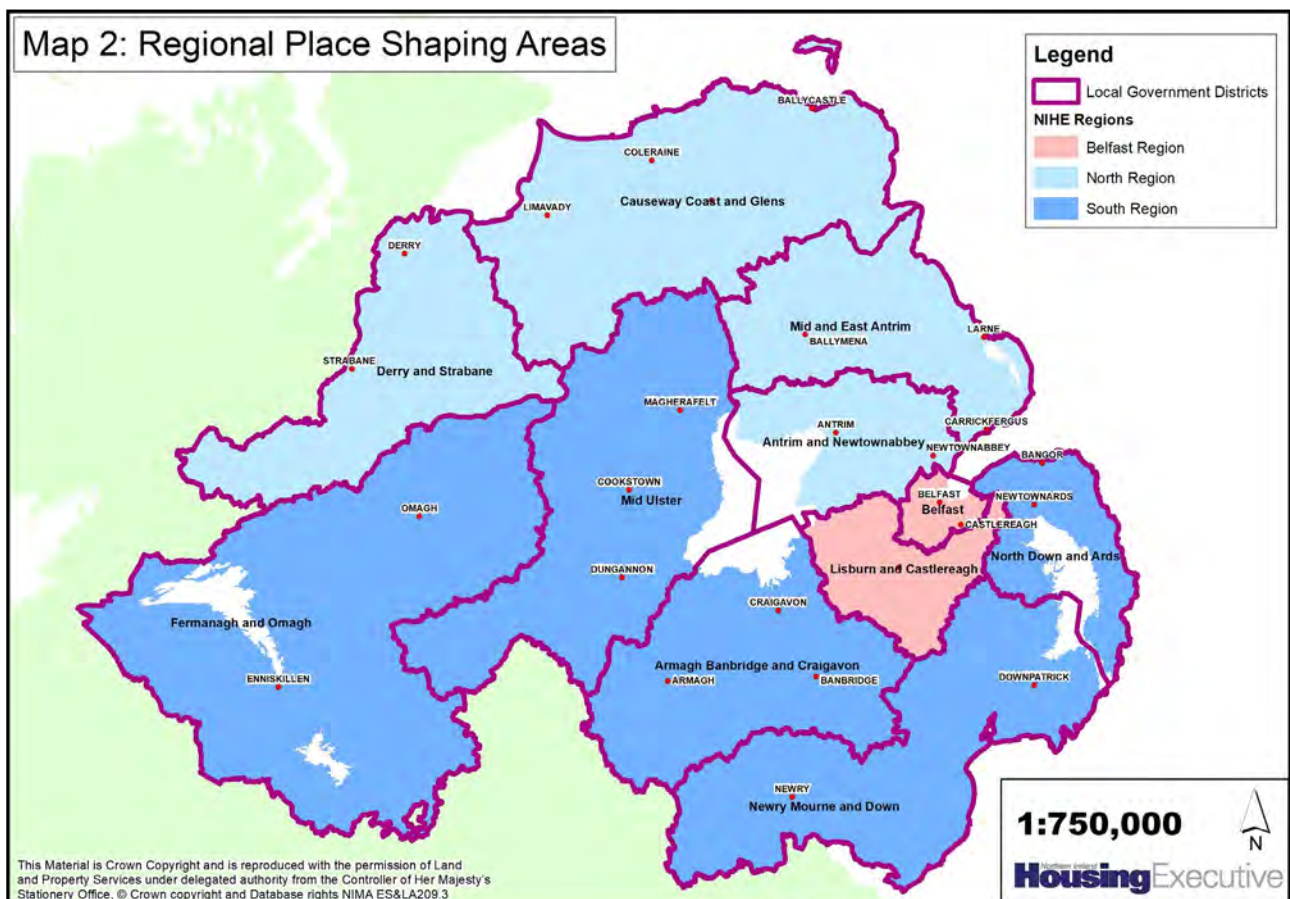
specific 'local' analysis and priorities that they would like to see delivered within the SHDP and other products being developed by Associations.

The Regional Place Shaping teams represent the main Housing Executive interface with Councils and community planning. They are also the main point of contact for those stakeholders involved in the delivery of social and affordable housing.

## Contacts

For any further information or advice, please contact the following in the first instance:

<b>Head of Place Shaping, Belfast Region</b>	<b>Fiona McGrath</b>	<a href="mailto:fiona.mcgrath@nihe.gov.uk">fiona.mcgrath@nihe.gov.uk</a>
<b>Head of Place Shaping, North Region</b>	<b>Louise Clarke</b>	<a href="mailto:louise.clarke@nihe.gov.uk">louise.clarke@nihe.gov.uk</a>
<b>Head of Place Shaping, South Region</b>	<b>Sinead Collins</b>	<a href="mailto:sinead.collins@nihe.gov.uk">sinead.collins@nihe.gov.uk</a>



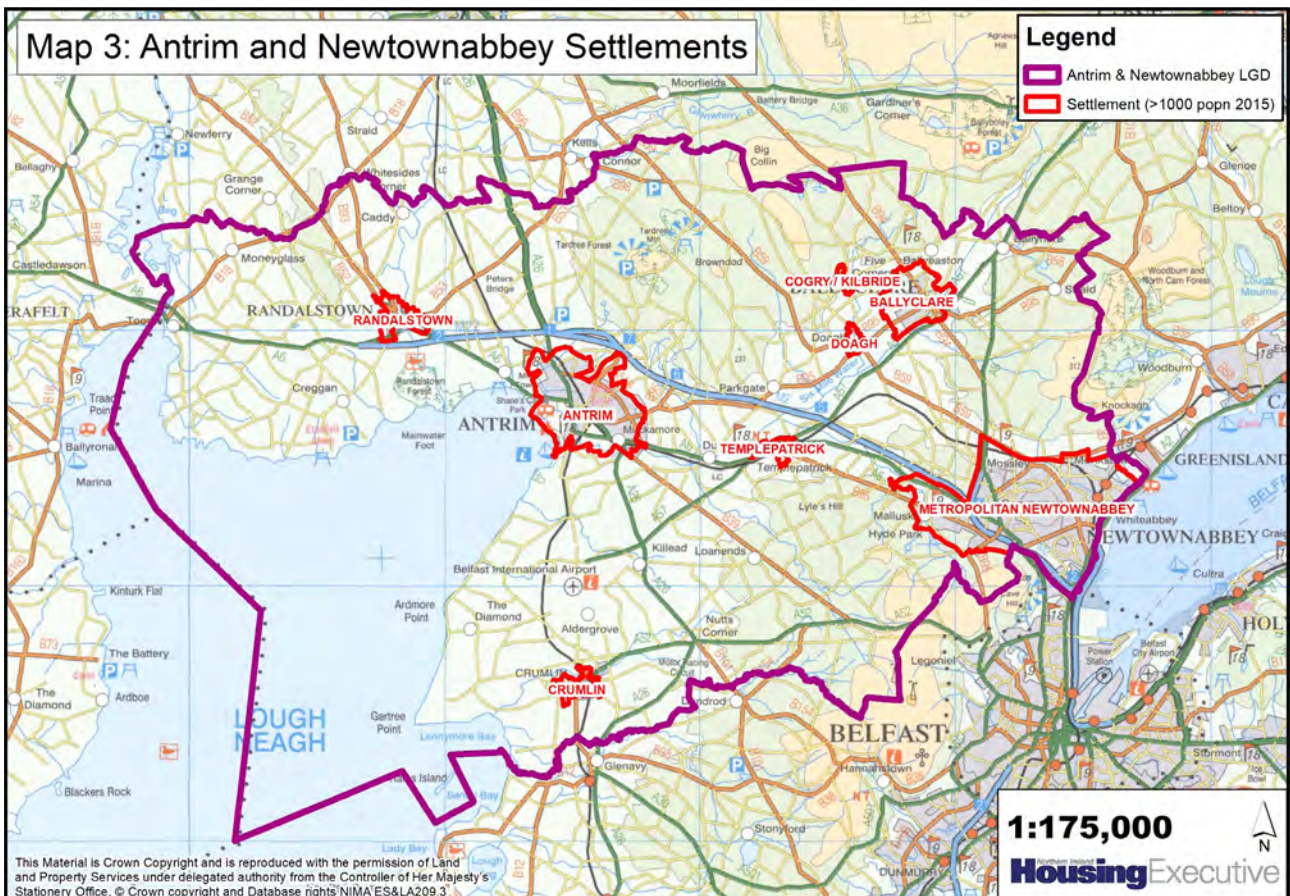
# Local Government District Analysis

# Antrim and Newtownabbey

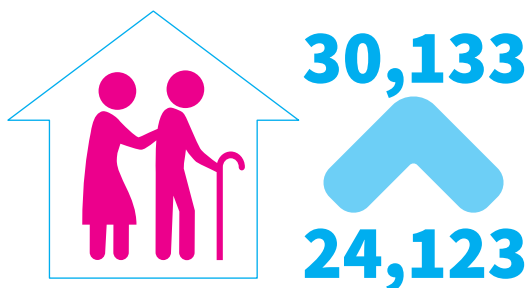
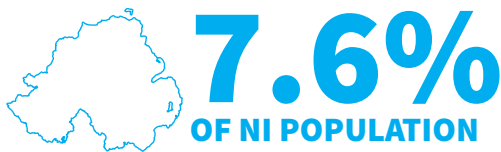
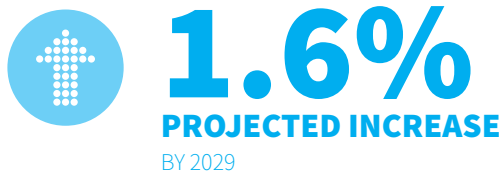
## Context

Antrim and Newtownabbey is a major industrial, retail, education and residential centre. The Council area extends from the lower River Bann and Lough Neagh in the west to Belfast Lough in the east,

covering 274 square miles. The range of facilities, recreational opportunities and its strategic location make the area an attractive place to live and work. The borough has a growing population of approximately 143,500 and while mostly urban, has a significant rural populace.



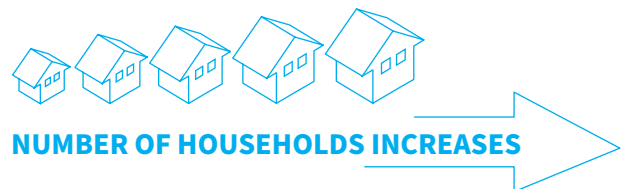
The population of Antrim and Newtownabbey Borough is projected to increase by 1.6% to 145,824 by 2029 when it will represent 7.6% of the NI population



The older person population is projected to increase from 24,123 in 2019 to 30,133 by 2029

This growth is concentrated in the 65 plus age group. This is an increase of 24.9% during this period and will represent 20.7% of the overall population of the borough. This is lower than the Northern Ireland percentage increase of 27.9%. The increase in the number of older people will have implications in terms of demand for housing adaptations, specialist housing and personal or nursing care.

While the working age population will reduce by 1.6% between 2019 and 2029, this group will continue to make up the largest proportion of the population of the Borough, representing 60.4% by 2029. The 'Children aged 0 -15 years' group is projected to decrease by 7.5% over this period.



Household size is projected to reduce from 2.50 to 2.42, while the number of households is projected to increase by 3,064 from 55,982 to 59,046 over the ten years to 2029

Over this period, one person and two person households are projected to increase by 12.4% and 9.3% respectively. While the need for small family and single household accommodation remains strong, there will be a requirement to design and construct suitable accommodation for older persons.



# Housing Market Analysis (across tenures)

## Housing & Land Supply



During 2020, there were 594 new units started and 521 units completed in Antrim and Newtownabbey (Source Land and Property Services)



There is a projected Housing Growth Indicator new dwelling requirement of 4,200 for the period 2016 to 2030 for the borough. The overall NI requirement for the same period is 84,800

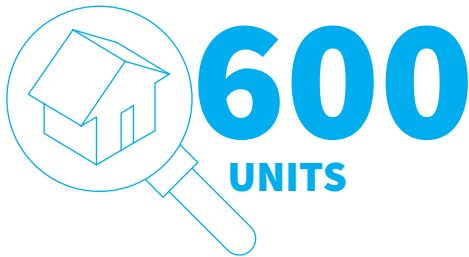
## Owner Occupied Housing Sector

- The sector comprises 71% of total occupied stock (Source Northern Ireland House Condition Survey 2016);



Ulster University states that the average house price in Antrim and Newtownabbey, 2020, was £154,737 which represents an increase of 7.0% on 2019 figures. This remains below the Northern Ireland average of £180,079

- During 2019, there were 31 repossessions in Antrim and Newtownabbey. This represents a 27.9% decrease since 2015;



Demand for intermediate housing aimed at low income households in Antrim and Newtownabbey is estimated at 600 units, 2020-2030

- Prior to the COVID-19 lockdowns, local estate agents reported that the local housing market was showing a steady improvement, within which, the first time buyer market was thriving and the second time buyer market had also increased. As the lockdowns eased, buyers have shown an interest in larger properties with outdoor space. Transactions have increased as has competition between buyers. The full impact of the pandemic on jobs, mortgages and the housing market in general are yet to be determined;
- Interest rate rises are uncertain as COVID-19 impact on the economy may be harsh and far reaching. For existing mortgages, rises in interest rates will place individuals and families under additional financial pressure.

### Private Rented Housing Sector

- The sector comprises 15% of total occupied housing stock in the borough (Source Northern Ireland House Condition Survey 2016);

- Local estate agents report an under supply throughout the borough. They apply increased rental charges in locations where demand is strong and supply fails to catch up;



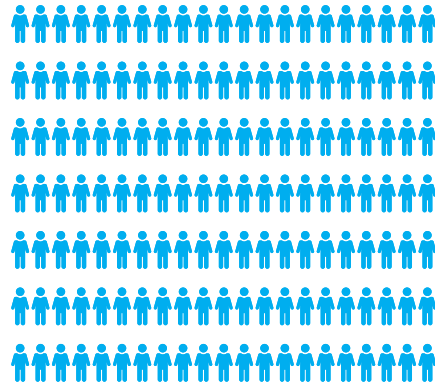
DfC's Landlord Registration Scheme identified 4,490 properties registered by 2,936 landlords for Antrim and Newtownabbey at March 2021

- At March 2021, there were 2,223 Private Housing Benefit claimants in the borough, a decrease of 13% on the previous year. The reduction in Housing Benefit claimants may be as a result of the migration exercise underway from Housing Benefit to Universal Credit;
- As household groups reduce in size, Houses in Multiple Occupation (HMO) will continue to play a greater role in the housing market, particularly for single households aged under 35. Since 1 April 2019, Belfast City Council has assumed responsibility for licensing of HMOs.

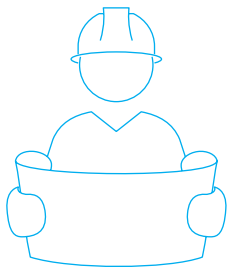


## Social Rented Housing Sector

- The sector comprises 14% of total housing stock in the borough (Source Northern Ireland House Condition Survey 2016);
- At March 2021, there were 6,382 Housing Executive owned properties in the borough;
- 10,536 Housing Executive properties have been sold through the House Sales Scheme, with 15 sold during 2020/21;



At March 2021, there were 2,958 applicants on the waiting list for Antrim and Newtownabbey, 2,187 of whom were in housing stress with 447 allocations made over the previous 12 months



**132**

**NEW SOCIAL HOMES  
COMPLETED IN YEAR  
TO MARCH 2021**

There were 132 new social homes completed in year to March 2021, and 257 on-site. A further 523 units are programmed to start over the next three years

# Social Housing Need and Strategic Guidelines Requirements

Social housing need is considered against each of the following subheadings:

- General Housing Need (Urban & Rural)**
- Shared Future Demand**
- Supported Housing Need**
- Wheelchair Housing Need**
- Travellers' accommodation requirements**

## General Housing Need (Urban & Rural)

### Urban

The Strategic Guidelines target share established for Antrim and Newtownabbey indicates 6.5% urban units and 2.7% rural units of the overall three year programme. Five year projected need for the area as a whole is 1,019 and the projected need for individual settlements is detailed in Table 5.

**Table 5: Projected (5-Year) Social Housing Need 2021-26**

Settlement	Housing Need Assessment Area*	Total 5 Year Projection
Newtownabbey Urban	Rathcoole	<b>49</b>
	Rushpark	<b>80</b>
	Rathfern	<b>24</b>
	Whiteabbey (Abbeyville, Glenville, Abbeyglen)*	<b>37</b>
	Longlands/Bawnmore/Old Mill	<b>68</b>
	Hightown	<b>17</b>
	Felden	<b>52</b>
	Ballyduff	<b>29</b>
	Central Glengormley (Glenvarna, Queens Park/Avenue, Glengormley Central)*	<b>163</b>
Antrim Town	Antrim Town	<b>255</b>
Crumlin	Crumlin	<b>116</b>
Randalstown	Randalstown	<b>59</b>

*Table continues*

Settlement	Housing Need Assessment Area*	Total 5 Year Projection
Parkgate/Templepatrick	Parkgate/Templepatrick	<b>21</b>
Toomebridge	Toomebridge	<b>13</b>
Ballyclare	Ballyclare	<b>20</b>
Remaining Settlements (need <10)**		<b>16</b>
<b>Total</b>		<b>1,019</b>

\*Some settlements may include a number of small settlements grouped together for waiting list purposes – where this occurs all settlements within the grouped HNA are listed

\*\* Remaining settlements includes Bleachgreen, Monkstown, Mossley, Hyde Park/Parkmount, Ballynure, Doagh/Kelburn Park and Oakview / Roughfort where need in each settlement is less than 10.

Please note that in relation to those settlements with <10 projected need, the Housing Executive will consider Housing Association development opportunities or Existing Satisfactory Purchases (ESP). In addition, if land can be identified that may provide for more than current projected social need suggests, the Housing Executive Place Shaping and Rural Units may be able to assist in Rural Housing Needs Testing or other marketing exercises to identify hidden additional social and mixed tenure demand.

The following comments are relevant to housing need within the Council area:

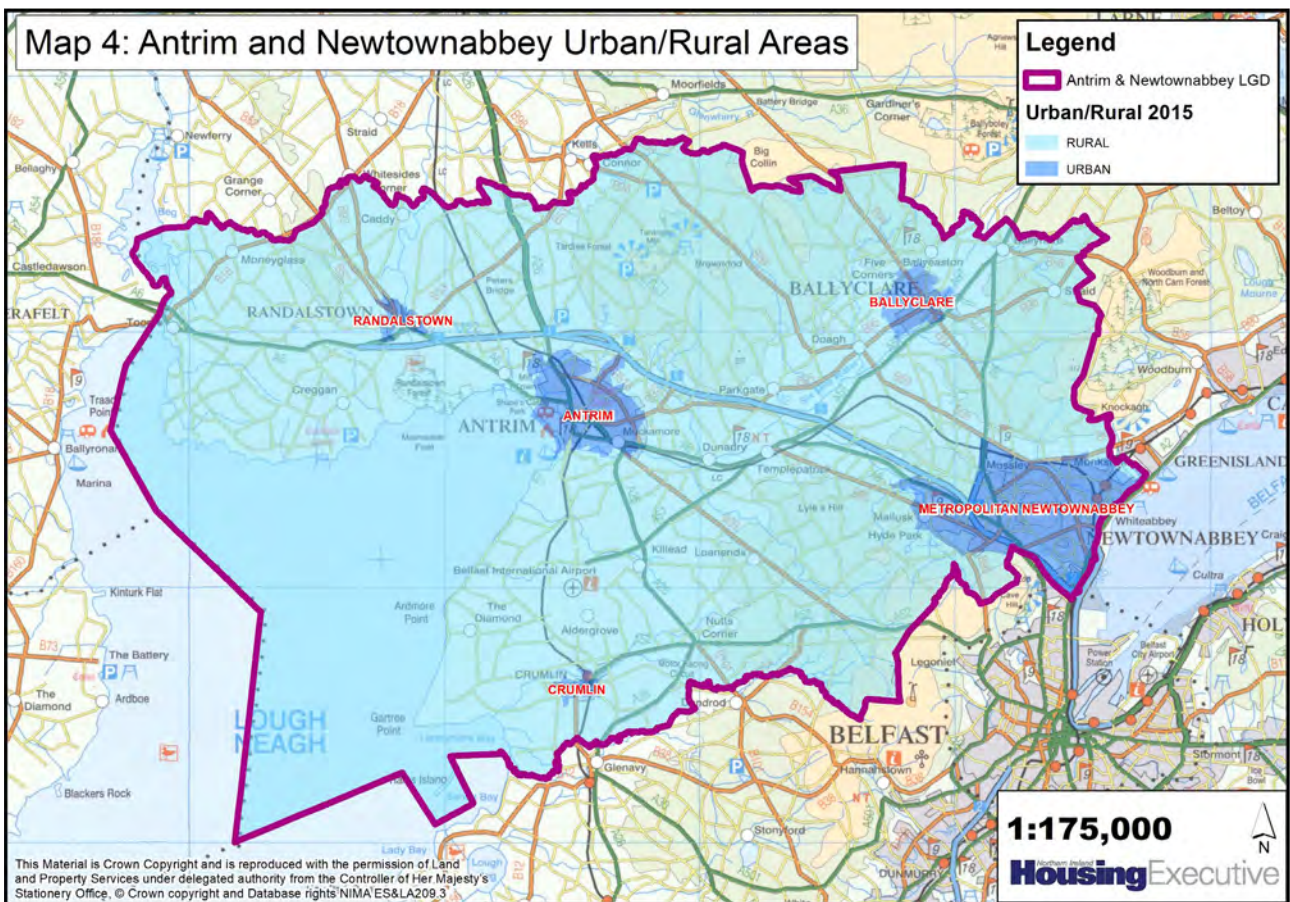
- Social housing proposals are particularly welcome for family homes in Glengormley, Crumlin and Randalstown, and proposals to provide single household accommodation in Antrim town;
- Proposals will be assessed against potential local impacts on existing housing stock, such as turnover in adjacent social housing estates;
- The population is ageing; the number of smaller sized households is increasing;
- We would welcome the development of mixed tenure schemes within the borough;

- Site Identification Studies (SIS) will be carried out by the Housing Executive in selected areas across the borough where there is a social housing need and a shortage of sites for development. In year 2020/21 SIS studies were carried out in Glengormley and Mallusk as a basis to facilitate Housing Market Tests;
- A review of Housing Executive owned undeveloped land is carried out annually. The Housing Executive has land bank in Ballyclare which will help meet future need in that area;
- A number of Estate-Based Strategies which included selective demolition of unpopular stock were successfully delivered throughout the borough over the past decades resulting in increased popularity and stability in these neighbourhoods. However, some large estates could be destabilised by further new build and there is not an identified need for additional properties in Springfarm, Newpark/Ballycraig, Greystone and Rathenraw in Antrim town.

## Rural

The provision of new social housing in rural settlements represents a strategic priority for

delivery of the SHDP. At 2022/23, the rural target share of the SHDP is 12.9% of the overall programme based on average levels of housing stress in rural areas.



In every case, it will be important to understand the localised nature of rural housing need and the alternative settlements that rural applicants are likely to consider.

The Housing Executive's Rural Unit will support housing providers by providing initial desk-top evidence of potential need based on neighbouring waiting lists and by facilitating subsequent Rural Housing Need testing and marketing.

## Indicative housing mix requirements

- Housing mix in new developments should cater for single, small family and older person households. Dwelling type should therefore comprise 1 and 2 bedroom design forms with emphasis on accessibility. Some 3 bedroom houses may be required for families and there may be a requirement for a small number of 4 bedroom houses; these should be discussed with the Housing Executive. Developments should include 10% wheelchair accessible units where possible and there may be an accommodation need for persons with complex needs;
- Accommodation for older persons should be designed flexibly with long term accessibility issues taken into consideration. Generic wheelchair units should be included in schemes where possible;
- Alternative mixes can be considered by Housing Associations in relation to specific sites or scheme types. However, significant changes from the above mix should be discussed with the Housing Executive to avoid nugatory work.

**Table 6: Indicative housing mix for Antrim and Newtownabbey**

Older Persons	Families*	Singles	Wheelchair
15%	39%	46%	10%

\* Focus on: Single and Small Family Households

## Areas where need is met

Currently there is no projected need for Bleachgreen, Monkstown, Mossley and Oakview/ Roughfort. These areas will be kept under annual review.

## Rural areas



At March 2021, there were 70 applicants in rural Antrim and Newtownabbey in housing stress; 3.2% of the total housing stress waiting list

Whilst the Housing Executive work closely with rural communities to identify housing need, Housing Association delivery of new social housing schemes is increasingly difficult due to small numbers often required in rural schemes and the economies of scale associated with delivery and management.



Based on the waiting list for social housing at March 2021, projected housing need for rural areas within Antrim and Newtownabbey is 41 units

Taking account of new build schemes on the current SHDP, residual housing need is focused in Toomebridge and Doagh.

It is recognised that there may be neighbouring rural settlements where demand has not yet been identified but where land may still be available. The Housing Executive will take account of the potential for 'hidden' or 'latent' demand within such areas if and when Housing Associations identify potential sites. Should sites come to the attention of Housing Associations the Housing Executive will seek to assist in assessing any hidden need by way of Rural Housing Need Testing if appropriate. We continue to work closely with rural communities to identify housing need.

## Wheelchair Housing Need (HNA)

At March 2021, there were 28 housing stress applicants and 27 transfer applicants who required wheelchair accessible accommodation with 13 allocations over the previous year. This leaves a requirement for 42 units. Need has been identified throughout the borough.

Housing Associations should actively discuss the inclusion of generic wheelchair units within suitable schemes with the Head of Place Shaping. In general, generic wheelchair units should be for 2 and 3 bed units and built in line with the space standards included in the Housing Association Guide.

## Shared Future Demand

The Housing Executive actively encourages mixed tenure and shared future housing (Housing for All). Housing Associations bringing forward suitable proposals for Housing for All designation would be welcomed.

## Travellers' accommodation

The Housing Executive has responsibility for identifying and meeting the accommodation needs of Irish Travellers. The Irish Travellers Accommodation Strategy 2021-2026 has been approved by the Housing Executive Board and includes a five-year implementation plan of 12 key actions.

Traveller community need continues to be monitored.

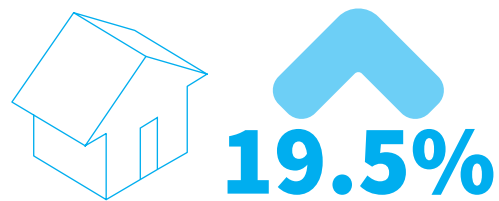


## Intermediate (Affordable) Demand

- The Housing Executive estimates intermediate/affordable housing demand for Antrim & Newtownabbey at approximately 60 units per annum;



Co-Ownership approved 140 applications in 2020/21 for Antrim and Newtownabbey



Average house prices in Antrim and Newtownabbey increased by 19.5% between 2015 and 2020, and are lower than the Northern Ireland average

- Average house prices in Northern Ireland increased by 20.5% between 2015 and 2020.

**Table 7: Average Annual House Prices Antrim & Newtownabbey & NI 2015-2020**

Area	2015	2016	2017	2018	2019	2020	% Change 2015-2020
Antrim and Newtownabbey	£129,475	£129,610	£141,810	£154,219	£144,567	£154,737	<b>19.5</b>
Northern Ireland	£149,449	£154,028	£155,049	£163,128	£169,057	£180,079	<b>20.5</b>

# Antrim and Newtownabbey Supporting Data

**Table 8: Antrim and Newtownabbey Waiting List – March 2021**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	1,361	167	730	63	198	439	<b>2,958</b>
<b>HS Applicants</b>	1,012	99	561	40	150	325	<b>2,187</b>
<b>Allocations</b>	196	18	121	<10	21	88	-

Applicants – Housing applicants at March 2021  
HS Applicants – Housing stress applicants at March 2021 (i.e. 30 points or more)  
Allocations – Annual allocations for year ending March 2021

**Table 9: Antrim Town Waiting List – March 2021**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	353	44	146	14	38	102	<b>697</b>
<b>HS Applicants</b>	268	26	113	10	29	83	<b>529</b>
<b>Allocations</b>	45	<10	31	<10	<10	12	<b>102</b>

Applicants – Housing applicants at March 2021  
HS Applicants – Housing stress applicants at March 2021 (i.e. 30 points or more)  
Allocations – Annual allocations for year ending March 2021

**Table 10: Antrim Town Time on List – Applicants in housing stress by Household**

GROUP HNA AREA	Comp HH	0-6 Mths	6-12 Mths	1-2 years	2 - 4 years	4+ years	Total Apps	Ave Months on WL
<b>Antrim Town</b>	<b>Single</b>	40	34	67	49	78	<b>268</b>	<b>37</b>
	<b>Small Adult</b>	<10	<10	<10	<10	<10	<b>26</b>	<b>36</b>
	<b>Small Family</b>	16	11	27	32	27	<b>113</b>	<b>34</b>
	<b>Large Adult</b>	<10	<10	<10	14	<10	<b>29</b>	<b>32</b>
	<b>Large Family</b>	<10	<10	<10	14	<10	<b>29</b>	<b>32</b>
	<b>Older Person</b>	<10	<10	14	20	34	<b>83</b>	<b>48</b>

**Table 11: Metropolitan Newtownabbey Waiting List – March 2021**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	750	98	424	44	105	237	<b>1,658</b>
<b>HS Applicants</b>	555	59	325	26	83	168	<b>1,216</b>
<b>Allocations</b>	120	<10	74	<10	13	57	<b>275</b>

Applicants – Housing applicants at March 2021

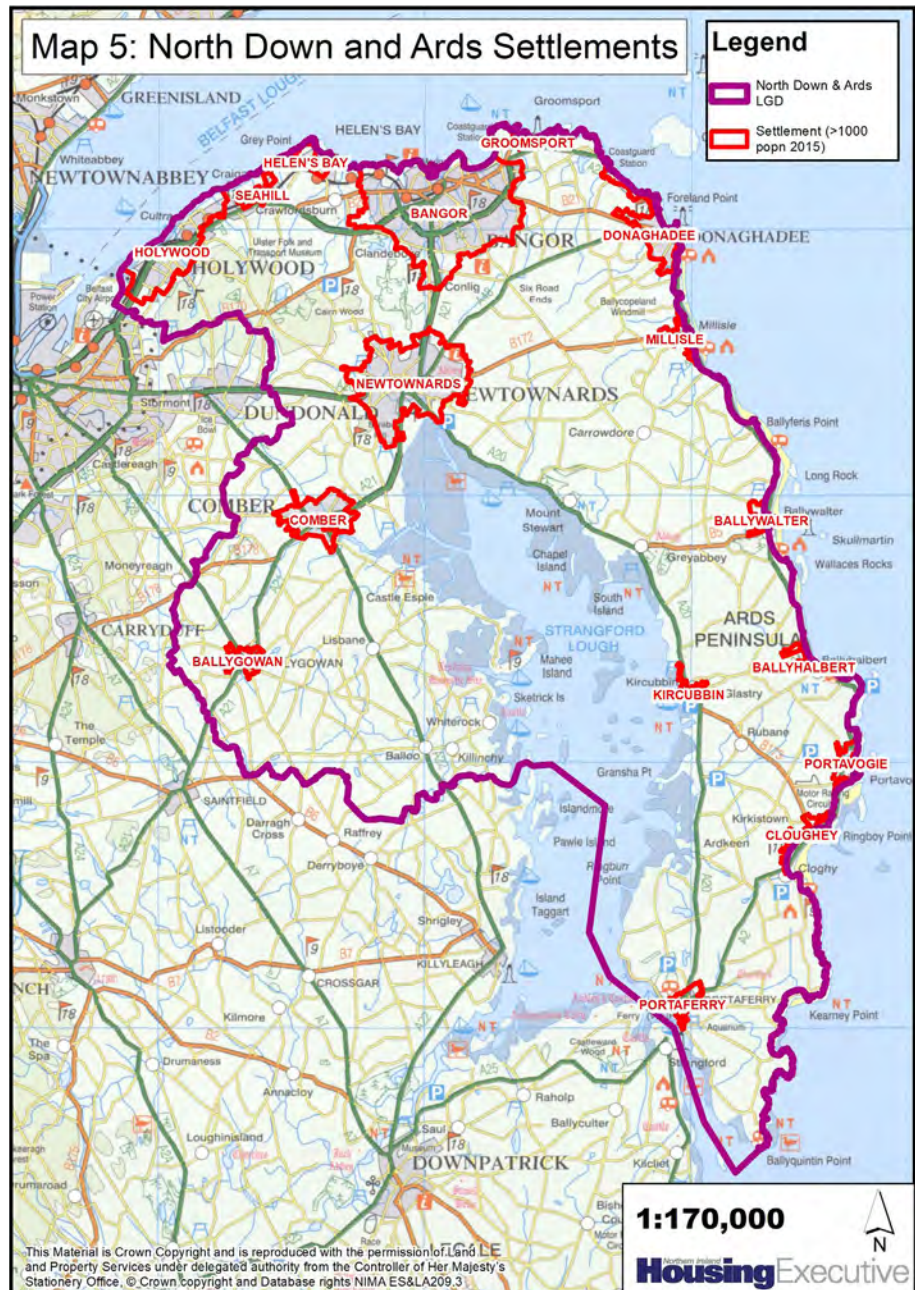
HS Applicants – Housing stress applicants at March 2021 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2021

# Ards & North Down

## Context

Ards and North Down Borough Council area is known for its rich diversity of scenic countryside and extends from Hollywood on the shores of Belfast Lough, to Portaferry on the southern tip of the Ards Peninsula, and Killinchy to the west of Strangford Lough. The Council comprises 8.5% of the overall population of Northern Ireland, located over an area of 228 square miles and approximately 115 miles of coastline. 80% of residents live in the northern 25% of the borough. The largest population centres are Bangor and Newtownards followed by Hollywood, Comber and Donaghadee. The Borough shares its boundary with three council areas: Belfast City Council, Lisburn and Castlereagh City Council and Newry, Mourne and Down District Council.



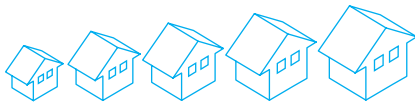


**1.4%**  
**PROJECTED INCREASE**

BY 2029

The borough population is projected to grow by 1.4% from 161,725 in 2019 to 163,943 in 2029

The number of children in Ards and North Down Borough is projected to fall by 8.0%, the working age population is projected to fall by 4% and the 65 plus age group is projected to grow by 24.6%.

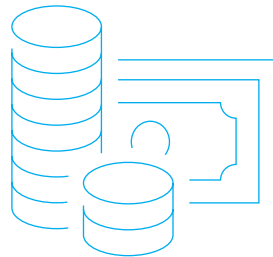


**NUMBER OF HOUSEHOLDS INCREASES**

The average household size is projected to reduce from 2.38 to 2.31 while the number of households is projected to increase by 3,218 from 66,728 to 69,946 over the 10 years to 2029

According to the Annual Survey of Hours and Earnings (ASHE), within the borough, there are 48,000 jobs, 5.1% of the 949,000 jobs across Northern Ireland in 2020. The most recently available Labour Force Survey statistics at the end of 2019 shows 74.7% of the working age population were economically active, above the

73.8% recorded for Northern Ireland. In 2020, the annual full-time median wage for residents in the area was £478.00 per week, an increase of 6.9% on the previous year. This compares to the overall Northern Ireland weekly basic full-time median wage of £528.60, a decrease of 1.1% on the 2019 figure (ASHE).



In 2020, the annual full-time median wage for residents in the area was £478.00 per week, an increase of 6.9% on the previous year

### **COVID-19**

The Coronavirus pandemic is likely to have an impact on the socio-economic development of the local area moving forward. The labour market is also likely to face adjustments given the economic challenges and changes to the way society operates. For example, through an increased reliance on online goods and service providers and increased numbers of people homeworking.

# Housing Market Analysis (across tenures)

## Housing & Land Supply



The borough has a Housing Growth Indicator (HGI) projection of new dwellings required of 5,500 for 2016-2030

- During 2020 there were 496 new dwelling starts in Ards and North Down. There are significantly more starts than the projected new dwellings requirement as estimated by the HGI 2016-30 of 367 per annum;



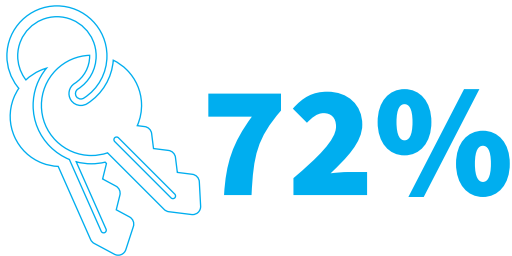
Land and Property Services (LPS) statistics show that over the 2016 to 2020 period, 3,599 new dwelling starts commenced in Ards and North Down

- Over the period 2016-20 there were 3,697 new dwelling completions in the borough according to LPS.

## Owner Occupied

- The general mood of positivity around the housing market continued in 2020/21 with sales and pricing activity accelerating as consumer confidence improved in line with the easing of restrictions and the wider economic recovery. Borrowing costs are exceptionally low by historic standards and ongoing lender competitiveness suggests this may improve further in the coming months. Underlying demand remains at exceptionally high levels and reduced property stock has put upward pressure on prices, particularly for larger properties in desirable areas. There are still uncertainties around the longer term impacts of COVID-19 on the housing market and wider economy;
- The Bank of England cut interest rates from 0.75% to 0.25% initially and then further to 0.1%, the lowest level on record, in response to the COVID-19 pandemic. At the most recent Monetary Policy Committee meeting held in August 2021, members voted unanimously for the Bank of England to maintain the Bank Rate at 0.1%. Although this is seen as a temporary measure any increases in interest rates are expected to be slow and gradual. Existing mortgagors may see this as an opportunity to re-mortgage at more favourable rates;





According to the Northern Ireland House Condition Survey 2016 owner occupiers make up 72% of all tenures in the borough

- The number of house sales in Ards and North Down had increased from 1,146 in 2010 to 2,911 in 2019 before falling by 453 to 2,458 in 2020 (LPS) as a result of the pandemic.
- The average house price for Ards and North Down has fluctuated over the 2012-2020 period. House prices had risen to £189,840 in 2018 but fallen 1.3% to £187,442 in 2019 before rising again to £198,468 in 2020;
- Popular locations include Bangor, Newtownards, Holywood and Comber;
- During 2019, there were 31 repossessions within Ards and North Down Borough, a slight increase over the previous year.

**Private Rented**

- The private rented sector across Ards and North Down has seen an unprecedented increase in its tenure share and according to the House Condition Survey 2016 now accounts for 16% of all housing. Rented accommodation is now the accommodation of choice for many households,

especially younger households on lower incomes who in previous decades would have become first time buyers;

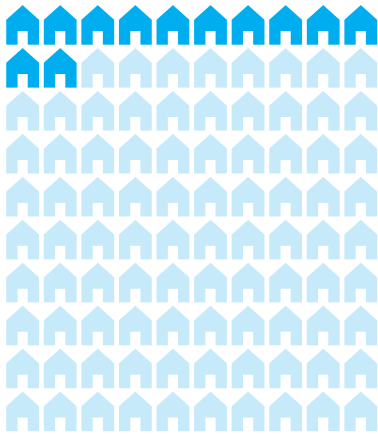
- During the second half of 2019 and first half of 2020, there were 8,377 lettings in LGDs outside of Belfast, 20.7% (1,732) of those were within Ards and North Down Borough. (Performance of the Private Rental Market in Northern Ireland H1 2020 Ulster University);
- The overall average rent in the borough in 2020 was £661 per month, an increase of £26 from £635 over the year and above the Northern Ireland average of £658 per month;



Within Ards and North Down, 5,579 private rented properties were registered by 4,252 landlords under DfC’s Landlord Registration scheme at March 2021

- The Landlord Registration scheme will provide evidence to assist monitoring and regulation of the sector;
- Housing Benefit plays a vital role in supporting the private rented sector. At March 2021, there were 2,809 private tenants in receipt of Housing Benefit in the borough, a 10.2% reduction on the comparable 2020 position. A key factor in this reduction is the introduction of Universal Credit.

## Social Rented Housing Sector



The social housing share of the housing market in Ards and North Down was 12% at 2016 (Northern Ireland House Condition Survey 2016)



At March 2021, there were 1,467 Housing Executive tenants in receipt of the Housing Cost element of Universal Credit

- Census 2011 showed that the social rented stock in the district (7,365 units) has fallen by 24% compared to the 2001 figure;
- Housing Executive stock at March 2021 was 6,230 with 8,100 properties sold since the commencement of the 'Right to Buy' scheme;
- There were 125 new social housing units completed and a further 84 social housing units on site in the year to March 2021;
- Ten Housing Executive properties were sold in the year to March 2021.

# Social Housing Need and Strategic Guidelines Requirements

Social Housing Need is considered against each of the following subheadings:

- General Housing Need (Urban & Rural)**
- Shared Future Demand**
- Supported Housing Need**
- Wheelchair Housing Need**
- Travellers' accommodation requirements**

## General Needs Housing (Urban & Rural)

### Urban

The Strategic Guidelines has established that for Year 1 of the Social Housing Development Programme, 4.9% (urban) and 4.2% (rural) units have been allocated to the borough. Five year projected need for the area as a whole is 1,068 and the projected need for individual settlements is detailed in Table 12.

**Table 12: Projected (5-Year) Social Housing Need 2021-26**

Settlement	Housing Need Assessment Area*	Total 5 Year Projection
Newtownards Town	Newtownards Town	<b>266</b>
Bangor Urban	Bangor Urban	<b>364</b>
Hollywood	Hollywood	<b>146</b>
Comber	Comber	<b>106</b>
Donaghadee	Donaghadee	<b>50</b>
Groomsport	Groomsport	<b>28</b>
Ballygowan	Ballygowan	<b>21</b>
Portaferry	Portaferry	<b>17</b>
Ballywalter	Ballywalter	<b>11</b>
Crawfordsburn	Crawfordsburn	<b>11</b>
Remaining Settlements (need <10)*	Remaining Settlements*	<b>48</b>
<b>Total</b>	<b>Ards &amp; North Down Borough</b>	<b>1,068</b>

Housing need has currently been met in Ballydrain, Cotton and Lisbane. These areas will be kept under annual review.

\* Remaining settlements include Ballyhalbert, Carrowdore, Cloughey, Greyabbey, Helen's Bay, Killinchy, Kircubbin, Loughries, Millisle and Portavogie where each settlement is less than 10.

Please note that in relation to those settlements with <10 projected need, the Housing Executive will consider Housing Association development opportunities or Existing Satisfactory Purchases (ESP). In addition, if land can be identified that may provide for more than current projected social need suggests, the Housing Executive Place Shaping and Rural Units may be able to assist in Rural Housing Needs Testing or other marketing exercises to identify hidden additional social and mixed tenure demand.

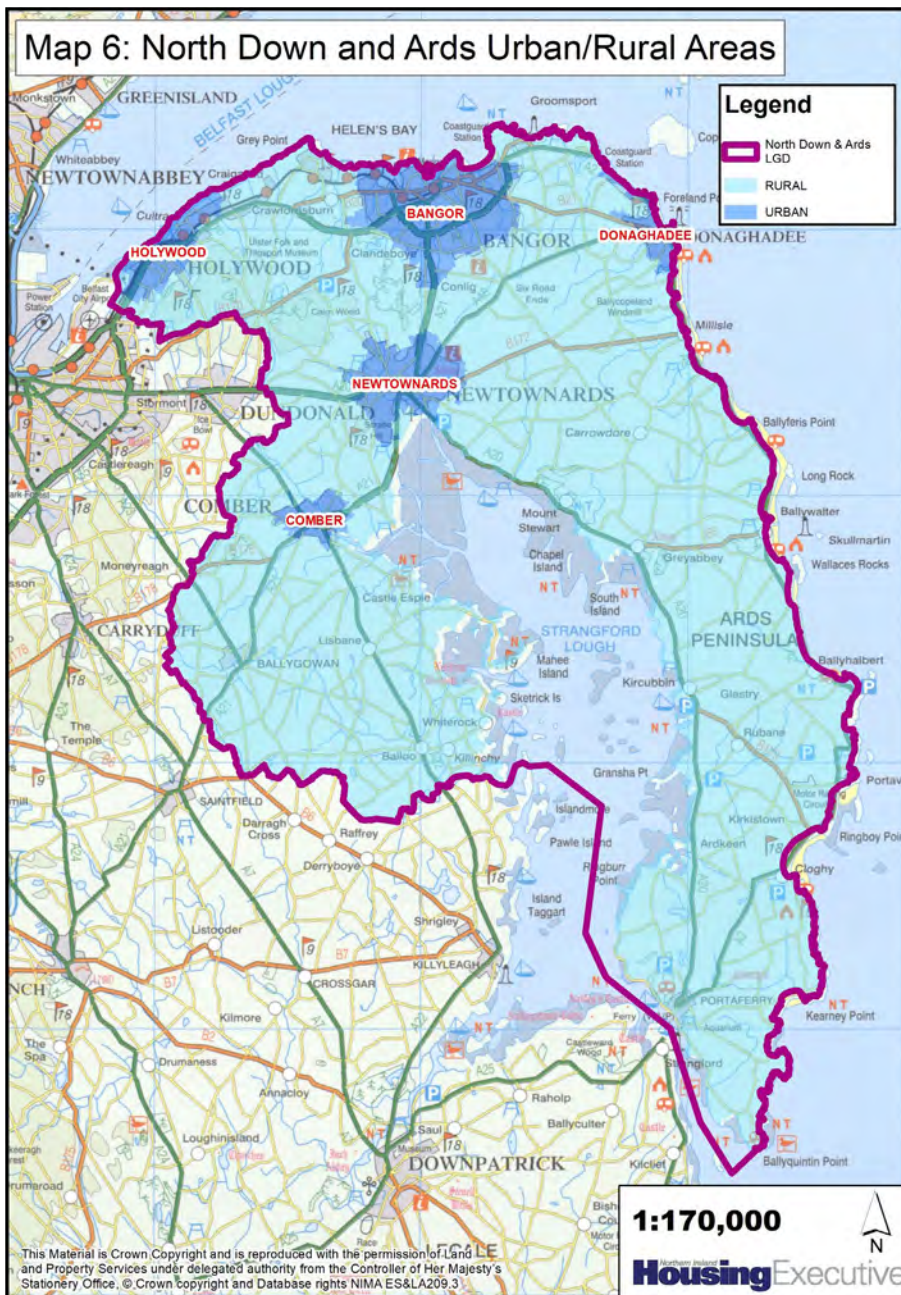
The following comments are relevant to housing need within the Council area:

- Housing need for Ards and North Down has remained at a consistently high level between 2012 and 2021. There has been a significant increase in the assessed housing need with the figure increasing by almost 12% from 954 for the five years to 2025 to 1,068 for the five years to 2026. The areas of greatest housing need are Bangor, Newtownards, Holywood and Comber;
- The majority of Housing Executive land has now been utilised for new build within the district;
- Within Newtownards town all areas are popular with Scrabo and Movilla particularly so. The need for small unit accommodation remains strong – 1 and 2 bed. Due to the high level of apartment provision within the town, 2 bed houses would be preferred. Mixed tenure schemes would also be welcomed moving forward;
- There is no requirement for additional Cat 1 accommodation in the town. A very high need exists for generic bungalow accommodation within the town, generic houses / apartments have been deemed unsuitable for these applicants by Occupational Therapists. The majority of cases held by the Housing Support Officer require the provision of generic w/c bungalows to meet their housing requirements;
- Within Bangor town, the most popular areas are Bloomfield / Balloo, Bangor East and Bangor Central. Conlig, Kilcooley and the arterial routes of the town would be less popular, experiencing little demand. There is no requirement for additional Cat 1 accommodation in the town;
- Mixed tenure schemes would be welcomed in Bangor. A high need exists for generic wheelchair accommodation (bungalows /apartments / houses) in the town;
- The Housing Executive has received a very high volume of apartment proposals for Newtownards and Bangor, in particular those providing 2 bedroom units. Moving forward, the preferred option for apartment proposals would be that they include 1 bedroom units within the housing mix. To assist with any possible housing management issues, independent access for the 1 bed units would be preferred. High density apartment schemes should include the provision of mixed tenure;
- There is a high requirement for the provision of 2 bed houses for small families throughout the borough, applicants for whom 2 bed apartments are not suitable;
- Within the towns of Comber and Holywood, the need for small unit accommodation remains strong. The delivery of 2 bed houses is preferred because of the high level of 2 bed apartment provision already available and the growing need demonstrated by single adults with caring responsibilities. Generic wheelchair and bespoke complex needs units are also needed. Mixed tenure schemes would be welcomed. There is no requirement for Cat 1 accommodation in either town;

- Within Donaghadee, site selection should be carefully considered to ensure that new housing does not destabilise existing estates such as Beechfield;
- The Housing Executive continues to monitor the availability of surplus public sector sites across the district and we continue to engage with our partners through the Community Planning partnership with regard to the strategic review of land assets;
- Future housing mix in new build developments will need to cater for singles, small families and wheelchair / complex needs households along with any potential changes associated with Welfare Reform;
- Dwelling type should therefore comprise 1 and 2 bedroom design forms with an emphasis on accessibility. Where possible, dwellings should be designed flexibly to cater for potential household growth;
- Some 3 bed properties may be required for families and these should be discussed with the Housing Executive. There may also be a requirement for a small number of 4 bed properties for large families;
- Increasingly there has been a requirement for the provision of 5 bed properties, or larger in certain areas. Consideration should be given to the inclusion of such units where identified. Any concerns regarding 'future planning' can be discussed with Place Shaping South at an early stage;
- A number of Estate-Based Strategies, which included selective demolition of unpopular stock, were successfully delivered throughout a number of the towns within Ards and North Down over the past two decades, resulting in increased popularity and stability in these neighbourhoods;
- The indicative housing mix for the urban areas of the borough should be 40% Single Persons and 60% Families. Wheelchair units should make up 10% of the housing mix across all groups. Family households include 2, 3 and 4 bed units. Place Shaping, South Region will provide further detail on the housing mix required for families upon request;
- As a result of the high level of Cat 1 accommodation available in Newtownards, Bangor, Comber and Holywood, additional accommodation of this type will only be supported if existing units are at full occupancy;
- Alternative mixes can be considered by Housing Associations in relation to specific sites or scheme types. However, significant changes from the above mix should be discussed with the Housing Executive to avoid nugatory work.



Rural



The provision of new social housing in rural settlements represents a strategic priority for delivery of the SHDP. The rural target share for Year 1 of the SHDP (2022/23) is 12.9% of the overall programme based on average levels of housing stress in rural areas.

In every case, it will be important to understand the localised nature of rural housing need and the alternative settlements that rural applicants are likely to consider. The Housing Executive's Rural Unit will support housing providers by providing initial desk-top evidence of potential need based on neighbouring waiting lists and by facilitating subsequent rural housing needs testing and marketing.

In some rural areas, there are no available sites within the development limit and a large percentage of public owned stock is sold. As a result of this, there are limited housing opportunities in these locations which has led to the development of latent need.



## Indicative Housing Mix Requirements

- At March 2021 there were 136 applicants in rural Ards and North Down in housing stress (12.7% of applicants in housing stress on the waiting list). Whilst the Housing Executive work closely with rural communities to identify housing need, Housing Association delivery of new social housing schemes is becoming increasingly difficult. This is due to the smaller numbers often required in rural schemes and the economies of scale associated with delivery and management;
- Future housing mix in new build developments will need to cater for singles, small families, and wheelchair / complex needs households along with any potential changes associated with Welfare Reform;
- Accommodation should be designed flexibly with long term accessibility issues taken into consideration. Generic wheelchair units should be included in schemes where possible;
- Alternative mixes can be considered by Housing Associations in relation to specific sites or scheme types. However, significant changes from the above mix should be discussed with the Housing Executive to avoid nugatory work.

**Table 13: Indicative housing mix for Ards & North Down**

Older Persons	Families*	Singles	Wheelchair
0%	60%	40%	10%

\* Focus on: Small Adult and Small Family Households

## Areas where need is met

Housing need has currently been met in Ballydrain, Cotton and Lisbane. These are small rural settlements which exhibit no projected housing need at this time. They will however be kept under annual review.

### Rural Areas

Based on the waiting list for social housing, at March 2021, the current projected need for rural areas within Ards and North Down Borough Council is for 136 units. Taking account of new build schemes on the current SHDP, the residual housing need is focused mainly in Groomsport, Ballygowan, Portaferry, Ballywalter and Crawfordsburn. There is also a small need in Ballyhalbert, Carrowdore, Cloughey, Greyabbey, Helen’s Bay, Killinchy, Kircubbin, Loughries, Millisle and Portavogie where need in each settlement is less than 10.

Proposals for social housing in these locations will be welcomed and given due consideration. Groomsport and Crawfordsburn are particularly popular rural locations for applicants. Groomsport in particular has become a popular overspill area for Bangor. Latent need is also highly likely in these areas as applicants do not register on the waiting list due to lack of availability.

It is recognised, however, that there may be other neighbouring rural settlements where demand has not yet been identified but where land may still be available. The Housing Executive will take account of the potential for ‘hidden’ or ‘latent’ demand within such areas if and when Housing Associations identify potential sites. Should sites come to the attention of Housing Associations, the Housing Executive will seek to assist in assessing any hidden need by way of rural housing needs testing if appropriate. We continue to work closely with rural communities to identify housing need.

## Wheelchair Housing Need (HNA)

The total projected wheelchair housing requirement for Ards and North Down is 123 units.

At March 2021, there were 108 housing stress applicants and 27 transfer applicants who require wheelchair accommodation. Only 12 allocations were made over the last year leaving a residual need of 123 applicants. Housing need for wheelchair units is concentrated mainly in Bloomfield, Bangor Central, Kilcooley and Newtownards Centre.

Housing Associations should actively discuss the inclusion of generic wheelchair units within suitable schemes with the Head of Place Shaping. Generally, generic wheelchair units should be for 2 and 3 bed units and built in line with the space standards included in the Housing Association Guide.

## Shared Future Demand

The Housing Executive actively encourages mixed tenure and Housing for All (shared future) housing. Housing Associations bringing forward suitable proposals for Housing for All designation would be welcomed.

## Traveller's accommodation

The need for Irish Traveller accommodation is currently met in Ards and North Down. Future Irish Traveller accommodation requirements are reviewed annually. The Housing Executive has initiated research into developing a new assessment methodology for Irish Travellers as set out in the Irish Travellers Accommodation Strategy 2021-26. The research programme is scheduled to complete in November 2022.

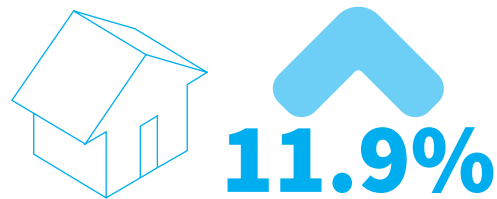
## Intermediate (Affordable) Demand

- The Housing Executive estimates intermediate/affordable housing demand for Ards and North Down is 70 units per annum;
- House prices in Ards and North Down ranged from a low of £177,222 in 2016 to £198,468 in 2020;
- Average house prices in Northern Ireland increased by 20.5% between 2015 and 2020.



Co-Ownership assisted with the purchase of 156 properties during 2020/21

- Co-Ownership had an active stock of 1,386 dwellings at March 2021, the third highest figure across all LGD's. This reflects the opportunities this scheme provides in the current housing market environment;
- In general house prices in Ards and North Down are substantially higher than the Northern Ireland average;



Average house prices in Ards and North Down have increased by 11.9% over the past five years

**Table 14: Average Annual House Prices Ards and North Down & NI 2015-2020**

Area	2015	2016	2017	2018	2019	2020	% Change 2015-2020
<b>Ards and North Down</b>	177,296	185,077	177,222	189,840	187,442	198,468	11.9
<b>Northern Ireland</b>	149,449	154,028	155,049	163,128	169,057	180,079	20.5



**Table 18: Bangor URBAN Waiting List – March 2021**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	502	79	274	30	74	359	<b>1,318</b>
<b>HS Applicants</b>	363	56	187	19	54	253	<b>932</b>
<b>Allocations</b>	80	<10	44	<10	13	43	<b>187</b>

Applicants – Housing applicants at March 2021

HS Applicants – Housing stress applicants at March 2021 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2021

**Table 19: Bangor Urban Housing Stress applicants time on list March 2021**

Household	0-6 mths	6-12 mths	1-2 years	2-4 years	4+ years	Total	Average Months on WL
Single	50	49	87	97	80	<b>363</b>	<b>36</b>
Small Adult	<10	<10	12	16	14	<b>56</b>	<b>40</b>
Small Family	30	22	42	51	42	<b>187</b>	<b>35</b>
Large Adult	<10	<10	<10	<10	<10	<b>19</b>	<b>51</b>
Large Family	<10	<10	13	16	15	<b>54</b>	<b>37</b>
Older Person	30	28	34	65	96	<b>253</b>	<b>59</b>
<b>Total</b>	-	-	-	-	-	<b>932</b>	<b>43</b>

**Table 20: Comber Waiting List – March 2021**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	115	17	45	<10	20	59	-
<b>HS Applicants</b>	89	10	25	<10	12	45	-
<b>Allocations</b>	15	<10	10	<10	<10	16	<b>47</b>

Applicants – Housing applicants at March 2021

HS Applicants – Housing stress applicants at March 2021 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2021

**Table 21: Comber Housing Stress applicants time on list March 2021**

Household	0-6 mths	6-12 mths	1-2 years	2-4 years	4+ years	Total	Average Months on WL
Single	19	20	14	17	19	<b>89</b>	<b>38</b>
Small Adult	0	<10	<10	<10	<10	<b>10</b>	<b>44</b>
Small Family	<10	<10	<10	<10	<10	<b>25</b>	<b>36</b>
Large Adult	0	0	<10	0	<10	<b>&lt;10</b>	<b>117</b>
Large Family	0	<10	<10	<10	<10	<b>12</b>	<b>49</b>
Older Person	<10	<10	<10	11	19	<b>45</b>	<b>65</b>
<b>Total</b>	-	-	-	-	-	-	<b>48</b>

**Table 22: Hollywood URBAN Waiting List – March 2021**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	96	13	34	<10	16	121	-
<b>HS Applicants</b>	64	<10	21	<10	13	82	<b>190</b>
<b>Allocations</b>	253	<10	12	<10	<10	<10	<b>48</b>

Applicants – Housing applicants at March 2021

HS Applicants – Housing stress applicants at March 2021 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2021

**Table 23: Hollywood URBAN Housing Stress applicants time on list March 2021**

Household	0-6 mths	6-12 mths	1-2 years	2-4 years	4+ years	Total	Average Months on WL
Single	11	<10	<10	12	24	<b>64</b>	<b>49</b>
Small Adult	0	0	0	<10	<10	<b>&lt;10</b>	<b>58</b>
Small Family	<10	<10	<10	<10	<10	<b>21</b>	<b>54</b>
Large Adult	<10	0	<10	<10	0	<b>&lt;10</b>	<b>22</b>
Large Family	<10	0	<10	<10	<10	<b>13</b>	<b>33</b>
Older Person	<10	<10	19	23	28	<b>82</b>	<b>50</b>
<b>Total</b>	-	-	-	-	-	<b>190</b>	<b>49</b>

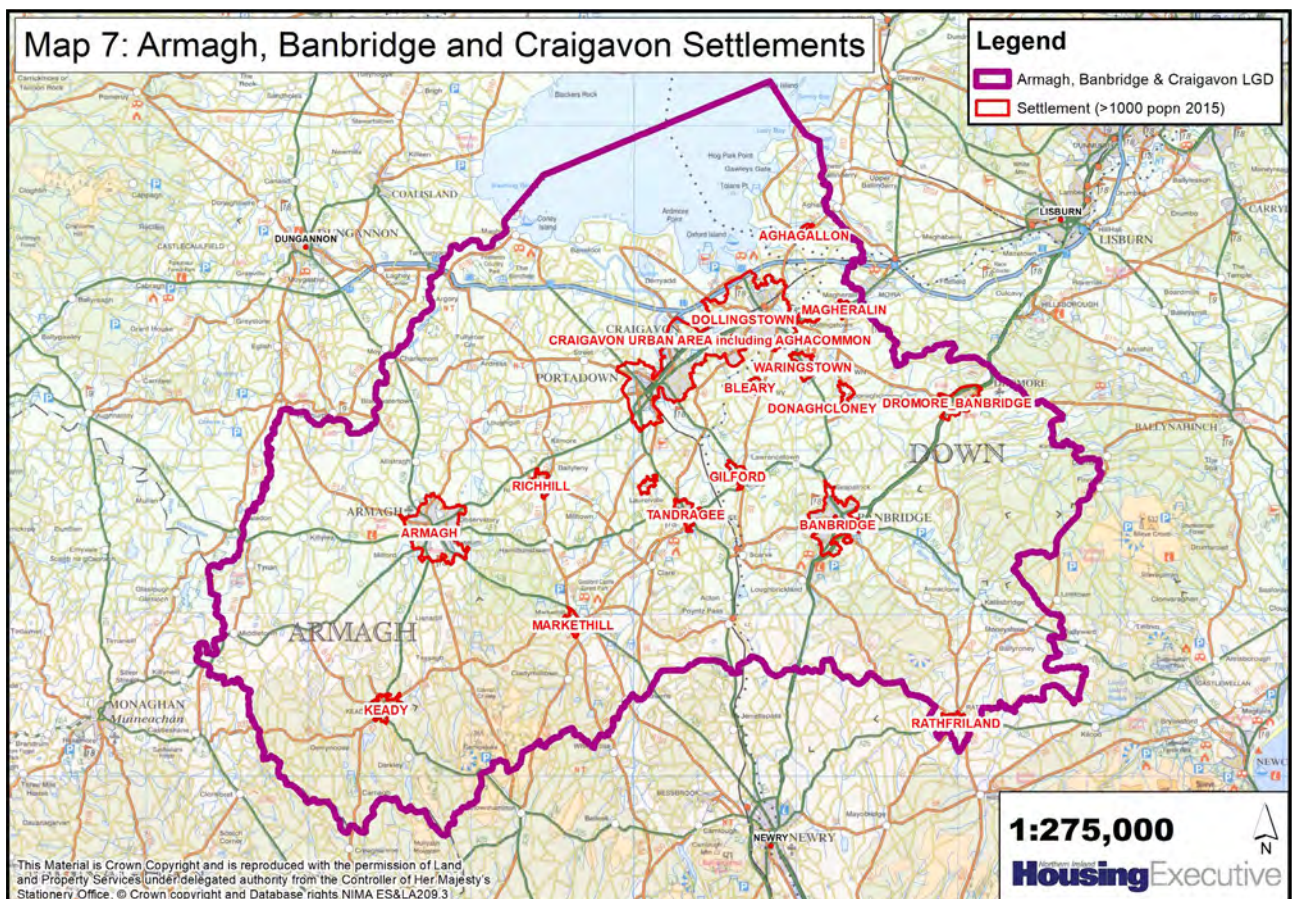


# Armagh City, Banbridge & Craigavon Borough

## Context

Covering an area of 554 square miles with a population of over 211,000, Armagh City, Banbridge and Craigavon Borough Council (ACBCBC) is the second largest Council in Northern Ireland, extending from the southern shores of Lough

Neagh to the foothills of the Mourne in the east, to the Blackwater Valley in the west. The borough comprises a diverse mix of attractive rural and urban landscapes as well as an abundance of heritage assets. The key urban centres of Armagh City, Central Craigavon, Portadown, Lurgan and Banbridge benefit from their strategic position on the Belfast/Dublin and Belfast/Enniskillen/Sligo Economic Corridors.



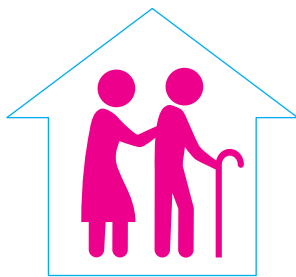


**8.1%**  
**PROJECTED INCREASE**

BY 2029

The borough population is projected to grow by 8.1% from 216,205 in 2019 to 233,682 in 2029

The Borough represented 11.4% of the NI population in 2019. The number of children in Armagh City, Banbridge and Craigavon Borough is projected to fall by 0.7%, the working age population is projected to increase by 5.5% and the 65 plus age group is projected to grow by 31%.



**31%**

The 65 plus age group is projected to grow by 31%



**NUMBER OF HOUSEHOLDS INCREASES**

The household size is projected to reduce from 2.63 to 2.58 while the number of households is projected to increase by 8,348 from 81,444 to 89,792 over the 10 years to 2029

According to the Annual Survey of Hours and Earnings (ASHE), within the borough, there are 102,000 jobs, 10.7% of the 949,000 jobs across Northern Ireland in 2020. The most recently available Labour Force Survey statistics at the end of 2019 showed 74.3% of the working age population were economically active, above the 73.8% recorded for Northern Ireland. In 2020, the annual full-time median wage for residents in the area was £502.30 per week, a decrease of 4.2% on the previous year. This compares to the overall Northern Ireland weekly basic full-time median wage of £528.60, a decrease of 1.1% on the 2019 figure (ASHE).



In 2020, the annual full-time median wage for residents in the area was £502.30 per week, a decrease of 4.2% on the previous year

## COVID-19

The Coronavirus pandemic is likely to have an impact on the socio-economic development of the local area moving forward. The labour market is also likely to face adjustments given the economic challenges and changes to the way society operates. For example, through an increased reliance on online goods and service providers and increased numbers of people homeworking.

## Housing Market Analysis (across tenures)



**17,200**

**NEW DWELLING REQUIREMENT**

The borough has a Housing Growth Indicator (HGI) projected new dwelling requirement of 17,200 for 2016-2030

### Housing & Land Supply

- During 2020, there were 756 new dwelling starts in Armagh City, Banbridge and Craigavon Borough which is less than the projected new dwelling requirement as estimated by the housing growth indicators 2016-2030 of 1,147 per annum;



Land and Property Services (LPS) statistics show that over the 2016 to 2020 period, 5,079 new dwelling starts commenced in Armagh City, Banbridge and Craigavon Borough

- Over the period 2016 to 2020 there were 4,683 new dwelling completions in the borough according to LPS.

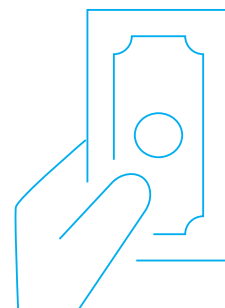
### Owner Occupied

- The general mood of positivity around the housing market continued in 2020/21 with sales and pricing activity accelerating as consumer confidence improved in line with the easing of restrictions and the wider economic recovery. Borrowing costs are exceptionally low by historic standards and ongoing lender competitiveness suggests this may improve further in the coming months. Underlying demand remains at exceptionally high levels and reduced property stock has put upward pressure on prices, particularly for larger properties in desirable areas. There are still uncertainties around the longer term impacts of COVID-19 on the housing market and wider economy however;

- The Bank of England cut interest rates from 0.75% to 0.25% initially and then further to 0.1%, the lowest level on record, in response to the COVID-19 pandemic. At the most recent Monetary Policy Committee meeting held in August 2021, members voted unanimously for the Bank of England to maintain the Bank Rate at 0.1%. Although this is seen as a temporary measure any increases in interest rates are expected to be slow and gradual. Existing mortgagors may see this as an opportunity to re-mortgage at more favourable rates;
- According to the Northern Ireland House Condition Survey 2016, owner occupiers make up 65% of all tenures in the borough;
- The private housing market had been showing signs of recovery – the number of house sales in Armagh City, Banbridge and Craigavon Borough has increased from 1,082 in 2010 to 2,840 in 2019, before falling by 334 to 2,506 in 2020 (LPS);
- The average house price for Armagh City, Banbridge and Craigavon Borough fluctuated between 2012 and 2020. The average annual figure for the borough in 2020 was £158,921, an increase of 11.7% over the comparable 2019 position. The Northern Ireland figure was over £11,000 higher, £180,079 in 2020;
- Popular locations include the local housing areas of Armagh City and North Lurgan. Banbridge town is also popular;
- During 2019, there were 36 repossessions within Armagh City, Banbridge and Craigavon Borough a slight increase from 30 over the previous year.

## Private Rented

- The private rented sector across Armagh City, Banbridge and Craigavon Borough has seen an unprecedented increase in its tenure share between 2001 and 2019 and now accounts for 24% of all housing. Rented accommodation is now the accommodation of choice for many households, especially younger households on lower incomes who in previous decades would have become first time buyers;
- During the second half of 2019 and first half of 2020, there were 8,377 lettings in LGDs outside of Belfast, 11.7% (977) of those were within Armagh City, Banbridge and Craigavon Borough (Performance of the Private Rental Market in Northern Ireland H1 2020 Ulster University);
- Armagh City, Banbridge and Craigavon are the most requested locations;



The overall average rent in the borough in 2020 was £537 per month, an increase of £9 (1.7%) from £528 over the year, but well below the Northern Ireland average of £658 per month in 2020



- Within Armagh City, Banbridge and Craigavon Borough, 7,431 private rented properties were registered by 3,986 landlords under DfC's Landlord Registration scheme at March 2021;
- Housing Benefit plays a vital role in supporting the private rented sector. At March 2021, there were 4,625 private tenants in receipt of Housing Benefit in the borough, a 9.6% decrease on the comparable 2020 position. A key factor in this reduction is the introduction of Universal Credit.
- Four schemes for seven units were completed over the year to March 2021;
- There were 12 schemes for 151 units on-site at March 2021, including two schemes in Lurgan for 39 units, two schemes in Armagh for 65 units, three schemes in Banbridge for 12 units and one scheme in Portadown for 12 units of social housing;
- Fifteen Housing Executive properties were sold in the year to March 2021.

### Social Rented Housing Sector

- The social housing share of the housing market in Armagh City, Banbridge and Craigavon was 11% at 2016 (Northern Ireland House Condition Survey 2016);
- Census 2011 showed that the social rented stock in the district (8,552 units) has fallen by 28% compared to the 2001 figure (11,887);



At March 2021, there were 1,816 Housing Executive tenants in receipt of the Housing Cost element of Universal Credit



**7,424**

**HOUSING EXECUTIVE STOCK**

Housing Executive stock at March 2021 was 7,424, with 14,454 properties sold since the commencement of the 'Right to Buy' scheme

# Social Housing Need and Strategic Guidelines

Social Housing Need is considered against each of the following subheadings:

- General Housing Need (Urban & Rural)**
- Shared Future Demand**
- Supported Housing Need**
- Wheelchair Housing Need**
- Travellers' accommodation requirements**

## General Needs Housing (Urban & Rural)

### Urban

The Strategic Guidelines have established that for Year 1 of the Social Housing Development Programme, 3.2% (urban) and 2.0% (rural) units have been allocated to the borough. Five year projected need for the area as a whole is 820 and the projected need for individual settlements is detailed in Table 24.

**Table 24: Projected (5-Year) Social Housing Need 2021-26**

Settlement	Housing Need Assessment Area*	Total 5 Year Projection
Armagh 1	Armagh 1	<b>79</b>
Armagh 2	Armagh 2	<b>31</b>
Banbridge Town	Banbridge Town	<b>171</b>
Central Craigavon	Central Craigavon	<b>40</b>
North Lurgan	North Lurgan	<b>184</b>
South Lurgan	South Lurgan	<b>53</b>
Portadown 1	Portadown 1	<b>62</b>
Portadown 2	Portadown 2	<b>56</b>
Aghagallon	Aghagallon	<b>19</b>
Dromore	Dromore	<b>39</b>
Keady	Keady	<b>10</b>
Rathfriland	Rathfriland	<b>20</b>
Remaining Settlements**	Remaining Settlements**	<b>56</b>
<b>Total</b>		<b>820</b>

Housing need has currently been met in Annahugh, Ashfield/Tullyhenan\*, Bellala, Banbridge Rural Cottages, Closkelt, Corbet, Dromore Rural Cottages, Drumhillery / Darkley/Derrynoose\*, Drumnacanvey, Gilford, Glenanne/Mountnorris/Loughgilly\*, Hamiltonsbawn/Edenaveys\*, Katesbridge, Killyman/Laghey\*, Kinallen, Lenaderg, Lisnagade/Ballyvarley\*, Portadown Rural, Poyntzpass, Scarva, Seapatrick, Tandragee, Tynan/Killylea\* and Waringstown. These areas will be kept under annual review.

\*Some settlements may include a number of small settlements grouped together for waiting list purposes – where this occurs all settlements within the grouped HNA are listed.

\*\* Remaining settlements includes Annaclone, Annaghmore / Eglis\*, Bleary, Carn, Charlemont / Blackwatertown / Carrickaness / Donnelly Hill\*, Clady, Corran, Ballymacnab, Derrymacash / Derrytrasna / Kinnego, Dollingstown, Donaghcloney, Lawrencetown, Loughbrickland, Laughgall, Madden / Milford / Ballyards\*, Magheralin, Markethill, Middletown, Richhill, and Tullylish where need in each settlement is less than 10.



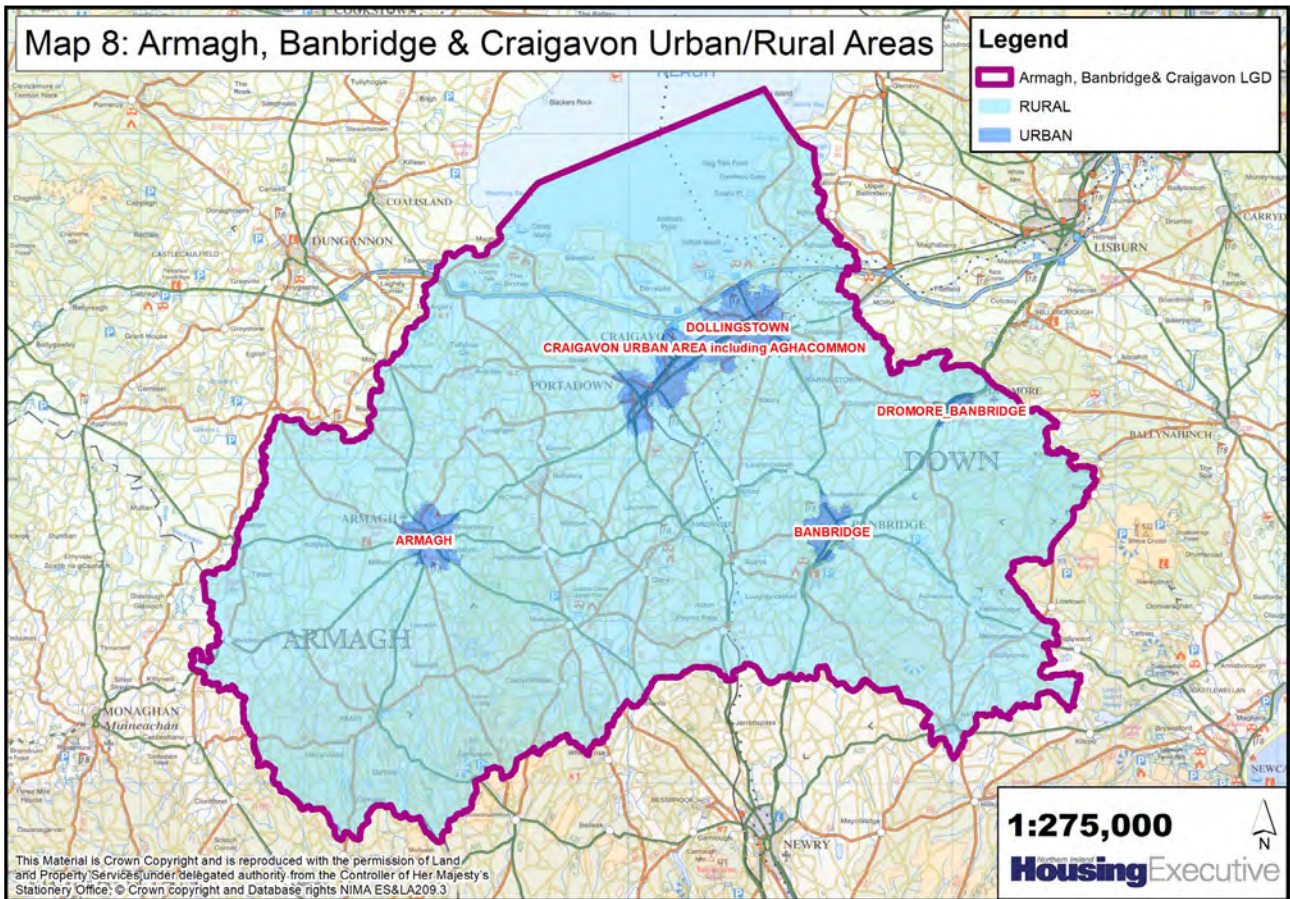
Please note that in relation to those settlements with <10 projected need; the Housing Executive will consider Housing Association development opportunities or Existing Satisfactory Purchases (ESP). In addition, if land can be identified that may provide for more than current projected social need suggests, the Housing Executive Place Shaping and Rural Units may be able to assist in Rural Housing Needs Testing or other marketing exercises to identify hidden additional social and mixed tenure demand.

The following comments are relevant to housing need within the Council area:

- Housing need for Armagh City, Banbridge and Craigavon Borough has remained at a relatively high level for the five year period to 2026. The housing need in the Council area is concentrated within North Lurgan, Banbridge Town and Armagh 1. North Lurgan comprises the common landlord areas of Lurgan Town Centre, Edward Street / Shankill, Lurgantarry, Manor Park and Taghnevan. Armagh 1 comprises the common landlord areas of Banbrook / Railway Street, Callanbridge Park, Culdee, Dairies Willows, Dalton, Drumarg, Drumbreda, Dukes Grove, Emania Terrace, Legar Hill Park, Mullacreevie, Navan Street and Windmill;
- Housing need continues to grow within North Lurgan however site location is of paramount importance. Housing Associations should focus on the Kilwilkie / Lurgantarry and Taghnevan areas of the town where the need and desire for housing is highest;
- Any potential sites in the centre of the town should be directed towards Place Shaping, South Region before any significant work is carried out. While additional housing here would be welcomed, location of the site will determine which local housing area is being catered for and whether support can be provided;
- There is no requirement for further Cat 1 accommodation in the borough due to sufficient accommodation being available;
- Housing need continues to remain high in Armagh 1 Housing Need Assessment (HNA) area which is located in the west of the City. The most popular areas within this HNA area include Culdee / Irish Street, Cregagh, Mullanstown, Nialls Crescent and Mullacreevie. Contact should be made with Place Shaping upon identification of a site as there are certain estates within this HNA area that experience letting difficulties;
- The housing need is predominately for small unit accommodation – 1 and 2 bed units. The preferred option is 2 bed units as there is a high demand for this type of accommodation from small families;
- Housing need has now grown to a significant level in Portadown 2 HNA area. Portadown 2 Housing Need Assessment area comprises the common landlord areas of Armagh Road, Portadown, Brownstown (Old), Clounagh Park, Corcrair, Fitzroy Street, Greenview Gardens, Kernan Hill Road, Portadown, Killicomaine, Magowan House, Old Rectory Park, Park Road, Rectory Park/Brownstown West, Redmanville, Seagoe Park, Town Centre, Union Street, West Street Area, Annagh and Junction Row. Demand for housing is highest in Killicomaine followed by the town centre and Brownstown. Housing Associations should forward town centre sites to Place Shaping South who will determine whether support can be provided, based on location and housing need assessment area;
- Portadown 2 experiences letting difficulties within certain estates / areas so it is pertinent that Housing Associations make contact with Place Shaping, South Region at site identification stage to eliminate unnecessary work;

- The Housing Executive has remaining land bank available within Portadown 2 HNA area which is currently being investigated for development;
- Central Craigavon is now showing a positive general housing need. The Housing Executive has a land bank in Central Craigavon which could be utilised to help meet this need;
- Historically, much of the social housing need in Armagh City, Banbridge and Craigavon Borough has been delivered by Housing Associations on Housing Executive land in Lurgan, Banbridge, Armagh and Portadown;
- The Housing Executive has land bank remaining within Armagh City, South Lurgan, Portadown 2 and Central Craigavon;
- Through the Community Planning Partnership, the local council and respective public sector delivery partners are currently preparing a Place Shaping plan for Armagh City, the purpose of which is to work collectively with statutory partners and communities to create and deliver a shared vision and aspirations for the City. The provision of further housing of all tenures forms a large part of the plan;
- The majority of Housing Executive land has now been utilised for new build within the district towns. Remaining sites are subject to planning regulations, lack of development potential or financial unviability;
- The Housing Executive continues to monitor the availability of surplus public sector sites across the district and we continue to engage with our partners through the Community Planning partnership with regard to the strategic review of land assets;
- The development of mixed tenure schemes within Armagh City, Banbridge and Craigavon Borough Council would be welcomed and encouraged;
- Future housing mix in new build developments will need to cater for singles, small families, and wheelchair / complex needs households along with any potential changes associated with Welfare Reform;
- Dwelling type should therefore comprise 1 and 2 bedroom design forms with an emphasis on accessibility. Where possible, dwellings should be designed flexibly to cater for potential household growth;
- Some 3 bed properties may be required for families and these should be discussed with the Housing Executive. There may also be a requirement for a small number of 4 bed properties for large families;
- Accommodation for older persons should be designed flexibly with long term accessibility issues taken into consideration, with generic wheelchair units to be included in schemes where possible;
- Within urban areas the indicative housing mix should be 40% Single Persons and 60% Families. Wheelchair units should make up 10% of the housing mix across all groups. Family households include 2, 3 and 4 bed units. Place Shaping, South Region will provide further detail on the housing mix required for families upon request;
- There is a high requirement for generic bungalow accommodation in many housing need assessment areas throughout the borough. Generic wheelchair houses have been ruled out for these applicants by their relevant Occupational Therapists;
- Alternative mixes can be considered by Housing Associations in relation to specific sites or scheme types. However, significant changes from the above mix should be discussed with the Housing Executive to avoid nugatory work.

Rural



The provision of new social housing in rural settlements represents a strategic priority for delivery of the SHDP. The rural target share for Year 1 of the SHDP (2022/23) is 12.9% of the overall programme based on average levels of housing stress in rural areas.

In some rural areas there are no available sites within the development limit and a large percentage of public owned stock is sold. As a result of this there are limited housing opportunities in these locations which have led to the development of latent need.

In every case, it will be important to understand the localised nature of rural housing need and the alternative settlements that rural applicants are likely to consider. The Housing Executive's Rural Unit will support housing providers by providing initial desk-top evidence of potential need based on neighbouring waiting lists and by facilitating subsequent rural housing needs testing and marketing.

## Indicative Housing Mix Requirements

- At March 2021, there were 382 applicants in rural Armagh City, Banbridge and Craigavon Borough in housing stress (16.1% of all applicants in housing stress on the waiting list). Whilst we work closely with rural communities to identify housing need, Housing Association delivery of new social housing schemes is becoming increasingly difficult; This is due to the smaller numbers often required in rural schemes and the economies of scale associated with delivery and management;
- Future housing mix in new build developments will need to cater for singles, small families and wheelchair / complex needs households along with any potential changes associated with Welfare Reform;
- Alternative mixes can be considered by Housing Associations in relation to specific sites or scheme types. However, significant changes from the above mix should be discussed with the Housing Executive to avoid nugatory work.

**Table 25: Indicative housing mix for Armagh City, Banbridge & Craigavon Borough**

Older Persons	Families*	Singles	Wheelchair
0%	60%	40%	10%

\* Family households include 2, 3 and 4 bed units. Place Shaping, South Region will provide further detail on the housing mix required for families upon request.

## Areas where need is met

Housing need has currently been met in Annahugh, Ashfield/Tullyhenan, Ballela, Banbridge Rural Cottages, Closkelt, Corbet, Dromore Rural Cottages, Drumhillery / Darkley/Derrynoose, Drumnacanvey, Gilford, Glenanne/Mountnorris/Loughgilly, Hamiltonsbawn/Edenaveys, Katesbridge, Killyman/Laghey, Kinallen, Lenaderg, Lisnagade/Ballyvarley, Portadown Rural, Poyntzpass, Scarva, Seapatrick, Tandragee, Tynan/Killylea and Waringstown. These areas will be kept under annual review.

## Rural Areas

Based on the waiting list for social housing, at March 2021, the current projected need for rural areas within Armagh City, Banbridge and Craigavon Borough Council is for 105 units. Taking account of new build schemes on the current SHDP, the residual housing need is focused mainly in the settlements of Aghagallon, Keady and Rathfriland. There is also a small need in Annaclone, Annaghmore / Eglis, Bleary, Carn, Charlemont / Blackwatertown / Carrickaness / Donnelly Hill, Clady, Corran, Ballymacnab, Derrymacash / Derrytrasna / Kinnego, Dollingstown, Donaghcloney, Lawrencetown, Loughbrickland, Loughgall, Madden / Milford / Ballyards, Magheralin, Markethill, Middletown, Richhill, and Tullylish where need in each settlement is less than 10. Proposals for social housing in these locations will be welcomed and given due consideration.

Site Identification Studies (SIS) have been completed for North Lurgan, Kinnego and Tullylish. Ongoing studies are nearing completion for Lenaderg and Lawrencetown. A SIS List containing Housing Associations areas of interest and rank by scheme delivery has been drawn up. The allocation of SIS's will be made on this basis.



During 2020/21, a rural housing need test took place in Markethill and a test in Maghera has been scheduled for 2021/2022. It is recognised that there may be neighbouring rural settlements where demand has not yet been identified but where land may still be available. The Housing Executive will take account of the potential for 'hidden' or 'latent' demand within such areas if and when Housing Associations identify potential sites. Should sites come to the attention of Housing Associations, the Housing Executive will seek to assist in assessing any hidden need by way of latent demand testing, if deemed appropriate. We continue to work closely with rural communities to identify housing need.

### **Wheelchair Housing Need (HNA)**

The total projected wheelchair housing requirement for Armagh City, Banbridge and Craigavon Borough is 68 units.

At March 2021 there were 51 housing stress applicants who require wheelchair accommodation with less than 10 allocations over the last year. Housing need for wheelchair units is concentrated mainly in Portadown 2, Banbridge Town, Central Craigavon and North Lurgan local housing area.

Housing Associations should actively discuss the inclusion of generic wheelchair units within suitable schemes with the Head of Place Shaping. Generic wheelchair units should be for 2 and 3 bed units and built in line with the space standards included in the Housing Association Guide.

### **Shared Future Demand**

The Housing Executive actively encourages mixed tenure and Housing for All (shared future) housing. Housing Associations bringing forward suitable proposals for Housing for All designation would be welcomed.

### **Traveller's accommodation**

Within the borough there is planning permission for a serviced site in Craigavon at Burnside and temporary planning permission for the operation of a halting site at Legahory (expires February 2022). The Housing Executive is working with the local council to discuss the potential for transferring the full planning permission of an Irish Travellers serviced site from Burnside to Legahory. Development of the sites, which are Housing Executive owned, will be dependent on the level of need.

Future Irish Traveller accommodation requirements are reviewed annually. The Housing Executive has initiated research into developing a new assessment methodology for Irish Travelers as set out in the Irish Travellers Accommodation Strategy 2021-26. The research programme is scheduled to complete in November 2022.

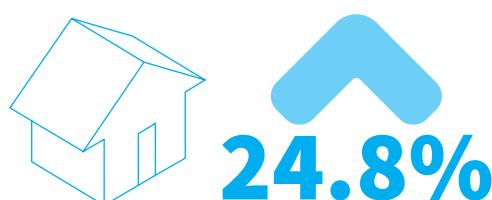
## Intermediate (Affordable) Demand

- The Housing Executive estimates intermediate/affordable housing demand for Armagh City, Banbridge and Craigavon Borough is 214 units per annum;
- Co-Ownership had an active stock of 1,389 dwellings at March 2020, 241 of which were purchased during 2020/21;



Co-Ownership assisted with the purchase of 241 properties during 2020/21

- In general house prices in Armagh City, Banbridge and Craigavon Borough are significantly lower than Northern Ireland;
- Average house prices in Northern Ireland increased by 20.5% between 2015 and 2020;



Average house prices in Armagh City, Banbridge and Craigavon Borough have increased over the 2015/20 period by 24.8%

**Table 26: Average Annual House Prices Armagh City, Banbridge and Craigavon Borough & NI 2015-2020**

Area	2015	2016	2017	2018	2019	2020	% Change 2015-2020
<b>ACBCBC</b>	127,347	130,671	135,787	129,705	142,263	158,921	24.8
<b>Northern Ireland</b>	149,449	154,028	155,049	163,128	169,057	180,079	20.5



# Armagh City, Banbridge & Craigavon Borough Supporting Data

**Table 27: Armagh City, Banbridge and Craigavon Borough Waiting List – March 2021**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	1,715	292	965	160	332	577	<b>4,041</b>
<b>HS Applicants</b>	1,029	141	545	91	188	373	<b>2,367</b>
<b>Allocations</b>	158	34	110	11	29	77	<b>419</b>

Applicants – Housing applicants at March 2021  
HS Applicants – Housing stress applicants at March 2021 (i.e. 30 points or more)  
Allocations – Annual allocations for year ending March 2021

**Table 28: North Lurgan Waiting List – March 2021**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	286	46	137	29	48	120	<b>666</b>
<b>HS Applicants</b>	172	28	91	18	29	92	<b>430</b>
<b>Allocations</b>	19	<10	<10	<10	<10	<10	<b>43</b>

Applicants – Housing applicants at March 2021  
HS Applicants – Housing stress applicants at March 2021 (i.e. 30 points or more)  
Allocations – Annual allocations for year ending March 2021

**Table 29: North Lurgan Housing Stress applicants time on list March 2021**

Household	0-6 mths	6-12 mths	1-2 years	2-4 years	4+ years	Total	Average Months on WL
<b>Single</b>	24	27	37	44	40	<b>172</b>	<b>34</b>
<b>Small Adult</b>	<10	<10	<10	<10	10	<b>28</b>	<b>57</b>
<b>Small Family</b>	11	<10	28	27	17	<b>91</b>	<b>34</b>
<b>Large Adult</b>	0	<10	<10	<10	<10	<b>18</b>	<b>54</b>
<b>Large Family</b>	<10	<10	<10	10	<10	<b>29</b>	<b>23</b>
<b>Older Person</b>	<10	<10	16	22	37	<b>92</b>	<b>63</b>
<b>Total</b>	-	-	-	-	-	<b>430</b>	<b>42</b>

**Table 30: Banbridge Town Waiting List – March 2021**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	200	35	112	16	38	88	<b>489</b>
<b>HS Applicants</b>	-	22	-	11	27	61	<b>319</b>
<b>Allocations</b>	21	<10	15	0	<10	<10	<b>56</b>

Applicants – Housing applicants at March 2021

HS Applicants – Housing stress applicants at March 2021 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2021

**Table 31: Banbridge Housing Stress applicants time on list March 2021**

Household	0-6 mths	6-12 mths	1-2 years	2-4 years	4+ years	Total	Average Months on WL
<b>Single</b>	17	<10	38	42	29	-	<b>35</b>
<b>Small Adult</b>	<10	<10	<10	<10	<10	<b>22</b>	<b>60</b>
<b>Small Family</b>	11	<10	14	16	16	-	<b>34</b>
<b>Large Adult</b>	<10	<10	<10	<10	<10	<b>11</b>	<b>41</b>
<b>Large Family</b>	<10	<10	<10	<10	<10	<b>27</b>	<b>23</b>
<b>Older Person</b>	<10	<10	14	14	26	<b>61</b>	<b>73</b>
<b>Total</b>	-	-	-	-	-	<b>319</b>	<b>43</b>

**Table 32: Armagh 1 Waiting List – March 2021**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	216	33	82	12	25	51	<b>419</b>
<b>HS Applicants</b>	140	12	44	<10	14	32	-
<b>Allocations</b>	<10	0	<10	0	0	<10	<b>23</b>

Applicants – Housing applicants at March 2021

HS Applicants – Housing stress applicants at March 2021 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2021

**Table 33: Armagh 1 Housing Stress applicants time on list March 2021**

Household	0-6 mths	6-12 mths	1-2 years	2-4 years	4+ years	Total	Average Months on WL
<b>Single</b>	19	15	33	39	34	<b>140</b>	<b>39</b>
<b>Small Adult</b>	<10	<10	<10	<10	<10	<b>12</b>	<b>58</b>
<b>Small Family</b>	<10	<10	11	15	<10	<b>44</b>	<b>37</b>
<b>Large Adult</b>	<10	0	0	<10	<10	<b>&lt;10</b>	<b>73</b>
<b>Large Family</b>	<10	<10	<10	<10	<10	<b>14</b>	<b>43</b>
<b>Older Person</b>	<10	<10	<10	<10	11	<b>32</b>	<b>50</b>
<b>Total</b>	-	-	-	-	-	-	<b>42</b>

**Table 34: Portadown 2 Waiting List – March 2021**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	272	64	137	24	46	110	<b>653</b>
<b>HS Applicants</b>	151	27	76	11	26	61	<b>352</b>
<b>Allocations</b>	22	<10	24	<10	<10	23	<b>79</b>

Applicants – Housing applicants at March 2021

HS Applicants – Housing stress applicants at March 2021 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2021

**Table 35: Portadown 2 Housing Stress applicants time on list March 2021**

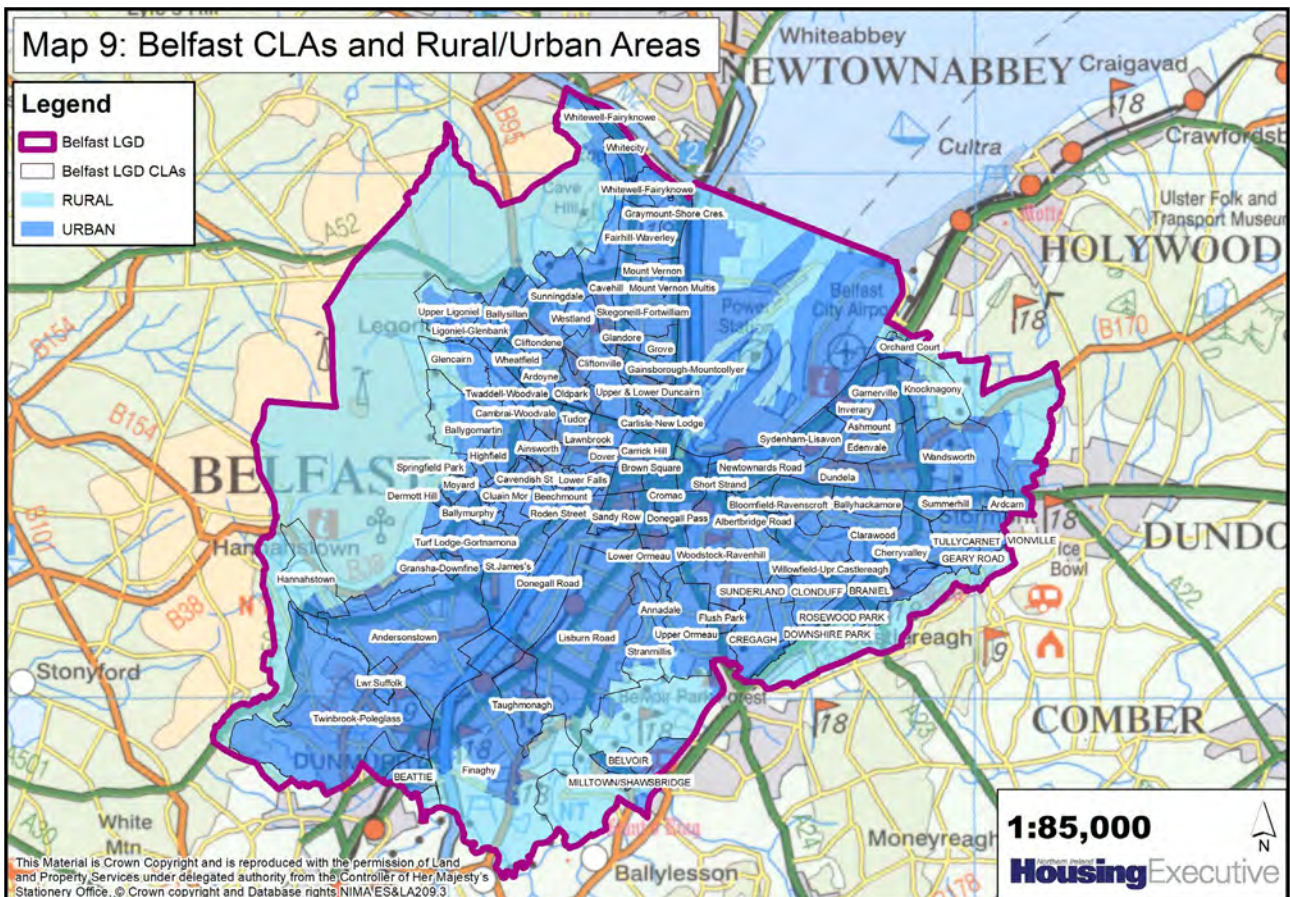
Household	0-6 mths	6-12 mths	1-2 years	2-4 years	4+ years	Total	Average Months on WL
<b>Single</b>	24	14	37	42	34	<b>151</b>	<b>32</b>
<b>Small Adult</b>	<10	<10	<10	<10	10	<b>27</b>	<b>44</b>
<b>Small Family</b>	13	<10	20	28	<10	<b>76</b>	<b>25</b>
<b>Large Adult</b>	<10	0	<10	<10	<10	<b>11</b>	<b>35</b>
<b>Large Family</b>	<10	0	<10	<10	<10	<b>26</b>	<b>36</b>
<b>Older Person</b>	10	<10	20	11	18	<b>61</b>	<b>42</b>
<b>Total</b>	-	-	-	-	-	<b>352</b>	<b>34</b>

# Belfast

## Context

Belfast is the major industrial, retail, education and residential centre in Northern Ireland. The range of facilities, recreational opportunities and its strategic

location make the area an attractive place to live and work. The area has a growing population of just over 340,000 and in common with other council areas, its older population is growing at a faster rate.



The economic performance of Belfast as demonstrated through levels of unemployment, economic inactivity and low incomes, continues to lag behind other parts of the UK.

The population continues to grow, with an increasingly ageing populace and smaller households. It is projected that by 2029, older people will represent 17% of the population in the area. The increase in the number of older people will have implications in terms of the demand for housing adaptations, specialist housing and personal or nursing care.

## Housing Market Analysis (cross-tenure)

### Housing & Land Supply

- Belfast City Council's Housing Land Availability Report for 2019/20 shows potential capacity for 21,692 additional dwellings in Belfast; an additional 7,400 new dwellings were allocated to Belfast for the period 2016-2030 under the Regional Development Strategy Housing Growth Indicators. However in the draft Local Development Plan Belfast City Council has an ambition for a future growth of 31,600 households;
- The actual rate of new house building is approximately half of the requirement as set out in the Regional Development Strategy 2035;



The Council area has a Housing Growth Indicator (HGI) projection 7,400 new dwellings required for the period 2016-30

- There were almost 700 completions in 2019/20 (Belfast City Council Housing Monitor).

### Owner Occupied Housing Sector

- 55% of all properties in Belfast are owner occupied, lower than the NI average of 67%, reflecting the large scale redevelopment in the 1970s to 1990s;
- The private housing market had been showing signs of recovery. The Stamp Duty holiday introduced in 2020 appears to have led to an increase in property transactions in the private sector in the last year. The three month period, April – June 2021, saw the highest level of transactions (over 4,000) in Northern Ireland since the house price boom of 2007-08;
- The most popular locations are in South and East Belfast where prices have traditionally been higher than other areas of the city.

The average house price for Belfast by March 2021 was £166,561 (Ulster University)

## Private Rented Housing Sector

- The private rented sector continues to play a significant role in the local housing market, particularly in parts of South Belfast where it is the dominant tenure.
- Local estate agents report that there is strong demand for private rental accommodation across the city;
- The DfC’s Landlord Registration Scheme identified almost 20,000 tenancies in Belfast in March 2021;
- Housing benefit continues to play a vital role in supporting the private rented sector. At March 2021, almost 8,000 private tenants in Belfast were in receipt of housing benefit;
- There are currently an estimated 6,270 Houses in Multiple Occupation (HMOs) in Northern Ireland, 3,767 of which are in Belfast. Recent tax changes for private landlords and significant numbers of Purpose Built Student Accommodation (PBSA) units will impact the traditional private rental market, particularly in the University area. This will be closely monitored as there is anecdotal evidence that the number of HMOs has peaked. Responsibility for HMOs passed from the Housing Executive to Belfast City Council in April 2019.



Housing Executive stock in Belfast at March 2021 was 25,407 with over 24,500 properties sold since the commencement of the ‘Right to Buy’ scheme

- Housing Association stock in Belfast was approximately 13,500 at March 2021;
- There were 303 new social housing units completed and a further 1,464 new social housing units under construction in the year ending March 2021;
- 81 Housing Executive properties were sold in the year to March 2021.

## Social Rented Housing Sector

- The social rented stock in the city at March 2021 was approximately 39,000 units which accounts for over a quarter of the total. This is higher than the NI average of 15% and reflects the high levels of redevelopment carried out in the city since the 1970s;



# Social Housing Need and Strategic Guidelines

Social housing need is considered against each of the following subheadings:

- General Housing Need**
- Shared Future Demand**
- Supported Housing Need**
- Wheelchair Housing Need**
- Travellers' accommodation requirements**

## General Housing Need

The requirement for new social housing in Belfast has increased consistently since 2010. The five year assessment for 2021-2026 shows a need for 6,125 units. Need is evident in all sectors of the city (North, South, East and West). Land availability continues to impact on housing need and is vital for the future delivery of social housing in Belfast. There was insufficient land zoned for social housing within Belfast Metropolitan Area Plan and it is hoped that the new Local Development Plan (LDP), currently being drawn up by Belfast City Council, will address this. Approximately 75% of the social housing waiting list comprises single people and small families. The ongoing predominance of these household types means that there is a high requirement for small dwellings to be built. Two bedroom dwellings offer the flexibility required in the housing market in the coming years.

## Shared Future Housing Need

It is important that future social housing developments deliver sustainable, mixed tenure communities and do not create concentrations of deprivation and social inequality. We are keen to promote the development of shared communities through education programmes in line with the Regional Development Strategy and the Strategic Planning Policy Statement. We will promote the good neighbour charter and our community cohesion themes of Race Relations, Communities in Transition, Interfaces, Flags and Emblems and Sectional Symbols. In addition, the Housing Executive is keen to promote housing in the City Centre. A new waiting list covering the city centre has been established and will be activated when a suitable housing scheme or schemes is/ are approved. This new waiting list is open to all applicants wishing to live in the city centre.

## Supported Housing Need

There is currently no new requirement identified for supported housing capital projects.

## Wheelchair Housing Need

The need for wheelchair accessible accommodation is increasing across all sectors in Belfast. The ongoing lack of suitable development sites means that in a lot of cases a new build solution is not possible within a reasonable timeframe. A protocol for the provision of bespoke dwellings within new build schemes has been agreed with Housing Associations. A key element of this protocol is the

early identification of cases to enable them to be incorporated into the design process. DfC indicated that 10% of all future social new build should be wheelchair standard by 2020, the adoption of generic wheelchair house types will assist in meeting this target. The Housing Executive’s Regional Place Shaping team will liaise with local Area office staff and Housing Associations to identify cases which may be suitable for inclusion in individual schemes. Housing Associations wishing to enter Design & Build contracts with developers must specify the 10% requirement at the outset or risk the scheme not being supported. Wheelchair

units should have at least two bedrooms and preferably located on the ground floor.

### Travellers’ Accommodation Requirements

Need for accommodation will be identified on an ongoing basis in conjunction with the Travellers Support Team.

Table 36 shows the Projected 5 year social housing need by settlement for period 2021-26.

**Table 36: Projected (5 Year) Social Housing Need**

Settlement	Housing Need Assessment Area	Total 5 Year Projection
<b>North Belfast</b>	North Belfast 1	<b>1,903</b>
	North Belfast 2	<b>188</b>
	<b>North Belfast Total</b>	<b>2,091</b>
<b>South &amp; East Belfast</b>	Upper Ormeau	<b>424</b>
	Donegall Road	<b>40</b>
	Finaghy	<b>110</b>
	Lisburn Road	<b>342</b>
	Lower Ormeau/Markets	<b>336</b>
	Inner East Belfast	<b>49</b>
	Middle East Belfast	<b>307</b>
	Outer East Belfast	<b>150</b>
	Short Strand	<b>68</b>
	<b>South &amp; East Belfast Total</b>	<b>1,826</b>
<b>West Belfast</b>	Inner West Belfast	<b>700</b>
	Greater Shankill	<b>60</b>
	Middle West Belfast	<b>889</b>
	Outer West Belfast	<b>559</b>
	<b>West Belfast Total</b>	<b>2,208</b>
<b>Belfast City Total</b>		<b>6,125</b>

The following comments are relevant to housing need within the Council area:

- Social housing need in Belfast has remained at a consistently high level between 2017 and 2021. There were 10,738 total applicants in 2017 and 11,858 in 2021;
- The number of applicants in Housing Stress over the same period rose from 7,322 in 2017 to 8,783 in 2021;
- Allocations over the same period fell from 2,361 in 2017, to 1,504 in 2021;
- Some locations are more suitable for certain accommodation types than others, for example, flat sites with road frontage are more suited to Category 1 older persons provision and wheelchair units;
- There is an increasing need for wheelchair accommodation across the city. Generic 2 bedroom 3 person units are flexible and meet the needs of a range of applicants. One bedroom wheelchair units will not normally be supported;
- The Urban Renewal Area Programme in Belfast is coming to an end, so the number of transfer schemes will also be reduced in future. Belfast Place Shaping Team will work closely with Housing Associations to identify suitable sites for new social housing provision;
- Land availability remains a challenge and we are working closely with Belfast City Council in its preparation of the Local Development Plan (LDP) to ensure that there is sufficient land available for social housing during the lifetime of the LDP;
- A number of Estate-Based Strategies which included selective demolition of unpopular stock were successfully delivered throughout Belfast

over the past two decades resulting in increased popularity and stability in these neighbourhoods;

- The Housing Executive's emerging Asset Management Strategy will determine and prioritise maintenance/improvement expenditure in its remaining stock over the next few years. This will have an impact on turnover and the availability of stock for re-letting.

## Key Emerging Issues

### High demand / Emerging demand areas

- The areas of greatest housing need are in Ardoyne/Cliftonville, Cavehill, New Lodge in North Belfast, Lisburn and Ormeau Roads in South Belfast, Middle East Belfast and most of West Belfast;
- Singles and small families account for 75% of the total waiting list, reflecting the trend towards smaller households, evident across the city;
- There is a shortage of specialist Category 1 older persons accommodation in some areas, reflecting an ageing population;
- The future need is predominantly for 2 bedroom design forms and with an emphasis on accessibility;
- Some areas within Belfast may be problematic and site identification in these areas should be discussed with the Housing Executive, local representatives and local communities in order to ensure scheme submissions can prove feasible;
- The ongoing Tower Block Strategy has highlighted blocks for demolition in Belfast. The Housing Executive is progressing these and

while we work on a decant strategy, Housing Associations will be nominated to deliver replacement housing. This is likely to increase need in the short term and has been taken into consideration.

### Indicative Housing mix requirements

- Single, Older Persons and Small Family households comprised over 80% of the Belfast waiting list in housing stress at March 2021;
- The table below provides an indicative housing mix based on the profile of applicants registered on the Waiting List. Early indications on the preferred housing mix, based on location, should be requested from the Place Shaping Team.

**Table 37: Indicative housing mix for Belfast**

Older Persons	Families*	Singles	Wheelchair
10% (Cat 1)	65%	25%	10%

\* Focus on: Small Adult and Small Family Households

- One and predominantly two bedroom accommodation would increasingly be the norm for singles and small families. Where possible, smaller dwellings should be designed flexibly to cater for potential household growth;
- Some three bed properties may be required for families and these should be discussed with the Housing Executive, as should bespoke wheelchair dwellings;
- Accommodation for older persons should be designed flexibly with long term accessibility issues taken into consideration, with wheelchair units to be included in schemes where possible;
- Alternative mixes can be considered by Housing Associations in relation to specific sites or

scheme types. Early contact with Planning/Place Shaping Team is strongly recommended to avoid nugatory work and unsuitable housing mixes.

### Low demand areas

- Less popular areas with low demand in Belfast typically contain a high proportion of social stock and/or concentrations of older or non-traditional stock. The local Place Shaping Team can advise, early contact is recommended;
- The Asset Management Strategy will address some of these issues and is currently finalising plans for all our high rise blocks in the city;
- Selective demolition may be carried out in some areas with low demand social housing stock in order to protect the significant investment made in surrounding stock.

### Wheelchair Housing Need

The total projected wheelchair housing requirement for Belfast is 63 units, see table below:

**Table 38: Wheelchair housing need breakdown by Settlement Area**

Settlement	Urban/Rural	Target Units
<b>North Belfast</b>	Urban	15
<b>South &amp; East Belfast</b>	Urban	33
<b>West Belfast</b>	Urban	15
<b>Belfast City Total</b>		<b>63</b>

Wheelchair units provided should be two and three bed units and built in line with the space standards included in the Housing Association Guide, one bedroom wheelchair units will not normally be supported. The generic wheelchair units and the 2 storey option in particular are proving less than satisfactory in meeting need. Occupational Therapy recommendations often rule out the use of a through floor lift in these properties for their clients (generally not suitable for families with children). Two bedroom ground floor accommodation is generally much more suitable for wheelchair users than 2 storey generic units.

### Shared Future Demand

Potential shared future housing schemes in Belfast should be identified, discussed and agreed by the Place Shaping Team.

## Intermediate (Affordable) Demand

- The Housing Executive estimates intermediate housing demand for Belfast is 140 units per year in the period to 2030;



Co-Ownership approved 192 applications in 2020/21 for Belfast, reflecting the opportunities this scheme provides in the current housing market environment

- In general, house prices in Belfast are lower than Northern Ireland, but are higher in parts of the South and East of the city. House prices are continuing to rise however.

**Table 39: Average Annual House Prices Belfast & NI 2017-2021**

Area	2015	2016	2017	2018	2019	2020	% Change 2015-2020
<b>Belfast</b>	156,991	163,665	162,474	168,094	160,857	164,796	5%
<b>Northern Ireland</b>	149,449	154,028	155,049	163,128	169,057	180,079	20.5%

Source: Ulster University

## Belfast Supporting Data

**Table 40: North Belfast Waiting List – March 2021**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	1626	99	733	23	178	247	<b>2906</b>
<b>HS Applicants</b>	1257	64	574	18	138	173	<b>2224</b>
<b>Allocations</b>	249	15	106	<10	27	55	-

Applicants – Housing applicants at March 2021  
HS Applicants – Housing stress applicants at March 2021 (i.e. 30 points or more)  
Allocations – Annual allocations for year ending March 2021

**Table 41: South & East Belfast Waiting List – March 2021**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	2664	243	896	83	270	585	<b>4741</b>
<b>HS Applicants</b>	1933	132	596	61	190	392	<b>3304</b>
<b>Allocations</b>	354	22	146	<10	28	95	-

Applicants – Housing applicants at March 2021  
HS Applicants – Housing stress applicants at March 2021 (i.e. 30 points or more)  
Allocations – Annual allocations for year ending March 2021

**Table 42: West Belfast Waiting List – March 2021**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	1932	177	1366	52	307	377	<b>4211</b>
<b>HS Applicants</b>	1442	127	1129	42	247	268	<b>3255</b>
<b>Allocations</b>	179	<10	133	<10	24	60	<b>402</b>

Applicants – Housing applicants at March 2021  
HS Applicants – Housing stress applicants at March 2021 (i.e. 30 points or more)  
Allocations – Annual allocations for year ending March 2021



**Table 43: North Belfast Housing Stress applicants time on list March 2021**

Household	0-6 mths	6-12 mths	1-2 years	2-4 years	4+ years	Total	Average Months on WL
<b>Single</b>	87	180	286	327	377	<b>1257</b>	<b>40</b>
<b>Small Adult</b>	<10	<10	13	21	22	<b>64</b>	<b>50</b>
<b>Small Family</b>	46	74	98	151	205	<b>574</b>	<b>47</b>
<b>Large Adult</b>	<10	<10	<10	<10	11	<b>18</b>	<b>64</b>
<b>Large Family</b>	<10	16	19	34	63	<b>138</b>	<b>47</b>
<b>Older Person</b>	16	11	36	39	71	<b>173</b>	<b>59</b>
<b>Total</b>	<b>160</b>	<b>285</b>	<b>456</b>	<b>574</b>	<b>749</b>	<b>2224</b>	<b>44</b>

**Table 44: South and East Belfast Housing Stress applicants time on list March 2021**

Household	0-6 mths	6-12 mths	1-2 years	2-4 years	4+ years	Total	Average Months on WL
<b>Single</b>	193	225	404	475	636	<b>1933</b>	<b>44</b>
<b>Small Adult</b>	<10	17	26	29	53	<b>132</b>	<b>52</b>
<b>Small Family</b>	51	65	126	142	212	<b>596</b>	<b>47</b>
<b>Large Adult</b>	<10	<10	14	<10	30	<b>61</b>	<b>52</b>
<b>Large Family</b>	11	13	41	61	64	<b>190</b>	<b>48</b>
<b>Older Person</b>	24	28	73	100	167	<b>392</b>	<b>65</b>
<b>Total</b>	<b>289</b>	<b>353</b>	<b>684</b>	<b>816</b>	<b>1162</b>	<b>3304</b>	<b>48</b>

**Table 45: West Belfast Housing Stress applicants time on list March 2021**

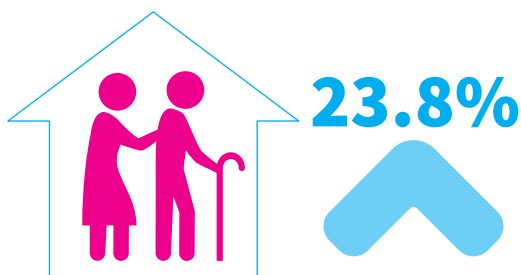
Household	0-6 mths	6-12 mths	1-2 years	2-4 years	4+ years	Total	Average Months on WL
<b>Single</b>	97	178	305	356	506	<b>1442</b>	<b>48</b>
<b>Small Adult</b>	10	13	24	33	47	<b>127</b>	<b>51</b>
<b>Small Family</b>	77	110	155	271	516	<b>1129</b>	<b>56</b>
<b>Large Adult</b>	<10	<10	<10	10	24	<b>42</b>	<b>70</b>
<b>Large Family</b>	<10	20	41	79	100	<b>247</b>	<b>54</b>
<b>Older Person</b>	11	26	42	67	122	<b>268</b>	<b>68</b>
<b>Total</b>	<b>203</b>	<b>349</b>	<b>572</b>	<b>816</b>	<b>1315</b>	<b>3255</b>	<b>53</b>



The population of Causeway Coast and Glens Borough is projected to increase by 0.3% from 144,838 in 2019 to 145,258 in 2029. It represents 7.6% of the NI population at 2019. Within Causeway Coast and Glens the percentage of older people (65+ years) in the population is projected to increase by 30% over the period 2019 to 2029. Therefore social stock to meet this specific future need will need to increase over the same period.

In 2016, there were 62,400 households in Causeway Coast & Glens, of these 69% were Owner Occupied; 20% Private Rented and 11% Social Rented (2016 NIHE House Condition Survey). These figures include ‘vacants when last occupied’ within the three main tenure groups.

Coleraine is the main centre of economic activity, although the higher proportion of older person residents and retirees in the borough means that on average it is not as economically active as the adjacent Council areas. However, among the working age population the number of claimants on unemployment-related benefits is comparable to the Northern Ireland average, although reducing at a slower pace.



It is projected that by 2029 older people will represent 23.8% of the population in the borough, more than the regional average

The increase in the number of older people will have implications in terms of the demand for housing adaptations, specialist housing and personal or nursing care.

## Housing Market Analysis (across tenures)

### Housing & Land Supply

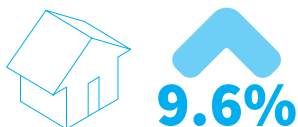
- The Council published its Local Development Plan 2030 Preferred Options Paper: Discussion Paper 12 Housing, which showed housing monitor information at 31st March 2016 and that there is potential capacity for 14,353 additional dwellings in the borough from 2012-2025;
- The annual housing monitor reports that there is 415.2 hectares of land remaining across the Borough as of April 2021;
- There are 17.58 hectares of Housing Executive undeveloped land asset in the borough;
- There were 79 units of social housing starts in the borough and 98 completions at March 2021;
- There are issues around second homes and land availability along the coastal towns and it is particularly difficult to buy in those areas.



There is a projected Housing Growth Indicator (HGI) new dwelling requirement of 5,600 for the period 2016-2030 in Causeway Coast and Glens. The overall NI requirement for the same period is 84,800

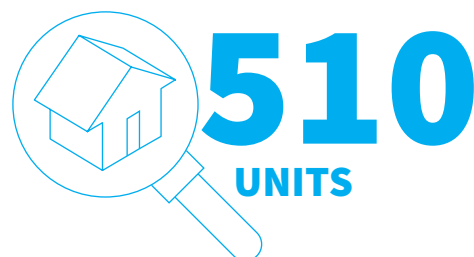
### Owner Occupied Housing Sector

- The sector comprised 69% of the total occupied housing stock at 2016 (Northern Ireland House Condition Survey 2016);
- Since the commencement of the Right to Buy scheme for tenants, there have been 9,500 total house sales in the area at 2020, compared to 9380 in 2018;



Ulster University states that the average house price in Causeway Coast and Glens in 2020 was £189,452 which represents an increase of 9.6% on 2019 figures

- The most popular groups that are buying are first time buyers and existing home owners. The median age for first time buyers in NI is 32 years old;
- House price inflation continues to outstrip wage growth, pushing up loan to income ratios.



Demand for intermediate housing aimed at low income households in Causeway Coast & Glens is estimated at 510 units between 2020-2030

## Private Rented Housing Sector

- The sector comprised 20% of the total occupied housing stock at 2016 (Northern Ireland House Condition Survey 2016);

**5,202**  
PROPERTIES REGISTERED



DfC's Landlord Registration scheme identified 5,202 properties registered by 3,074 landlords in Causeway Coast and Glens at March 2021

- As household groups reduce in size, Houses in Multiple Occupation (HMO) will continue to play a greater role in the housing market, particularly for single households aged under 35. Since 1 April 2019, Belfast City Council has assumed responsibility for licensing of HMOs.

## Social Rented Housing Sector

- The sector comprised 11% of the total occupied housing stock at 2016 (Northern Ireland House Condition Survey 2016);

**6,529**  
HOUSING EXECUTIVE STOCK



There are 6,529 Housing Executive owned homes in the borough at March 2021; 9,500 Housing Executive homes have been purchased by tenants in the borough up to March 2021

- There were 1,810 Housing Executive tenants receiving the Housing Cost element of Universal Credit in Causeway Coast and Glens at end of March 2021;
- 154 social housing units were on-site at March 2021, and a further 221 are programmed to start in the next three years;
- There were 3,330 applicants on the waiting list, of which 53% were in housing stress at March 2021.

# Social Housing Need

Social housing need is considered against each of the following subheadings:

- General Housing Need (Urban & Rural)**
- Shared Future Demand**
- Supported Housing Need**
- Wheelchair Housing Need**
- Travellers' accommodation requirements**

## General Housing Need (Urban & Rural)

### Urban

The Strategic Guidelines target share established for Causeway Coast and Glens indicates 4.2% urban units and 12.7% rural units of the overall three year programme. Five year projected need for the area as a whole is 1,347 and the projected need for individual settlements is detailed in Table 46.

**Table 46: Projected (5 Year) Social Housing Need 2021-26**

Settlement	Housing Need Assessment Area*	Total 5 Year Projection
<b>Main towns (Hubs)</b>	Ballycastle	<b>100</b>
	Ballymoney	<b>135</b>
	Coleraine	<b>400</b>
	Limavady	<b>130</b>
<b>Other Towns</b>	Ballykelly	<b>35</b>
	Cushendall	<b>39</b>
	Dungiven	<b>65</b>
	Portrush	<b>157</b>
	Portstewart	<b>80</b>
	Balnamore	<b>14</b>
	Castlerock	<b>14</b>
	Portballintrae	<b>15</b>
<b>Remaining Settlements (need &lt;10)**</b>		<b>163</b>
<b>Total</b>		<b>1,347</b>

\*\* Remaining settlements include Armoy, Aghadowey, Ardgarvan, Articlave, Artikelly, Atlantic, Bendooragh, Ballintoy, Ballybogey, Ballyrashane, Ballyvoy, Ballywoodock, Boveedy, Burnfoot, Bushmills, Bellarena, Castleroe, Clintyfinnan, Cloughmills, Corkey, Craigmore, Cushendun, Dernaflaw, Dervock, Druckendult, Drumadraw, Drumsurn, Dunaghy, Dunloy, Dunluce, Farrenlester, Feeny, Foreglen, Garvagh, Glack, Glenleary, Glenuillin, Gortnaghey, Greysteel, Grove, Killyrammer, Kilrea, Largs, Liscolman, Loughguile, Macfin, Macosquin, Maybouy, Mosside, Rasharkin, Seacon, Stranocum, Waterfoot, Windyhall and Rathlin Island where need in each settlement is equal or less than 10.



Please note that in relation to those settlements with <10 projected need, the Housing Executive will consider Housing Association development opportunities or Existing Satisfactory Purchases (ESP). In addition, if land can be identified that may provide for more than current projected social need suggests, the Housing Executive Place Shaping and Rural Units may be able to assist in Rural Housing Needs Testing or other marketing exercises to identify hidden additional social and mixed tenure demand.

The following comments are relevant to housing need within the Council area:

- Social housing proposals are particularly welcome in locations such as Portrush, and Portstewart where there is a persistent unmet need. There is also need in Coleraine, Ballymoney, Limavady, Ballycastle and Dungiven;
- Proposals will be assessed against potential local impacts on existing housing stock, such as turnover in adjacent social housing estates;
- Some settlements have land zoned for social housing, or have sites with Key Site Requirements for social housing. Housing Associations are encouraged to investigate these;
- Currently, the Housing Executive is seeking a quota of social housing (normally 20%) on mixed tenure sites in areas of need across the borough, as facilitated by Policy HOU2 of the Northern Area Plan. This will help to deliver more balanced communities and social housing, especially in areas where the social housing sector cannot compete with the private sector;
- Site Identification Studies (SIS) will be carried out by the Housing Executive in selected areas across the borough where there is a social housing need and a shortage of sites for development. These include Bellarena, Artikelly, Armoy, Kilrea, Garvagh, Boleran, Moneydig and Glenullin which are all undergoing and should be complete by December 2021;
- A review of Housing Executive owned/ undeveloped land is carried out annually.



## Indicative housing mix requirements

- The overall demographic trend is for an ageing population and for smaller household size (1-3 persons). Future need is predominantly for 1 and 2 bedroom design forms and with an emphasis on accessibility;
- Accommodation for older persons should be designed flexibly with long term accessibility issues taken into consideration. Generic wheelchair units should be included in schemes where possible (10% of overall scheme);
- Alternative mixes can be considered by Housing Associations in relation to specific sites or scheme types. However, significant changes from the above mix should be discussed with the Housing Executive to avoid nugatory work.

**Table 47: Indicative housing mix for Causeway Coast and Glens**

Older Persons	Families*	Singles	Wheelchair
18%	38%	44%	10%

\* Focus on: Small Adult and Small Family Households

## Areas where need is met

- Need is met in some of the rural settlements which are listed in the small print below the housing need table (Table 46) above.

## Rural areas

- Normally only sites or dwellings within the statutory development limits can be considered for rural social housing, however some of the smaller settlements and hamlets without development limits may still be acceptable if there is an identified need for housing and where it accords with the prevailing planning policy;
- The Housing Executive will also take into account the potential for ‘hidden’ (or ‘latent’) demand in rural areas. Should sites come to the attention of Housing Associations, the Housing Executive will assist in assessing any hidden need by way of rural housing needs testing if appropriate. There may be neighbouring rural settlements where demand has not yet been identified but where land is still available;
- The Housing Executive will continue to work closely with rural communities to identify housing need and this is an action in the Community Plan;
- Rural areas where there is highest unmet need include Armoy, Artikelly, Ballintoy, Ballybogy, Bellarena, Bendooragh, Feeney, Garvagh, Glack, Greysteel, and Kilrea.

## Wheelchair Housing Need (HNA)

There is a projected need for 59 wheelchair units for the five year period 2021-26 for the Causeway Coast and Glens borough.

Housing Associations should actively discuss the inclusion of generic wheelchair units within suitable schemes with the Head of Place Shaping. In general, generic wheelchair units should be for 2 and 3 bed units (although there is a need for 4 bedroom units in Coleraine Town) and built in line with the space standards included in the Housing Association Guide.

## Shared Future Demand

The Housing Executive actively encourages mixed tenure and shared future housing. Housing Associations bringing forward suitable proposals for shared future designation would be welcomed. There are currently 3 new build social housing schemes being progressed for potential shared future housing in the area.

## Traveller Accommodation

The Housing Executive has responsibility for identifying and meeting the accommodation needs of Irish Travellers.

# Intermediate (Affordable) Demand

- The Housing Executive estimates intermediate housing demand for the borough at approximately 51 units per annum for the 2020 to 2030 period.
- Co-Ownership had an active stock of 495 dwellings at March 2021, 55 of which were purchased during 2020/21.



Co-Ownership assisted with the purchase of 55 properties in the area in 2020/21

**Table 48: Average Annual House Prices Causeway Coast and Glens & NI 2016-2020**

Area	2016	2017	2018	2019	2020	% Change 2016-2020
Causeway	£145,453	£150,410	£158,604	£172,790	£189,452	30
Northern Ireland	£154,028	£155,049	£163,128	£169,057	£180,079	17

## Causeway Supporting Data

**Table 49: Causeway Waiting List – March 2021**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	1,461	204	741	97	237	590	<b>3,330</b>
<b>HS Applicants</b>	828	83	363	39	117	323	<b>1,753</b>
<b>Allocations</b>	171	15	96	<10	27	73	-

Applicants – Housing applicants at March 2021  
HS Applicants – Housing stress applicants at March 2021 (i.e. 30 points or more)  
Allocations – Annual allocations for year ending March 2021

**Table 50: Coleraine Town Waiting List – March 2021**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	412	49	170	18	48	148	<b>845</b>
<b>HS Applicants</b>	248	24	93	11	21	84	<b>481</b>
<b>Allocations</b>	52	<10	28	<10	<10	20	<b>114</b>

Applicants – Housing applicants at March 2021  
HS Applicants – Housing stress applicants at March 2021 (i.e. 30 points or more)  
Allocations – Annual allocations for year ending March 2021

**Table 51: Coleraine Town Housing Stress Applicants time on list March 2021**

GROUP HNA AREA	Comp HH	0-6 Mths	6-12 Mths	1-2 years	2 - 4 years	4+ years	Total Apps	Average Months on WL
<b>Coleraine Town</b>	<b>Single</b>	41	32	56	64	55	<b>248</b>	<b>35</b>
	<b>Small Adult</b>	<10	<10	<10	<10	<10	<b>24</b>	<b>44</b>
	<b>Small Family</b>	15	15	21	24	18	<b>93</b>	<b>28</b>
	<b>Large Adult</b>	<10	0	<10	<10	<10	<b>11</b>	<b>97</b>
	<b>Large Family</b>	<10	<10	<10	<10	<10	<b>21</b>	<b>37</b>
	<b>Older Person</b>	<10	<10	20	17	40	<b>84</b>	<b>68</b>

**Table 52: Limavady Town Waiting List – March 2021**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	195	25	86	12	32	52	<b>402</b>
<b>HS Applicants</b>	111	<10	38	<10	14	26	<b>200</b>
<b>Allocations</b>	22	<10	<10	<10	<10	12	<b>114</b>

Applicants – Housing applicants at March 2021

HS Applicants – Housing stress applicants at March 2021 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2021

**Table 53: Limavady Town Housing Stress applicants time on list March 2021**

Household	0-6 mths	6-12 mths	1-2 years	2-4 years	4+ years	Total	Average Months on WL
<b>Single</b>	10	13	26	34	28	<b>111</b>	<b>35</b>
<b>Small Adult</b>	<10	<10	<10	<10	<10	<b>6</b>	<b>20</b>
<b>Small Family</b>	<10	<10	<10	14	11	<b>38</b>	<b>45</b>
<b>Large Adult</b>	0	<10	0	<10	<10	<b>5</b>	<b>55</b>
<b>Large Family</b>	0	<10	<10	<10	<10	<b>14</b>	<b>45</b>
<b>Older Person</b>	<10	<10	<10	<10	<10	<b>26</b>	<b>40</b>
<b>Total</b>	<b>15</b>	<b>23</b>	<b>45</b>	<b>60</b>	<b>57</b>	<b>200</b>	<b>39</b>

**Table 54: Ballycastle Town Waiting List – March 2021**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	84	<10	45	<10	17	62	<b>223</b>
<b>HS Applicants</b>	44	<10	23	<10	<10	28	<b>108</b>
<b>Allocations</b>	13	<10	<10	<10	<10	<10	<b>-</b>

Applicants – Housing applicants at March 2021

HS Applicants – Housing stress applicants at March 2021 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2021



**Table 55: Ballycastle Housing Stress Applicants time on list March 2021**

Household	0-6 mths	6-12 mths	1-2 years	2-4 years	4+ years	Total	Average Months on WL
<b>Single</b>	<10	<10	10	14	11	<b>44</b>	<b>37</b>
<b>Small Adult</b>	<10	0	0	<10	0	<b>&lt;10</b>	<b>14</b>
<b>Small Family</b>	<10	<10	<10	<10	<10	<b>23</b>	<b>35</b>
<b>Large Adult</b>	0	0	0	<10	0	<b>&lt;10</b>	<b>41</b>
<b>Large Family</b>	0	<10	0	<10	<10	<b>10</b>	<b>73</b>
<b>Older Person</b>	0	<10	<10	11	10	<b>28</b>	<b>48</b>
<b>Total</b>	<b>8</b>	<b>13</b>	<b>18</b>	<b>39</b>	<b>30</b>	<b>108</b>	<b>43</b>

**Table 56: Ballymoney Town Waiting List – March 2021**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	188	24	73	11	28	60	<b>384</b>
<b>HS Applicants</b>	102	<10	38	<10	14	34	<b>197</b>
<b>Allocations</b>	20	<10	<10	<10	<10	<10	<b>43</b>

Applicants – Housing applicants at March 2021

HS Applicants – Housing stress applicants at March 2021 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2021

**Table 57: Ballymoney Town Housing Stress Applicants time on list March 2021**

GROUP HNA AREA	Comp HH	0-6 Mths	6-12 Mths	1-2 years	2 - 4 years	4+ years	Total Apps	Average Months on WL
<b>Coleraine Town</b>	<b>Single</b>	<10	17	23	20	36	<b>102</b>	<b>&lt;10</b>
	<b>Small Adult</b>	0	<10	<10	<10	0	<b>&lt;10</b>	<b>25</b>
	<b>Small Family</b>	<10	<10	<10	10	<10	<b>38</b>	<b>30</b>
	<b>Large Adult</b>	0	0	<10	<10	<10	<b>&lt;10</b>	<b>53</b>
	<b>Large Family</b>	<10	<10	<10	<10	<10	<b>14</b>	<b>35</b>
	<b>Older Person</b>	<10	<10	<10	10	15	<b>34</b>	<b>63</b>

# Derry City and Strabane

## Context

The district has a population of approximately 151,284 and while mostly urban, there is a significant rural populace. The local economy has shown scope for improvement in recent years with percentage levels of people claiming unemployment-related benefits consistently above the Northern Ireland average.



**1%**

**PROJECTED DECREASE**

BY 2029

The population of Derry City & Strabane is projected to decrease by 1% to 149,792 in 2029. It represented 8% of the NI population at 2019 (NISRA)

The district council area has a relatively young population and there is a high propensity for growth. Similar to other councils, the older population is growing and is projected to increase by 26.8% over the ten-year period 2019 to 2029. In the same period, the working age population is projected to decrease by 5.8% and the 0-15 year age group to decrease by 6.3%.

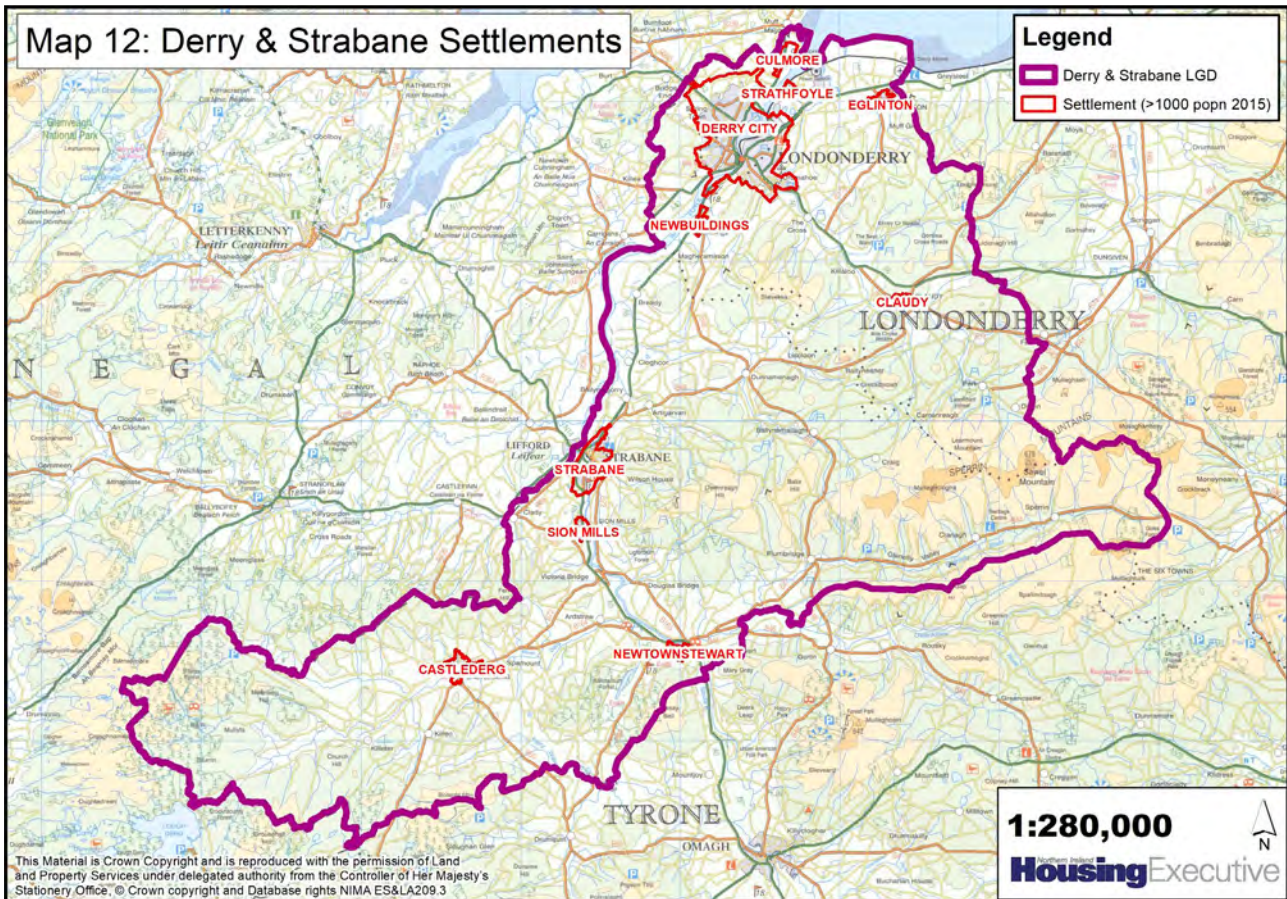


**NUMBER OF HOUSEHOLDS INCREASES**

Average household size is predicted to reduce from 2.56 to 2.47, while the number of households is projected to increase from 58,066 to 59,917 over the ten years to 2029

While the need for family accommodation remains strong, there is a growing need to construct dwellings to facilitate the increasing older person and smaller households. The increasing proportion of older people will have implications in terms of the demand for housing adaptations, specialist housing and personal or nursing care.

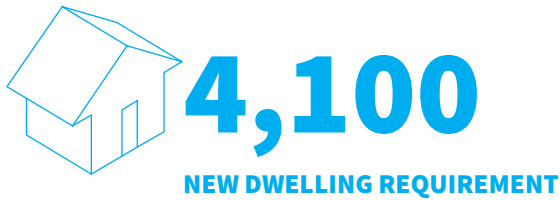
The economic performance of Derry City and Strabane, as demonstrated through levels of unemployment, economically inactive and low incomes, continues to lag behind the rest of Northern Ireland. Pockets of the Derry City and Strabane area rank amongst the most deprived areas in Northern Ireland. Improvement in the local economy would have a positive effect on development within the private sector.



## Housing Market Analysis (across tenures)

### Housing & Land Supply

- The Derry City and Strabane Local Development Plan (LDP) 2032: Draft Plan Strategy states that there is an approximate current housing capacity for 20,844 housing units across the District Council area. Across areas with an identified social housing need (2020-25), there is an estimated approximate capacity for 17,591. While these figures appear to be encouraging, the Housing Executive does not see this level of land availability in terms of sites coming forward for social housing;
- The 2011 census shows that 27.6% of Derry City and Strabane households were one-person and 27.71% of households were two-person;



Derry City and Strabane has a Housing Growth Indicator of 4,100 units (2016-30) which is below the NI average



Within 2020/21, there were 470 new dwelling starts and 532 completions in Derry City and Strabane. (Source: LPS)

### Owner Occupied

- As per the NI House Condition Survey (2016), the tenure share in Derry City and Strabane was approximately 56% owner occupied;
- In 2020/21, there were 1,431 residential property sales in the district (LPS);



House prices have decreased in the past year with an average price of £129,661 recorded for Derry City and Strabane in 2020 compared with £133,092 in 2019

- Demand for intermediate housing aimed at low income households in Derry City and Strabane is estimated at 500 units between 2020-2030;
- Prior to COVID-19, feedback from local estate agents indicated that demand was highest in urban and suburban locations, with three and 4 bed houses (with a driveway) being particularly popular. Recent large scale housing developments going on-site, particularly in the Waterside area, are welcome and there is hope for continued improvement in the market.

## Private Rented

- As per the NI House Condition Survey (2016), private rented properties were estimated to make up approximately 20% of housing stock in Derry City and Strabane;
- Due mainly to a lack of new-build private development, demand continues to outstrip supply across the district. High demand areas include Westbank, Waterside, Strabane Town and Eglinton;

**5,191**   
PROPERTIES REGISTERED

DfC's Landlord Registration Scheme identified 5,191 properties registered in Derry City and Strabane at March 2021

- Housing benefit continues to play a vital role in supporting the private rented sector.



**5,240**

At March 2021, 5,240 private tenants in Derry City and Strabane were in receipt of housing benefit

- As household groups reduce in size, Houses in Multiple Occupation (HMO) will continue to play a greater role in the housing market, particularly for single households aged under 35. Since 1st April 2019, Belfast City Council has assumed responsibility for the licensing of HMOs.

## Social Rented Housing Sector

- The sector comprises 24% of total housing stock (Northern Ireland House Condition Survey 2016);

 **8,684**  
HOUSING EXECUTIVE STOCK

At March 2021, there were 8,684 Housing Executive owned properties in the district with 11,729 Housing Executive properties sold since the commencement of the Right to Buy scheme

- There were 35 Housing Executive properties sold during 2020/21;
- There were 207 new social housing homes completed in the year to March 2021 and 1,082 on-site. A further 1,797 units are programmed to start over the next three years;
- At March 2021, there were 5,557 applicants on the waiting list for Derry City and Strabane, 3,951 of whom were in housing stress with 650 allocations made over the previous 12 months.



# Social Housing Need and Strategic Guidelines

Social Housing Need is considered against each of the following subheadings:

- General Housing Need (Urban & Rural)**
- Shared Future Demand**
- Supported Housing Need**
- Wheelchair Housing Need**
- Travellers' accommodation requirements**

## General Needs Housing (Urban & Rural)

### Urban

The Strategic Guidelines target share established for Derry City and Strabane indicates 25.6% urban units and 12.8% rural units of the overall three-year programme. Five-year projected need for the area as a whole is 4,126 and the projected need for individual settlements is detailed in Table 58:

**Table 58: Projected (5-Year) Social Housing Need 2021-26**

Settlement	Housing Need Assessment Area*	Total 5-Year Projection
<b>Derry City</b>	Waterloo Place Westbank	<b>1,121</b>
	Collon Terrace Westbank	<b>1,759</b>
	Waterside 1	<b>306</b>
	Waterside 2	<b>306</b>
	Waterside 3	<b>164</b>
	Coshquin	<b>5</b>
	Curryneirin, Drumahoe, Tullyally	<b>8</b>
	<b>Derry City Total</b>	<b>3,679</b>
<b>Strabane Town</b>	Strabane Town	<b>178</b>
<b>Ballymagorry</b>	Ballymagorry	<b>14</b>
<b>Castledearg</b>	Castledearg	<b>21</b>
<b>Claudy</b>	Claudy	<b>31</b>
<b>Eglinton</b>	Eglinton	<b>67</b>
<b>Newbuildings</b>	Newbuildings	<b>16</b>
<b>Sion Mills</b>	Sion Mills/Glebe	<b>55</b>
<b>Strathfoyle</b>	Strathfoyle	<b>21</b>
<b>Nixons Corner</b>	Nixons Corner	<b>10</b>
<b>Remaining Settlements (need &lt;10)**</b>		<b>34</b>
<b>Total</b>		<b>4,126</b>

\*Some settlements may include a number of small settlements grouped together for waiting list purposes – where this occurs all settlements within the grouped HNA are listed. \*\* Remaining settlements include Ardmore, Artigarvan, Clady, Douglas Bridge, Lettershandoney, Magheramason and Plumbridge, where need in each settlement is less than 10.

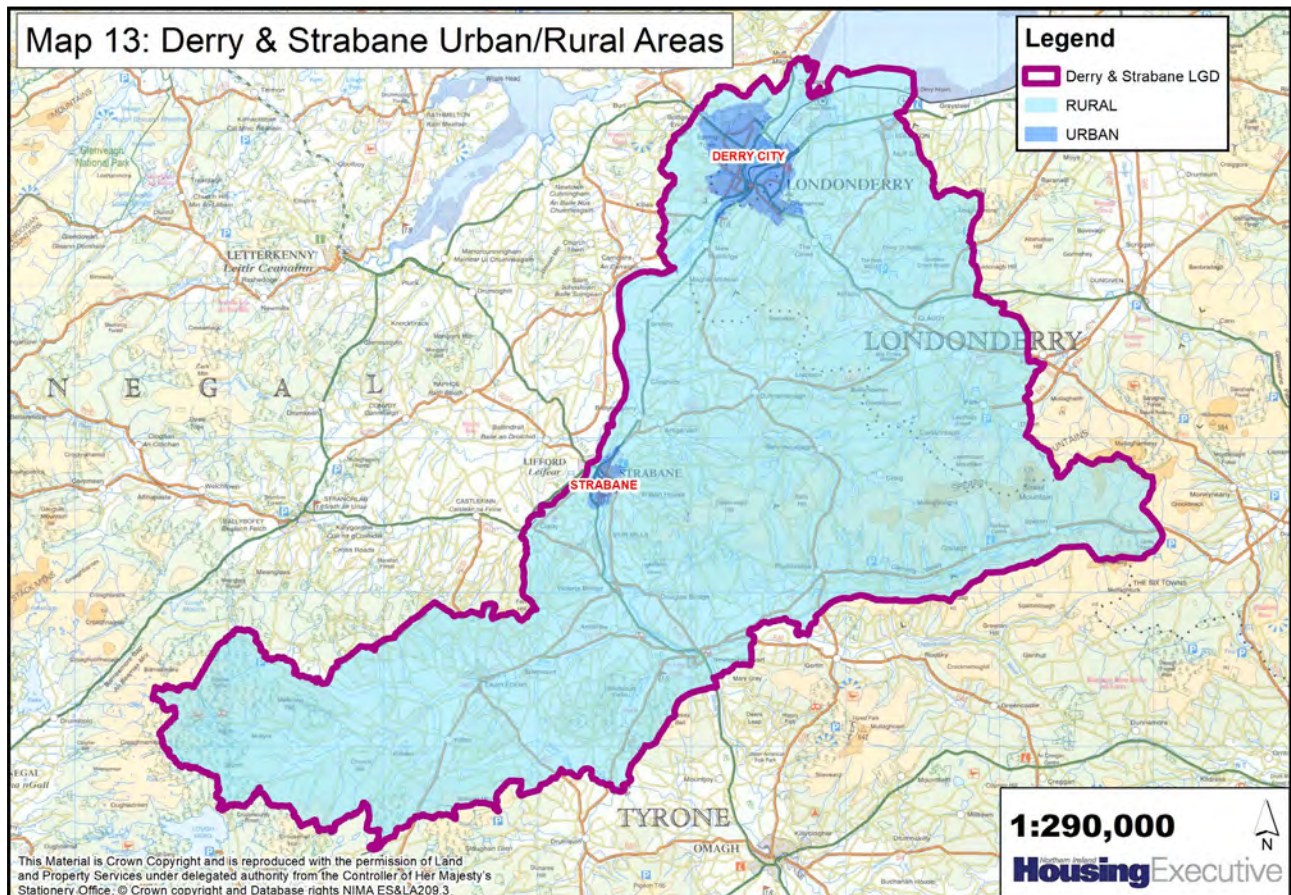


Please note that in relation to those settlements with <10 projected need; the Housing Executive will consider Housing Association development opportunities or Existing Satisfactory Purchases (ESPs). In addition, if land can be identified that may provide for more than current projected social need suggests, the Housing Executive Place Shaping and Rural Units may be able to assist in Rural Housing Needs Testing or other marketing exercises to identify hidden additional social and mixed tenure demand.

The following comments are relevant to housing need within the Council area:

- The Housing Executive has identified Castleterg, Strathfoyle and Ballymagorry as locations where we would like to see small sites brought forward within the settlement limits as per the relevant Local Development Plans. Larger sites can be considered for Eglinton, Sion Mills and Claudy;
- In Claudy and Sion Mills, any development proposal should be within the village settlement limits as opposed to the rural estates 1-2 miles outside the village;
- All new build proposals should be within development limits unless there is no developable land within the limits and a reasonable argument can be made for planning permission currently within the auspices of Planning Policy Statement 21 – Sustainable Development in the Countryside. Once the Derry City and Strabane Local Development Plan 2032 is formally adopted, Policy HOU 25 – Affordable Housing in the Countryside will thus apply.
- Strabane Town now has a substantial development programme, however increasing need means that new sites can be considered;
- Housing need has continued to increase throughout Derry City;
- The proportion of single person applicants in Housing Stress has continued to increase. Therefore, proposals for 1 bedroom properties at appropriate locations would be most welcome;
- Site Identification Studies (SIS) were carried out in Claudy and Eglinton in autumn 2020. While significant potential remains in Claudy, land availability to meet social housing need in Eglinton is very limited.

## Rural



The provision of new social housing in rural settlements represents a strategic priority for delivery of the SHDP. At 2022/23, the rural target share of the SHDP is 12.9% of the overall programme based on average levels of housing stress in rural areas.

In all cases, it will be important to understand the localised nature of rural housing need and the alternative settlements that rural applicants are likely to consider. The Housing Executive's Rural Unit will support housing providers by providing initial desk-top evidence of potential need based on neighbouring waiting lists and by facilitating subsequent Rural Housing Need testing and marketing.

## Indicative Housing Mix Requirements

- Singles comprised 50% of applicants in housing stress followed by small families (29%) and Older Persons (11%);
- The housing mix may need to differ depending on location and initial contact with Place Shaping North at design stage is strongly encouraged;
- Accommodation for older persons should be designed flexibly with long-term accessibility issues taken into consideration. Generic wheelchair units should be included in schemes where possible;

- Alternative mixes can be considered by Housing Associations in relation to specific sites or scheme types. However, significant changes from the above mix should be discussed with the Housing Executive to avoid nugatory work.

**Table 59: Indicative Housing Mix for Derry City and Strabane**

Older Persons	Families*	Singles	Wheelchair
15%	35%	50%	10%

\* Focus on: Small Adult and Small Family Households

### Areas where need is met

- The only low demand area in Derry City is the Fountain estate;
- In Strabane town, the Fountain Street area is considered to be ‘low demand’ in comparison to other areas of the town. Therefore, proposals in that area are not required;
- Current supply is also meeting demand in all settlements not mentioned in the ‘Projected (5-Year) Social Housing Need’ table above.

### Rural Areas

Based on waiting list trends up to March 2021, the current projected need for rural areas within Derry City and Strabane is for 269 units which is an increase of 42 from 227 units in 2020. Taking account of new build schemes on the current SHDP, the residual housing need is focused mainly on the villages of Eglinton, Sion Mills, Ballymagorry, Claudy and Strathfoyle.

It is recognised that there may be neighbouring rural settlements where demand has not yet been identified but where land may still be available. For example, Ardmore may be a suitable location for social housing. The Housing Executive will take account of the potential for ‘hidden’ or ‘latent’ demand within such areas if and when Housing Associations identify potential sites. Should sites come to the attention of Housing Associations, the Housing Executive will seek to assist in assessing any hidden need by way of Rural Housing Need Testing if appropriate. We continue to work closely with rural communities to identify housing need.

### Wheelchair Housing Need (HNA)

There is an identified need for 42 wheelchair units (2021-26) for the Derry City and Strabane District Council area.

Housing Associations should actively discuss the inclusion of generic wheelchair units within suitable schemes with the Head of Place Shaping. Generally, generic wheelchair units should be for two and 3 bed units and built in line with the space standards included in the Housing Association Guide.

### Shared Future Demand

The Housing Executive actively encourages mixed tenure and shared future housing. Housing Associations bringing forward suitable proposals for shared future designation would be welcomed. There are currently two new build social housing schemes being progressed for potential shared future housing in the area.

### Travellers’ accommodation

There is no current identified need for additional Travellers’ accommodation in the Derry City and Strabane District Council area.

## Intermediate (Affordable) Demand

- The Housing Executive estimates intermediate/affordable housing demand for the Derry City and Strabane at approximately 50 units per annum;



In Derry City and Strabane, 46 properties were purchased through Co-Ownership in 2020/21

**Table 60: Average Annual House Prices Derry City and Strabane and NI 2015-2020**

Area	2015	2016	2017	2018	2019	2020	% Change 2015-2020
<b>Derry City and Strabane</b>	£105,458	£104,291	£118,473	£132,276	£133,092	£129,661	23
<b>Northern Ireland</b>	£149,499	£154,028	£155,049	£163,128	£169,057	£180,079	20.5

# Derry City and Strabane Supporting Data

**Table 61: Derry City and Strabane Waiting List – March 2021**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	2,840	193	1,497	90	299	638	<b>5,557</b>
<b>HS Applicants</b>	1,987	128	1,138	49	207	442	<b>3,951</b>
<b>Allocations</b>	285	15	223	<10	50	73	-

Applicants – Housing applicants at March 2021

HS Applicants – Housing stress applicants at March 2021 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2021

**Table 62: Derry City and Strabane Time on Waiting List (HS Applicants) – March 2021**

	0-6 Mths	6-12 Mths	1-2 years	2 - 4 years	4+ years	Total Apps	Average Months on WL
<b>Single</b>	222	200	406	501	658	<b>1,987</b>	<b>43</b>
<b>Small Adult</b>	11	<10	21	35	52	<b>128</b>	<b>50</b>
<b>Small Family</b>	87	93	194	299	465	<b>1,138</b>	<b>49</b>
<b>Large Adult</b>	<10	0	<10	15	26	<b>49</b>	<b>61</b>
<b>Large Family</b>	21	12	38	53	83	<b>207</b>	<b>50</b>
<b>Older Persons</b>	29	30	70	115	198	<b>442</b>	<b>60</b>
<b>Total</b>	<b>371</b>	<b>344</b>	<b>736</b>	<b>1,018</b>	<b>1,482</b>	<b>3,951</b>	<b>48</b>

**Table 63: Derry City Waiting List – March 2021**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	2,222	136	1,125	54	207	477	<b>4,221</b>
<b>HS Applicants</b>	1,610	90	906	36	158	329	<b>3,129</b>
<b>Allocations</b>	240	13	187	<10	39	53	-

Applicants – Housing applicants at March 2021

HS Applicants – Housing stress applicants at March 2021 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2021

**Table 64: Derry City Time on Waiting List (HS Applicants) – March 2021**

	0-6 Mths	6-12 Mths	1-2 years	2 - 4 years	4+ years	Total Apps	Average Months on WL
<b>Single</b>	175	163	327	407	538	<b>1,610</b>	<b>43</b>
<b>Small Adult</b>	<10	<10	13	24	39	<b>90</b>	<b>53</b>
<b>Small Family</b>	69	71	143	229	394	<b>906</b>	<b>51</b>
<b>Large Adult</b>	<10	0	<10	10	19	<b>36</b>	<b>62</b>
<b>Large Family</b>	14	<10	31	41	64	<b>158</b>	<b>49</b>
<b>Older Persons</b>	16	21	48	87	157	<b>329</b>	<b>63</b>
<b>Total</b>						<b>3,129</b>	<b>48</b>

**Table 65: Strabane Town Waiting List – March 2021**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	252	26	150	14	36	56	<b>534</b>
<b>HS Applicants</b>	158	15	91	<10	16	37	<b>323</b>
<b>Allocations</b>	10	0	<10	0	<10	<10	<b>30</b>

Applicants – Housing applicants at March 2021

HS Applicants – Housing stress applicants at March 2021 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2021

**Table 66: Strabane Town Time on Waiting List (HS Applicants) – March 2021**

	0-6 Mths	6-12 Mths	1-2 years	2 - 4 years	4+ years	Total Apps	Average Months on WL
<b>Single</b>	19	14	27	38	60	<b>158</b>	<b>50</b>
<b>Small Adult</b>	0	<10	<10	<10	<10	<b>15</b>	<b>48</b>
<b>Small Family</b>	<10	10	16	28	32	<b>91</b>	<b>42</b>
<b>Large Adult</b>	0	0	<10	<10	<10	<b>6</b>	<b>41</b>
<b>Large Family</b>	<10	0	<10	<10	<10	<b>16</b>	<b>59</b>
<b>Older Persons</b>	<10	<10	<10	10	13	<b>37</b>	<b>56</b>
<b>Total</b>	<b>31</b>	<b>28</b>	<b>57</b>	<b>88</b>	<b>119</b>	<b>323</b>	<b>49</b>

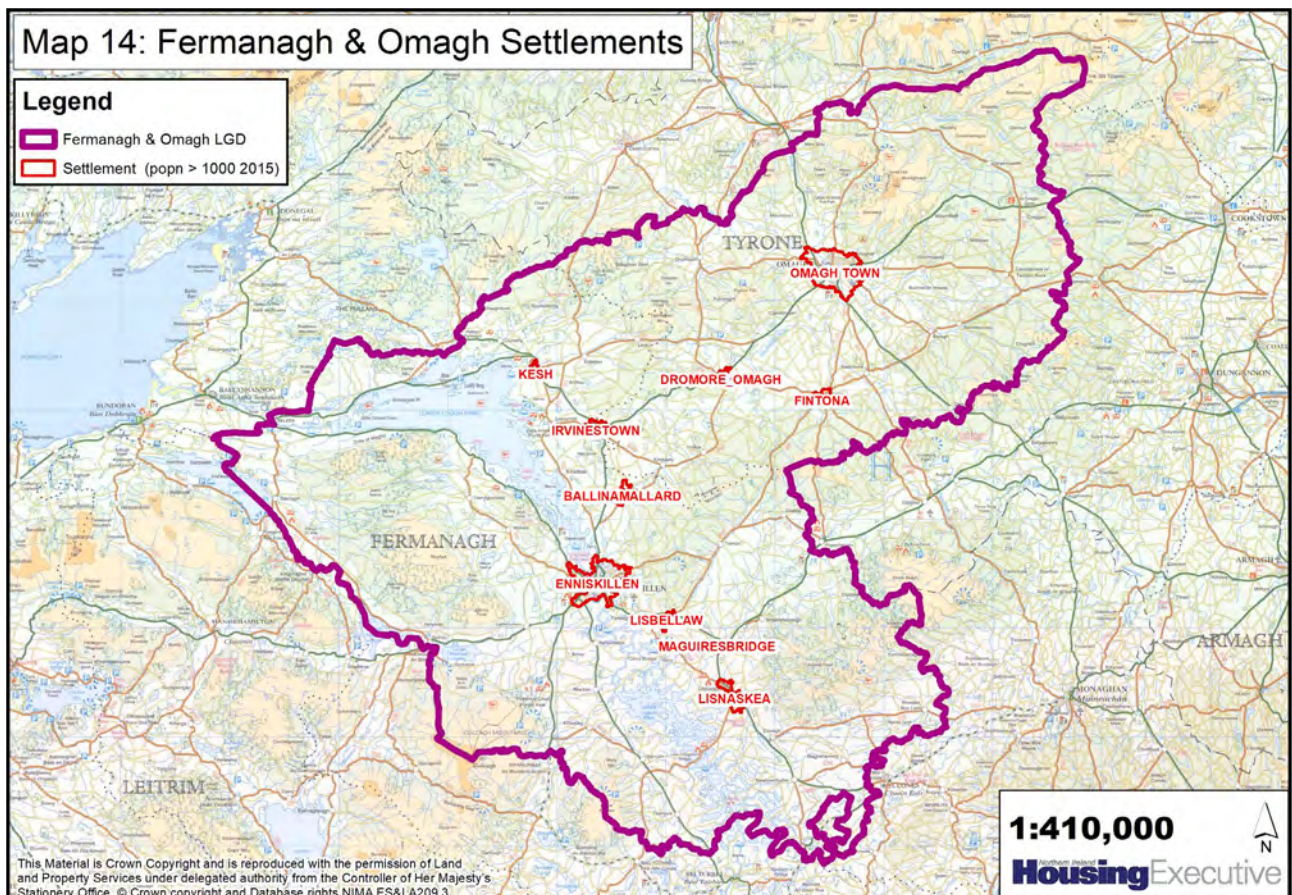


# Fermanagh & Omagh District

## Context

Fermanagh and Omagh is widely recognised as a place of outstanding natural beauty. The Council is Northern Ireland’s largest area in terms of land mass covering approximately 3,000 Km<sup>2</sup> and smallest in terms of population density (38 people per Km<sup>2</sup>). There are a total of 116,835 residents (6.2%

of NI Population), in the District living in 43,354 households. Within this mainly rural district, 30% of the population live in Enniskillen or Omagh, 7% live in smaller towns including Carrickmore, Dromore, Fintona, Irvinestown and Lisnaskea. Villages and small settlements account for 16% of the population and 47% live in the open countryside which provides challenges to service delivery.





**2%**

**PROJECTED INCREASE**

BY 2029

The population of the district is projected to increase by 2% to 119,732 between 2019 and 2029

Population growth will be mainly concentrated in the 65 plus age group which is projected to grow by 30.2% over the ten-year period. In contrast, the population of children 0 – 15 years is projected to decrease by 7.6% and the working age population to decrease by 2.5%.

According to the Annual Survey of Hours and Earnings (ASHE), within the district, there are 49,000 jobs, 5.2% of the 949,000 jobs across Northern Ireland in 2020. The most recently available Labour Force Survey statistics at the end of 2019 shows 66.9% of the working age population were economically active, below the 73.8% recorded for Northern Ireland. This compares to the overall Northern Ireland weekly basic full-time median wage of £528.60, a decrease of 1.1% on the 2019 figure (ASHE).



In 2020, the annual full-time median wage for residents

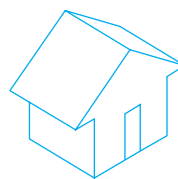
in the area was £478.40 per week, a decrease of 10.1% on the previous year

## COVID-19

The Coronavirus pandemic is likely to have an impact on the socio-economic development of the local area moving forward. The labour market is also likely to face adjustments given the economic challenges and changes to the way society operates. For example, through an increased reliance on online goods and service providers and increased numbers of people homeworking.

## Housing Market Analysis (across tenures)

### Housing & Land Supply



**4,300**

**NEW DWELLING REQUIREMENT**

The district has a Housing Growth Indicator (HGI) projection of new dwellings required of 4,300 for 2016-2030

- During 2020 there were 319 new dwelling starts in Fermanagh and Omagh, which is more than the projected new dwelling requirement as estimated by the HGI 2016-30 of 287 which is the annual HGI figure.



Land and Property Services (LPS) statistics show that over the 2016-20 period, 2,038 new dwellings commenced in Fermanagh and Omagh district and 1,706 dwellings completed

### Owner Occupied

- The general mood of positivity around the housing market continued in 2020/21 with sales and pricing activity accelerating as consumer confidence improved in line with the easing of restrictions and the wider economic recovery. Borrowing costs are exceptionally low by historic standards and ongoing lender competitiveness suggests this may improve further in the coming months. Underlying demand remains at exceptionally high levels and reduced property stock has put upward pressure on prices, particularly for larger properties in desirable areas. There are still uncertainties around the longer term impacts of COVID-19 on the housing market and wider economy however;
- The Bank of England cut interest rates from 0.75% to 0.25% initially and then further to 0.1%, the lowest level on record, in response to the COVID-19 pandemic. At the most recent Monetary Policy Committee meeting held in August 2021, members voted unanimously for the Bank of England to maintain the Bank Rate at 0.1%. Although this is seen as a temporary measure any increases in interest rates are expected to be slow and gradual. Existing mortgagors may see this as an opportunity to re-mortgage at more favourable rates;
- According to the Northern Ireland House Condition Survey 2016 owner occupiers make up 63% of all tenures in the district;
- The private housing market had been showing signs of recovery – the number of house sales in Fermanagh & Omagh had increased from 376 in 2010 to 1,046 in 2019 before falling by 186 to 860 in 2020 (LPS);
- The average house price for Fermanagh & Omagh has been increasing from £129,501 in 2015 to £165,877 in 2020. House prices are consistently lower than the Northern Ireland average over the years. The Northern Ireland average was over £14,000 higher, £180,079 in 2020;
- Popular locations include Enniskillen and Omagh towns as well as the rural villages spread across the council area;
- During 2019, there were 25 repossessions within Fermanagh and Omagh District, a slight increase over the previous year.

## Private Rented

- The private rented sector across Fermanagh and Omagh has increased in tenure share and according to the House Condition Survey 2016 now accounts for 27% of all housing. Rented accommodation is now the accommodation of choice for many households, especially younger households on lower incomes who in previous decades would have become first time buyers;
- During the second half of 2019 and first half of 2020 there were 8,377 lettings in LGDs outside of Belfast, 4.4% (372) of those were within Fermanagh and Omagh District. (Performance of the Private Rental Market in Northern Ireland H1 2020 Ulster University);
- The overall average rent in the district in 2020 was £492 per month, an increase of £1 from £491 over the year, but well below the Northern Ireland average of £658 per month in 2020;

**3,553**  
**PROPERTIES REGISTERED**



Within Fermanagh and Omagh, 3,553 private rented properties were registered by 2,394 landlords under DfC’s Landlord Registration scheme at March 2021

- Housing Benefit continues to play a vital role in supporting the private rented sector. At March 2021, there were 3,068 private tenants in receipt of Housing Benefit in the district, an 8.4% decrease on the 2020 figure. A key factor in this reduction is the introduction of Universal Credit.

## Social Rented Housing Sector

- The social housing share of the housing market in Fermanagh and Omagh was 10% at 2016 (Northern Ireland House Condition Survey 2016);
- Census 2011 also showed that the social rented stock in the district (3,983 units) has fallen by 32% compared to the 2001 figure;

 **3,597**  
**HOUSING EXECUTIVE STOCK**

Housing Executive stock at March 2021 was 3,597 with 6,553 properties sold since the commencement of the ‘Right to Buy’ scheme

- There were two schemes for 17 units on-site at March 2021 with four schemes for 18 units completed over the year;
- Nine Housing Executive properties were sold in the year to March 2021;
- At March 2021, there were 1,054 Housing Executive tenants in receipt of the Housing Cost element of Universal Credit.

# Social Housing Need and Strategic Guidelines

Social Housing Need is considered against each of the following subheadings:

- General Housing Need (Urban & Rural)**
- Shared Future Demand**
- Supported Housing Need**
- Wheelchair Housing Need**
- Travellers' accommodation requirements**

## General Needs Housing (Urban & Rural)

### Urban

The Strategic Guidelines have established that for Year 1 of the Social Housing Development Programme, 2.1% (urban) and 4.1% (rural) units share have been allocated to the district of the overall three year programme. Five year projected need for the area as a whole is 637 and the projected need for individual settlements is detailed in Table 67.

**Table 67: Projected (5-Year) Social Housing Need 2021-26**

Settlement	Housing Need Assessment Area*	Total 5 Year Projection
<b>Enniskillen Town</b>	Enniskillen Town	<b>253</b>
<b>Omagh Town</b>	Omagh Town	<b>203</b>
<b>Derrylin</b>	Derrylin	<b>13</b>
<b>Dromore</b>	Dromore	<b>10</b>
<b>Irvinestown</b>	Irvinestown	<b>13</b>
<b>Lisbellaw</b>	Lisbellaw	<b>17</b>
<b>Lisnaskea</b>	Lisnaskea	<b>30</b>
<b>Maguiresbridge</b>	Maguiresbridge	<b>16</b>
<b>Remaining Settlements *</b>	Remaining Settlements *	<b>82</b>
<b>Fermanagh &amp; Omagh Total Social New Build Requirement</b>		<b>637</b>

Housing need has currently been met in Belcoo, Clanabogan, Garrison, Greencastle, Lisnarick, Magheraveely, Mountjoy, Newtownbutler, Omagh Cottages, Teemore and Trillick. These areas will be kept under annual review.

\* Remaining settlements where need is less than 10 includes Aghadrumsee, Arney / Bellanaleck\*\*, Ballinamallard, Belleek, Beragh, Brookeborough, Carrickmore, Derrygonnelly, Donagh, Drumquin, Ederney/Lack\*\*, Fintona, Florencecourt, Gortin, Kesh, Kinawley, Roslea and Tempo.

\*\* Some settlements may include a number of small settlements grouped together for waiting list purposes, where this occurs all settlements within the grouped HNA are listed.



Please note that in relation to those settlements with <10 projected need, the Housing Executive will consider Housing Association development opportunities or Existing Satisfactory Purchases (ESP). In addition, if land can be identified that may provide for more than current projected social need suggests, the Housing Executive Place Shaping and Rural Units may be able to assist in Rural Housing Needs Testing or other marketing exercises to identify hidden additional social and mixed tenure demand.

The following comments are relevant to housing need within the Council area:

- Housing need for Fermanagh & Omagh has increased by 36% from 469 for the period from 2020 to 2025 to 637 for the 2021 to 2026 period. The housing need in the Council area is concentrated within Enniskillen and Omagh towns. There is also an emerging need in Lisnaskea, Lisbellaw, Maguiresbridge, Derrylin and Irvinestown;
- The majority of Housing Executive land has now been utilised for new build within the district towns. Remaining sites are subject to planning regulations, lack of development potential or financial unviability;
- Within Enniskillen Town, the most popular areas would be Hillview and Cornagrade. There is a very high requirement for small unit accommodation with single person households comprising over half of those presenting in housing stress;
- There is a high demand for ground floor accommodation in the town, for single persons and those with mobility issues;
- The provision of mixed tenure schemes in the town and within the district as a whole would be encouraged;
- There is a limited requirement for Cat 1 accommodation throughout the district. Contact should be made with Place Shaping, South Region at an early stage who will advise in what areas there is a remaining unmet Cat 1 need;
- Within Omagh Town, Lammy and Tamlaght would be the most popular areas for housing. Lisnally and Strathroy would be considered less popular although the situation is improving in these areas;
- The provision of small unit accommodation within Omagh is a priority with single person households comprising over half of those in housing stress;
- The Housing Executive continues to monitor the availability of surplus public sector sites across the district and we continue to engage with our partners through the Community Planning partnership with regard to the strategic review of land assets;
- Future housing mix in new build developments will need to cater for singles, small families, older persons and wheelchair / complex needs households along with any potential changes associated with Welfare Reform;
- Dwelling type should therefore comprise 1 and 2 bedroom design forms with emphasis on accessibility. Where possible dwellings should be designed flexibly to cater for potential household growth;
- Some 3 bed properties may be required for families and these should be discussed with the Housing Executive. There may also be a requirement for a small number of 4 bed properties for large families;
- Accommodation for older persons should be designed flexibly with long term accessibility

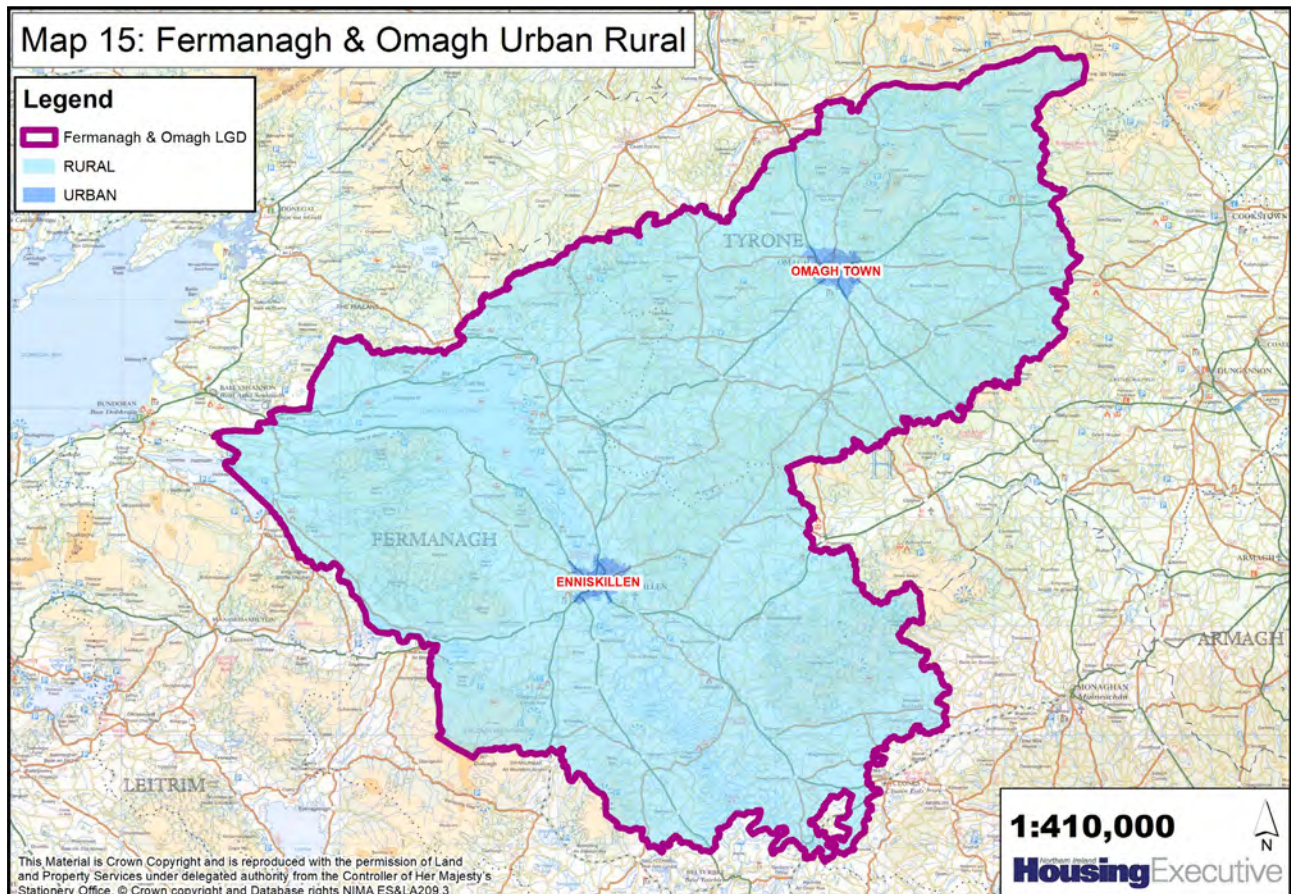


issues taken into consideration, with generic wheelchair units to be included in schemes where possible;

- During 2020/21, Site Identification Studies (SIS) were completed in Trillick and Maguiresbridge. An ongoing study is nearing completion for Omagh. SIS are programmed for Enniskillen and Donagh. A SIS List containing Housing Associations areas of interest and rank by scheme delivery has been drawn up. The allocation of SIS's will be made on this basis;

- Within urban areas the indicative housing mix should be 30% Single Persons, 60% Families and 10% Older Persons. Wheelchair units should make up 10% of the housing mix across all groups;
- Family households include 2, 3 and 4 bed units. Place Shaping, South Region will provide further detail on the housing mix required for families upon request.

## Rural



The provision of new social housing in rural settlements represents a strategic priority for delivery of the SHDP. The rural target share for Year 1 of the SHDP (2022/23) is 12.9% of the overall programme based on average levels of housing stress in rural areas.

In every case, it will be important to understand the localised nature of rural housing need and the alternative settlements that rural applicants are likely to consider. The Housing Executive’s Rural Unit will support housing providers by providing initial desk-top evidence of potential need based on neighbouring waiting lists and by facilitating subsequent rural housing needs testing and marketing.

In some rural areas there are no available sites within the development limit and a large percentage of public owned stock is sold. As a result of this there are limited housing opportunities in these locations which has led to the development of latent need.

### Indicative Housing Mix Requirements

- At March 2021 there were 460 applicants in rural Fermanagh & Omagh in housing stress (36.5% of the 1,261 applicants in housing stress on the waiting list in the district). Whilst the Housing Executive work closely with rural communities to identify housing need, Housing Association delivery of new social housing schemes is becoming increasingly difficult. This is due to the smaller numbers often required in rural schemes and the economies of scale associated with delivery and management;
- SIS have been programmed for Enniskillen and Donagh during 2021/22;
- During 2020/21, rural housing need tests took

place in Newtownbutler, Kesh, Teemore and Tempo. Due to the impact of COVID-19 some tests had to be postponed;

- Alternative mixes can be considered by Housing Associations in relation to specific sites or scheme types. However, significant changes from the above mix should be discussed with the Housing Executive to avoid nugatory work.

**Table 68: Indicative housing mix for Fermanagh and Omagh District**

Older Persons	Families*	Singles	Wheelchair
10%	60%	30%	10%

\* Family households include 2, 3 and 4 bed units. Place Shaping, South Region will provide further detail on the housing mix required for families upon request.

### Areas where need is met

Housing need has currently been met in Belcoo, Clanabogan, Garrison, Greencastle, Lisnarick, Magheraveely, Mountjoy, Newtownbutler, Omagh Cottages, Teemore and Trillick. These areas will be kept under annual review.

### Rural Areas

Based on the waiting list for social housing, at March 2021, the current projected need for rural areas within Fermanagh & Omagh Council is 181 units. Taking account of new build schemes on the current SHDP, the residual housing need is focused in the settlements of Lisnaskea, Lisbellaw, Maguiresbridge, Derrylin, Irvinestown and Dromore. There is a small need of less than 10 in Aghadrumsee, Arney / Bellanaleck, Ballinamallard, Belleek, Beragh, Brookeborough, Carrickmore, Derrygonnelly, Donagh, Drumquin, Ederney/Lack,

Fintona, Florencecourt, Gortin, Kesh, Kinawley, Roslea and Tempo. Proposals for social housing in these locations will be welcomed and given due consideration.

It is recognised that there may be neighbouring rural settlements where demand has not yet been identified but where land may still be available. The Housing Executive will take account of the potential for 'hidden' or 'latent' demand within such areas if and when Housing Associations identify potential sites. Should sites come to the attention of Housing Associations, the Housing Executive will seek to assist in assessing any hidden need by way of rural needs testing if deemed appropriate. We continue to work closely with rural communities to identify housing need.

### **Wheelchair Housing Need (HNA)**

The total projected wheelchair housing requirement for Fermanagh & Omagh is 22 units.

At 1 April 2021, there were 23 housing stress applicants and less than 10 transfers on the waiting list who require wheelchair accommodation. There were less than 10 allocations over the last year. Housing need for wheelchair units is concentrated mainly in Enniskillen Town and Omagh General.

Housing Associations should actively discuss the inclusion of generic wheelchair units within suitable schemes with the Head of Place Shaping. Generic wheelchair units should be for 2 and 3 bed units and built in line with space standards included in the Housing Association Guide.

### **Shared Future Demand**

The Housing Executive actively encourages mixed tenure and Housing for All (shared future) housing. Housing Associations bringing forward suitable proposals for Housing for All designation would be welcomed.

### **Traveller's accommodation**

The need for Irish Traveller accommodation is currently met in Fermanagh & Omagh District Council. Future Irish Traveller accommodation requirements are reviewed annually. The Housing Executive has initiated research into developing a new assessment methodology for Irish Travellers as set out in the Irish Travellers Accommodation Strategy 2021-26. The research programme is scheduled to complete in November 2022.

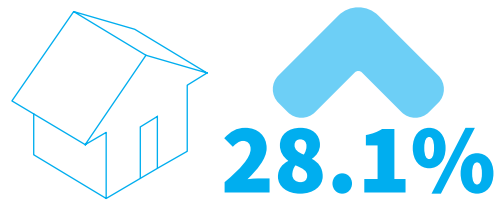
## Intermediate (Affordable) Demand

- The Housing Executive estimates intermediate/affordable housing demand for Fermanagh & Omagh is 63 units per annum between 2020-2030;
- In general house prices in Fermanagh and Omagh are lower than Northern Ireland;
- Co-Ownership had an active stock of 98 dwellings at March 2021, 15 of which were purchased during 2020/21. This reflects the opportunities this scheme provides in the current housing market environment;



Co-Ownership assisted in the purchase of 15 properties in 2020/21

- Average house prices in Northern Ireland increased by 20.5% between 2015 and 2020;



Average house prices in Fermanagh & Omagh have increased by 28.1% over the 2015/20 period

- Fermanagh is particularly popular with retirees and those seeking to relocate with local estate agents receiving frequent enquiries from those living outside the area who wish to buy property in the area.

**Table 69: Average Annual House Prices Fermanagh and Omagh District & NI 2015- 2020**

Area	2015	2016	2017	2018	2019	2020	% Change 2015-2020
<b>Fermanagh and Omagh</b>	129,501	135,181	134,959	149,476	152,241	165,877	28.1
<b>Northern Ireland</b>	149,449	154,028	155,049	163,128	169,057	180,079	20.5



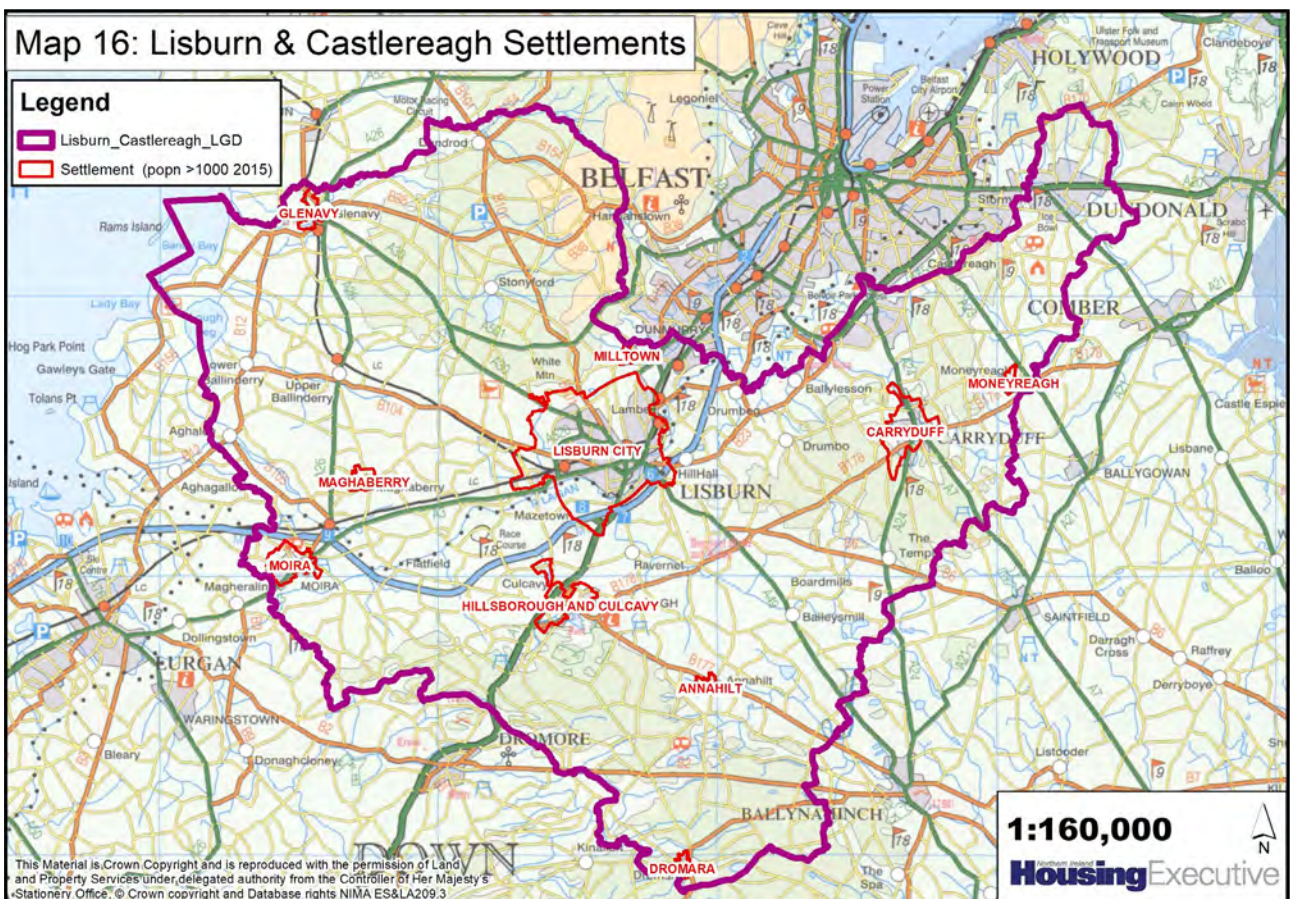




# Lisburn and Castlereagh City Council

## Context

Lisburn and Castlereagh City Council has been in operation since 2015. The boundary forms areas of both the old Lisburn and Castlereagh councils.










The Council, made up of 40 Elected Members, represents just over 146,800 residents in 58,300 households and covers an area of nearly 200 square miles.

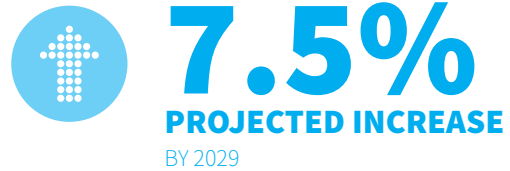
The Council area is one of the most prestigious areas within Northern Ireland to live, work and visit. It is a locality which consists of an urban and rural mix and is designated as a city area. It is already recognised as a premier business location within Northern Ireland. There are opportunities to grow and develop the local and regional economy.

The Housing Executive plays an important role in encouraging regeneration in the Council area, both through the use of land within its ownership and its powers to buy and sell land.

The Housing Executive has supported community based regeneration by implementing estate-based strategies in several estates and by providing premises or land for community groups, facilities and enterprise projects.

District Electoral Area (DEA) Population Estimates (2019)

Castlereagh East 20,860	
Castlereagh South 24,010	
Downshire East 16,720	
Downshire West 17,110	
Killultagh 21,450	
Lisburn North 23,050	
Lisburn South 23,610	



The population of Lisburn & Castlereagh City Council area is projected to grow by 7.5% from 2019 to 2029

This growth will be concentrated mainly in the children and working age profiles. The older people population is expected to grow by 32.9% in the years to 2029. While the need for small family accommodation remains strong, there will still be a requirement to design and construct suitable accommodation for older persons.

Local economic performance and peoples' economic circumstances affect demand for housing and individual housing choices. Within the Lisburn and Castlereagh City Council 80% of the working age population are economically active compared to 74% within Northern Ireland. The public Sector accounts for 33% of jobs and retail 21% of jobs. Lisburn City centre retail units are 75% occupied.

# Housing Market Analysis (across tenures)

## Housing & Land Supply

- The 2011 census shows that 24.9% of Lisburn and Castlereagh households were one person and 31.2% of households were two person;
- The average household size in Lisburn and Castlereagh was 2.51;

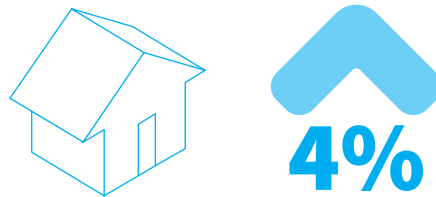


The Housing Growth Indicator (HGI) requirement for Lisburn and Castlereagh over the period 2016-2030 is 10,700 new dwellings

- Land and Property Services estimated new starts at 2020 as 554. This is a count of all starts and completions inspections carried out by Building Control in the Council area.

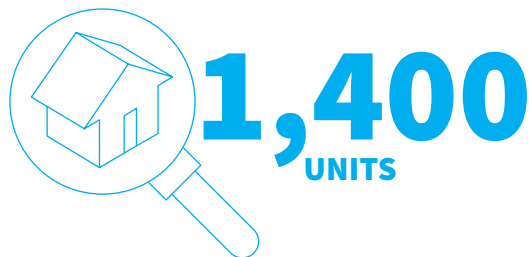
## Owner Occupied Housing Sector

- At 2016 there were 58,300 households in Lisburn and Castlereagh, 78% of these are owner occupied;
- During 2020/21, 142 properties were purchased through Co-Ownership in Lisburn and Castlereagh;
- Co-Ownership had an active stock of 1,122 dwellings at March 2021.



The average house price for Lisburn and Castlereagh was £199,017 in 2020, this represents an increase of 4% on 2019 figures

- Demand is highest in urban and suburban areas.



Ten year Intermediate Housing Demand 2020-2030 is 1,400

## Private Rented Housing Sector (PRS)

- At 2016, 9% of households in Lisburn and Castlereagh were privately rented (2016 House Condition Survey);
- Local estate agents also indicated that rents have maintained a consistent level in the past 12 months, the average weekly rent is £153 across Lisburn and Castlereagh compared to £151 in 2020;

**3,845**  
**PROPERTIES REGISTERED**



DfC's Landlord Registration Scheme identified 3,845 tenancies registered for Lisburn and Castlereagh in March 2021

- Local estate agents have suggested that key drivers affecting the PRS in Lisburn and Castlereagh include: high demand for private rental; a slowdown of additional supply, difficulty in raising deposits for mortgage, job and income uncertainty and low turnover/high demand in the social housing sector;
- Housing benefit continues to play a vital role in supporting the private rented sector. At March 2020, 1,786 private tenants in Lisburn and Castlereagh were in receipt of housing benefit.

## Social Rented Housing Sector

**5,313**  
**HOUSING EXECUTIVE STOCK**



Housing Executive stock at March 2021 was 5,313. A total of 7,947 properties have been sold since the commencement of the 'Right to Buy' scheme

- There were 260 social housing units on site as at March 2021;
- There were 97 social units completed in 2020/21;
- 13 Housing Executive properties were sold in the 2020/21;
- 5 year social housing requirement for 2021-2026 shows a need for 1,576 units.





There are 602 units planned in the 3 year Social Housing Development Programme. The five-year projected need for the area as a whole is 1,576 units. The projected need for individual settlements is detailed in Table 75.

Outside of the urban settlements, the Lisburn and Castlereagh area encompasses a significant rural landscape, including the popular towns of Glenavy, Moira and Carryduff. Rural communities within the council area benefit from their close proximity to these locations and also from their commutable distance to Belfast and its wider urban settlements. There were 240 rural applicants in housing stress at March 2021.

House and land prices, land availability and rates of development may make the first steps into owner occupation more difficult for many young rural households within Lisburn and Castlereagh City Council area. The tendency for owner occupation in rural areas will also result in limited opportunity for the private rented sector to offer affordable accommodation due to a more competitive housing market. As we begin to emerge from a time of unprecedented change during the COVID-19 pandemic, the Housing Executive will review the impact on housing market areas resulting from this period of mandatory home-working, considering in particular the impact on rural housing.

The Housing Executive will continue to work with rural communities to identify hidden or ‘latent’ housing need through rural housing needs tests. These rural locations will be determined following the annual review of the Housing Need Assessment and consideration is also given to requests from community representatives. Belfast Place Shaping Team completed a Site Investigation Study for Annahilt where eight potential sites were identified. After a consultation exercise, interest in Annahilt was shown by a number of applicants on the Lisburn waiting list. The next phase will be to liaise

with Housing Associations to investigate further the potential development sites for social housing development.

**Table 75: Social Housing Need by Settlement 2021-26**

Settlement	Social Housing Need (Units) 5 Year (2021-26)
<b>Lisburn/Dunmurry Urban</b>	1,087
<b>Castlereagh Urban</b>	222
<b>Aghalee</b>	5
<b>Annahilt</b>	0
<b>Ballynadolly</b>	0
<b>Boardmills</b>	0
<b>Carryduff</b>	61
<b>Culcavey</b>	9
<b>Dromara</b>	7
<b>Drumbo</b>	0
<b>Dundrod</b>	2
<b>Glenavy</b>	36
<b>Hillsborough</b>	37
<b>Lambeg</b>	61
<b>Lisburn Rural</b>	0
<b>Lower and Upper Ballinderry</b>	1
<b>Maze</b>	0
<b>Megaherry</b>	3
<b>Milltown</b>	5
<b>Moira</b>	34
<b>Moneyrea</b>	4
<b>Purdysburn</b>	0
<b>Ravarnette</b>	1
<b>Stoneyford</b>	1
<b>Total Social New Build Requirement Lisburn and Castlereagh</b>	<b>1,576</b>



Please note that in relation to those settlements with low projected need, the Housing Executive may still consider Housing Association development opportunities or Existing Satisfactory Purchases (ESP). In addition, if land can be identified that may provide for more than current projected social need suggests, the Housing Executive Place Shaping and Rural Units may be able to assist in Rural Housing Needs Tests or other marketing exercises to identify hidden additional social and mixed tenure demand.

The following is a summary of comments relevant to housing need within the Council area:

- Housing need has remained at a consistently high level in Lisburn and Castlereagh and is focused in the main urban settlements;
- Future housing mix in new build developments will need to cater for singles, small families and older persons along with any potential changes associated with Welfare Reform;
- Numbers in housing stress have remained high in the area and the number of allocations remains inadequate to meet demand;
- There is an increasing need for two and three bedroom wheelchair units that are flexible to meet the needs of a wide range of applicants;
- Increasingly, areas of housing need are emerging in locations where the Housing Executive does not own land in the Council area;
- Land availability remains a problem and the Housing Executive are working closely with Lisburn and Castlereagh in its preparation of the Local Development Plan (LDP) to ensure that there is sufficient land available for social housing during the lifetime of the LDP;

- In recent years, social housing need in Lisburn and Castlereagh has been delivered by Housing Associations on Housing Executive land;
- The areas of greatest housing need are in and around Lisburn City;
- The overall demographic trend is for an ageing population and for smaller household size (1-3 persons);
- The future need is predominantly for one and two bedroom design forms and with an emphasis on accessibility;
- Wheelchair applicants seeking accessible units are increasing in the area.

### Indicative Housing mix requirements

- Single, older and family households comprise 86% of the waiting list in housing stress;
- The table below provides an indicative housing mix based on the profile of housing stress applicants registered on the waiting list;

**Table 76: Indicative housing mix for Lisburn and Castlereagh**

Older Persons	Families*	Singles	Wheelchair
15%	37%	48%	10%

\* Focus on: Small Adult and Small Family Households

- The trend for new dwellings in Lisburn and Castlereagh is for smaller two bedroom households. Where possible one bed properties, while addressing the immediate requirements under Welfare Reform, should be designed flexibly to cater for potential household growth;

- Some three and four bed properties may be required for families and these should be discussed with the Housing Executive;
- Accommodation for older persons should be designed flexibly with long term accessibility issues taken into consideration. Generic wheelchair units should be included in schemes where need exists;
- Alternative mixes can be considered by Housing Associations in relation to specific sites or scheme types. However, significant changes from the above mix should be discussed with the Housing Executive to avoid nugatory work.

### Areas where Demand is currently met

Much of Lisburn and Castlereagh is a popular place to live and this is reflected in the high projected need. There are however a small number of areas where demand is largely met. Discussion with the Place Shapers will confirm if this is the case on a site by site basis.

### Wheelchair Housing Need (HNA)

Demand for wheelchair accommodation is concentrated in the urban areas of Lisburn and Castlereagh with small numbers scattered across the remaining settlements. Proposals for wheelchair accommodation are welcomed and the Housing Executive will actively encourage the consideration for inclusion of generic wheelchair units in all suitable schemes.

There were 41 housing stress applicants at March 2021, with only 5 allocations last year which leaves a residual of 36 applicants. Taking into consideration the 12 transfers and a projected supply of 4 units gives an end residual need of 44. The trend appears

to be increasing demand for specific wheelchair units. Allocations over the past years have not kept pace with demand. 10% of units within any development should be designed to wheelchair standard.

Generic wheelchair units provided should be two and three bed units and built in line with the space standards included in the Housing Association Guide.

### Shared Future Demand

All potential shared future proposals will be considered by the local Place Shaping team.

### Traveller accommodation

Need for accommodation will be identified on an ongoing basis in conjunction with the Travellers Support Team.

The Traveller Need Assessment identified no accommodation requirements for Traveller families in the council area. Any requirements will be confirmed as this Prospectus is reviewed and updated.

## Intermediate (Affordable) Demand

The new definition of affordable housing will allow the expansion of intermediate housing products, including intermediate rent, the provision of which is a commitment made by the Minister for Communities, in November 2020.

To support the development of new products, the Housing Executive is undertaking an assessment of intermediate housing need, which for the first time, provides data at Council level in line with the new definition of affordable housing. It is intended that we will have a full understanding of intermediate housing need and all affordable housing need by Council area, across Northern Ireland by March 2022.

Co-Ownership is the most recognised provider of intermediate housing in Northern Ireland. In 2020/21 a total of 142 applications were approved in the Lisburn and Castlereagh area, there is an active stock of 1,122 dwellings in Co-Ownership at March 2021; reflecting the opportunities this scheme provides.



Co-Ownership assisted in the purchase of 142 properties in Lisburn and Castlereagh in 2020/21

Average house prices in Lisburn and Castlereagh have fluctuated since 2015, but have consistently remained higher than the Northern Ireland average. In 2020, the average house price increased to £199,017, 4% higher than in 2019.

**Table 77: Average Annual House Prices Lisburn and Castlereagh City & NI 2016-2020**

Area	2015	2016	2017	2018	2019	2020	% Change 2015-2020
<b>Lisburn &amp; Castlereagh</b>	182,750	£177,298	£179,317	£185,484	£191,393	£199,017	8.9
<b>Northern Ireland</b>	149,449	£154,028	£155,049	£163,128	£169,057	£180,079	20.5

# Lisburn & Castlereagh City Supporting Data

**Table 78: Castlereagh Rural Waiting List – March 2021**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	53	<10	45	<10	12	11	<b>128</b>
<b>HS Applicants</b>	46	<10	33	<10	10	10	<b>102</b>
<b>Allocations</b>	11	<10	10	<10	<10	<10	<b>31</b>

Applicants – Housing applicants at March 2021

HS Applicants – Housing stress applicants at March 2021 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2021

Please note that where there are less than 10 applicants, applicants in housing stress or allocations, they have been listed as <10 in compliance with Data Protection requirements.

**Table 79: Castlereagh Urban Waiting List – March 2021**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	158	29	89	<10	32	73	<b>389</b>
<b>HS Applicants</b>	105	14	54	<10	24	48	<b>251</b>
<b>Allocations</b>	38	<10	31	<10	<10	10	<b>90</b>

Applicants – Housing applicants at March 2021

HS Applicants – Housing stress applicants at March 2021 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2021

Please note that where there are less than 10 applicants, applicants in housing stress or allocations, they have been listed as <10 in compliance with Data Protection requirements.

**Table 80: Lisburn Rural Waiting List – March 2021**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	165	31	113	10	33	106	<b>458</b>
<b>HS Applicants</b>	124	17	84	<10	19	75	<b>325</b>
<b>Allocations</b>	17	<10	30	<10	<10	21	<b>76</b>

Applicants – Housing applicants at March 2021

HS Applicants – Housing stress applicants at March 2021 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2021

Please note that where there are less than 10 applicants, applicants in housing stress or allocations, they have been listed as <10 in compliance with Data Protection requirements.

**Table 81: Lisburn Urban Waiting List – March 2021**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	759	104	329	21	66	187	<b>1466</b>
<b>HS Applicants</b>	565	63	246	16	54	125	<b>1069</b>
<b>Allocations</b>	109	12	87	<10	17	36	<b>266</b>

Applicants – Housing applicants at March 2021

HS Applicants – Housing stress applicants at March 2021 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2021

Please note that where there are less than 10 applicants, applicants in housing stress or allocations, they have been listed as <10 in compliance with Data Protection requirements.

**Table 82: Lisburn & Castlereagh Council Housing Stress applicants average months on list**

GROUP HNA AREA	Comp HH	<6 Mths	6-12 Mths	1-2 Yrs	2-4 Yrs	4 Yrs +	Average Months on WL
Castlereagh Rural	Older Persons	<10	0	<10	<10	<10	51
	Large Adult	0	0	0	0	<10	70
	Large Family	<10	0	0	<10	<10	67
	Single	<10	12	<10	12	<10	30
	Small Adult	0	0	0	0	<10	92
	Small Family	<10	<10	11	10	<10	37
<b>Castlereagh Rural Total</b>		-	-	-	-	-	<b>39</b>
Castlereagh Urban	Older Persons	<10	<10	<10	15	21	69
	Large Adult	0	<10	0	0	<10	58
	Large Family	<10	<10	<10	11	<10	38
	Single	12	13	35	25	20	36
	Small Adult	<10	0	<10	<10	<10	44
	Small Family	<10	10	11	11	20	48
<b>Castlereagh Urban Total</b>		-	-	-	-	-	<b>46</b>
Lisburn Rural	Older Persons	<10	<10	16	18	26	57
	Large Adult	<10	0	1	1	3	79
	Large Family	<10	0	<10	<10	<10	39
	Single	14	21	24	29	36	42
	Small Adult	<10	<10	<10	<10	<10	48
	Small Family	<10	13	14	20	31	42
<b>Lisburn Rural Total</b>		-	-	-	-	-	<b>46</b>
Lisburn Urban	Older Persons	13	<10	26	28	52	56
	Large Adult	0	<10	<10	<10	<10	49
	Large Family	<10	<10	16	17	15	37
	Single	64	74	137	158	132	34
	Small Adult	<10	<10	14	13	23	47
	Small Family	15	40	57	76	58	34
<b>Lisburn Urban Total</b>		-	-	-	-	-	<b>38</b>
<b>Grand Total</b>		<b>160</b>	<b>218</b>	<b>403</b>	<b>464</b>	<b>502</b>	<b>41</b>

Please note that where there are less than 10 applicants, applicants in housing stress or allocations, they have been listed as <10 in compliance with Data Protection requirements.



# Mid and East Antrim

## Context

Mid and East Antrim Borough Council has brought about new opportunities and a renewed focus on how different communities and environments are connected across the geographical area. The Council area extends from the Irish Sea/North Channel in the east to the River Bann in the west covering 104,954 hectares.

This growth will be mainly concentrated in the 65+ age group, with the older population projected to increase by 26.1%. In the same period, 2019 to 2029, the working age population is projected to decrease by 3.2% and the 0-15 year age group to decrease by 6.8%. Over this period, one person and two person households are projected to increase by 10.1% and 8.6% respectively. Though the need for small family accommodation remains strong, there will be a requirement to design and construct suitable accommodation for older persons.

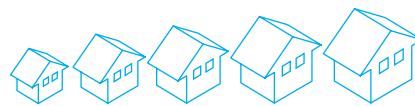


**1.9%**  
**PROJECTED INCREASE**  
BY 2029



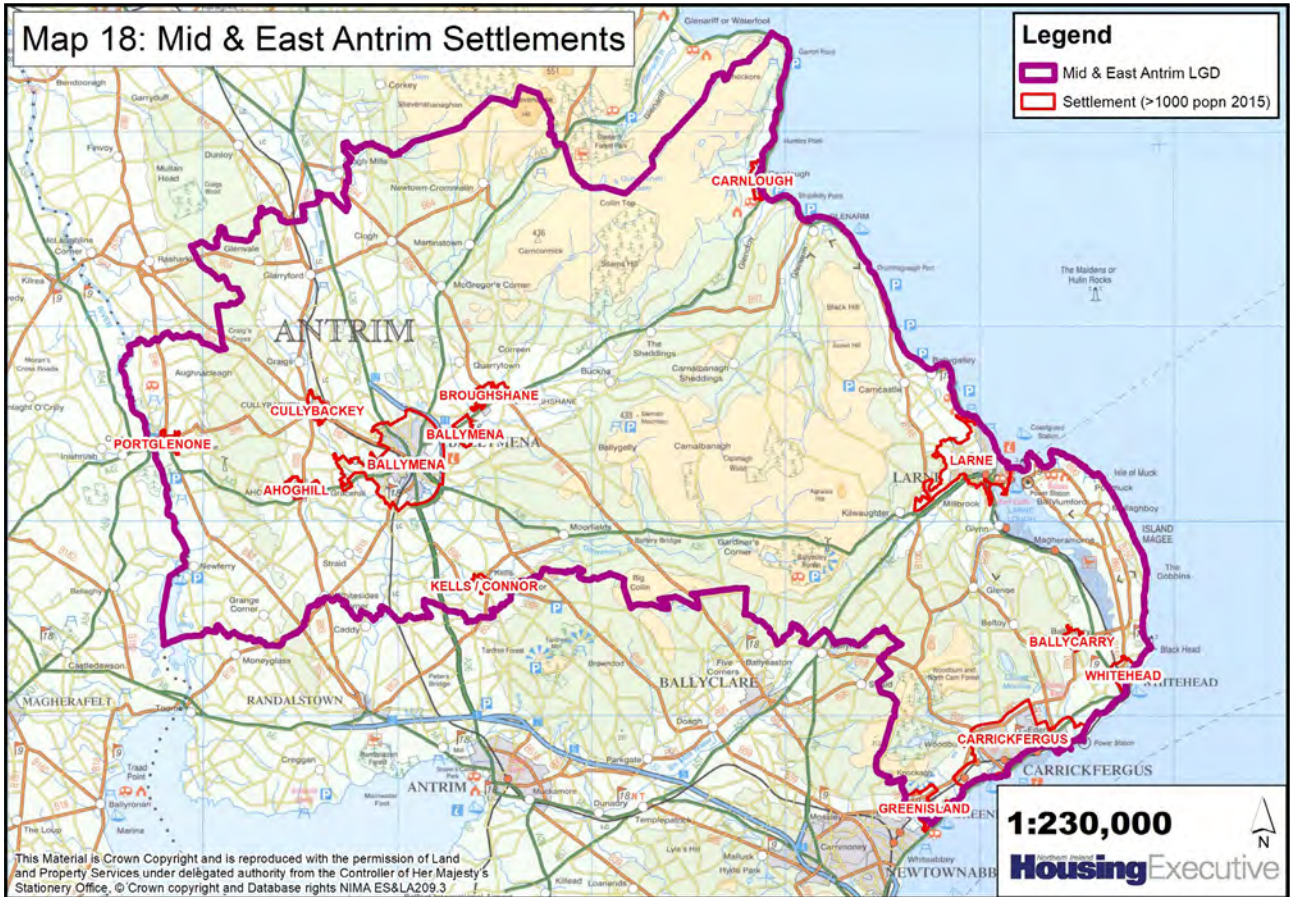
**7.4%**  
**OF NI POPULATION**

The population of Mid and East Antrim Borough is projected to grow by 1.9% from 139,274 in 2019 to 141,981 in 2029. It represented 7.4% of the NI population at 2019 (source NISRA)



**NUMBER OF HOUSEHOLDS INCREASES**

Household size is predicted to reduce from 2.44 to 2.38, while the number of households is projected to increase by 2,726 from 56,337 to 59,063 over the ten years to 2029

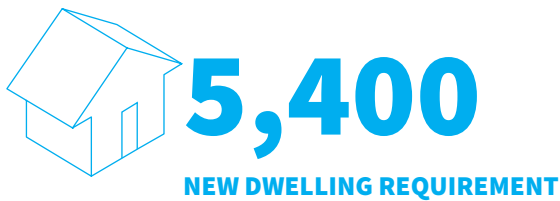


# Housing Market Analysis (across tenures)

## Housing & Land Supply



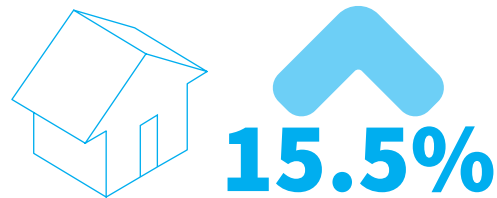
During 2020, there were 422 starts and 520 units completed in Mid and East Antrim (LPS)



The borough has a Housing Growth Indicator projected new dwelling requirement of 5,400 for 2016-2030. Mid and East Antrim is below the NI average of 7,709

## Owner Occupied Housing Sector

- The sector comprises 73% of total occupied stock (Source Northern Ireland House Condition Survey 2016);



Ulster University states that the average house price in Mid and East Antrim in 2020 was £158,168, which represents an increase of 15.5% on 2019 figures

- However, this is significantly below the Northern Ireland average of £180,079;
- During 2019, there were 18 repossessions in Mid and East Antrim; a 61.7% reduction from 2015;
- Demand for intermediate housing aimed at low income households in Mid and East Antrim is estimated at 620 units between 2020-2030;
- Prior to the COVID 19 lockdowns, local estate agents reported that the local housing market was showing a steady improvement, within which, the first time buyer market was thriving and the second time buyer market had increased. As the lockdowns eased, buyers showed an interest in larger properties with outdoor space. Transactions have increased as has competition between buyers. It is likely that the full impact of the pandemic on jobs,

mortgages and the housing market in general is yet to be determined;

- Interest rate rises are uncertain as the COVID 19 impact on the economy may be harsh and far reaching. For existing mortgages, rises in interest rates will place individuals and families under additional financial pressure.

### Private Rented Housing Sector

- The sector comprises 13% of total occupied housing stock (Source Northern Ireland House Condition Survey 2016);
- Local estate agents report an under supply throughout the borough. They apply increased rental charges in locations where demand is strong and supply fails to catch up;



DfC’s Landlord Registration scheme identified 5,750 properties registered by 3,314 landlords in Mid and East Antrim at March 2021

- At March 2021, there were 2,846 Private Housing Benefit claimants in the borough, a decrease of 12.8% on the previous year. The reduction in Housing Benefit claimants may be as a result of the migration exercise underway from Housing Benefit to Universal Credit;

- As household groups reduce in size, Houses in Multiple Occupation (HMO) will continue to play a greater role in the housing market, particularly for single households aged under 35. Since 1 April 2019, Belfast City Council has assumed responsibility for licensing of HMOs.

### Social Rented Housing Sector

- The sector comprises 14% of total housing stock (Source Northern Ireland House Condition Survey 2016);



At March 2021, there were 5,693 Housing Executive owned properties in the borough; 10,073 Housing Executive properties have been sold through the House Sales Scheme, with 14 sold during 2020/21

- There were 169 new social housing homes completed in the year to March 2021, and 153 on-site. A further 449 units are programmed to start over the next three years;
- At March 2021, there were 2,806 applicants on the waiting list for Mid and East Antrim, 1,852 of whom were in housing stress, with 514 allocations made over the previous 12 months.

# Social Housing Need and Strategic Guidelines

Social housing need is considered against each of the following subheadings:

- General Housing Need (Urban & Rural)**
- Shared Future Demand**
- Supported Housing Need**
- Wheelchair Housing Need**
- Travellers' accommodation requirements**

## General Housing Need (Urban & Rural)

### Urban

The Strategic Guidelines target share established for Mid and East Antrim indicates 4.7% urban units and 8.3% rural units of the overall three year programme. Five year projected need for the area as a whole is 984 and the projected need for individual settlements is detailed in Table 83.

**Table 83: Projected (5 Year) Social Housing Need 2021-26**

Settlement	Housing Need Assessment Area*	Total 5 Year Projection
<b>Ballymena Town</b>	Ballymena Town	<b>313</b>
<b>Carrickfergus Town</b>	Carrickfergus Town	<b>340</b>
<b>Larne Town</b>	Larne Town	<b>74</b>
<b>Whitehead</b>	Whitehead	<b>33</b>
<b>Ahoghill</b>	Ahoghill	<b>35</b>
<b>Broughshane</b>	Broughshane	<b>50</b>
<b>Carnlough</b>	Carnlough	<b>15</b>
<b>Cullybackey</b>	Cullybackey	<b>31</b>
<b>Greenisland</b>	Greenisland	<b>33</b>
<b>Glenravel</b>	Glenravel	<b>13</b>
<b>Kells</b>	Kells	<b>13</b>
<b>Portglenone</b>	Portglenone	<b>21</b>
<b>Remaining Settlements**</b>	*Remaining Settlements <10	<b>13</b>
<b>Total</b>		<b>984</b>

\*Remaining Settlements include: Ballycarry, Glenarm, Glynn and Islandmagee where need in each settlement is less than 10.

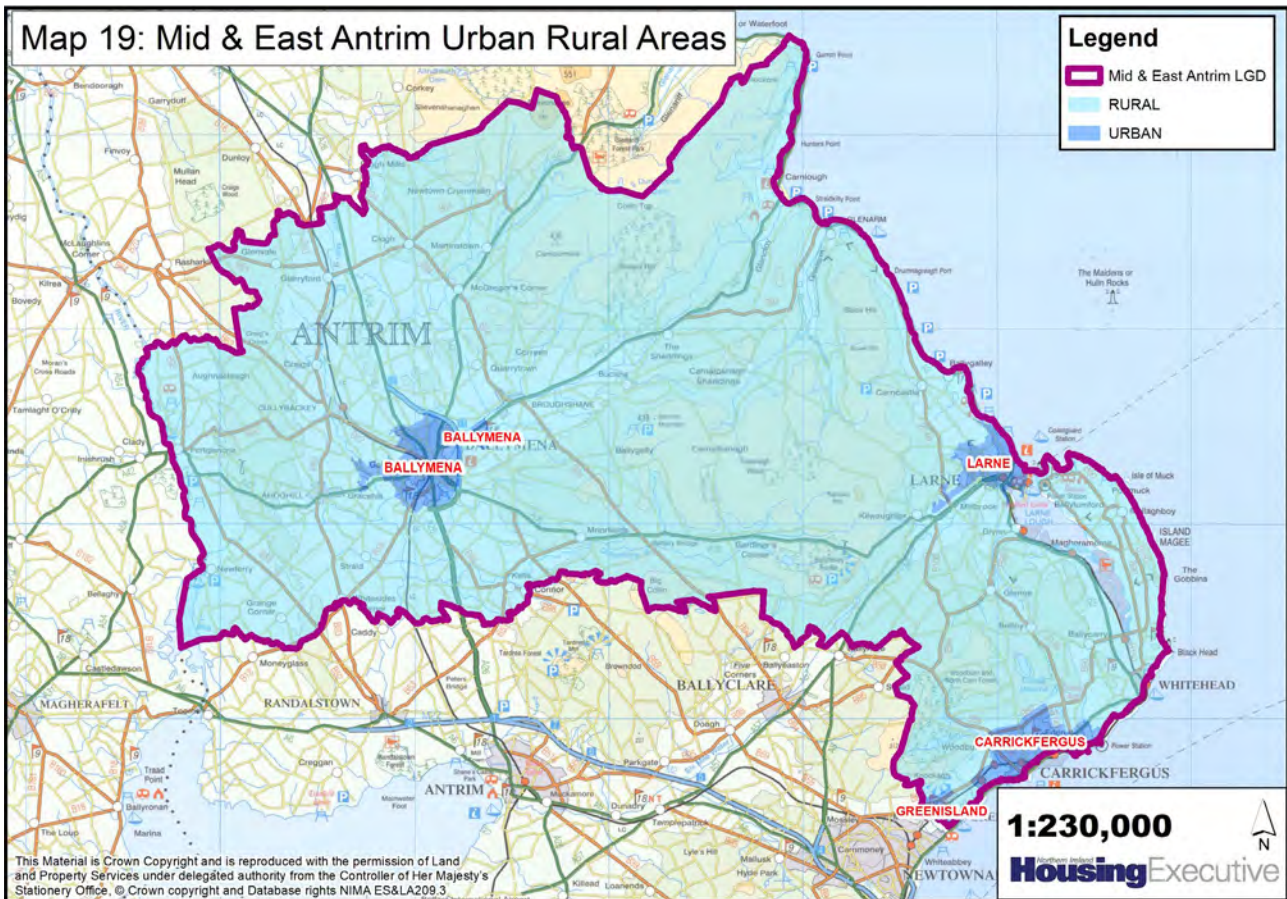
Please note that in relation to those settlements with <10 projected need; the Housing Executive will consider housing association development opportunities or Existing Satisfactory Purchases (ESP). In addition, if land can be identified that may provide for more than current projected social need suggests, the Housing Executive Place Shaping and Rural Units may be able to assist in Rural Housing Need Testing or other marketing exercises to identify hidden additional social and mixed tenure demand.

The following comments are relevant to housing need within the Council area:

- Social housing proposals are welcome for Carrickfergus town, particularly for single household accommodation, Whitehead and Broughshane;
- A high number of units have been supported for Ballymena town, additional units will be held in reserve until on-site and programmed units are complete;
- Projected need for Larne town will be met through a programmed scheme and transfer of Housing Executive land;
- Proposals will be assessed against potential local impacts on existing housing stock, such as turnover in adjacent social housing estates;
- The population is ageing and the number of smaller sized households is increasing. Future housing mix in new build developments should cater for single, small family and older person households. Dwelling type should therefore comprise 2 person 1 bedroom apartments for single households, 3 person 2 bedroom apartments for older persons, with emphasis on accessibility and 3 person 2 bedroom family houses. Some 3 bedroom houses may be required for families and there may also be a requirement for a small number of 4 bedroom houses; these should be discussed with the Housing Executive. Developments should include 10% wheelchair accessible units where possible and there may be an accommodation need for persons with complex needs;
- We would welcome the development of mixed tenure schemes within the borough;
- Site identification studies will be carried out by Housing Executive in selected areas across the borough where there is a social housing need and a shortage of sites for development. In year 2020/21 there were no site identification studies carried out in Mid and East Antrim.
- A review of Housing Executive owned undeveloped land is carried out annually;
- A number of Estate-Based Strategies which included selective demolition of unpopular stock were successfully delivered throughout the borough over past decades resulting in increased popularity and stability in these neighbourhoods. However, some large estates could be destabilised by further new build and there is not an identified need for additional properties in: Ballykeel 2 in Ballymena; Castlemara, Glenfield and Dunluskin in Carrickfergus.



Rural



The provision of new social housing in rural settlements represents a strategic priority for delivery of the SHDP. At 2022/23, the rural target share of the SHDP is 12.9% of the overall programme based on average levels of housing stress in rural areas.

In every case, it will be important to understand the localised nature of rural housing need and the alternative settlements that rural applicants are likely to consider. The Housing Executive's Rural Unit will support housing providers by providing initial desk-top evidence of potential need based on neighbouring waiting lists and by facilitating subsequent Rural Housing Need Testing and marketing.

## Indicative housing mix requirements

- Housing mix in new developments should cater for single, small family and older person households. Dwelling type should therefore comprise 1 and 2 bedroom design forms with emphasis on accessibility. Some 3 bedroom houses may be required for families and there may also be a requirement for a small number of 4 bedroom houses; these should be discussed with the Housing Executive;
- Developments should include 10% wheelchair accessible units where possible and there may be an accommodation need for persons with complex needs;
- Accommodation for older persons should be designed flexibly with long term accessibility issues taken into consideration. Generic wheelchair units should be included in schemes where possible;
- Alternative mixes can be considered by Housing Associations in relation to specific sites or scheme types. However, significant changes from the below mix should be discussed with the Housing Executive to avoid nugatory work.

**Table 84: Indicative housing mix for Mid and East Antrim**

Older Persons	Families*	Singles	Wheelchair
21%	30%	49%	10%

\* Focus on: Small Adult and Small Family Households

## Areas where need is met

- There is currently no projected social housing need in Ballymarlow, Clough, Craigywarren, Glarryford, Glenoe/Mounthill, Magheramourne, Moorefields/Glenwherry, Procklis, Slatt, Straid and Taylorstown/Moorlands. These areas will be kept under annual review.

## Rural areas

At March 2021, there were 400 applicants in rural Mid and East Antrim in housing stress; 22% of the total housing stress waiting list. Whilst the Housing Executive work closely with rural communities to identify housing need, Housing Association delivery of new social housing schemes is increasingly difficult due to smaller numbers often required in rural schemes and the economies of scale associated with delivery and management.

Based on the waiting list for social housing, at March 2021, projected housing need for rural areas within Mid and East Antrim is 203 units. Taking account of new build schemes on the current SHDP, residual housing need is focused in the villages of Broughshane and Whitehead.

It is recognised that there may be neighbouring rural settlements where demand has not yet been identified but where land may still be available. The Housing Executive will take account of the potential for ‘hidden’ or ‘latent’ demand within such areas if and when housing associations identify potential sites. Should sites come to the attention of housing associations the Housing Executive will seek to assist in assessing any hidden need by way of Rural Housing Need Testing, if appropriate. We continue to work closely with rural communities to identify housing need.

## Wheelchair Housing Need (HNA)

At March 2021, there were 26 housing stress applicants and 27 transfer applicants who require wheelchair accessible accommodation with 18 allocations over the previous year.

This leaves a requirement for 35 units. Need has been identified throughout the borough.

Housing Associations should actively discuss the inclusion of generic wheelchair units within suitable schemes with the Head of Place Shaping. In general, generic wheelchair units should be for 2 and 3 bedroom units and built in line with space standards included in the Housing Association Guide.

## Shared Future Demand

The Housing Executive actively encourages mixed tenure and Housing for All (shared future) housing. Housing Associations bringing forward suitable proposals for Housing for All designation would be welcomed.

## Travellers' accommodation

The Housing Executive has responsibility for identifying and meeting the accommodation needs of Irish Travellers.

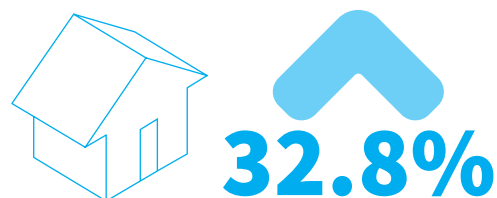
Housing need for the Traveller community is currently met in the borough.

## Intermediate (Affordable) Demand

- The Housing Executive estimates intermediate/affordable housing demand for Mid and East Antrim at approximately 62 units per annum between 2020-2030;



- Average house prices in Northern Ireland increased by 20.5% between 2015 and 2020;
- Although average house prices in Mid and East Antrim are lower than the Northern Ireland average these increased by almost a third, 32.8% over the same period.



Average house prices in Mid & East Antrim increased by 32.8% between 2015 and 2020

**Table 85: Average Annual House Prices for Mid and East Antrim & NI 2015-2020**

Area	2015	2016	2017	2018	2019	2020	% Change 2015-2020
<b>Mid and East Antrim</b>	£119,072	£123,538	£130,007	£142,366	£136,997	£158,168	32.8
<b>Northern Ireland</b>	£149,449	£154,028	£155,049	£163,128	£169,057	£180,079	20.5

## Mid and East Antrim Supporting Data

**Table 86: Mid and East Antrim Waiting List – March 2021**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	1,217	138	633	79	174	565	<b>2,806</b>
<b>HS Applicants</b>	825	87	413	45	100	382	<b>1,852</b>
<b>Allocations</b>	235	34	102	<10	29	106	-

Applicants – Housing applicants at March 2021

HS Applicants – Housing stress applicants at March 2021 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2021

**Table 87: Ballymena Town Waiting List – March 2021**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	460	44	207	25	59	149	<b>944</b>
<b>HS Applicants</b>	316	24	136	14	37	101	<b>628</b>
<b>Allocations</b>	99	15	35	<10	11	19	-

Applicants – Housing applicants at March 2021

HS Applicants – Housing stress applicants at March 2021 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2021

**Table 88: Ballymena Town Housing Stress applicants time on list March 2021**

GROUP HNA AREA	Comp HH	0-6 Mths	6-12 Mths	1-2 years	2 - 4 years	4+ years	Total Apps	Ave Months on WL
<b>Ballymena Town</b>	<b>Single</b>	50	35	75	72	84	316	39
	<b>Small Adult</b>	<10	<10	<10	<10	10	24	55
	<b>Small Family</b>	18	<10	31	41	37	136	36
	<b>Large Adult</b>	<10	<10	<10	<10	<10	14	68
	<b>Large Family</b>	<10	<10	<10	<10	13	37	41
	<b>Older Person</b>	17	<10	17	19	41	101	59

**Table 89: Carrickfergus Town Waiting List – March 2021**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	281	44	198	25	40	191	<b>779</b>
<b>HS Applicants</b>	195	33	136	17	25	124	<b>530</b>
<b>Allocations</b>	36	<10	31	<10	<10	43	<b>124</b>

Applicants – Housing applicants at March 2021  
HS Applicants – Housing stress applicants at March 2021 (i.e. 30 points or more)  
Allocations – Annual allocations for year ending March 2021

**Table 90: Carrickfergus Town Housing Stress applicants time on list March 2021**

GROUP HNA AREA	Comp HH	0-6 Mths	6-12 Mths	1-2 years	2 - 4 years	4+ years	Total Apps	Ave Months on WL
<b>Carrickfergus Town</b>	<b>Single</b>	24	22	51	57	41	195	35
	<b>Small Adult</b>	<10	<10	<10	<10	<10	33	42
	<b>Small Family</b>	14	11	26	49	36	136	37
	<b>Large Adult</b>	<10	0	<10	<10	11	17	75
	<b>Large Family</b>	<10	<10	<10	<10	11	25	43
	<b>Older Person</b>	20	<10	23	20	52	124	60

**Table 91: Larne Town Waiting List – March 2021**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	158	18	75	<10	28	78	<b>365</b>
<b>HS Applicants</b>	92	10	37	<10	13	57	<b>212</b>
<b>Allocations</b>	31	<10	10	0	<10	17	<b>64</b>

Applicants – Housing applicants at March 2021  
HS Applicants – Housing stress applicants at March 2021 (i.e. 30 points or more)  
Allocations – Annual allocations for year ending March 2021



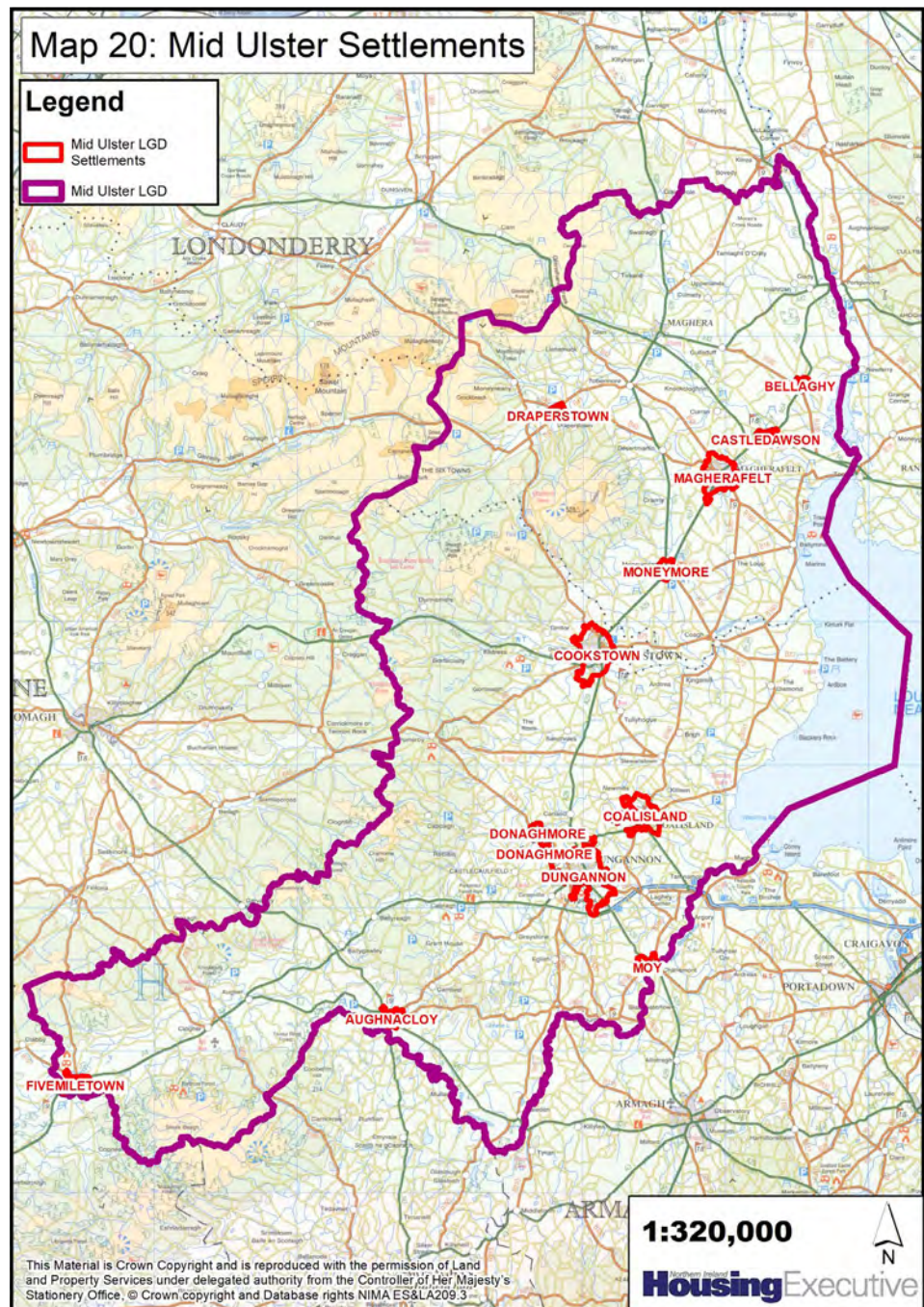
**Table 92: Larne Town Housing Stress applicants time on list March 2021**

<b>GROUP HNA AREA</b>	<b>Comp HH</b>	<b>0-6 Mths</b>	<b>6-12 Mths</b>	<b>1-2 years</b>	<b>2 - 4 years</b>	<b>4+ years</b>	<b>Total Apps</b>	<b>Ave Months on WL</b>
<b>Larne Town</b>	<b>Single</b>	21	17	24	19	11	92	27
	<b>Small Adult</b>	<10	<10	<10	<10	<10	10	24
	<b>Small Family</b>	<10	<10	<10	15	<10	37	34
	<b>Large Adult</b>	<10	<10	<10	<10	<10	<10	88
	<b>Large Family</b>	<10	<10	<10	<10	<10	13	29
	<b>Older Person</b>	<10	<10	<10	23	19	57	52

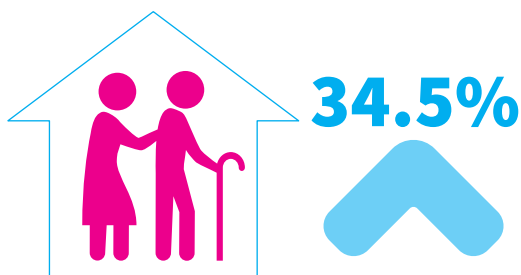
# Mid Ulster District

## Context

The Mid Ulster District Council area covers an area extending to 1,714 Km<sup>2</sup> extending from Swatragh and Bellaghy in the north to Fivemiletown, Aughnacloy and Moy in the South. The population of the District is estimated to increase by 7.9% to 160,197 in 2029. The estimated population in 2019, 148,528, represented 7.8% of the NI population of Northern Ireland. One third of the population lives in urban areas while two thirds inhabit rural areas. The principal towns within the district are Cookstown, Coalisland, Dungannon, Magherafelt and Maghera.



The range of facilities, recreational opportunities and its strategic location at the heart of Northern Ireland make the area an attractive place to live and work. Although much of the district is in excess of 50 miles from Belfast, many settlements are close to the A6 (leading to the M2) or the M1, both of which create easy access to Belfast.



Population growth will be mainly concentrated in the 65 plus age group which is projected to grow by 34.5% over the ten-year period 2019-2029

In contrast, the population of children 0 – 15 years is projected to decrease by 1.7% and the working age population to increase by 5.2%.

According to the Annual Survey of Hours and Earnings (ASHE), within the district, there are 64,000 jobs, 6.7% of the 949,000 jobs across Northern Ireland in 2020. The most recently available Labour Force Survey statistics at the end of 2019 shows 77.6% of the working age population were economically active above the 73.8% recorded for Northern Ireland. In 2020, the annual full-time median wage for residents in the area was £452.10 per week, a decrease of 5.7% on the previous year. This compares to the overall Northern Ireland weekly basic full-time median wage of £528.60, a decrease of 1.1% on the 2019 figure (ASHE).



In 2020, the annual full-time median wage for residents in the area was £452.10 per week, a decrease of 5.7% on the previous year

### COVID-19

The Coronavirus pandemic is likely to have an impact on the socio-economic development of the local area moving forward. The labour market is also likely to face adjustments given the economic challenges and changes to the way society operates. For example, through an increased reliance on online goods and service providers and increased numbers of people homeworking.

# Housing Market Analysis (across tenures)

## Housing & Land Supply



**NEW DWELLING REQUIREMENT**

The district has a Housing Growth Indicator (HGI) projection of new dwellings required of 10,300 for 2016-2030

- During 2020, there were 534 new dwelling starts in Mid Ulster which is less than the projected new dwelling requirement as estimated by the HGI 2016-30 of 687 per annum;



**NEW DWELLING STARTS**

Land and Property Services (LPS) statistics show that over the 2016 to 2020 period, there were 3,563 new dwelling starts and 3,556 new dwelling completions and in Mid Ulster

## Owner Occupied

- The general mood of positivity around the housing market continued in 2020/21 with sales and pricing activity accelerating as consumer confidence improved in line with the easing of restrictions and the wider economic recovery. Borrowing costs are exceptionally low by historic standards and ongoing lender competitiveness suggests this may improve further in the coming months. Underlying demand remains at exceptionally high levels and reduced property stock has put upward pressure on prices, particularly for larger properties in desirable areas. There are still uncertainties around the longer term impacts of COVID-19 on the housing market and wider economy;
- The Bank of England cut interest rates from 0.75% to 0.25% initially and then further to 0.1%, the lowest level on record, in response to the COVID-19 pandemic. At the most recent Monetary Policy Committee meeting held in August 2021, members voted unanimously for the Bank of England to maintain the Bank Rate at 0.1%. Although this is seen as a temporary measure any increases in interest rates are expected to be slow and gradual. Existing mortgagors may see this as an opportunity to re-mortgage at more favourable rates;
- According to the Northern Ireland House Condition Survey 2016 owner occupiers make up 69% of all tenures in the district;
- The number of house sales in Mid Ulster has increased from 720 in 2012 to 1,406 in 2019 before decreasing by 286 to 1,120 in 2020; (LPS)
- The average house price for Mid Ulster fluctuated between 2012 and 2020. House prices have increased to £164,016 in 2020, an increase of 4.5% over the past year. Properties in Mid Ulster

are £16,063 lower than the Northern Ireland average figure of £180,079.

- Popular locations in the district include the urban centres of Dungannon, Cookstown and Magherafelt;
- During 2019, there were 28 repossessions within Mid Ulster District, a slight increase over the previous year.

### Private Rented

- The private rented sector across Mid Ulster has seen an unprecedented increase in its tenure share and according to the House Condition Survey 2016, now accounts for 21% of all housing. Although first time buyers appear to be buying in the district, rented accommodation is now the accommodation of choice for many households, especially younger households on lower incomes who in previous decades would have become first time buyers;
- During the second half of 2019 and first half of 2020, there were 8,377 lettings in LGDs outside of Belfast, 7.3% (613) of those were within Mid Ulster District. (Performance of the Private Rental Market in Northern Ireland H1 2020 Ulster University);
- The overall average rent in the district in 2020 was £552 per month, an increase of £16 from £536 over the year, but well below the Northern Ireland average of £658 per month;
- Housing Benefit continues to play a vital role in supporting the private rented sector. At March 2021, there were 2,964 private tenants in receipt of Housing Benefit in the district, an 8.7% decrease on the 2020 figure. A key factor in this reduction is the introduction of Universal Credit.

**3,709**   
**PROPERTIES REGISTERED**

Within Mid Ulster, 3,709 private rented properties were registered by 2,805 landlords under the DfC's Landlord Registration scheme at March 2021. The registration scheme will provide evidence to assist monitoring and regulation of the sector



## Social Rented Housing Sector

- The social housing share of the housing market in Mid Ulster was 10% at 2016 (Northern Ireland House Condition Survey 2016);
- Census 2011 also showed that the social rented stock in the district (4,395 units) has fallen by 15% compared to the 2001 figure (5,960);
- There were 30 new social housing units completed and a further 93 social housing units on site in the year to March 2021;
- Fifteen Housing Executive properties were sold in the year to March 2021;
- COVID-19 is likely to continue to have an impact on the social housing sector with the economic impacts of the pandemic potentially resulting in increased demand for social housing across Northern Ireland;
- At March 2021, there were 831 Housing Executive tenants in receipt of the Housing Cost element of Universal Credit.



Housing Executive stock at March 2021 was 3,855, with 7,651 properties sold since the commencement of the ‘Right to Buy’ scheme



## Social Housing Need

Social Housing Need is considered against each of the following subheadings:

- General Housing Need (Urban & Rural)**
- Shared Future Demand**
- Supported Housing Need**
- Wheelchair Housing Need**
- Travellers’ accommodation requirements**

### General Needs Housing (Urban & Rural)

#### Urban

The Strategic Guidelines have established that for Year 1 of the Social Housing Development Programme, 2.7% (urban) and 9.7% (rural) units have been allocated to Mid Ulster. Five year projected need for the area as a whole is 780 and the projected need for individual settlements is detailed in Table 93.

**Table 93: Projected (5-Year) Social Housing Need 2021-26**

Settlement	Housing Need Assessment Area*	Total 5 Year Projection
<b>Cookstown North</b>	Cookstown North	<b>29</b>
<b>Cookstown South</b>	Cookstown South	<b>58</b>
<b>Dungannon 1</b>	Dungannon 1	<b>241</b>
<b>Dungannon 2</b>	Dungannon 2	<b>42</b>
<b>Magherafelt</b>	Magherafelt	<b>99</b>
<b>Coalisland</b>	Coalisland	<b>129</b>
<b>Maghera</b>	Maghera	<b>20</b>
<b>Ardboe / Moortown / Ballinderry*</b>	Ardboe / Moortown / Ballinderry*	<b>10</b>
<b>Ballygawley</b>	Ballygawley	<b>10</b>
<b>Castledawson</b>	Castledawson	<b>22</b>
<b>Donaghmore</b>	Donaghmore	<b>19</b>
<b>Draperstown</b>	Draperstown	<b>17</b>
<b>Moy</b>	Moy	<b>31</b>
<b>Remaining Settlements**</b>	Remaining Settlements**	<b>53</b>
<b>Total</b>		<b>780</b>

Housing need has currently been met in Moygashel, Ackinduff/ Sheer’s Place\*, Augher, Ballymaguigan, Ballyronan, Caledon, Clogher, Coagh/Lisnahull\*, Cookstown Rural Cottages, Fivemiletown, Gulladuff, Innishrush, Knockloughrim, Loup, Magherafelt Rural, Mountjoy, Sandholes, The Rock, Tobermore, and Upperlands. These areas will be kept under annual review.

\*Some settlements may include a number of small settlements grouped together for waiting list purposes – where this occurs all settlements within the grouped HNA are listed.

\*\* Remaining settlements includes:- Aghnacloy, Bellaghy, Benburb, Bush, Cappagh, Castlecaulfield, Granville/Brantry\*, Lissan/Dunamore\*, Moneymore, Newmills, Pomeroy, Stewartstown, Swatragh and Tullyhogue, where need in each settlement is less than 10.

Please note that in relation to those settlements with <10 projected need, the Housing Executive will consider Housing Association development opportunities or Existing Satisfactory Purchases (ESP). In addition, if land can be identified that may provide for more than current projected social need suggests, the Housing Executive Place Shaping and Rural Units may be able to assist in Rural Needs Tests (RNT) or other marketing exercises to identify hidden additional social and mixed tenure demand.

The following comments are relevant to housing need within the Council area:

- Housing need for Mid Ulster has remained at a consistently high level between 2012 and 2021. Need is concentrated mainly in urban areas chiefly the west of Dungannon town, Coalisland and Magherafelt;
- Dungannon 1, which lies to the western side of the town, continues to demonstrate the highest demand. Site selection should be carefully considered so as not to destabilise established areas, including Ballygawley Road and Lisnahull. There is a high requirement for small unit accommodation plus wheelchair and bespoke complex needs units;
- The preparation of a pilot Dungannon Place Shaping plan is currently underway by the Community Planning Partnership, with the local council and respective public sector delivery partners. The consolidation of emerging land use aspirations is considered essential moving forward given the high volume of apartment proposals received for the town centre. The plan is due to complete shortly having been delayed by the pandemic;
- Within Magherafelt, the Leckagh area of the town should be precluded because of letting difficulties and housing management issues;
- Cookstown North lies north of Fairhill Road and Molesworth Street within the town boundary, Cookstown South lies to the south;
- Within Cookstown South, there is the potential for Housing for All and the sourcing of sites for this purpose would be welcomed;
- Future housing mix in new build developments will need to cater for singles, small families, older persons and wheelchair / complex needs households;
- The development of mixed tenure schemes would be welcomed and encouraged in Mid Ulster;
- There is a limited need remaining for Cat 1 accommodation throughout the district. Contact should be made with Place Shaping South Region at an early stage who can advise in what areas a remaining unmet Cat 1 need exists;
- Across Mid Ulster there are variations in patterns of demand;
- The Housing Executive continues to monitor the availability of surplus public sector sites across the district and we continue to engage with our partners through the Community Planning partnership with regard to the strategic review of land assets;
- Dwelling type should therefore comprise 1 and 2 bedroom design forms with emphasis on accessibility. Where possible, dwellings should be designed flexibly to cater for potential household growth;
- Where possible, the provision of independent access for one bedroom units is preferred to limit possible issues with anti-social behaviour;

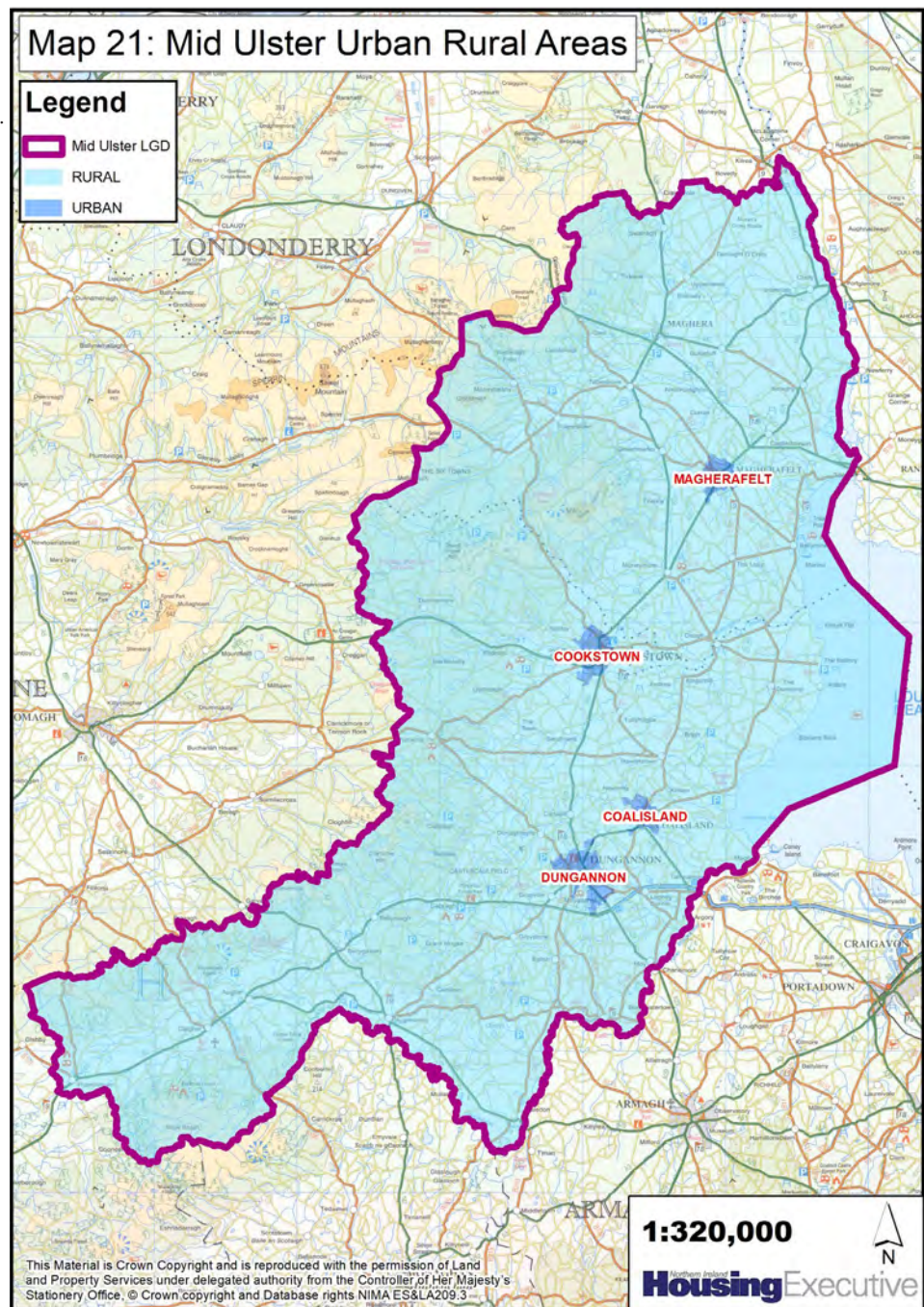
- Some 3 bed properties may be required for families and these should be discussed with the Housing Executive. There may also be a requirement for a small number of 4 bed properties for large families;
- Accommodation for older persons should be designed flexibly with long term accessibility issues taken into consideration, with generic wheelchair units to be included in schemes where possible;
- Within the Mid Ulster area, there is a high requirement for a number of generic bungalow units for complex needs applicants. Generic wheelchair houses with through floor lifts have been deemed unsuitable for these applicants by Occupational Therapists and a number of these cases have gone to judicial review because of lengthy waiting times for suitable housing;
- Within urban areas, the indicative housing mix should be 30% Single Persons, 60% Families and 10% Older Persons. Wheelchair units should make up 10% of the housing mix across all groups;
- Family households include 2, 3 and 4 bed units. Place Shaping, South Region will provide further detail on the housing mix required for families upon request;
- Alternative mixes can be considered by Housing Associations in relation to specific sites or scheme types. However, significant changes from the above mix should be discussed with the Housing Executive to avoid nugatory work.

## Rural

The provision of new social housing in rural settlements represents a strategic priority for delivery of the Social Housing Development Programme. The rural target share for Year 1 of the SHDP (2022/23) is 12.9% of the overall programme based on average levels of housing stress in rural areas.

In every case, it will be important to understand the localised nature of rural housing need and the alternative settlements that rural applicants are likely to consider. The Housing Executive’s Rural Unit will support housing providers by providing initial desk-top evidence of potential need based on neighbouring waiting lists and by facilitating subsequent rural needs testing and marketing.

In some rural areas, there are no available sites within the development limit and a large percentage of public owned stock is sold. As a result of this, there are limited housing opportunities in these locations which has led to the development of latent need.



## Indicative Housing Mix Requirements

- At March 2021 there were 353 applicants in rural Mid Ulster in housing stress (27.9% of the total waiting list). Whilst the Housing Executive work closely with rural communities to identify housing need, Housing Association delivery of new social housing schemes is becoming increasingly difficult. This is due to the smaller numbers often required in rural schemes and the economies of scale associated with delivery and management.

**Table 94: Indicative housing mix for Mid Ulster District**

Older Persons	Families*	Singles	Wheelchair
10%	60%	30%	10%

\* Family households include 2, 3 and 4 bed units. Place Shaping, South Region will provide further detail on the housing mix required for families upon request.

## Areas where need is met

Housing need has currently been met in Moygashel, Ackinduff/ Sheer’s Place, Augher, Ballymaguigan, Ballyronan, Caledon, Clogher, Coagh/Lisnahull, Cookstown Rural Cottages, Fivemiletown, Gulladuff, Innishrush, Knockloughrim, Loup, Magherafelt Rural, Mountjoy, Sandholes, The Rock, Tobermore, and Upperlands. These areas will be kept under annual review.

## Rural Areas

Based on the waiting list for social housing, at March 2021, the current projected need for rural areas within Mid Ulster Council is for 182 units. Taking account of new build schemes on the current SHDP, the residual housing need is focused in the settlements of Ardboe / Moortown / Ballinderry, Aughnacloy, Ballygawley, Bellaghy, Benburb, Bush, Cappagh, Castlecaulfield, Castledawson, Donaghmore, Draperstown, Granville/Brantry, Lissan/Dunamore, Moneymore, Moy, Newmills, Pomeroy, Stewartstown, Swatragh and Tullyhogue, where need in each settlement is less than 10. Proposals for social housing in these locations will be welcomed and given due consideration.

Site Identification Studies (SIS) have been completed for Ballyronan, Donaghmore and Moy, Brockagh, Dernagh/Clonoe, Eglis, Drumullan, Galbally, Ardboe, Cappagh, Ballinderry and Killeen over the past year. A SIS List containing Housing Associations areas of interest and rank by scheme delivery has been drawn up. The allocation of SIS’s will be made on this basis.

During 2020/21, rural needs tests took place in Longfields/Desertmartin, Gulladuff and Ballyronan. A test is underway in Clonoe.

It is recognised that there may be neighbouring rural settlements where demand has not yet been identified but where land may still be available. The Housing Executive will take account of the potential for ‘hidden’ or ‘latent’ demand within such areas if and when Housing Associations identify potential sites. Should sites come to the attention of Housing Associations, the Housing Executive will seek to assist in assessing any hidden need by way of rural needs testing if appropriate. We continue to work closely with rural communities to identify housing need.



## Wheelchair Housing Need (HNA)

The total projected wheelchair housing requirement for Mid Ulster is 23 units.

At April 2021, there were 20 housing stress applicants and a small number of transfer housing stress applicants who require wheelchair accommodation with less than 10 allocations over the last year. Housing need for wheelchair units is concentrated mainly in Dungannon 1, Magherafelt, and Cookstown South.

Housing Associations should actively discuss the inclusion of generic wheelchair units within suitable schemes with the Head of Place Shaping. Generic wheelchair units should be for 2 and 3 bed units and built in line with the space standards included in the Housing Association Guide.

## Shared Future Demand

The Housing Executive actively encourages mixed tenure and Housing for All (shared future) housing. Housing Associations bringing forward suitable proposals for Housing for All designation would be welcomed.

## Traveller's accommodation

Consultation has been completed and agreement obtained to refurbish the washrooms on the existing footprint at The Glen, Coalisland at a cost of circa £450k. It is anticipated that works will begin during the 4th quarter of 2021/22.

A need has been identified for a two pitch serviced site in Magherafelt. The Housing Executive will seek to identify a suitable site and planning permission for such provision.

Future Irish Traveller accommodation requirements are reviewed annually. The Housing Executive has initiated research into developing a new assessment methodology for Irish Travellers as set out in the Irish Travellers Accommodation Strategy 2021-26. The research programme is scheduled to complete in November 2022.



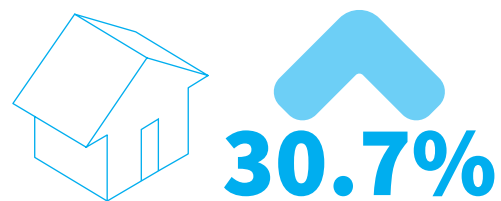
## Intermediate (Affordable) Demand

- The Housing Executive estimates intermediate/affordable housing demand for Mid Ulster is 135 units per annum;
- Co-Ownership had an active stock of 574 dwellings at March 2021, 96 of which were purchased during 2020/21;



Co-Ownership assisted with the purchase of 96 properties in Mid Ulster in 2020/21

- In general, house prices in Mid Ulster are lower than Northern Ireland;
- Average house prices in Northern Ireland increased by 20.5% between 2015 and 2020;



Average house prices in Mid Ulster have increased by 30.7% over the past 7 years

**Table 95: Average Annual House Prices Mid Ulster District & NI 2015-2020**

Area	2015	2016	2017	2018	2019	2020	% Change 2015-2020
<b>Mid Ulster</b>	125,503	140,339	141,988	154,706	156,879	164,016	30.7
<b>Northern Ireland</b>	149,449	154,028	155,049	163,128	169,057	180,079	20.5

## Mid Ulster Supporting Data

**Table 96: Mid Ulster Waiting List – March 2021**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	850	132	618	93	202	263	<b>2,158</b>
<b>HS Applicants</b>	531	71	340	52	110	163	<b>1,267</b>
<b>Allocations</b>	121	13	77	<10	32	32	-

Applicants – Housing applicants at March 2021

HS Applicants – Housing stress applicants at March 2021 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2021

**Table 97: Dungannon 1 Waiting List – March 2021**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	195	47	206	32	74	30	<b>584</b>
<b>HS Applicants</b>	139	25	120	19	48	24	<b>375</b>
<b>Allocations</b>	10	<10	25	<10	13	<10	-

Applicants – Housing applicants at March 2021

HS Applicants – Housing stress applicants at March 2021 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2021

**Table 98: Dungannon 1 Housing Stress applicants time on list March 2021**

Household	0-6 Mths	6-12 Mths	1-2 years	2 - 4 years	4+ years	Total	Average Months on WL
<b>Single</b>	25	23	27	32	32	<b>139</b>	<b>36</b>
<b>Small Adult</b>	<10	<10	<10	<10	<10	<b>25</b>	<b>33</b>
<b>Small Family</b>	19	<10	21	37	36	<b>120</b>	<b>41</b>
<b>Large Adult</b>	<10	<10	<10	<10	<10	<b>19</b>	<b>44</b>
<b>Large Family</b>	<10	<10	10	11	25	<b>48</b>	<b>53</b>
<b>Older Person</b>	<10	<10	<10	<10	11	<b>24</b>	<b>84</b>
<b>Total</b>	-	-	-	-	-	<b>375</b>	<b>43</b>

**Table 99: Magherafelt Waiting List – March 2021**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	109	14	64	16	32	46	<b>281</b>
<b>HS Applicants</b>	66	<10	31	11	17	18	-
<b>Allocations</b>	11	<10	<10	<10	0	<10	<b>17</b>

Applicants – Housing applicants at March 2021

HS Applicants – Housing stress applicants at March 2021 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2021

**Table 100: Magherafelt Housing Stress applicants time on list March 2021**

Household	0-6 Mths	6-12 Mths	1-2 years	2 - 4 years	4+ years	Total	Average Months on WL
<b>Single</b>	<10	<10	16	12	20	<b>66</b>	<b>39</b>
<b>Small Adult</b>	<10	<10	<10	<10	<10	<b>&lt;10</b>	<b>71</b>
<b>Small Family</b>	<10	<10	<10	14	<10	<b>31</b>	<b>37</b>
<b>Large Adult</b>	<10	<10	<10	<10	<10	<b>11</b>	<b>24</b>
<b>Large Family</b>	<10	<10	<10	<10	<10	<b>17</b>	<b>32</b>
<b>Older Person</b>	<10	<10	<10	<10	11	<b>18</b>	<b>75</b>
<b>Total</b>	-	-	-	-	-	-	<b>43</b>

**Table 101: Coalisland Waiting List – March 2021**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	79	<10	66	<10	14	16	<b>190</b>
<b>HS Applicants</b>	-	<10	42	<10	<10	13	<b>119</b>
<b>Allocations</b>	14	<10	11	<10	<10	<10	<b>35</b>

Applicants – Housing applicants at March 2021

HS Applicants – Housing stress applicants at March 2021 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2021

**Table 102: Coalisland Housing Stress applicants time on list March 2021**

Household	0-6 Mths	6-12 Mths	1-2 years	2 - 4 years	4+ years	Total	Average Months on WL
<b>Single</b>	<10	10	12	11	11	-	<b>33</b>
<b>Small Adult</b>	<10	<10	<10	<10	<10	<b>&lt;10</b>	<b>46</b>
<b>Small Family</b>	<10	<10	<10	<10	19	<b>42</b>	<b>54</b>
<b>Large Adult</b>	<10	<10	<10	<10	<10	<b>&lt;10</b>	<b>126</b>
<b>Large Family</b>	<10	<10	<10	<10	<10	<b>&lt;10</b>	<b>19</b>
<b>Older Person</b>	<10	<10	<10	<10	<10	<b>13</b>	<b>71</b>
<b>Total</b>	-	-	-	-	-	<b>119</b>	<b>48</b>

**Table 103: Cookstown South Waiting List – March 2021**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	101	11	73	13	20	26	<b>244</b>
<b>HS Applicants</b>	66	<10	38	<10	11	13	<b>141</b>
<b>Allocations</b>	<10	<10	<10	<10	<10	<10	<b>&lt;10</b>

Applicants – Housing applicants at March 2021  
HS Applicants – Housing stress applicants at March 2021 (i.e. 30 points or more)  
Allocations – Annual allocations for year ending March 2021

**Table 104: Cookstown South Housing Stress applicants time on list March 2021**

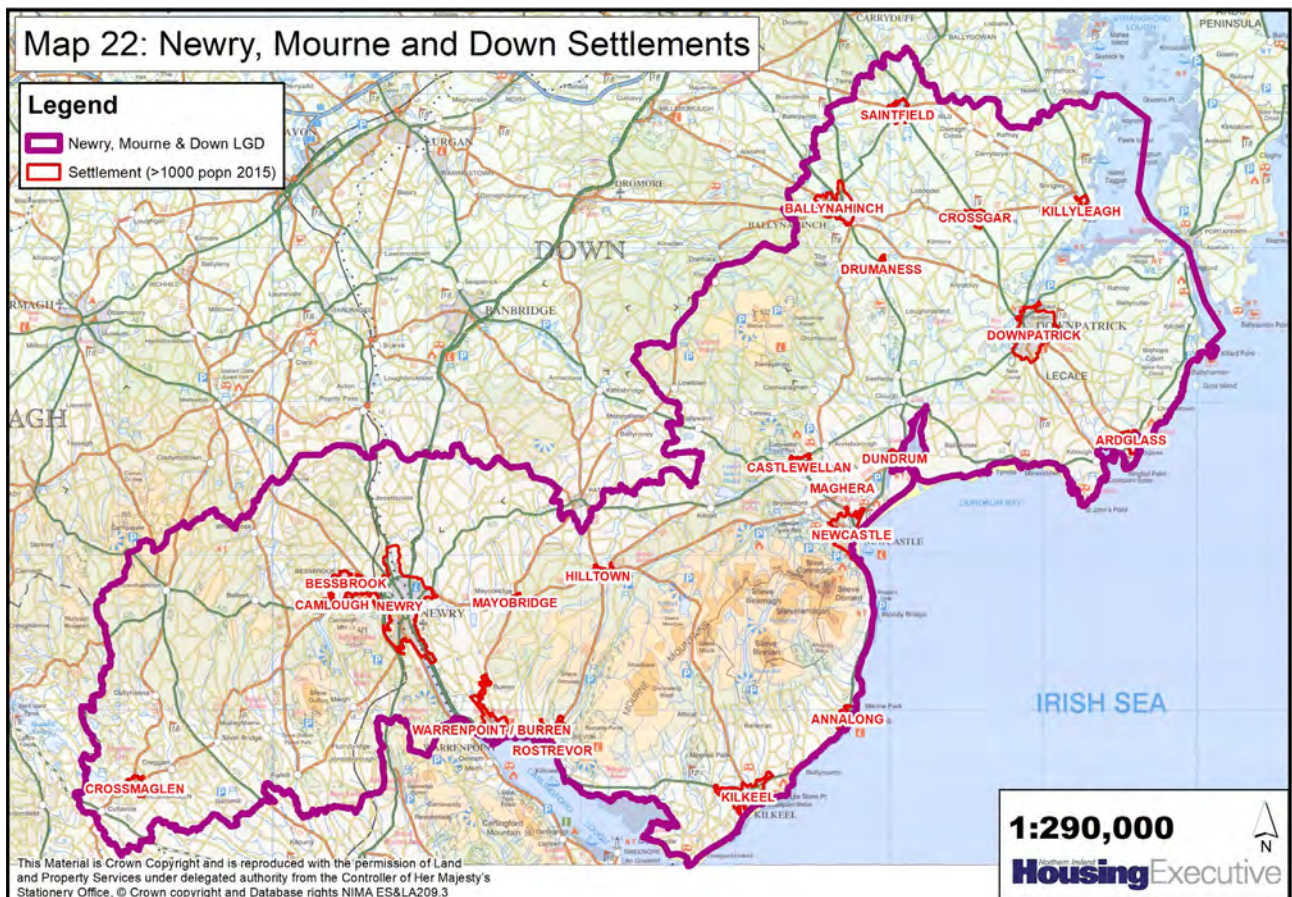
Household	0-6 Mths	6-12 Mths	1-2 years	2 - 4 years	4+ years	Total	Average Months on WL
<b>Single</b>	<10	12	19	15	14	<b>66</b>	<b>37</b>
<b>Small Adult</b>	<10	<10	<10	<10	<10	<b>&lt;10</b>	<b>89</b>
<b>Small Family</b>	<10	<10	<10	<10	14	<b>38</b>	<b>40</b>
<b>Large Adult</b>	<10	<10	<10	<10	<10	<b>&lt;10</b>	<b>45</b>
<b>Large Family</b>	<10	<10	<10	<10	<10	<b>11</b>	<b>34</b>
<b>Older Person</b>	<10	<10	<10	<10	<10	<b>13</b>	<b>59</b>
<b>Total</b>	-	-	-	-	-	<b>141</b>	<b>42</b>

# Newry, Mourne and Down

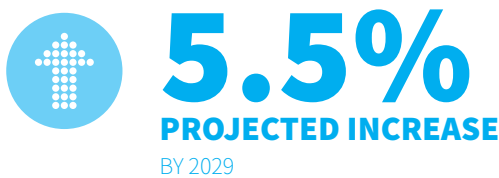
## Context

Newry, Mourne and Down District is an attractive location for business. Newry City is strategically placed on the A1/M1 Belfast to Dublin corridor

and Downpatrick is in close proximity to Belfast. The district is well served with a strong retail offering and diverse range of service industries, manufacturing and agri-food businesses.

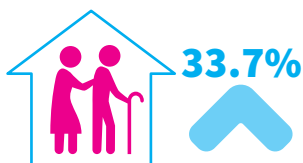


This district is renowned for its scenic beauty, bounded on the east by Strangford Lough and Carlingford Lough, on the west by Slieve Gullion and Slieve Croob, with the Mountains of Mourne at the centre making it an attractive place to live and work. The district has a growing population of approximately 180,012 and is the 3rd largest Council in Northern Ireland, making up approximately 11% of the total land area.



The population of Newry, Mourne and Down District is projected to increase by 5.5% to 191,338 in 2029

The district accounted for 9.6% of the overall Northern Ireland population at 2019 and is the third most highly populated local government district behind Belfast and Armagh City, Banbridge and Craigavon. There is a projected decrease in 0-15 year olds by 1.8% and a slight increase by 1.0% in the working age population.



Projected population growth in the district will be concentrated mainly in the 65 plus age group which is projected to increase by 33.7% over the ten-year period to 2029

According to the Annual Survey of Hours and Earnings (ASHE), within the district, there are 74,000 jobs, 7.8% of the 949,000 jobs across Northern Ireland in 2020. The most recently available Labour Force Survey statistics at the end of 2019 shows 75.6% of the working age population were economically active, above the 73.8% recorded for Northern Ireland. In 2020, the annual full-time median wage for residents in the area was £499.50 per week, a decrease of 2.5% on the previous year. This compares to the overall Northern Ireland weekly basic full-time median wage of £528.60, a decrease of 1.1% on the 2019 figure (ASHE).



In 2020, the annual full-time median wage for residents in the area was £499.50 per week, a decrease of 2.5% on the previous year

**COVID-19**

The Coronavirus pandemic is likely to have an impact on the socio-economic development of the local area moving forward. The labour market is also likely to face adjustments given the economic challenges and changes to the way society operates. For example, through an increased reliance on online goods and service providers and increased numbers of people homeworking.



# Housing Market Analysis (across tenures)

## Housing & Land Supply



The district has a Housing Growth Indicator (HGI) projection of new dwelling required of 10,000 for 2016-2030

- During 2020, there were 724 new dwelling starts in Newry, Mourne and Down which is more than the projected new dwelling requirement as estimated by the HGI 2016-2030 of 667 per annum;



Land and Property Services (LPS) statistics show that over the 2016 to 2020 period, 3,851 new dwelling starts commenced and 3,212 new dwelling completed in Newry, Mourne and Down district

## Owner Occupied

- According to the Northern Ireland House Condition Survey 2016, owner occupiers make up 68% of all tenures in the district;
- The number of house sales in Newry, Mourne and Down has increased from 919 in 2012 to 1,845 in 2019 before falling by 300 to 1,554 in 2020 (LPS);
- The average house price for Newry, Mourne and Down fluctuated between 2012 and 2020. House prices decreased by 1.4% to £162,181 in 2019 but have since increased again to £180,132 in 2020. The Northern Ireland figure was slightly lower at £180,079 in 2020.
- Popular locations include Newry City, Newcastle, Warrenpoint, Bessbrook, Castlewellan and Downpatrick;
- The general mood of positivity around the housing market continued in 2020/21 with sales and pricing activity accelerating as consumer confidence improved in line with the easing of restrictions and the wider economic recovery. Borrowing costs are exceptionally low by historic standards and ongoing lender competitiveness suggests this may improve further in the coming months. Underlying demand remains at exceptionally high levels and reduced property stock has put upward pressure on prices, particularly for larger properties in desirable areas. There are still uncertainties around the longer term impacts of COVID-19 on the housing market and wider economy however;
- The Bank of England cut interest rates from 0.75% to 0.25% initially and then further to 0.1%, the lowest level on record, in response to the COVID-19 pandemic. At the most recent Monetary Policy Committee meeting held in August 2021,

members voted unanimously for the Bank of England to maintain the Bank Rate at 0.1%. Although this is seen as a temporary measure, any increases in interest rates are expected to be slow and gradual. Existing mortgagors may see this as an opportunity to re-mortgage at more favourable rates;

- During 2019, there were 27 repossessions within Newry, Mourne and Down District, a slight decrease over the previous year.

## Private Rented Sector

**4,603**  **PROPERTIES REGISTERED**

In Newry, Mourne and Down, 4,603 private rented properties were registered by 3,609 landlords under DfC's Landlord Registration scheme at March 2021. The registration scheme will provide evidence to assist monitoring and regulation of the sector

- The private rented sector across the district has seen an unprecedented increase in its tenure share and according to the House Condition Survey 2016 now accounts for 21% of all housing;
- During the second half of 2019 and first half of 2020, there were 8,377 lettings in LGDs outside of Belfast, 7.6% (636) of those were within Newry, Mourne and Down District. (Performance of the Private Rental Market in Northern Ireland H1 2020 Ulster University);
- The overall average rent in the district in 2020 was £585 per month, an increase of £29 from £556 over the year, but well below the Northern Ireland average of £658 per month;

- Housing Benefit continues to play a vital role in supporting the private rented sector. At March 2021, there were 4,439 private tenants in receipt of Housing Benefit in the district, an 8.3% decrease on the 2020 figure. A key factor in this reduction is the introduction of Universal Credit.

## Social Rented Housing Sector

- The social housing share of the housing market in Newry, Mourne and Down was 11% at 2016 (Northern Ireland House Condition Survey 2016);
- Census 2011 showed that the social rented stock in the district (6,176 units) has fallen by 26% compared to the 2001 (8,344) figure;

 **5,220** **HOUSING EXECUTIVE STOCK**

Housing Executive stock at March 2021 was 5,220 with 12,344 properties sold since the commencement of the 'Right to Buy' scheme

- There were 117 new social housing units completed and a further 576 social housing units on site in the year to March 2021;
- Fifteen Housing Executive properties were sold in the year March 2021;
- COVID-19 will undoubtedly continue to have an impact on the social housing sector with the economic impacts of the pandemic resulting in increased demand for social housing across Northern Ireland;
- At March 2021, there were 1,121 Housing Executive tenants in receipt of the Housing Cost element of Universal Credit.

## Social Housing Need

Social Housing Need is considered against each of the following subheadings:

- General Housing Need (Urban & Rural)**
- Shared Future Demand**
- Supported Housing Need**
- Wheelchair Housing Need**
- Travellers’ accommodation requirements**

### General Needs Housing (Urban & Rural)

#### Urban

The Strategic Guidelines have established that for Year 1 of the Social Housing Development Programme, 6.3% (urban) and 37.4% (rural) units have been allocated to the district. Five year projected need for the area as a whole is 1,773 and the projected need for individual settlements is detailed in Table 105.

**Table 105: Projected (5-Year) Social Housing Need 2021-26**

Settlement	Housing Need Assessment Area*	Total 5 Year Projection
<b>Newry City</b>	Newry City	<b>418</b>
<b>Downpatrick</b>	Downpatrick	<b>109</b>
<b>Annalong / Longstone / Glassdrumman*</b>	Annalong / Longstone / Glassdrumman*	<b>17</b>
<b>Ardglass</b>	Ardglass	<b>33</b>
<b>Ballynahinch</b>	Ballynahinch	<b>20</b>
<b>Bessbrook / Derramore*</b>	Bessbrook / Derramore*	<b>106</b>
<b>Camlough</b>	Camlough	<b>40</b>
<b>Castlewellan</b>	Castlewellan	<b>105</b>
<b>Crossgar</b>	Crossgar	<b>57</b>
<b>Crossmaglen</b>	Crossmaglen	<b>56</b>
<b>Culloville</b>	Culloville	<b>13</b>
<b>Drumaness</b>	Drumaness	<b>15</b>
<b>Dundrum / Seaford / Clough*</b>	Dundrum / Seaford / Clough*	<b>20</b>
<b>Forkhill</b>	Forkhill	<b>20</b>
<b>Hilltown</b>	Hilltown	<b>12</b>
<b>Kilkeel</b>	Kilkeel	<b>20</b>

*Table continues*

<b>Settlement</b>	<b>Housing Need Assessment Area*</b>	<b>Total 5 Year Projection</b>
<b>Killough</b>	Killough	<b>16</b>
<b>Killyleagh</b>	Killyleagh	<b>29</b>
<b>Mayobridge</b>	Mayobridge	<b>13</b>
<b>Meigh</b>	Meigh	<b>28</b>
<b>Mullaghbawn</b>	Mullaghbawn	<b>11</b>
<b>Newcastle</b>	Newcastle	<b>222</b>
<b>Newtowncloghogue</b>	Newtowncloghogue	<b>17</b>
<b>Rostrevor</b>	Rostrevor	<b>40</b>
<b>Saintfield</b>	Saintfield	<b>47</b>
<b>Strangford</b>	Strangford	<b>17</b>
<b>The Commons / Ballyholland*</b>	The Commons / Ballyholland*	<b>17</b>
<b>Warrenpoint</b>	Warrenpoint	<b>198</b>
<b>Remaining Settlements (need &lt;10)*</b>	Remaining Settlements**	<b>57</b>
<b>Total</b>	<b>Newry, Mourne and Down Total Social New Build Requirement</b>	<b>1,773</b>

Housing need has currently been met in Annsborough, Ballyrone, Creggan, Granite View, Newtownhamilton, Shrigley and Spa. These areas will be kept under annual review.

\*Some settlements may include a number of small settlements grouped together for waiting list purposes – where this occurs all settlements within the grouped HNA are listed.

\*\* Remaining settlements includes Attical, Ballykinler, Ballymartin, Ballyward, Belleek, Burren, Burrenbridge, Cullyhanna, Drumintee, Jonesborough, Kilcoo, Killeen, Kilmore (incl Loughinisland), Lurganare / Barnmeen\*, Mullaghglass, Silverbridge and Whitecross where need in each settlement is less than 10.

Please note that in relation to those settlements with <10 projected need, the Housing Executive will consider Housing Association development opportunities or Existing Satisfactory Purchases (ESP). In addition, if land can be identified that may provide for more than current projected social need suggests, the Housing Executive Place Shaping and Rural Units may be able to assist in Rural Housing Needs Testing or other marketing exercises to identify hidden additional social and mixed tenure demand.

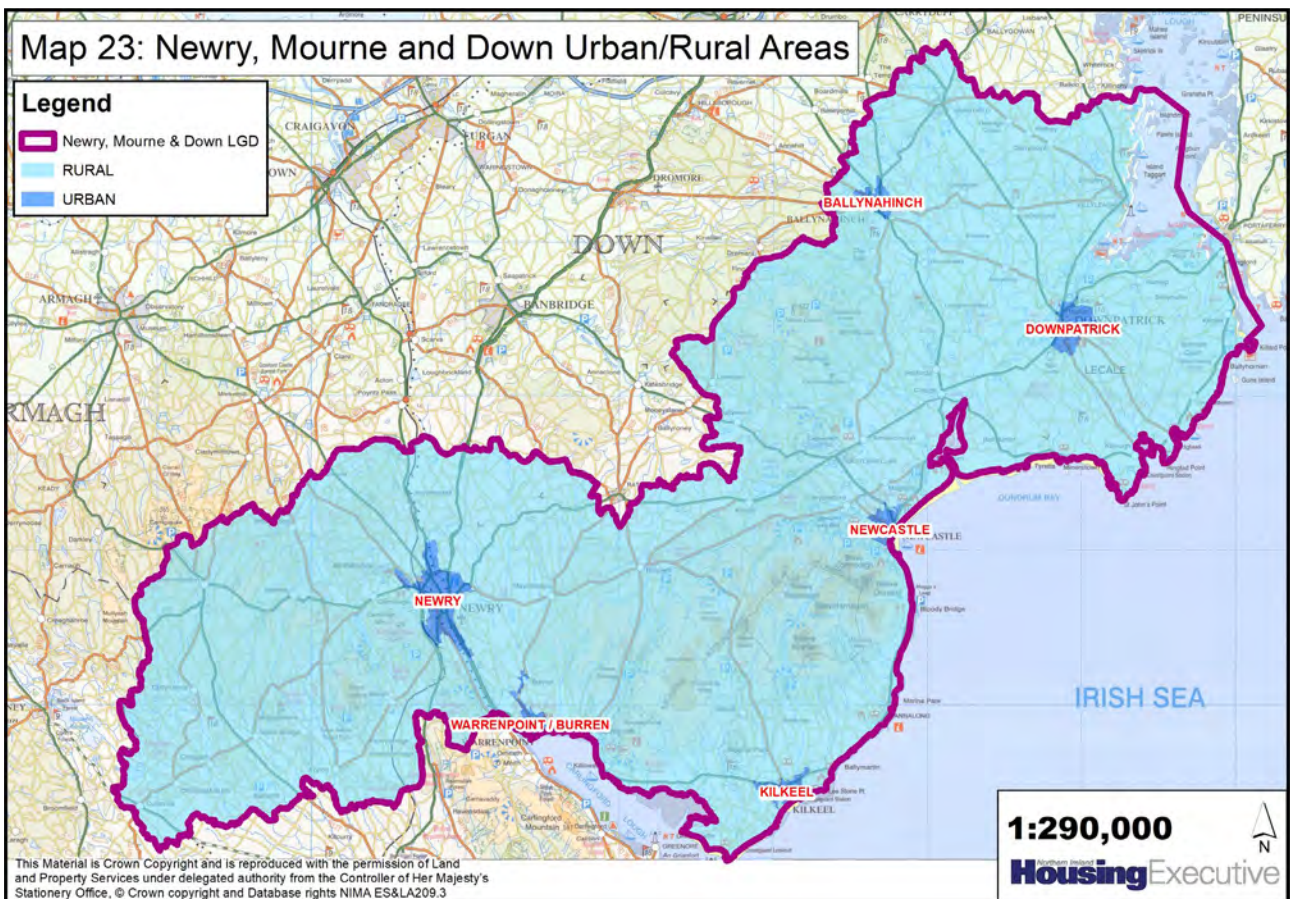
The following comments are relevant to housing need within the council area:

- Housing need for Newry, Mourne and Down has remained at a consistently high level between 2012 and 2021. Need is concentrated in the main urban settlements and some of the larger rural areas;
- Historically, much of the social housing need in Newry, Mourne and Down has been delivered by Housing Associations on Housing Executive land in Newry City, Bessbrook, Crossmaglen, Downpatrick, Mayobridge and Meigh;
- The majority of Housing Executive land has now been utilised for new build within the district. Remaining sites are subject to planning regulations, lack of development potential or financial unviability;
- Newry City continues to demonstrate the highest housing requirement within the district. All areas within the City are popular with applicants. Sites should be within the development limit of the City and not on arterial routes. Small unit accommodation remains a priority however the Housing Executive has received a very high volume of 2 bed apartment proposals in the City for consideration;
- Moving forward, apartment proposals should include the provision of one bedroom accommodation within the housing mix to cater for the very high single person housing requirement evident in all housing need assessment areas throughout the district. To limit possible housing management issues, independent access would be preferred for such units;
- There is a high requirement for 2 bed houses throughout Newry, Mourne and Down to cater for the needs of small families. Apartments are not considered suitable for this client grouping;
- Eighteen sites throughout the City have received a social housing zoning as per the Banbridge, Newry and Mourne Area Plan 2015. While some of these sites have come forward, a number have not, and Housing Associations would be encouraged to investigate those remaining for potential development opportunities;
- Mixed tenure schemes within Newry City would be particularly welcomed and encouraged;
- The Housing Executive continues to monitor the availability of surplus public sector sites across the district and we continue to engage with our partners through the Community Planning partnership with regard to the strategic review of land assets;
- There is a very high requirement for generic wheelchair and bespoke (bungalow) units for complex needs in Newry City and throughout the district. Proposed schemes should include the provision of generic units within the housing mix (DfC target 10%) unless financially unviable. The Housing Support Officer now has a long list of applicants who require generic bungalow accommodation as their Occupational Therapists have ruled out other generic options;
- There is a very high social housing requirement in Newcastle for all types of accommodation. The town is located within an Area of Outstanding Natural Beauty which presents challenges from a planning perspective. Due to the availability of older person accommodation in the town, this need is considered to be met. The provision of additional family accommodation would be greatly welcomed;

- Future housing mix in new build developments will need to cater for singles in particular, small families and wheelchair / complex needs households along with any potential changes associated with Welfare Reform. The provision of additional Cat 1 units will only be considered in areas where existing accommodation is at full occupancy;
- Dwelling type should therefore comprise 1 and 2 bedroom design forms with emphasis on accessibility. Where possible, dwellings should be designed flexibly to cater for potential household growth;
- Some 3 bed properties may be required for families and these should be discussed with the Housing Executive. There may also be a requirement for a small number of 4 bed properties for large families;
- Increasingly there are a number of families throughout the district who require 5 bedroom properties or larger to meet their housing needs. Any proposals that are able to include larger dwellings, where identified, within the housing mix would be welcomed;
- A number of Estate-Based Strategies which included selective demolition of unpopular stock were successfully delivered throughout Newry City and Downpatrick over the past two decades resulting in increased popularity and stability in these neighbourhoods;
- Site Identification Studies (SIS) have been completed for Newry City, Warrenpoint, Ardglass, Killough, Crossgar, Saintfield, Crossmaglen, Rostrevor, Newtowncloghogue, Mayobridge, Hilltown, Strangford, Ballyholland, Bessbrook, Newcastle and Camlough;
- SIS are ongoing for Raholp / Saul. A SIS List containing Housing Associations areas of interest and rank by scheme delivery has been drawn up. The allocation of SIS's will be made on this basis;
- We would welcome Housing Associations investigating the development potential of same, particularly those located in Warrenpoint and Rostrevor;
- Within urban areas, the indicative housing mix should be 35% Single Persons and 65% Families. Wheelchair units should make up 10% of the housing mix across all groups. Family accommodation includes 2, 3 and 4 bed units and Place Shaping, South Region will provide further detail on the housing mix required for family households upon request;
- Alternative mixes can be considered by Housing Associations in relation to specific sites or scheme types. However, significant changes from the above mix should be discussed with the Housing Executive to avoid nugatory work.



**Rural**



The provision of new social housing in rural settlements represents a strategic priority for delivery of the SHDP. The rural target share for Year 1 of the SHDP, 2022/23 is 12.9% of the overall programme based on average levels of housing stress in rural areas.

In some rural areas there are no available sites within the development limit and a large percentage of public owned stock is sold. As a result of this there are limited housing opportunities in these locations which has led to the development of latent need.

In every case, it will be important to understand the localised nature of rural housing need and the alternative settlements that rural applicants are likely to consider. The Housing Executive’s Rural Unit will support housing providers by providing initial desk-top evidence of potential need based on neighbouring waiting lists and by facilitating subsequent rural housing needs testing and marketing.

## Indicative Housing Mix Requirements

- At March 2021, there were 996 applicants in rural Newry, Mourne and Down in housing stress (33.5% of applicants in housing stress on the waiting list). Whilst we work closely with rural communities to identify housing need the Housing Association delivery of new social housing schemes is becoming increasingly difficult; This is due to the smaller numbers often required in rural schemes and the economies of scale associated with delivery and management;

**Table 106: Indicative housing mix for Newry, Mourne and Down**

Older Persons	Families*	Singles	Wheelchair
0%	65%	35%	10%

\* Family households include 2, 3 and 4 bed units. Place Shaping, South Region will provide further detail on the housing mix required for families upon request.

## Areas where need is met

- Housing need has currently been met in Annsborough, Ballyrone, Creggan, Granite View, Newtownhamilton, Shrigley and Spa. These areas will be kept under annual review;
- The above rural settlements exhibit no projected housing need and do not accept overspill from nearby settlements;
- During 2020/21 rural housing needs tests had taken place in Raholp / Saul and Ballyalton.

## Rural Areas

Based on the waiting list for social housing, at March 2021, the current projected need for rural areas within Newry, Mourne and Down Council is for 787 units. Taking account of new build schemes on the current SHDP, the following settlements have a residual housing need of ten or above:-

**Table 107: Settlements with a residual housing need >10**

Ardglass	Bessbrook / Derramore
Camrough	Castlewellan
Crossgar	Crossmaglen
Culloville	Drumaness
Dundrum / Seaford / Clough	Forkhill
Hilltown	Killough
Killyleagh	Mayobridge
Meigh	Mullaghbawn
Newtowncloghogue	Rostrevor
Saintfield	Strangford
The Commons/ Ballyholland	

\*\* Remaining settlements includes Attical, Ballykinler, Ballymartin, Ballyward, Belleek, Burren, Burrenbridge, Cullyhanna, Drumintee, Jonesborough, Kilcoo, Killeen, Kilmore (incl Loughinisland), Lurganare / Barnmeen\*, Mullaghglass, Silverbridge and Whitecross where need in each settlement is less than 10.

Proposals for social housing in these locations will be welcomed and given due consideration.

Bessbrook is a very popular choice with applicants and an overspill area for Newry City and nearby rural settlements. Castlewellan is also a particularly popular rural location and an overspill area for Newcastle.

There is an urgent requirement for bespoke (bungalow) complex needs accommodation in Crossmaglen.

Two sites within Rostrevor received social housing zonings as per the Banbridge, Newry and Mourne Area Plan 2015. Neither has progressed to date.

It is recognised that there may be neighbouring rural settlements where demand has not yet been identified but where land may still be available. The Housing Executive will take account of the potential for 'hidden' or 'latent' demand within such areas if and when Housing Associations identify potential sites. Should sites come to the attention of Housing Associations, the Housing Executive will seek to assist in assessing any hidden need by way of rural housing needs testing if appropriate. The Housing Executive continues to work closely with rural communities to identify housing need.

## Wheelchair Housing Need (HNA)

The total projected wheelchair housing requirement for Newry, Mourne and Down is 94 units.

At 1 April 2021, there were 72 housing stress applicants and 30 transfer applicants who require wheelchair accommodation with less than 10 allocations over the last year. Housing need for wheelchair units is concentrated mainly in Downpatrick, Newry City and Newcastle.

Housing Associations should actively discuss the inclusion of generic wheelchair units within suitable schemes with the Head of Place Shaping. In general, generic wheelchair units should be for 2 and 3 bed units and built in line with space standards included in the Housing Association Guide.

## Shared Future Demand

The Housing Executive actively encourages mixed tenure and Housing for All (shared future) housing. Housing Associations bringing forward suitable proposals for Housing for All designation would be welcomed.

## Traveller's accommodation

The need for Irish Traveller accommodation is currently met in Newry, Mourne and Down. Future Irish Traveller accommodation requirements are reviewed annually. The Housing Executive has initiated research into developing a new assessment methodology for Irish Travellers as set out in the Irish Travellers Accommodation Strategy 2021-26. The research programme is scheduled to complete in November 2022.

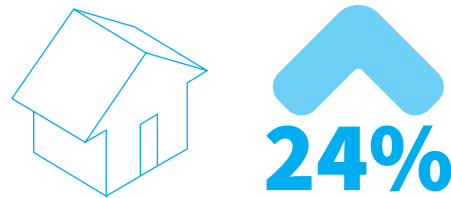
## Intermediate (Affordable) Demand

- The Housing Executive estimates intermediate/affordable housing demand for Newry, Mourne and Down is 141 units per annum between 2020-2030;
- Co-Ownership had an active stock of 554 dwellings at March 2021, 59 of which were purchased during 2020/21;



Co-Ownership assisted with the purchase of 59 properties in Newry, Mourne and Down in 2020/21

- In general, house prices in Newry, Mourne and Down had been lower than the Northern Ireland average, however at 2020 the Newry, Mourne and Down average was slightly higher than the Northern Ireland average;
- Average house prices in Northern Ireland increased by 20.5% between 2015 and 2020;



Average house prices in Newry, Mourne and Down have increased by 24.0% over the past six years

**Table 108: Average Annual House Prices Newry, Mourne and Down & NI 2015-2020**

Area	2015	2016	2017	2018	2019	2020	% Change 2015-2020
<b>Newry, Mourne and Down</b>	145,304	145,228	157,674	164,496	162,181	180,132	24.0
<b>Northern Ireland</b>	149,449	154,028	155,049	163,128	169,057	180,079	20.5



**Table 112: Newcastle Waiting List – March 2021**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	223	16	77	<10	21	92	-
<b>HS Applicants</b>	185	11	59	<10	16	-	-
<b>Allocations</b>	21	<10	<10	<10	<10	<10	-

Applicants – Housing applicants at March 2021

HS Applicants – Housing stress applicants at March 2021 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2021

**Table 113: Newcastle Housing Stress applicants time on list March 2021**

Household	0-6 Mths	6-12 Mths	1-2 years	2 - 4 years	4+ years	Total	Average Months on WL
<b>Single</b>	27	18	38	49	53	<b>185</b>	<b>38</b>
<b>Small Adult</b>	<10	<10	<10	<10	<10	<b>11</b>	<b>88</b>
<b>Small Family</b>	<10	<10	10	17	20	<b>59</b>	-
<b>Large Adult</b>	0	<10	0	0	0	<b>&lt;10</b>	-
<b>Large Family</b>	<10	<10	<10	<10	<10	<b>16</b>	<b>53</b>
<b>Older Person</b>	12	<10	19	16	20	-	-
<b>Total</b>	-	-	-	-	-	-	<b>44</b>

**Table 114: Warrenpoint Waiting List – March 2021**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	87	<10	60	<10	22	46	<b>225</b>
<b>HS Applicants</b>	-	<10	45	<10	17	39	<b>181</b>
<b>Allocations</b>	<10	0	<10	0	<10	<10	<b>14</b>

Applicants – Housing applicants at March 2021

HS Applicants – Housing stress applicants at March 2021 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2021



**Table 115: Warrenpoint Housing Stress applicants time on list March 2021**

Household	0-6 Mths	6-12 Mths	1-2 years	2 - 4 years	4+ years	Total	Average Months on WL
<b>Single</b>	<10	11	13	13	32	-	<b>51</b>
<b>Small Adult</b>	0	0	<10	0	<10	<b>&lt;10</b>	<b>74</b>
<b>Small Family</b>	<10	<10	<10	<10	18	<b>45</b>	<b>52</b>
<b>Large Adult</b>	0	0	0	0	<10	<b>&lt;10</b>	<b>135</b>
<b>Large Family</b>	<10	<10	<10	<10	<10	<b>17</b>	<b>48</b>
<b>Older Person</b>	<10	<10	10	10	12	<b>39</b>	<b>46</b>
<b>Total</b>	-	-	-	-	-	<b>181</b>	<b>52</b>

**Table 116: Bessbrook / Derramore Waiting List – March 2021**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	48	<10	54	0	15	<10	<b>126</b>
<b>HS Applicants</b>	43	<10	47	0	14	<10	<b>113</b>
<b>Allocations</b>	<10	<10	<10	0	<10	<10	-

Applicants – Housing applicants at March 2021

HS Applicants – Housing stress applicants at March 2021 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2021

**Table 117: Bessbrook / Derramore Housing Stress applicants time on list March 2021**

Household	0-6 Mths	6-12 Mths	1-2 years	2 - 4 years	4+ years	Total	Average Months on WL
<b>Single</b>	<10	<10	10	<10	23	<b>43</b>	<b>67</b>
<b>Small Adult</b>	<10	<10	0	<10	<10	<b>&lt;10</b>	<b>74</b>
<b>Small Family</b>	<10	<10	<10	13	22	<b>47</b>	<b>60</b>
<b>Large Adult</b>	0	0	0	0	0	<b>0</b>	<b>--</b>
<b>Large Family</b>	<10	0	0	<10	<10	-	<b>71</b>
<b>Older Person</b>	0	0	0	<10	<10	<b>&lt;10</b>	<b>115</b>
<b>Total</b>	-	-	-	-	-	<b>113</b>	<b>67</b>

**Table 118: Castlewellan Waiting List – March 2021**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	71	<10	49	<10	18	<10	-
<b>HS Applicants</b>	60	<10	37	<10	11	<10	-
<b>Allocations</b>	<10	0	<10	0	<10	<10	<b>15</b>

Applicants – Housing applicants at March 2021

HS Applicants – Housing stress applicants at March 2021 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2021

**Table 119: Castlewellan Housing Stress applicants time on list March 2021**

Household	0-6 Mths	6-12 Mths	1-2 years	2 - 4 years	4+ years	Total	Average Months on WL
<b>Single</b>	<10	<10	14	15	21	<b>60</b>	<b>48</b>
<b>Small Adult</b>	0	0	<10	<10	<10	<b>&lt;10</b>	<b>35</b>
<b>Small Family</b>	<10	<10	<10	10	14	<b>37</b>	<b>48</b>
<b>Large Adult</b>	0	0	0	0	<10	<b>&lt;10</b>	<b>57</b>
<b>Large Family</b>	0	<10	<10	<10	<10	<b>11</b>	<b>47</b>
<b>Older Person</b>	0	<10	<10	<10	<10	<b>&lt;10</b>	<b>54</b>
<b>Total</b>	-	-	-	-	-	<b>122</b>	<b>48</b>

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