

A hand is holding a light-colored wooden cutout of a house with a chimney and two rectangular windows. The background is a soft-focus sunset with a bright sun on the right and a cloudy sky. The overall tone is warm and hopeful.

**Housing**  
Executive

# **Commissioning Prospectus**

Affordable Social and Intermediate  
Housing for Social Housing Development  
Programme Period (2021/22 - 2023/24)

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## Introduction

This has been an unprecedented year for the Housing Executive with the COVID-19 outbreak making it necessary for us to make changes to the way services were delivered to ensure the safety of customers and staff.

In response to the COVID-19 pandemic, all activities were suspended in late March with the exception of for emergency situations and the undertaking of statutory inspections and servicing.

The pandemic essentially paused the housing market in March 2020 leaving the future unclear. Some of the figures and narrative in this document are from before and after the pandemic broke which should be considered before reading.

## Overview and Purpose

This is the fifth 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.

The Prospectus sets out the key priorities and locations for affordable social and intermediate housing in Northern Ireland; also broken down for each Local Government District (LGD) council area 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 Northern Ireland Housing Executive (NIHE) Regions. These are aligned to LGD council areas, and 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 (2020/21 to 2022/23). The 2020 Bidding Round already concluded will produce a new draft SHDP for approval by the Department for Communities (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 1,893,700 (30 June 2019). The population increased by 12,000 people or 0.6 per cent between mid-2018 and mid-2019. The age profile is becoming older as people live longer and household sizes are getting smaller. NISRA statistics show the proportion of the population aged 65 or more is increasing (16.6% in mid-2019 from 13% in mid-1994). The proportion of the population aged 0 to 15 years is by contrast decreasing (20.9% in mid-2019 from 25.4% in mid-1994). 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.

### Housing Market Analysis (across tenures)

#### Owner Occupation

Prior to the COVID-19 pandemic in March 2020, the Northern Ireland Housing market was considered to be relatively healthy. House prices were growing but Northern Ireland remained one of the most affordable housing markets in the whole of the UK. Analysis by Ulster University indicated that the average price of properties sold during the third quarter of 2019 was £171,763. This figure was on a sample of more than 2,300 transactions - the largest number picked up by the survey since spring 2017. There were still affordability challenges for first time buyers with limited capacity for a significant increase in the level of 'affordable' stock coming onto the market. Overall, considering the potential impact of Brexit, the outlook was cautiously optimistic.

## Private Rental

The private rented sector has remained buoyant and stable in recent years. The most recent figures show a continued decrease in the volume of transactions. This is possibly an indicative of the continued recovery in the owner occupation market and longer leases. Average rents continued to rise between 2018 and 2019 although more modestly than in previous years suggesting a plateau. The figures indicate that the private rental sector remains a healthy and sustainable market and a long term housing solution for many households.

It should be noted that Brexit may still have an impact on the Private Rental Sector due to the high number of migrant workers who chose this housing option. The COVID-19 pandemic has shifted focus off Brexit for now but the impact may still be felt in the future.

## Social Housing

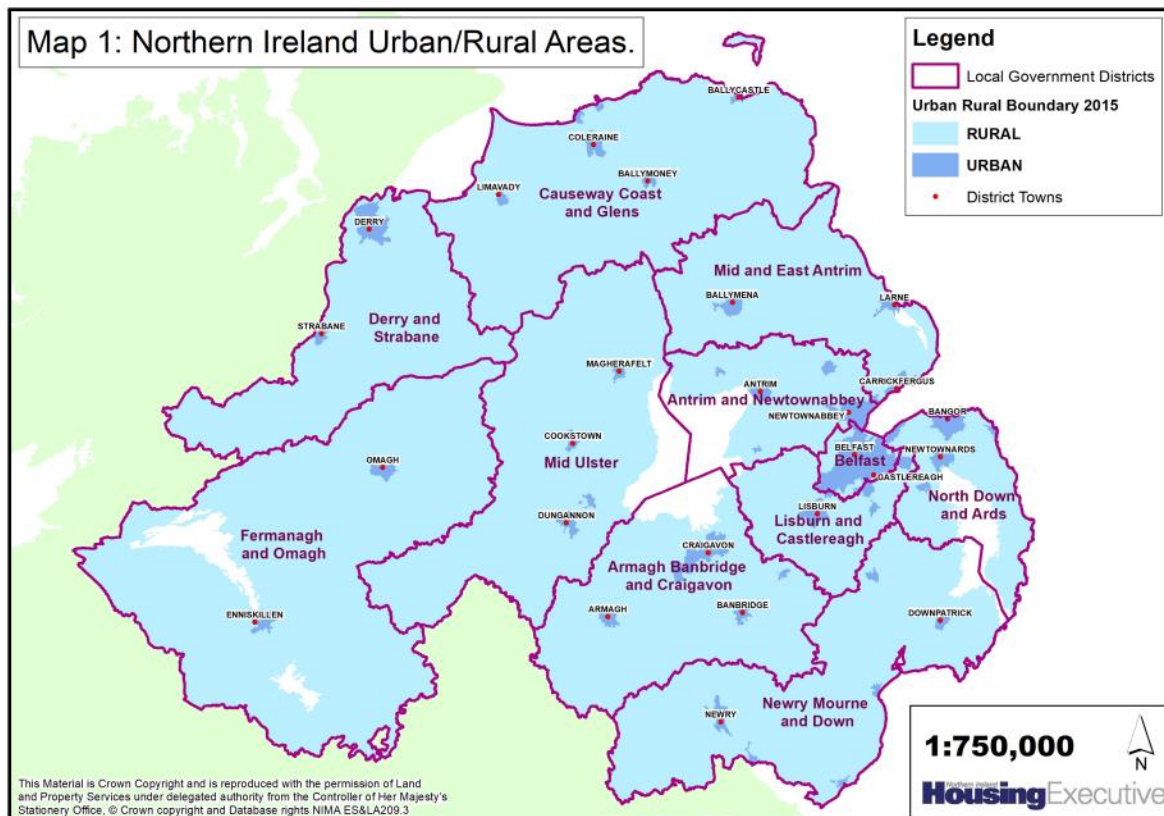
The social housing sector experienced a decrease in tenure share from 21.2% in 2001 to 14.9% in 2011 with many tenants leaving social housing during the housing market boom for the private rented and owner occupied sectors. This share decreased further to 12% in 2018/19 according to the DfC's Northern Ireland Housing Statistics. Despite this shift in tenure profile, the relatively insecure nature of private tenancies and difficulties accessing home ownership indicate that many households still seek housing within the social sector, if even as a safety net.

Social housing stress waiting lists have increased by 40.7% from 19,716 in March 2010 to 27,745 in March 2020. As the dynamic of the private rented market evolves, social housing new build is becoming an ever more important tenure option.

Within the Social Housing Need Assessment, 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;
- The proportion of social housing stock in rural areas (7%) remains significantly lower than in urban areas (18%);
- Approximately 18% of the Housing Executive's stock is located in rural areas.

Map 1: Northern Ireland urban/rural areas



## Social Housing Need & Strategic Guideline Requirements

### General Needs Housing (Urban & Rural NI)

The Net Stock Model (NSM) is used by the Housing Executive and DfC to inform the Programme for Government (PfG) of the need for new social housing in Northern Ireland over the upcoming planning period. The current five year draft PfG outcome (2016/21) for new social housing is 9,600.

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 (as set by the PfG budget) at a 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).

- 2021/22– 1,900 Total Units
- 2022/23 – 1,950 Total Units
- 2023/24 – 2,000 Total Units

Table 1 details the Social Housing Strategic Guideline Requirements for the next three years for each LGD, by Urban and Rural classifications.

**Table 1: Social Housing Strategic Guideline Requirement (2021/22 – 2022/24)**

Local Government District	Strategic Group		
	Urban Target Requirement	Rural Target Requirement	Total Target Requirement
<b>2021/22 1,900 Total Units</b>			
Belfast	591	0	591
Lisburn & Castlereagh	117	9	126
Antrim & Newtownabbey	111	6	117
Causeway Coast & Glens	53	38	91
Derry & Strabane	385	23	408
Mid & East Antrim	48	17	65
Ards & North Down	76	9	85
Armagh, Banbridge & Fermanagh & Omagh	41	5	46
Mid Ulster	29	1	30
Newry, Mourne & Down	65	15	80
	150	111	261
	<b>1,666</b>	<b>234</b>	<b>1,900</b>
<b>2022/23 1,950 Total Units</b>			
Belfast	607	0	607
Lisburn & Castlereagh	120	10	130
Antrim & Newtownabbey	114	6	120
Causeway Coast & Glens	54	39	93
Derry & Strabane	395	24	419
Mid & East Antrim	50	17	67
Ards & North Down	78	9	87
Armagh, Banbridge & Fermanagh & Omagh	43	5	48
Mid Ulster	29	1	30
Newry, Mourne & Down	67	15	82
	154	114	268
	<b>1,711</b>	<b>239</b>	<b>1,950</b>
<b>2023/24 2,000 Total Units</b>			
Belfast	622	0	622
Lisburn & Castlereagh	123	10	133
Antrim & Newtownabbey	117	6	123

Local Government District	Strategic Group		
	Urban Target Requirement	Rural Target Requirement	Total Target Requirement
Causeway Coast & Glens	56	40	96
Derry & Strabane	405	25	430
Mid & East Antrim	51	18	69
Ards & North Down	80	9	89
Armagh, Banbridge & Fermanagh & Omagh	44	5	49
Mid Ulster	30	1	31
Newry, Mourne & Down	68	16	84
	158	117	275
	<b>1,754</b>	<b>246</b>	<b>2,000</b>

While housing associations are encouraged to develop proposals to meet the identified need in specific locations, the Housing Executive adopt a flexible cross-boundary approach to meeting housing need 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 boundary 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 our tailored approach to identifying rural housing need across NI and working with housing association partners to address this need.

In 2020/21 we are reviewing our Rural Strategy to take account of the changing policy context for rural regeneration and housing development and to maximise opportunities for future partnership working.

We remain focused on providing a rural housing enabler service which will continue to assist rural communities who wish to examine the provision of affordable housing in their locality. This service will incorporate:

- Identifying, testing and assessing rural housing need;
- Monitoring of the percentage target of the Social Housing Development Programme for rural new build schemes;
- Highlighting specific, priority rural housing requirements in the Prospectus;
- Identifying land in rural areas with potential for housing development; and

- Working with housing providers to address the increasing demand for mixed tenure and intermediate housing in rural areas.

Further information on the current Rural Strategy & Action Plan 2016 - 2020, on the Rural Strategy review or 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"*.

Having initially supported the delivery of 10 Shared Housing schemes under the TBUC programme, the Housing Executive is now working with DfC to bring forward up to 200 new Shared Housing units annually through the SHDP under the Housing for All programme.

The Building Successful Communities (BSC) programme is a strand of the 'Facing the Future – Housing Strategy for Northern Ireland' and aims to use housing interventions as one of the main catalysts for local regeneration. The BSC Programme aims to test a housing-led approach to regeneration in five urban areas across Belfast and one area in Ballymena. These areas suffer from a range of issues associated with dereliction and social housing market failure. The objectives of the programme are to:

- Improve current housing and infrastructure;
- Deliver new social and affordable homes;
- Deliver environmental upgrading works;
- Improve access to amenities; and
- Improve access to economic and social activity.

## *Supported Housing Need*

The Housing Executive's Supporting People Unit works in partnership with the Health and Social Care Board and the Probation Board to jointly fund high quality, cost effective and reliable housing support services.

The programme's purpose is 'to provide housing support services to vulnerable people to live as independently as possible in the community.' Support funded through 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 (see contacts) and the Supporting People Assistant Director. Supporting People can be contacted via [supporting.people@nihe.gov.uk](mailto:supporting.people@nihe.gov.uk)

## Wheelchair Housing Need

The Housing Executive works closely with the DfC to increase the supply of wheelchair accessible accommodation in Northern Ireland where necessary. An annual target has been set for generic wheelchair units provision within the SHDP at 10%, for the end of the PfG period in 2020/21.

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 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 2 details the generic wheelchair accommodation requirements at March 2020 by LGD.

**Table 2: Wheelchair Needs Assessment as at March 2020**

Local Government District	5 Year Wheelchair Needs Assessment 2020-25
Antrim and Newtownabbey	48
Ards and North Down	72
Armagh, Banbridge and Craigavon	45
Belfast	152
Causeway Coast and Glens	55
Derry City and Strabane	29
Fermanagh and Omagh	30
Lisburn and Castlereagh City	48
Mid and East Antrim	46
Mid Ulster	32
Newry, Mourne and Down	77
<b>Total</b>	<b>634</b>

Housing associations are encouraged to include generic wheelchair units within all suitable schemes and seek support for these from 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 associations 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 NIHE website in June 2020. It has been used to inform the draft Irish Travellers Accommodation Strategy 2020-2025.

The Housing Executive's draft Irish Travellers Accommodation Strategy 2020-2025 is complete and was approved by the Housing Executive Board in May 2020 for public consultation. The Strategy was launched for public consultation on 1st July for 12 weeks. Due to restrictions imposed as a result of COVID-19, the Housing Executive decided to extend the public consultation period by 8 weeks to allow consultees sufficient opportunity to take part in the consultation. The Strategy has 4 objectives and 12 key actions and will guide the Housing Executive's strategic direction on the provision of accommodation for Irish Travellers. The Strategy will be reviewed on completion of the public consultation exercise and resubmitted to Board for final approval and implementation.

## Affordability - Intermediate Housing and Demand

### Intermediate Housing Options

The Strategic Planning Policy Statement defines **affordable housing** as both **Social Housing** and **Intermediate Housing**.

Intermediate Housing generally consists of shared ownership/rented housing provided through a Registered Housing Association and helps households who can afford a small mortgage, but that 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 Registered 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 DfC website. In addition, the definition of intermediate affordable housing used for the purposes of this policy may change over time to incorporate other forms of housing tenure below open market rates and the model of shared ownership may also be reviewed. Co-ownership Housing is the best known scheme in Northern Ireland for people who want to buy a home but who cannot afford to purchase 100% of the property.

## Intermediate Housing Demand

PPS12 (Housing in Settlements), PPS21 (Sustainable Development in the Countryside) and the Strategic Planning and Policy Statement sets out a requirement for the Housing Executive to update Planning Service and Councils on affordable housing need.

Currently the Housing Executive assesses the potential annual demand for intermediate housing based on a model adopted by the Welsh Assembly created by Professor Glen Bramley (Welsh Model). The model uses the number of households in a council area, their median income levels and the lower quartile house prices for a 2/3 bedroom house in the council area to determine the level of income needed to be able to afford to purchase a house within that council area. The calculation determines households who can afford to buy a house and those who cannot, leaving a remainder who could avail of intermediate housing. Newly arising household formation is then taken into consideration as a means to project for future years.

Table 3 details the annual intermediate housing requirement for the 10 year period 2019 to 2029. This assessment is reviewed and updated on an annual basis.

**Table 3: Intermediate Demand between 2019 and 2029**

Local Government District	Intermediate Need
<b>Antrim &amp; Newtownabbey</b>	620
<b>Ards and North Down</b>	720
<b>Armagh, Banbridge &amp; Craigavon</b>	1,830
<b>Belfast</b>	490
<b>Causeway Coast &amp; Glens</b>	510
<b>Derry &amp; Strabane</b>	370
<b>Fermanagh &amp; Omagh</b>	500
<b>Lisburn &amp; Castlereagh</b>	1,460
<b>Mid &amp; East Antrim</b>	570
<b>Mid Ulster</b>	1,330
<b>Newry, Mourne and Down</b>	1,360

The Housing Executive is carrying out research to review and refine our methods to assess cross tenure housing need on a long term basis. The research will identify housing need under different household growth scenarios. It proposes using a net stock model approach to calculate total housing need and will use affordability indicators to assign this need into different tenure groups (private, social and intermediate housing). It is anticipated that the outcome of the research will be available in late 2020 or early 2021.

In addition, DfC is also reviewing the definition of affordable housing. It has been proposed that the social housing element of affordable housing will remain unchanged but it is likely to expand the number of intermediate products available. A new definition has not been finalised and DfC have advised that the Strategic Planning Policy Statement remains in place until a new definition is adopted.

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 Regional Place Shaping teams.

## Individual Local Government 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 NIHE interface with councils and community planning. They also are the main point of contact for those stakeholders involved in the delivery of social and affordable housing.

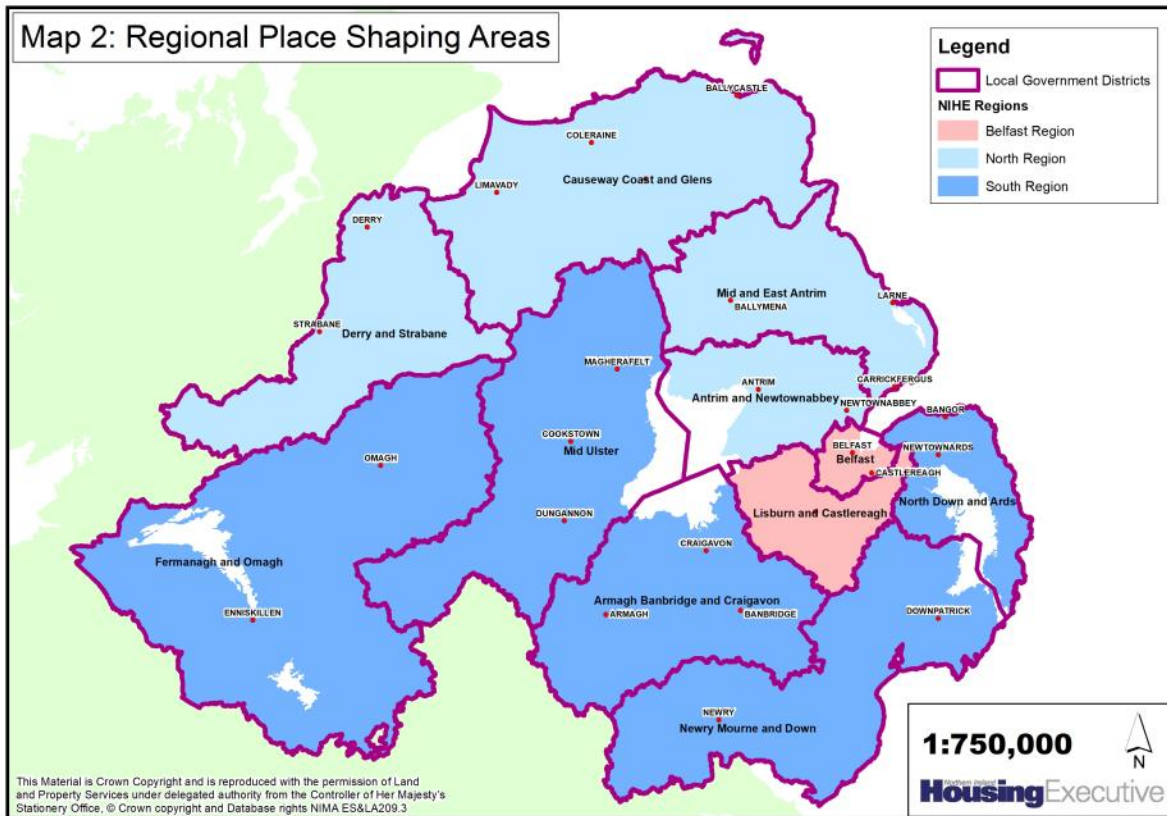
## Contacts

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

<b>Head of Place Shaping Belfast</b>	<b>Fiona McGrath</b>	<a href="mailto:fionamcgrath@nihe.gov.uk">fionamcgrath@nihe.gov.uk</a>
<b>Head of Place Shaping North</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</b>	<b>Ailbhe Hickey</b>	<a href="mailto:ailbhe.hickey@nihe.gov.uk">ailbhe.hickey@nihe.gov.uk</a>



Map 2: Regional place shaping areas



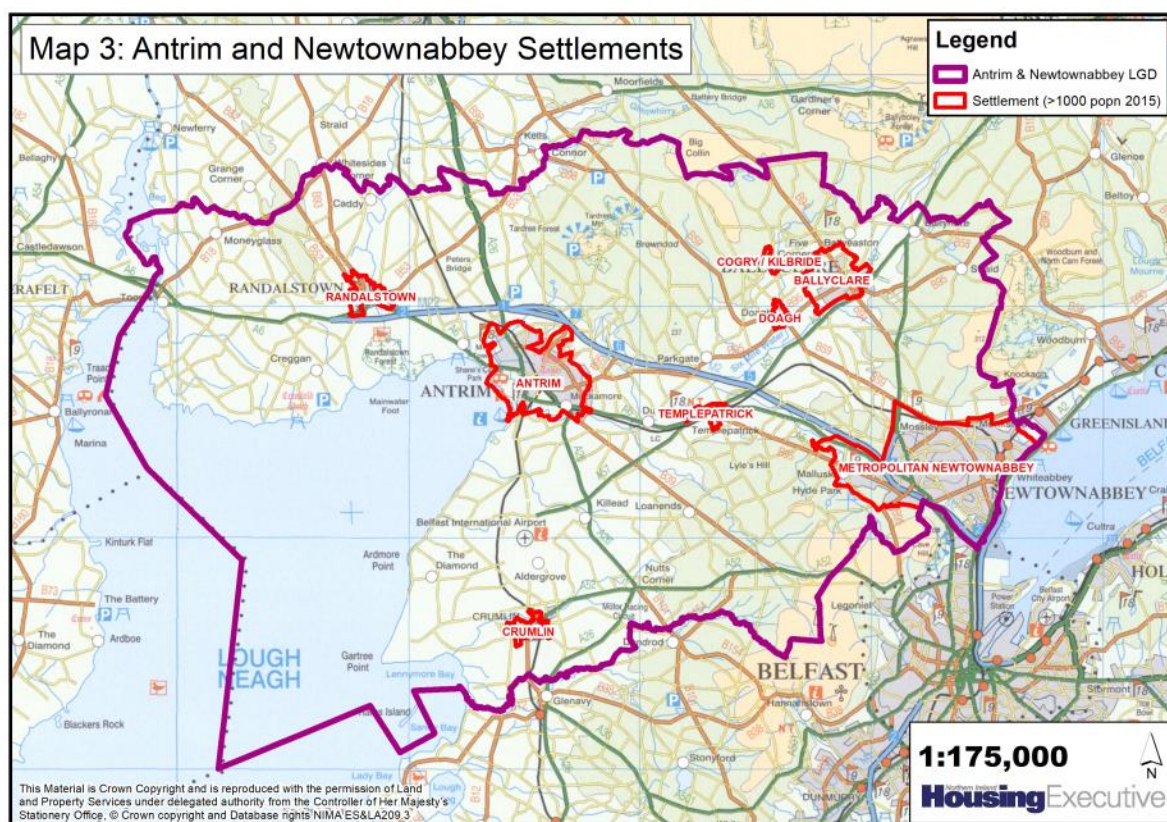
# Local Government District Analysis

## 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 142,000 and while mostly urban, has a significant rural populace.

**Map 3: Antrim and Newtownabbey Borough Council with main settlements**



The population of Antrim and Newtownabbey Borough is projected to increase by 2.1% to 145,626 by 2028; it will represent 7.5% of the NI population.

This growth is concentrated in the 65 plus age group. The older person population is projected to increase from 23,635 in 2018 to 29,315 by 2028, an increase of 24% during this period and will represent 20% of the overall population of the borough. This is lower than the Northern Ireland percentage increase of 27%. 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% between 2018 and 2028, this group will continue to make up the largest proportion of the population of the Borough representing 61% by 2028. Children aged 0 -15 years group is projected to decrease by 6% 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 3,049 from 55,743 to 58,792 over the ten years to 2028. Over this period, one person and two person households are projected to increase by 12.18% and 8.99% 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

- Between 1st April 2019 and 31st March 2020 there were 577 units completed;
- There is a projected Housing Growth Indicator new dwelling requirement of 4,200 for the period 2016 to 2030 for the Borough. Antrim and Newtownabbey falls below the NI average of 7,709.

### Owner Occupied

- 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 in 2019 was £144,567 which represents a decrease of 6.3% on 2018 figures. This remains below the Northern Ireland average of £169,057;
- During 2018, there were 21 repossessions in Antrim and Newtownabbey. This represents a 76% decrease since 2014;
- Demand for intermediate housing aimed at low income households in Antrim and Newtownabbey is estimated at 620 units for 2019-2029;
- Prior to the COVID-19 lockdown, local estate agents reported that the local housing market was showing a steady improvement, in that the first time buyer market was thriving and the second time buyer market had increased. As the lockdown eased buyers were showing an interest in larger properties with outdoor space. Ulster Bank reports that in Northern Ireland first time buyers are still the most common property purchaser. The full impact of the epidemic on jobs, mortgages and the housing market in general are yet to be determined;

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

## Private Rented

- 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;
- The DfC's Landlord Registration Scheme identified 5,158 properties registered by 3,415 landlords for Antrim and Newtownabbey at February 2020;
- At March 2020 there were 2,556 Private Housing Benefit claimants in the borough, a decrease of 20% 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 35 or under. Since 1 April 2019, Belfast City Council has assumed responsibility for licensing of HMOs.

## Social Rented

- The sector comprises 14% of total housing stock in the borough (Source Northern Ireland House Condition Survey 2016);
- At March 2020 there were 6,406 Housing Executive owned properties in the borough;
- 10,536 Housing Executive properties have been sold through the House Sales Scheme, with 38 sold during 2019/20;
- There were 107 new social homes completed in year to March 2020 and 197 on-site. A further 636 units are programmed to start over the next three years;
- At March 2020 there were 2,657 applicants on the waiting list for Antrim and Newtownabbey, 2,039 of whom were in housing stress with 474 allocations made over the previous 12 months.

## Social Housing Need and Strategic Guideline 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 NI)

#### Urban

The Strategic Guidelines target share established for Antrim and Newtownabbey indicates 6.7% urban units and 2.4% rural units of the overall three year programme. Five year projected need for the area as a whole is 1,159 and the projected need for individual settlements is detailed in Table 4.

**Table 4: Projected (5-Year) Social Housing Need 2020-25**

Settlement	Housing Need Assessment Area*	Total 5 Year Projection 2020-25
<b>Newtownabbey Urban</b>	Rathcoole	59
	Rushpark	65
	Rathfern	24
	Whiteabbey(Abbeyville,Glenville,Abbeyglen)	59
	Longlands/Bawnmore/Old Mill	70
	Hightown	23
	Felden	72
	Ballyduff	28
	Central Glengormley (Glenvarna, Queens Park/Avenue, Glengormley Central)*	180
	Mossley	62
	Monkstown	49
<b>Antrim Town</b>	Antrim Town	229
<b>Crumlin</b>	Crumlin	107
<b>Randalstown</b>	Randalstown	51
<b>Parkgate/Templepatrick</b>	Parkgate/Templepatrick	28
<b>Toomebridge</b>	Toomebridge	12
<b>Doagh/Kelburn Park</b>	Doagh/Kelburn Park	16
<b>Ballyclare</b>	Ballyclare	10

Settlement	Housing Need Assessment Area*	Total 5 Year Projection 2020-25
<b>Remaining Settlements (need &lt;10)**</b>		<b>15</b>
<b>Total</b>		<b>1,159</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, Hyde Park / Parkmount, Ballynure, 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:

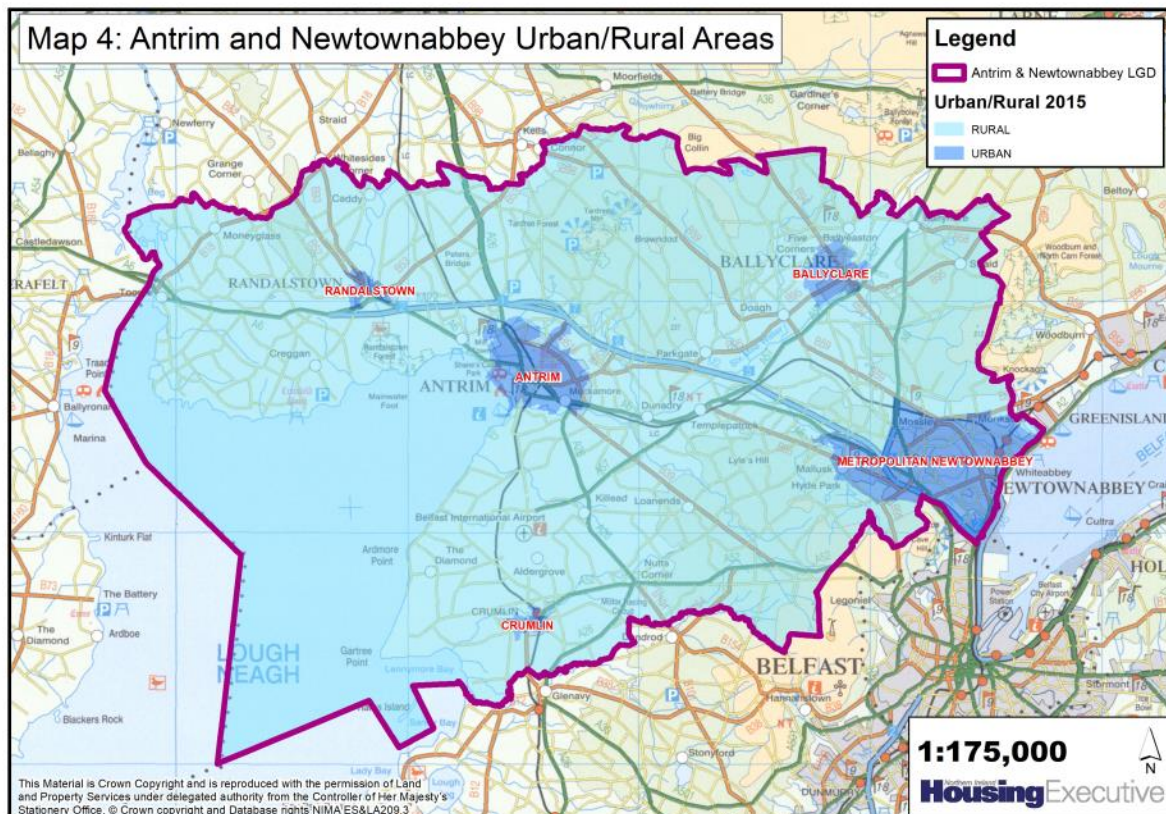
- Social housing proposals are particularly welcome in Central Glengormley, family homes in Randalstown and proposals to provide single household accommodation in Antrim town;
- Proposals will be assessed against potential local impacts on existing housing stock, such as turnover in adjacent social housing estates;
- The population is ageing; the number of smaller sized households is increasing. Future housing mix in new build developments should cater for single, small families and older person households. Dwellings 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;
- 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;
- A review of Housing Executive owned undeveloped land is carried out annually. 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 no identified need for additional properties in: Springfarm, Newpark/Ballycraigy, 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 2020/21, the rural target share of the SHDP is 12.3% of the overall programme based on average levels of housing stress in rural areas.

Map 4: Antrim and Newtownabbey Rural Map



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

Housing mix in new developments should cater for single, small family and older person households. Dwelling type should therefore comprise one and two bedroom design forms with emphasis on accessibility. Some three bedroom houses may be required for families and there may be a requirement for a small number of four 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 5: Indicative Housing Mix for Antrim and Newtownabbey**

Elderly	Families*	Singles	Wheelchair
17%	35%	48%	10%

\* Focus on: Small Adult and Small Family Households

## Areas where need is met

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 builds and there is not yet an identified need for additional properties in: Springfarm, Newpark/Ballycraigy, Greystone and Rathenraw.

## Rural Areas

At March 2020, there were 68 applicants in rural Antrim and Newtownabbey in housing stress; 3.3% of the total housing stress waiting list. Whilst we 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 2020, projected housing need for rural areas within Antrim and Newtownabbey is 71 units. Taking account of new build schemes on the current SHDP, residual housing need is focused in 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 NIHE 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 2020, there were 29 housing stress applicants and 25 transfer applicants who require wheelchair accessible accommodation with 6 allocations over the previous year. This leaves a requirement for 48 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. Generally, generic wheelchair units should be for two and three 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 shared future housing (Housing for All). Housing Associations bringing forward suitable proposals for Housing for All designation would be welcomed.

## **Traveller's accommodation**

Traveller Community Need continues to be monitored.

## **Intermediate (Affordable) Demand**

- The Housing Executive estimates intermediate/affordable housing demand for Antrim & Newtownabbey at approximately 62 units per annum;
- Co-Ownership approved 126 applications in 2019/20 for Antrim and Newtownabbey;
- Average house prices in Northern Ireland increased by 20.6% between 2014 and 2019;
- Average house prices in Antrim and Newtownabbey are lower than the Northern Ireland average; these increased by 10.6% over the same period.

**Table 6: Average Annual House Prices Antrim and Newtownabbey & NI 2014-2019**

Area	2014	2015	2016	2017	2018	2019	% Change 2014- 2019
<b>Antrim and Newtownabbey</b>	£130,706	£129,475	£129,610	£141,810	£154,219	£144,567	10.6
<b>Northern Ireland</b>	£140,217	£149,449	£154,028	£155,049	£163,128	£169,057	20.6

## Antrim and Newtownabbey Supporting Data

**Table 7: Antrim and Newtownabbey Waiting List – March 2020**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	1,170	136	655	63	167	466	<b>2,657</b>
<b>HS Applicants</b>	900	80	524	43	139	353	<b>2,039</b>
<b>Allocations</b>	183	27	127	<10	37	94	-

Applicants – Housing applicants at March 2020

HS Applicants – Housing stress applicants at March 2020 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2020

**Table 8: Antrim Town Waiting List – March 2020**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	313	29	126	11	31	106	<b>616</b>
<b>HS Applicants</b>	237	18	99	<10	28	86	-
<b>Allocations</b>	41	11	39	<10	14	15	-

Applicants – Housing applicants at March 2020

HS Applicants – Housing stress applicants at March 2020 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2020

**Table 9: Metropolitan Newtownabbey Waiting List – March 2020**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	713	88	413	47	102	293	<b>1,656</b>
<b>HS Applicants</b>	543	48	327	30	84	215	<b>1,247</b>
<b>Allocations</b>	134	12	78	<10	19	69	-

Applicants – Housing applicants at March 2020

HS Applicants – Housing stress applicants at March 2020 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2020

## Ards & North Down

### Context

Ards and North Down Council area is known for its rich diversity of scenic countryside and extends from Holywood 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 the residents live in the northern 25% of the borough. The largest population centres are Bangor and Newtownards followed by Holywood, 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.

Map 5: Ards & North Down Council with main settlements



Within the borough, there are 37,898 jobs, 5% of all jobs across Northern Ireland. The Labour Market Structure shows 78% of the working age population are economically

active, compared to 74% across Northern Ireland. There are 4,555 registered businesses in the borough, 6% of all businesses in Northern Ireland. 88% of businesses are micro businesses, employing nine or less employees. The services sector within the Borough has the largest number of VAT/PAYE registered businesses at 68%, significantly above the Northern Ireland average of 55%.

The number of businesses within the construction and production sectors is generally similar to that of Northern Ireland at 13% and 7% respectively. The agriculture sector however is significantly under represented at 13% compared to 25% at Northern Ireland level. While Ards and North Down has many significant assets, including the quality of its natural environment, the skills and education of its people and geographic proximities to market opportunities, it faces many challenges chiefly, low levels of economic productivity, commuters travelling elsewhere for employment and an ageing population. Political and policy uncertainty both in Northern Ireland and on the national / international stage add to the challenges faced by the borough.

## Housing Market Analysis (across tenures)

### Housing & Land Supply

- The DOE's Northern Ireland Housing Land Availability Report for 2013 (Planning NI:2014) shows potential capacity for 13,347 additional dwellings;
- The borough has a HGI projected new dwelling requirement of 5,500 for 2016-2030;
- During 2019 there were 633 new dwelling starts in Ards and North Down which is more than the projected new dwelling requirement as estimated by the housing growth indicators 2016/30 of 393;
- Over the April 2015 to March 2020 period, 3,869 new dwelling starts commenced in Ards and North Down, the fourth highest of all eleven council areas;
- Over the same period 2015/20 there was 3,532 new dwelling completions in the borough.

### Owner Occupied Housing Sector

- Census 2011 demonstrates the continued desire of residents to own their own home;
- The private housing market is showing signs of recovery – the number of house sales in Ards and North Down has increased from 1,146 in 2010 to 2,904 in 2019 (LPS.) Obviously there will be a significant impact on the housing market and house sales during 2020 due to the impact of COVID-19, the full impact of which is yet to emerge;
- The average house price for Ards and North Down has fluctuated over the 2012/19 period. House prices had risen to £189,840 in 2018 but has fallen

1.3% to £187,442 in the last year. Again, COVID-19 will have a major impact on house prices across Northern Ireland during 2020 and beyond;

- Popular locations include Bangor, Newtownards, Holywood and Comber;
- From a general mood of positivity in 2019 and local estate agents reporting a local housing market in steady ascent the mood has shifted to uncertainty due to COVID-19. Semi-detached followed by detached houses comprise the majority of property sales within the district;
- 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. 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 2018, there were 30 repossessions within Ards and North Down Borough, a slight increase over the previous year.

## Private Rented Housing Sector

- The private rented sector across Ards and North Down has seen an unprecedented increase in its tenure share between 2001 and 2019 and 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 2019 there were 9,734 lettings in LGDs outside of Belfast, 20% (1,944) of those were within Ards and North Down Borough. (Performance of the Private Rental Market in Northern Ireland H2 2019 Ulster University).
- The overall average rent in the borough in 2019 was £635 per month, an increase of £13 (2.1%) from £622 over the year, but below the Northern Ireland average of £627 per month in 2019;
- Within Ards and North Down, 6,556 private rented properties were registered by 4,991 landlords under DfC's Landlord Registration scheme at February 2020. The 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 2020, there were 3,128 private tenants in receipt of Housing Benefit in the borough, a 17.1% reduction on the comparable 2019 position. A key factor in this reduction is the introduction of Universal Credit. At March 2020, there were 926 Housing Executive tenants in receipt of the Housing Cost element 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);
- 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 2020 was 6,240 with 8,105 properties sold since the commencement of the 'Right to Buy' scheme;
- There were 124 new social housing units completed and a further 160 social housing units on site in the year to March 2020;
- Thirty five Housing Executive properties were sold in the year March 2020;
- COVID-19 will undoubtedly 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.

## 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 has established that, of the overall three year programme, 4.6% of the urban and 3.7% of the rural units has been allocated to Ards and North Down. Five year projected need for the area as a whole is 954 and the projected need for individual settlements is detailed in Table 10.



**Table 10: Projected (5 Year) Social Housing Need 2020-2025**

Settlement	Social Housing Need 2020-25
Newtownards Town	252
Bangor Urban	337
Holywood	119
Comber	74
Donaghadee	40
Groomsport	31
Ballygowan	20
Portaferry	16
Millisle	11
Crawfordsburn	10
Remaining Settlements*	44
<b>Ards &amp; North Down Borough</b>	<b>954</b>

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

\* Remaining settlements include Ballyhalbert, Ballywalter, Carrowdore, Cloughey, Greyabbey, Helen's Bay, Killinchy, Kircubbin, Lisbane 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 2019. There has been a significant increase in the assessed housing need with the figure increasing by almost 20% from 797 for the five years to 2024 to 954 for the five years to 2025. The areas of greatest housing need are Bangor, Newtownards, Holywood and Comber;
- Historically, much of the social housing need in Ards and North Down has been delivered by housing associations on Housing Executive land in Newtownards, Bangor 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, one and two bed. Due to the high level of apartment provision within the town two bed houses would be preferred. Mixed tenure schemes would be welcomed moving forward;

- Within Newtownards Town all areas would be popular with applicants. There is no requirement for additional Cat 1 accommodation in the town. A high need exists for generic wheelchair accommodation (apartments / houses) and some bespoke units (bungalows) for complex needs;
- Within Bangor the most popular areas of the town 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 (apartments / houses) as well as bespoke (bungalow) units for complex needs;
- Within the towns of Comber and Holywood the need for small unit accommodation remains strong. The delivery of two bed houses is preferred because of the high level of two 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. No requirement for Cat 1 accommodation in either town. A site identification study has been programmed for Holywood;
- Within Donaghadee any potential sites for new build should be located a distance from Beechfield estate which is prone to instability. A site identification study is currently underway in Donaghadee;
- A site identification study was completed in Helen's Bay during 2019/20;
- Site identification studies are currently ongoing in Holywood and Groomsport;
- 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 three 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 four 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;

A number of Estate-Based Strategies which included selective demolition of unpopular stock was 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 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;
- 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.

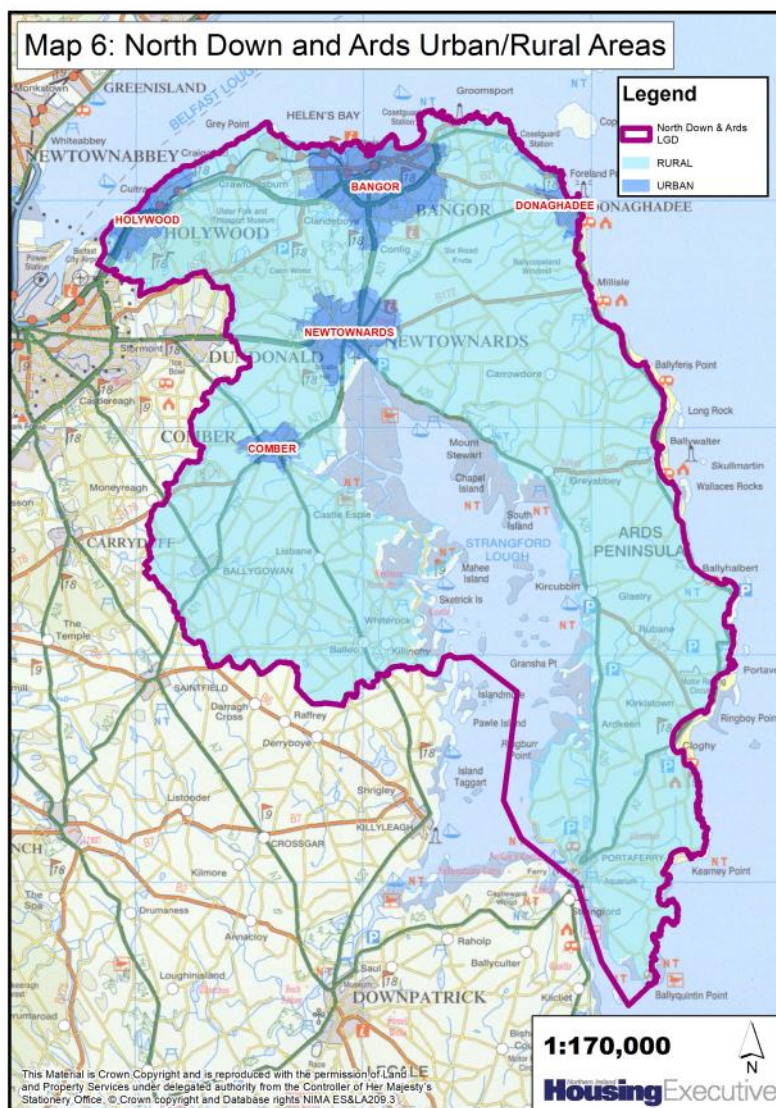
## Rural

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 Social Housing Development Programme, 2021/24 is 12.3% 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.

Map 6: Ards & North Down rural map



## Indicative housing mix requirements

At March 2020 there were 195 applicants in rural Ards and North Down in housing stress (7% 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.

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.

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 11: Indicative housing mix for Ards & North Down**

Elderly	Families*	Singles	Wheelchair
10%	60%	30%	10%

\* Family households include 2, 3 and 4 bed units. Placeshaping, 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 Ballydrain, Cotton and Loughries. 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 2020, the current projected need for rural areas within Ards and North Down Council is for 160 units. Taking account of new build schemes on the current SHDP, the residual housing need is focused in the villages of Ballygowan, Ballyhalbert, Ballywalter, Carrowdore, Cloughey, Crawfordsburn, Groomsport, Helens Bay, Killinchy, Kircubbin, Lisbane, Millisle, Portaferry and Portavogie. 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. 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 NIHE 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 72 units.

At March 2020 there were 84 housing stress applicants who require wheelchair accommodation with only 22 allocations over the last year. This leaves a residual need of 62 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. Generic wheelchair units should be for two and three bed units and built in line with space standards included in the Housing Association Guide.

## *Shared Future Demand (Housing for All)*

The Housing Executive continues to support the Northern Ireland Executive's Together Building a United Community (TBUC) Programme through the facilitation of new build Shared Housing schemes. Having initially supported the delivery of 10 Shared Housing schemes under the TBUC programme, the Housing Executive is now working with DfC to bring forward up to 200 new Shared Housing units annually through the SHDP under the Housing for All programme. Housing Associations bringing forward suitable proposals for housing for all designation would be welcomed.

## *Traveller's accommodation*

The 2013/18 Traveller Need Assessment identified no accommodation requirements for Traveller families in the Council area. Our Research Unit has recently completed the Irish Travellers' Accommodation Survey 2018/19 which will inform the development of our Irish Travellers Accommodation Strategy 2020 – 2025. The Strategy includes proposals for a Travellers housing needs assessment. The Strategy was submitted to the Housing Executive Board for approval in May 2020 and released for formal consultation.

## *Intermediate (Affordable) Demand*

- The Housing Executive estimates intermediate/affordable housing demand for Ards and North Down is 72 units per annum;
- Co-ownership had an active stock of 1,317 dwellings at March 2020, highest figure outside of Belfast, 152 of which were purchased during 2019/20. 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;

- House prices in Ards and North Down ranged from a low of £163,492 in 2013 to £189,840 in 2018 before falling slightly to 187,442 in the year to March 2019;
- Average house prices in Northern Ireland increased by 28.9% between 2013 and 2019;
- Average house prices in Ards and North Down have increased by 14.6% over the past 7 years.

**Table 12: Average Annual House Prices Ards & North Down & NI 2013-2019**

Area	2013	2014	2015	2016	2017	2018	2019	% Change 2013/19
<b>Ards &amp; North Down</b>	163,492	176,972	177,296	185,077	177,222	189,840	187,442	14.6
<b>Northern Ireland</b>	131,204	140,217	149,449	154,028	155,049	163,128	169,057	28.9

## Ards & North Down Supporting Data

**Table 13: Ards & North Down Waiting List – March 2020**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	1,064	193	522	61	190	740	<b>2,770</b>
<b>HS Applicants</b>	785	116	353	46	134	519	<b>1,953</b>
<b>Allocations</b>	277	27	181	<10	38	118	-

Applicants – Housing applicants at March 2020

HS Applicants – Housing stress applicants at March 2020 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2020

**Table 14: Newtownards Urban Waiting List – March 2020**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	277	44	120	<10	49	128	-
<b>HS Applicants</b>	208	23	91	<10	34	86	-
<b>Allocations</b>	74	<10	37	0	<10	30	<b>151</b>

Applicants – Housing applicants at March 2020

HS Applicants – Housing stress applicants at March 2020 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2020

**Table 15: Newtownards Urban Housing Stress applicants time on list March 2020**

Household	0-6 mths	6-12 mths	1-2 years	2-4 years	4+ years	Total	Average Months
<b>Single</b>	38	37	40	40	53	208	<b>38</b>
<b>Small Adult</b>	<10	<10	<10	<10	<10	23	<b>35</b>
<b>Small Family</b>	13	15	18	25	20	91	<b>37</b>
<b>Large Adult</b>	0	<10	0	0	<10	<10	<b>77</b>
<b>Large Family</b>	<10	<10	<10	<10	11	34	<b>38</b>
<b>Older Person</b>	10	<10	11	14	46	86	<b>75</b>
<b>Total</b>	72	65	79	91	141	-	<b>45</b>

**Table 16: Bangor Urban Waiting List – March 2020**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	427	66	225	29	74	312	<b>1,133</b>
<b>HS Applicants</b>	329	46	156	19	55	220	<b>825</b>
<b>Allocations</b>	102	14	85	<10	20	44	-

Applicants – Housing applicants at March 2020

HS Applicants – Housing stress applicants at March 2020 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2020



**Table 17: Bangor Urban Housing Stress applicants time on list March 2020**

Household	0-6 mths	6-12 mths	1-2 years	2-4 years	4+ years	Total	Average Months
<b>Single</b>	53	56	81	61	78	<b>329</b>	<b>35</b>
<b>Small Adult</b>	<10	<10	<10	17	10	<b>46</b>	<b>41</b>
<b>Small Family</b>	28	23	36	35	34	<b>156</b>	<b>35</b>
<b>Large Adult</b>	<10	<10	<10	<10	<10	<b>19</b>	<b>45</b>
<b>Large Family</b>	<10	<10	18	<10	12	<b>55</b>	<b>28</b>
<b>Older Person</b>	17	21	43	48	91	<b>220</b>	<b>64</b>
<b>Total</b>	<b>112</b>	<b>115</b>	<b>193</b>	<b>175</b>	-	<b>825</b>	<b>43</b>

**Table 18: Comber Waiting List – March 2020**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	78	17	46	<10	19	61	-
<b>HS Applicants</b>	52	12	25	<10	10	51	-
<b>Allocations</b>	31	<10	18	0	<10	22	<b>76</b>

Applicants – Housing applicants at March 2020

HS Applicants – Housing stress applicants at March 2020 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2020

**Table 19: Comber Housing Stress applicants time on list March 2020**

Household	0-6 mths	6-12 mths	1-2 years	2-4 years	4+ years	Total	Average Months
<b>Single</b>	<10	<10	16	<10	13	<b>52</b>	<b>45</b>
<b>Small Adult</b>	<10	<10	<10	<10	<10	<b>12</b>	<b>33</b>
<b>Small Family</b>	<10	<10	<10	<10	<10	<b>25</b>	<b>36</b>
<b>Large Adult</b>	<10	0	<10	<10	<10	-	<b>104</b>
<b>Large Family</b>	<10	0	<10	<10	<10	<b>10</b>	<b>45</b>
<b>Older Person</b>	<10	<10	<10	<10	22	<b>51</b>	<b>64</b>
<b>Total</b>	<b>24</b>	<b>19</b>	<b>30</b>	<b>28</b>	<b>54</b>	-	<b>51</b>

**Table 20: Hollywood Urban Waiting List – March 2020**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	87	16	41	<10	12	115	-
<b>HS Applicants</b>	57	<10	26	<10	10	82	<b>189</b>
<b>Allocations</b>	30	<10	16	<10	<10	10	<b>63</b>

Applicants – Housing applicants at March 2020

HS Applicants – Housing stress applicants at March 2020 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2020

**Table 21: Hollywood Urban Housing Stress applicants time on list March 2020**

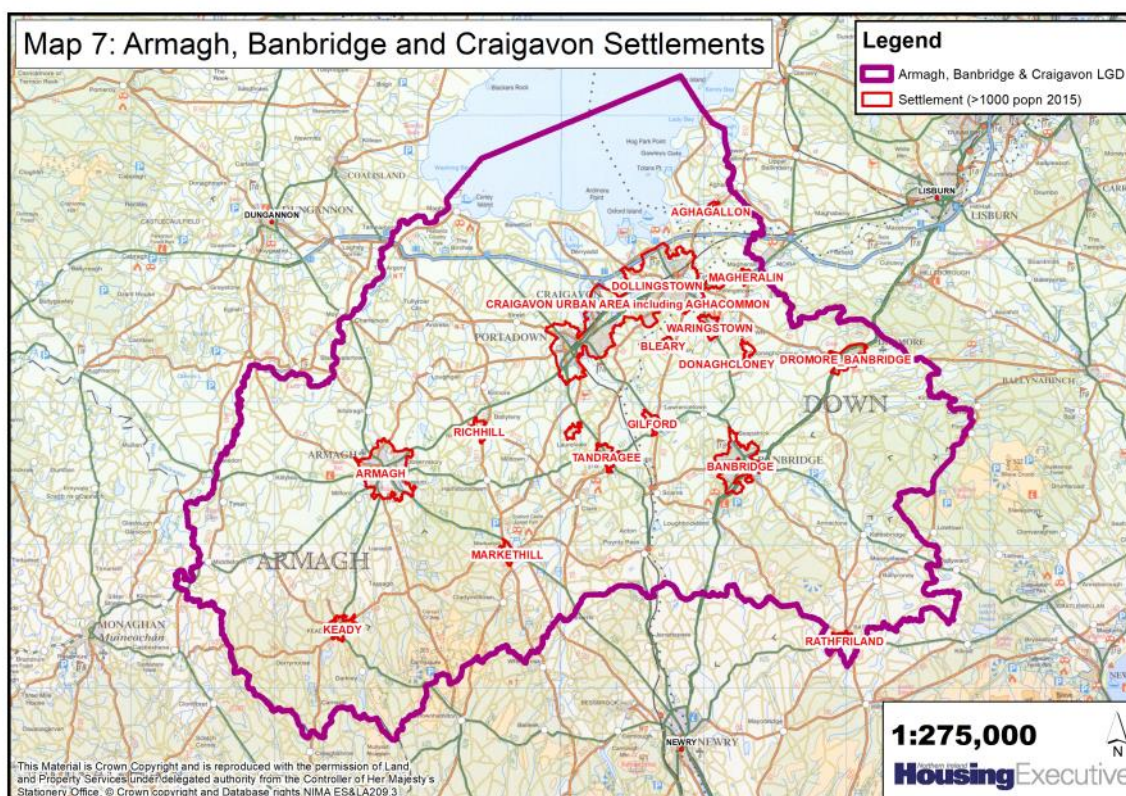
Household	0-6 mths	6-12 mths	1-2 years	2-4 years	4+ years	Total	Average Months
<b>Single</b>	<10	<10	13	10	23	<b>57</b>	<b>51</b>
<b>Small Adult</b>	<10	<10	<10	<10	<10	<b>9</b>	<b>46</b>
<b>Small Family</b>	<10	<10	<10	<10	<10	<b>26</b>	<b>43</b>
<b>Large Adult</b>	<10	<10	<10	<10	<10	-	<b>12</b>
<b>Large Family</b>	<10	<10	<10	<10	<10	<b>10</b>	<b>34</b>
<b>Older Person</b>	<10	11	12	21	29	<b>82</b>	<b>53</b>
<b>Total</b>	<b>25</b>	<b>20</b>	<b>36</b>	<b>41</b>	<b>67</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.

### Map 7: Armagh City, Banbridge and Craigavon Borough with main settlements



The borough population is projected to grow by 8.4% from 2018 to 2028 with 67% of the population living in towns and 33% in rural areas. The number of children in Armagh City, Banbridge and Craigavon Borough is projected to grow by 1%, the working age population is projected to grow by 5.7% and the 65 plus age group is projected to grow by 30%. The household size is projected to reduce from 2.63 to 2.58 while the number of households is projected to increase by 8,291 from 80,712 to 89,003 over the 10 years to 2028.

According to the Annual Survey of Hours and Earnings (ASHE), within the borough, there are 93,000 jobs, 10.7% of the 867,000 jobs across Northern Ireland in 2019. The most recently available Labour Market Structure statistics at the end of 2018 shows

77.1% of the working age population were economically active in line with the 73% across Northern Ireland. In 2019, the annual full-time median wage for residents in the area was £466.80 per week, an increase of 2.3% on the previous year. This compares to the overall Northern Ireland weekly basic full-time median wage of £483.40, an increase of 0.9% on the 2018 figure (ASHE).

## COVID-19

The Coronavirus pandemic will obviously have a significant impact on the socio-economic development of the local area moving forward. The labour market will change significantly given the challenging economic forecasts and changes to the way society operates 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 DOE's Northern Ireland Housing Land Availability Report for 2013 (Planning NI:2014) shows potential capacity for 22,707 additional dwellings;
- The district has a HGI projected new dwelling requirement of 17,200 for 2016-2030;
- During 2019 there were 1,126 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 2016/30 of 1,229;
- Over the April 2015 to March 2020 period, 5,254 new dwelling starts commenced in Armagh City, Banbridge and Craigavon Borough, the highest of all eleven council areas;
- Over the same period 2015/20 there were 4,764 new dwelling completions in the borough, again the highest of all eleven council areas.

### Owner Occupied Housing Sector

- Census 2011 demonstrates the continued desire of residents to own their own home;
- 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 2,822 in 2019 (LPS.) Obviously there will be a significant impact on the housing market and house sales during 2020 due to the impact of COVID-19, the full impact of which is yet to emerge;
- The average house price for Armagh City, Banbridge and Craigavon Borough fluctuated between 2012 and 2019. The average annual figure for the borough in 2019 was £142,263, an increase of 9.6% over the comparable

2018 position. The Northern Ireland figure was almost £21,000 higher, £163,128 in 2019. Again, COVID-19 will have a major impact on house prices across Northern Ireland during 2020 and beyond;

- Popular locations include the Housing Need Assessment areas of Armagh City and North Lurgan. Banbridge Town is also popular;
- From a general mood of positivity in 2019 and local estate agents reporting a local housing market in steady ascent, the mood has shifted to uncertainty due to COVID-19. Semi-detached followed by detached houses comprise the majority of property sales within the borough;
- 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. 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 2018, there were 30 repossessions within Armagh City, Banbridge and Craigavon Borough a slight increase over the previous year.

## Private Rented Housing Sector

- 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 2019 there were 9,734 lettings in LGDs outside of Belfast, 12.6% (1,231) of those were within Armagh City, Banbridge and Craigavon Borough. (Performance of the Private Rental Market in Northern Ireland H2 2019 Ulster University);
- Local towns within the borough are the most requested location;
- The overall average rent in the borough in 2019 was £528 per month, an increase of £5 (0.9%) from £523 over the year, but well below the Northern Ireland average of £627 per month in 2019;
- Within Armagh City, Banbridge and Craigavon Borough, 8,810 private rented properties were registered by 4,798 landlords under DfC's Landlord Registration scheme at February 2020;
- Housing Benefit plays a vital role in supporting the private rented sector. At March 2020, there were 5,114 private tenants in receipt of Housing Benefit in the borough, a 14.9% decrease on the comparable 2019 position. A key factor in this reduction is the introduction of Universal Credit. At March 2020, there were 1,287 Housing Executive tenants in receipt of the Housing Cost element of Universal Credit.

## 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);
- Housing Executive stock at March 2020 was 7,449 with 14,483 properties sold since the commencement of the 'Right to Buy' scheme;
- Five schemes for 25 units completed over the year to March 2020;
- There were six schemes for 78 units on-site at March 2020, including two schemes in Lurgan for 39 units and one scheme in Armagh for 23 units of social housing;
- Sixty Housing Executive properties were sold in the year to March 2020;
- COVID-19 will undoubtedly 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.

## 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 has established that, of the overall three year programme, 2.5% of the urban and 2.0% of the rural units has been allocated to Armagh City, Banbridge and Craigavon Borough. Five year projected need for the area as a whole is 646 and the projected need for individual settlements is detailed in Table 22.

**Table 22: Projected (5 Year) Social Housing Need 2020-2025**

Settlement	Social Housing Need 2020-25
Armagh 1	98
Armagh 2	25
Banbridge Town	141
Central Craigavon	10
North Lurgan	168
South Lurgan	33
Portadown 1	43
Portadown 2	56
Derrymacash/Derrytrasna/Kinnego*	15
Dromore	11
Rathfriland	15
Remaining Settlements**	31
<b>Total</b>	<b>646</b>

Housing need has currently been met in Annaclone, Annahugh, Annaghmore / Eglisk\*, Ashfield / Tullyhenan, Ballela, Banbridge Rural Cottages, Carn, , Clady/Corran/Ballymacnab\*, Closkelt, Corbet, Dollingstown, Donaghcloney, Dromore Rural Cottages, Drumhillery / Darkley/Derrynoose\*, Drumnacanvey, Gilford, Glenanne/Mountnorris/Loughgilly\*, Hamiltonsbawn/Edenaveys\*, Katesbridge, Keady, Killyman/Laghey\*, Kinallen, , Lenaderg, Lisnagrade/Ballyvarley\*, Loughgall, Madden / Milford / Ballyards\*, Markethill, Magheralin, Portadown Rural, Poyntzpass, Richhill, Scarva, Seapatrick, Tandragee, Tullylish, 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 Aghagallon, Bleary, Charlemont / Blackwatertown / Carrickaness / Donnelly Hill\*, Lawrencetown, Loughbrickland and Middletown 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 2025. 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 Placeshaping, South Region before any significant work is carried out. While additional housing here would be welcomed, location of the site will determine which area is being catered for and whether support can be provided;
- There is no requirement for Cat 1 accommodation in North or South Lurgan due to the level of provision already available;
- A site identification study has been completed for North Lurgan and will be distributed to Housing Associations in due course;
- 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 LHA include Culdee / Irish Street, Cregagh, Mullanstown, Nialls Crescent and Mullacreevie. Contact should be made with South Regional Placeshaping upon identification of a site as there are certain estates within this HNA that experience letting difficulties. The housing need is predominately for one and two bed accommodation, including some generic / bespoke complex needs units. There is no requirement for further Cat 1 accommodation;
- Housing need has now grown to a significant level in Portadown 2 HNA. Portadown 2 HNA 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, Junction Row. Demand for housing is highest in Killicomaine followed by the town centre and Brownstown. Housing Associations should forward town centre sites to South Regional Placeshaping who will determine whether support can be provided based on location and HNA;
- Portadown 2 experiences letting difficulties within certain estates / areas so it is pertinent that Housing Associations make contact with Placeshaping, South Region at site identification stage to eliminate unnecessary work;
- The Housing Executive has remaining landbank available within Portadown 2 HNA which is currently being investigated for development;



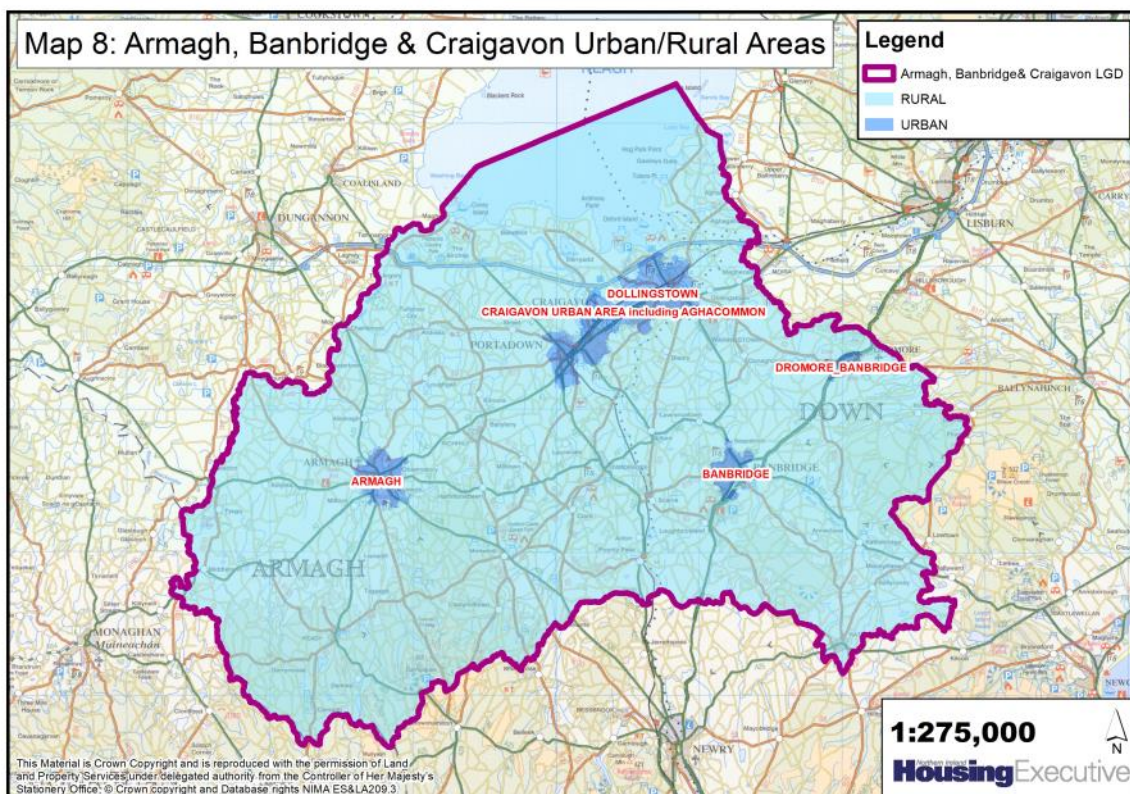
- Central Craigavon is now showing a small positive general housing need. The Housing Executive has landbank in Central Craigavon which will be utilised to help meet this need;
- There is a limited need remaining for Cat 1 accommodation throughout the local area. Contact should be made with Placeshaping South Region at an early stage who can advise in what areas a remaining unmet Cat 1 need exists;
- 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 landbank remaining within Armagh City and Central Craigavon;
- 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, 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 three 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 four 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 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. Placeshaping, 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 SHDP. The rural target share for Year 1 of the Social Housing Development Programme, 2020/23 is 12.3% 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.

**Map 8: Armagh City, Banbridge and Craigavon Borough rural map**



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.

## Indicative housing mix requirements

- At March 2020 there were 290 applicants in rural Armagh City, Banbridge and Craigavon Borough in housing stress (15% 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;
- 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;
- 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 23: Indicative housing mix for Armagh City, Banbridge & Craigavon Borough**

Elderly	Families*	Singles	Wheelchair
10%	60%	30%	10%

\* Family households include 2, 3 and 4 bed units. Placeshaping, 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 Annaclone, Annahugh, Annaghmore / Eglis, Ashfield / Tullyhenan, Ballela, Banbridge Rural Cottages, Carn, Clady/Corran/Ballymacnab, Closkelt, Corbet, Dollingstown, Donaghcloney, Dromore Rural Cottages, Drumhillery / Darkley / Derrynoose, Drumnacanvey, Gilford, Glenanne / Mountnorris / Loughgilly, Hamiltonsbawn / Edenaveys, Katesbridge, Keady, Killyman/Laghey, Kinallen, , Lenaderg, Lisnagrade/Ballyvarley, Madden / Milford / Ballyards, Markethill, Magheralin, Portadown Rural, Richhill, Scarva, Seapatrick, Tandragee, Tullylish, Tynan/Killylea and Waringstown. These areas will be kept under annual review.

## Rural areas

Based on the waiting list for social housing, at March 2020, the current projected need for rural areas within Armagh City, Banbridge and Craigavon Borough Council is for 65 units. Taking account of new build schemes on the current SHDP, the residual housing need is focused in the settlements of Aghagallon, Bleary, Charlemont / Blackwatertown / Carrickaness / Donnelly Hill, Dromore, Lawrencetown, Loughbrickland, Loughgall, Middletown, and Rathfriland. Proposals for social housing in these locations will be welcomed and given due consideration.

Site identification studies have been completed for Kinnego and Tullylish. Ongoing studies are nearing completion for Annaghmore/Eglis, Lenaderg and Lawrencetown.

During 2019/20 rural housing need tests took place in Darkley, Moneyslane and Middletown. Expressions of interest to the tests in Darkley and Moneyslane were very low. While there were eleven expressions of interest to the Middletown test, only a couple of people came onto the waiting list. While the test proved ultimately unsuccessful there remains a projected housing need of eight for the village and the requirement is for single person accommodation.

It is recognised that there may be neighbouring rural settlements where demand has not yet been identified but where land may still be available. 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 NIHE will seek to assist in assessing any hidden need by way of Rural Housing 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 Armagh City, Banbridge and Craigavon Borough is 45 units. Wheelchair housing need breakdown by Settlement Area

At March 2020 there were 35 housing stress applicants who require wheelchair accommodation with only 5 allocations over the last year. This leaves a residual need of 30 applicants. Housing need for wheelchair units is concentrated mainly in Portadown 2, Central Craigavon, Banbridge Town and Armagh 2 HNA.

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 two and three bed units and built in line with space standards included in the Housing Association Guide.

## Shared Future Demand (Housing for All)

The Housing Executive continues to support the Northern Ireland Executive’s Together Building a United Community (TBUC) Programme through the facilitation of new build Shared Housing schemes. Having initially supported the delivery of 10 Shared Housing schemes under the TBUC programme, the Housing Executive is now working with DfC to bring forward up to 200 new Shared Housing units annually through the SHDP under the Housing for All programme. 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 two serviced sites in Craigavon at Burnside and Leghorn and for two additional pitches at Acorn Grove, Monbrief Road. The development of all, or some of the above sites, which are Housing Executive owned, will be dependent on the level of need. We continue to assess demand for Traveller accommodation across the borough. Our Research Unit has recently completed the Irish Travellers’ Accommodation Survey 2018/19 which will inform the development of our Irish Travellers Accommodation Strategy 2020 – 2025. The Strategy includes proposals for a Travellers housing needs assessment. The Strategy was submitted to the Housing Executive Board for approval in May 2020 and released for formal consultation.

## Intermediate (Affordable) Demand

- The Housing Executive estimates intermediate/affordable housing demand for Armagh City, Banbridge and Craigavon Borough is 183 units per annum;
- Co-ownership had an active stock of 1,255 dwellings at March 2019, 192 of which were purchased during 2019/20;
- 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 28.9% between 2013 and 2019;
- Average house prices in Armagh City, Banbridge and Craigavon Borough have increased over the 2013/19 period by 25.1% and by 9.7% over the past year.

**Table 24: Average Annual House Prices Armagh City, Banbridge and Craigavon Borough & NI 2013-2019**

Area	2013	2014	2015	2016	2017	2018	2019	% Change 2013-2019
<b>ACBCBC</b>	113,714	102,719	127,347	130,671	135,787	129,705	142,263	25.1
<b>Northern Ireland</b>	131,204	140,217	149,449	154,028	155,049	163,128	169,057	28.9

## Armagh City, Banbridge & Craigavon Borough Supporting Data

**Table 25: Armagh City, Banbridge and Craigavon Borough Waiting List – March 2020**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	1,309	246	781	129	250	513	<b>3,228</b>
<b>HS Applicants</b>	813	123	463	73	152	326	<b>1,950</b>
<b>Allocations</b>	205	21	123	13	44	92	<b>498</b>

Applicants – Housing applicants at March 2020

HS Applicants – Housing stress applicants at March 2020 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2020

**Table 26: North Lurgan Waiting List – March 2020**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	207	37	121	22	29	104	<b>520</b>
<b>HS Applicants</b>	133	21	88	15	15	80	<b>352</b>
<b>Allocations</b>	23	<10	<10	<10	<10	<10	<b>48</b>

Applicants – Housing applicants at March 2020

HS Applicants – Housing stress applicants at March 2020 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2020

**Table 27: North Lurgan Housing Stress applicants time on list March 2020**

Household	0-6 mths	6-12 mths	1-2 years	2-4 years	4+ years	Total	Average Months
<b>Single</b>	25	19	33	29	27	<b>133</b>	<b>31</b>
<b>Small Adult</b>	<10	<10	<10	<10	<10	<b>21</b>	<b>60</b>
<b>Small Family</b>	20	17	21	21	<10	<b>88</b>	<b>26</b>
<b>Large Adult</b>	<10	<10	<10	<10	<10	<b>15</b>	<b>52</b>
<b>Large Family</b>	<10	<10	<10	<10	<10	<b>15</b>	<b>25</b>
<b>Older Person</b>	10	10	14	15	31	<b>80</b>	<b>61</b>
<b>Total</b>	<b>64</b>	<b>53</b>	<b>78</b>	<b>74</b>	<b>83</b>	<b>352</b>	<b>39</b>

**Table 28: Banbridge Town Waiting List – March 2020**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	157	30	94	13	21	81	<b>396</b>
<b>HS Applicants</b>	111	21	56	<10	17	57	<b>-</b>
<b>Allocations</b>	30	0	15	<10	<10	15	<b>68</b>

Applicants – Housing applicants at March 2020

HS Applicants – Housing stress applicants at March 2020 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2020

**Table 29: Banbridge Housing Stress applicants time on list March 2020**

Household	0-6 mths	6-12 mths	1-2 years	2-4 years	4+ years	Total	Average Months
<b>Single</b>	16	18	28	25	24	111	<b>31</b>
<b>Small Adult</b>	0	<10	<10	<10	<10	21	<b>54</b>
<b>Small Family</b>	11	<10	13	14	<10	56	<b>29</b>
<b>Large Adult</b>	0	<10	<10	<10	<10	<10	<b>35</b>
<b>Large Family</b>	<10	<10	<10	<10	<10	17	<b>20</b>
<b>Older Person</b>	<10	<10	13	<10	24	57	<b>66</b>
<b>Total</b>	<b>39</b>	<b>44</b>	<b>66</b>	<b>53</b>	<b>69</b>	-	<b>39</b>

**Table 30: Armagh 1 Waiting List – March 2020**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	157	24	69	10	14	40	<b>314</b>
<b>HS Applicants</b>	107	<10	41	<10	<10	24	<b>192</b>
<b>Allocations</b>	19	<10	<10	0	<10	10	<b>43</b>

Applicants – Housing applicants at March 2020

HS Applicants – Housing stress applicants at March 2020 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2020

**Table 31: Armagh 1 Housing Stress applicants time on list March 2020**

Household	0-6 mths	6-12 mths	1-2 years	2-4 years	4+ years	Total	Average Months
<b>Single</b>	13	18	22	31	23	<b>107</b>	<b>36</b>
<b>Small Adult</b>	<10	0	<10	<10	<10	<10	<b>64</b>
<b>Small Family</b>	<10	<10	12	<10	<10	<b>41</b>	<b>33</b>
<b>Large Adult</b>	0	0	0	<10	<10	-	<b>82</b>
<b>Large Family</b>	<10	<10	<10	<10	<10	-	<b>38</b>
<b>Older Person</b>	<10	<10	<10	<10	11	<b>24</b>	<b>54</b>
<b>Total</b>	<b>25</b>	<b>26</b>	<b>44</b>	<b>46</b>	<b>51</b>	<b>192</b>	<b>41</b>

**Table 32: Portadown 2 Waiting List – March 2020**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	202	56	120	17	37	101	<b>533</b>
<b>HS Applicants</b>	113	25	62	10	23	62	<b>295</b>
<b>Allocations</b>	31	<10	22	<10	<10	26	<b>88</b>

Applicants – Housing applicants at March 2020

HS Applicants – Housing stress applicants at March 2020 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2020

**Table 33: Portadown 2 Housing Stress applicants time on list March 2020**

Household	0-6 mths	6-12 mths	1-2 years	2-4 years	4+ years	Total	Average Months
<b>Single</b>	21	17	24	32	19	<b>113</b>	<b>28</b>
<b>Small Adult</b>	<10	<10	<10	<10	<10	<b>25</b>	<b>35</b>
<b>Small Family</b>	13	13	19	13	<10	<b>62</b>	<b>19</b>
<b>Large Adult</b>	<10	<10	<10	<10	<10	<b>10</b>	<b>28</b>
<b>Large Family</b>	<10	<10	<10	<10	<10	<b>23</b>	<b>29</b>
<b>Older Person</b>	11	12	14	<10	17	<b>62</b>	<b>42</b>
<b>Total</b>	<b>58</b>	<b>48</b>	<b>69</b>	<b>64</b>	<b>56</b>	<b>295</b>	<b>30</b>

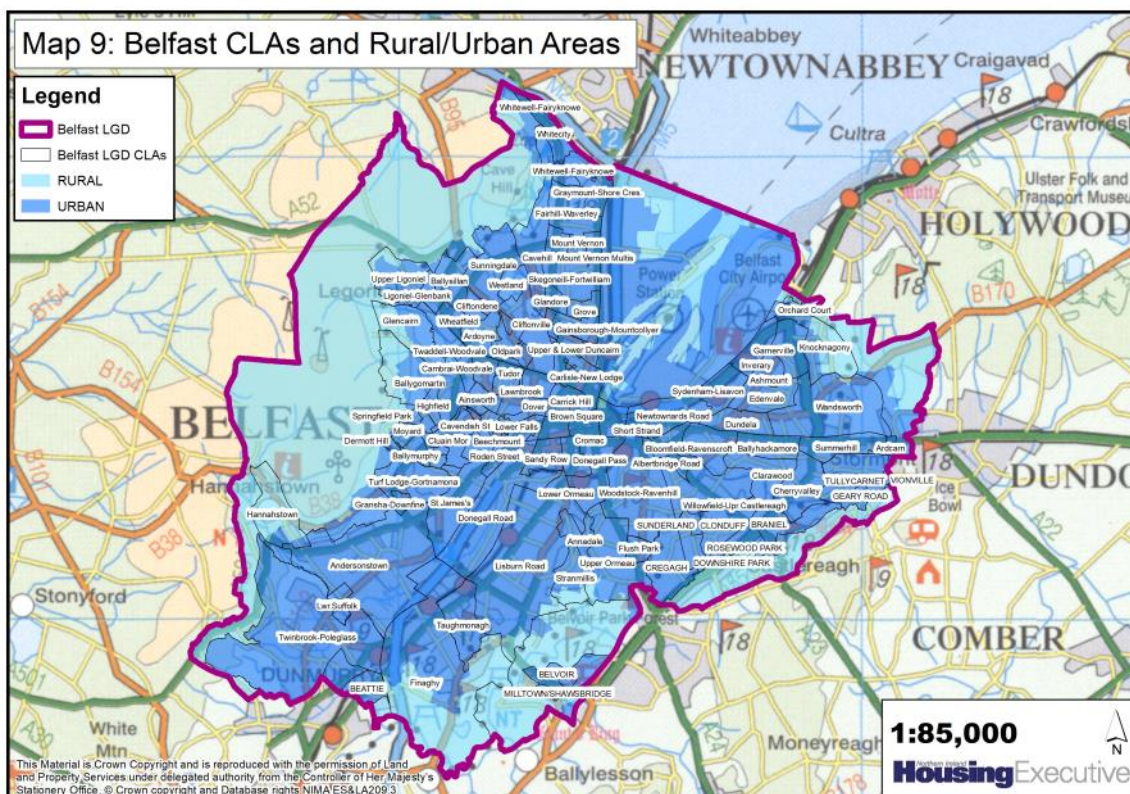


## Belfast

### 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.

Map 9: Belfast City Council Area



The economic performance of Belfast as demonstrated through levels of unemployment, economic inactivity and low incomes, continues to lag behind other parts of the U.K. The economic consequences of the Brexit vote may be more acutely felt in Northern Ireland as its industrial and agricultural sectors are closely linked to E.U. markets. In addition the COVID-19 pandemic will have an impact on the economic activity in the city in the next few years.

The population continues to grow, with an increasingly ageing populace and smaller households. It is projected that by 2028 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

- The DOE's Northern Ireland Housing Land Availability Report for 2013 (Planning NI: 2014) shows potential capacity for almost 19,000 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;
- The actual rate of new house building is approximately half of the requirement as set out in the Regional Development Strategy 2035;
- New build starts in Belfast have increased from 410 units in 2014/15 to over 700 in 2019/20.

### Owner Occupied Housing Sector

- Census 2011 demonstrates the continued desire of residents to own their own home, 55% of all properties in Belfast are owner occupied, lower than the N.I. average of 67%;
- The private housing market had been showing signs of a slow recovery - the number of house sales in Belfast increased from 2343 in 2010 to 4,620 in 2018 (LPS); The COVID-19 pandemic will slow activity across all sectors of the housing market;
- The average house price for Belfast stabilised at £161k in 2019 slightly below the Northern Ireland average of £169k (Ulster University);
- The most popular locations are in South and East Belfast where prices have traditionally been higher than other areas of the city.

### 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 22,617 tenancies registered in Belfast in March 2020;
- Housing benefit continues to play a vital role in supporting the private rented sector. At March 2020, over 11,000 private tenants in Belfast were in receipt of Housing Benefit;
- There are currently an estimated 6,270 Houses of 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.

## Social Rented Housing Sector

- The social rented stock in the city at March 2020 was approximately 39,000 units which accounts for over a quarter of the total. This is higher than the N.I. average of 15% and reflects the high levels of redevelopment carried out in the city since the 1970s;
- Housing Executive stock in Belfast at March 2020 was 25,494 with over 24,500 properties sold since the commencement of the 'Right to Buy' scheme;
- Housing Association stock in Belfast is around 13,500;
- There were 319 new social housing units completed and a further 975 new social housing units under construction in the year ending March 2020;
- 110 Housing Executive properties were sold in the year to March 2020.

## 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***

The requirement for new social housing in Belfast has increased consistently since 2010. The five year assessment for 2020-2025 shows a need for almost 5,149 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 BMAP 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.

## 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 will be established when a suitable housing scheme or schemes is/are approved. This new waiting list will be open to all applicants wishing to live in the city centre.

## Supported Housing Need

The term Supported Housing relates to accommodation with complimentary housing support services to cater for people with a range of special needs. The Supporting People Commissioning Body sets the strategic priorities for Planning and Commissioning the Supporting People Programme. New capital and revenue programmes have to be prioritised and the Commissioning Body has indicated that the following type of scheme may attract funding:

- Schemes that are related to the closure of a long stay institution or hospital or have been the subject of a long term planning process;
- Schemes related to Housing Executive Homeless Action Plans;
- Replacement schemes where Supporting People revenue funding streams are already in place;
- Schemes that fit into regional Health or Probation Strategies.

## 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 has 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.

Table 34 shows the Projected 5 year Social Housing Need by Settlement.

**Table 34: Projected (5 Year) Social Housing Need 2020-2025**

Settlement	Housing Need Assessment Area*	Total 5 Year Projection
<b>North Belfast</b>	North Belfast 1	1,597
	North Belfast 2	81
	<b>North Belfast Total</b>	<b>1,678</b>
<b>South &amp; East Belfast</b>	Donegall Road	30
	Finaghy	70
	Inner East Belfast	0
	Lisburn Road	324
	Lower Ormeau/Markets	212
	Middle East Belfast	258
	Outer East Belfast	100
	Short Strand	56
	Upper Ormeau	376
	<b>South &amp; East Belfast Total</b>	<b>1,426</b>
<b>West Belfast</b>	Inner West Belfast	680
	Greater Shankill	57
	Middle West Belfast	777
	Outer West Belfast	500
	<b>West Belfast Total</b>	<b>2,014</b>
	<b>Belfast City Total</b>	<b>5,118</b>

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

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 2016 and 2020. There were 10,813 total applicants in 2016 and 10,819 in 2020;
- The number of applicants in Housing Stress over the same period has risen from 7,134 in 2016 to 8,143 in 2020;
- Allocations over the same period remained consistent at around 2,000 per year, but fell to fewer than 1,880 in the year ending March 2020;
- 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;
- Some locations are more suitable for certain accommodation types than others, for example, flat sites with road frontage are more suited to Category 1 elderly 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;
- The Urban Renewal Area Programme in Belfast is coming to an end hence 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 problem and we are working closely with Belfast City Council in its preparations 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, which is evident across the city;
- There is a shortage of Specialist Category 1 elderly accommodation in some areas, reflecting an ageing population;
- The future need is predominantly for 2 bedroom design forms and with 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.

## Indicative Housing Mix Requirements

- Single, elderly and small family households comprised over 80% of the Belfast waiting list in housing stress;
- The table below provides an indicative housing mix based on the profile of applicants registered on the Waiting List.

**Table 35: Indicative Housing Mix for Belfast**

Elderly	Families*	Singles	Wheelchair
10%	65%	25%	10%

\* Focus on: Small Adult and Small Family Households

- The trend for new dwellings in Belfast is for smaller households for single and elderly persons as well as small family units. One and two bedroom accommodation would increasingly be the norm for singles and small families. 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 bed properties may be required for families and these should be discussed with the Housing Executive, as should bespoke wheelchair dwellings;
- DfC has advised Housing Associations that the proportion of wheelchair units be increased to 10% of the overall new build by 2020;
- 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;
- 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.

## 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 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 of low demand social housing stock in order to protect the significant investment made in surrounding stock.

## Wheelchair Housing Need (HNA)

The Total Projected Wheelchair Housing Requirement for Belfast is 152 units, see table below:

**Table 36: Wheelchair housing need breakdown by Settlement Area**

Settlement	Urban/Rural	Target Units
<b>North Belfast</b>	Urban	28
<b>South &amp; East Belfast</b>	Urban	84
<b>West Belfast</b>	Urban	40
<b>Belfast City Total</b>		<b>152</b>

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

## Shared Future Demand

Potential Shared Future Housing Schemes in Belfast should be identified, discussed and agreed by the Planning/Place Shaping Team.

## Supported Housing Need

There is currently no new requirement identified for Supported Housing Capital Projects beyond those already in the 3 Year SHDP for Belfast.

## Travellers' Accommodation

The need for Travellers' Accommodation will be assessed by the Travellers Support Team and programmed accordingly.

## Intermediate (Affordable) Demand

- The Housing Executive estimates Intermediate/Affordable Housing Demand for Belfast is 490 units in the period to 2029;
- Co-ownership approved 181 applications in 2019/20 for Belfast, reflecting the opportunities this scheme provides in the current housing market environment;
- Average house prices in Northern Ireland decreased by almost 30% between 2008 and 2018;
- In general house prices in Belfast are lower than Northern Ireland, but are higher in parts of the South and East of the city.



**Table 37: Average Annual House Prices Belfast & NI 2015-2019**

Area	2015	2016	2017	2018	2019	% Change 2015-2019
<b>Belfast</b>	156,991	163,665	162,474	168,094	160,857	2.46%
<b>Northern Ireland</b>	149,949	154,028	155,049	163,128	169,057	12.74%

## Belfast Supporting Data

**Table 38: North Belfast Waiting List – March 2020**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	1,417	101	625	19	161	245	<b>2,568</b>
<b>HS Applicants</b>	1,086	65	477	14	120	184	<b>1,946</b>
<b>Allocations</b>	288	13	158	<10	35	47	-

Applicants – Housing applicants at March 2020

HS Applicants – Housing stress applicants at March 2020 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2020

**Table 39: South & East Belfast Waiting List – March 2020**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	2,398	226	861	77	274	581	<b>4,417</b>
<b>HS Applicants</b>	1,776	129	581	55	189	420	<b>3,150</b>
<b>Allocations</b>	402	25	156	<10	28	113	-

Applicants – Housing applicants at March 2020

HS Applicants – Housing stress applicants at March 2020 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2020

**Table 40: West Belfast Waiting List – March 2020**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	1,695	153	1,268	46	296	376	<b>3,834</b>
<b>HS Applicants</b>	1,323	108	1,065	38	234	279	<b>3,047</b>
<b>Allocations</b>	240	19	232	<10	46	67	-

Applicants – Housing applicants at March 2020

HS Applicants – Housing stress applicants at March 2020 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2020

**Table 41: North Belfast Housing Stress Applicants Time on List – March 2020**

Household	0-6 mths	6-12 mths	1-2 years	2-4 years	4+ years	Total	Average Months
Single	115	148	219	281	323	<b>1,086</b>	<b>39</b>
Small Adult	<10	<10	11	22	21	<b>65</b>	<b>49</b>
Small Family	47	47	95	105	183	<b>477</b>	<b>47</b>
Large Adult	<10	<10	<10	<10	<10	<b>14</b>	<b>61</b>
Large Family	11	12	23	31	43	<b>120</b>	<b>43</b>
Older Person	24	24	35	35	66	<b>184</b>	<b>55</b>
<b>Total</b>	<b>203</b>	<b>239</b>	-	-	-	<b>1,946</b>	<b>43</b>

**Table 42: South & East Belfast Housing Stress Applicants Time on List – March 2020**

Household	0-6 mths	6-12 mths	1-2 years	2-4 years	4+ years	Total	Average Months
Single	200	267	369	408	532	<b>1,776</b>	<b>42</b>
Small Adult	<10	17	26	35	43	-	<b>52</b>
Small Family	66	85	122	118	190	<b>581</b>	<b>43</b>
Large Adult	<10	<10	<10	15	27	<b>55</b>	<b>60</b>
Large Family	18	26	45	47	53	<b>189</b>	<b>42</b>
Older Person	46	52	80	87	155	<b>420</b>	<b>59</b>
<b>Total</b>	<b>341</b>	-	-	<b>710</b>	<b>1,000</b>	-	<b>45</b>

**Table 43: West Belfast Housing Stress Applicants Time on List – March 2020**

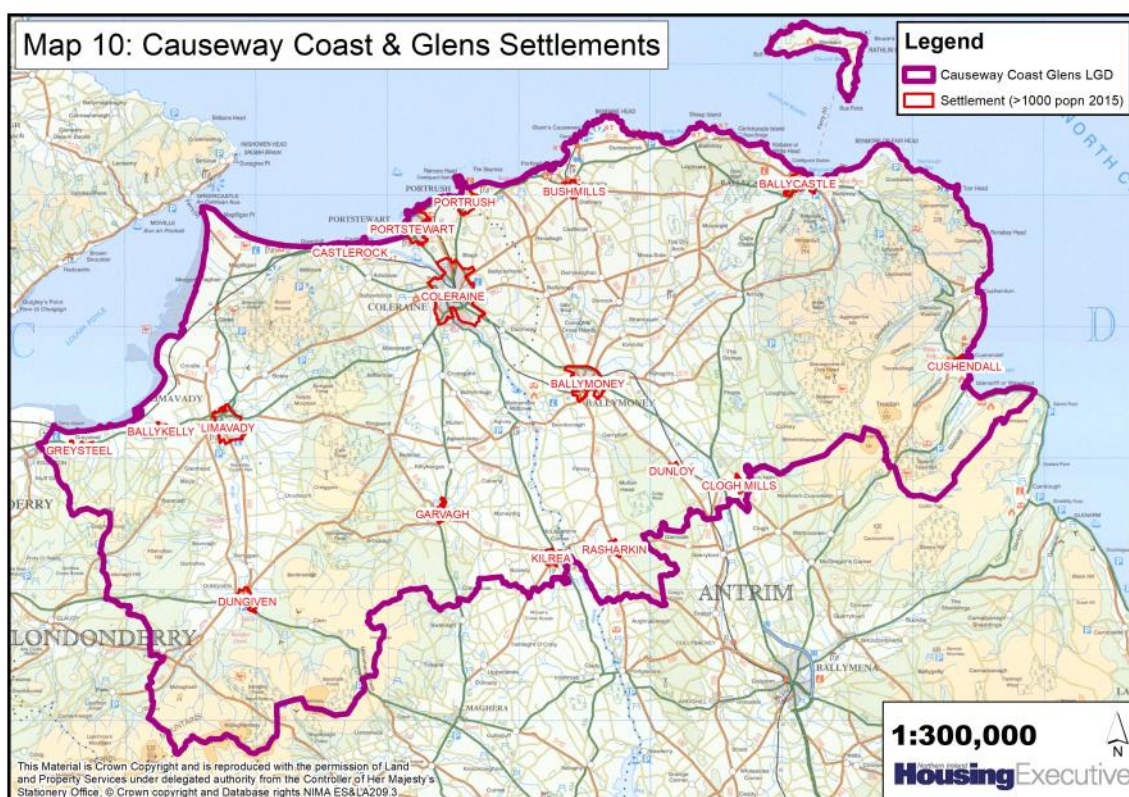
Household	0-6 mths	6-12 mths	1-2 years	2-4 years	4+ years	Total	Average Months
Single	104	209	241	310	459	<b>1,323</b>	<b>47</b>
Small Adult	<10	15	24	21	41	-	<b>54</b>
Small Family	64	107	170	266	458	<b>1,065</b>	<b>53</b>
Large Adult	0	<10	<10	12	20	<b>38</b>	<b>72</b>
Large Family	15	29	39	72	79	<b>234</b>	<b>48</b>
Older Person	25	29	54	45	126	<b>279</b>	<b>64</b>
<b>Total</b>	-	-	-	<b>726</b>	<b>1,183</b>	<b>3,047</b>	<b>47</b>

## Causeway Coast & Glens

### Context

Causeway Coast and Glens borough is an amalgamation of the former districts of Limavady, Coleraine, Ballymoney and Moyle. It has seven towns and a hierarchy of other villages and settlements serving a large rural hinterland. The population is increasing by about 2% every ten years, which is lower than the average growth for Northern Ireland. Most of the growth is happening in the main towns and in certain rural villages, although most rural areas have shown a population decline between the last two Censuses.

**Map 10: Causeway Coast & Glens Borough Council with main settlements**



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 2026 older people will represent 21.9% 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 DOE's Northern Ireland Housing Land Availability Report for 2013 (Planning NI: 2014) showed potential capacity for 13,858 additional dwellings in the borough but this has not been updated for 2014 onwards;
- There is a projected Housing Growth Indicator new dwelling requirement of 5,600 for the period 2016 to 2030 for the borough. Causeway Coast and Glens falls below the NI average of 7,709. This breaks down as 400 dwellings per year;
- New build starts have increased from 503 to 706 between 2015 and 2016, which is the highest since the start of the recession. They fell to 457 in 2019.

### Owner Occupied Housing Sector

- The sector comprised 68% of the total occupied housing stock at 2016 (Northern Ireland House Condition Survey 2016)
- House sales are increasing with 9,455 house sales in 2019 compared to 9,380 in 2018 and 1,050 in 2010;
- Ulster University states that the average house price in Causeway Coast and Glens in 2019 was £172,790 which represents an increase of 8.9% on 2018 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. Impending interest rate rises are currently not impacting the market as they are expected to be slow and gradual.

### Private Rented Housing Sector

- The sector comprised 20% of the total occupied housing stock at 2016 (Northern Ireland House Condition Survey 2016);
- The highest age profile private renting are aged 25-34 years old. The most popular house types are semi-detached houses;
- DfC's Landlord Registration scheme identified 6,322 properties registered by 3,742 landlords in Causeway Coast and Glens at February 2020. Due to the ongoing COVID-19 Pandemic, DfC are unable to report end of March 2020 information;

- There were 1,366 Housing Executive tenants receiving the Housing Cost element of Universal Credit in Causeway Coast and Glens at end of March 2020;
- 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 12% of the total occupied housing stock at 2016 (Northern Ireland House Condition Survey 2016);
- There are 6,560 NIHE owned homes in the borough;
- 9,504 NIHE homes have been purchased by tenants in the borough;
- 173 social housing units are on-site at March 2020, and a further 281 are programmed to start in the next three years;
- There are 2,833 applicants on the waiting list, of which 56% are in housing stress

## 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 3.2% urban units and 16.3% rural units of the overall three year programme. Five year projected need for the area as a whole is 1,010 and the projected need for individual settlements is detailed in Table 44.

**Table 44: Projected (5 Year) Social Housing Need 2020-25**

Settlement	Housing Need Assessment Area*	Total 5 Year Projection
<b>Main towns (Hubs)</b>	Ballycastle	93
	Ballymoney	100
	Coleraine	320
	Limavady	78
<b>Other Towns</b>	Ballykelly	30
	Cushendall	23
	Dungiven	43
	Portrush	153
	Rathlin Island	10
	Balnamore	14
	Castlerock	11
	Greysteel	12
	Portballintrae	15
<b>Remaining Settlements (need ≤10)**</b>		<b>108</b>
<b>Total</b>		<b>1,010</b>

\* Remaining settlements include Armoy, Aghadowey, Ardgargan, Articlave, Artikelly, Atlantic, Bendooragh, Ballintoy, Ballybogey, Ballyrashane, Ballyvogy, Ballywoodock, Boveedy, Burnfoot, Bushmills, Bellarena, Castleroe, Clintyfinnan, Cloughmills, Corkey, Craigmore, Cushendun, Dernaflaw, Dervock, Druckendult, Drumadraw, Drumsurn, Dunaghy, Dunloy, Dunluce, Farranlester, Feeny, Foreglen, Garvagh, Glack, Glenleary, Glenullin, Gortnaghey, Grove, Killyrammer, Kilrea, Largy, Liscolman, Loughguile, Macfin, Macosquin, Maybouy, Mosside, Portstewart, Rasharkin, Seacon, Stranocum, Waterfoot and Windyhall 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 formerly known as Latent Demand Testing (LDT) 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:

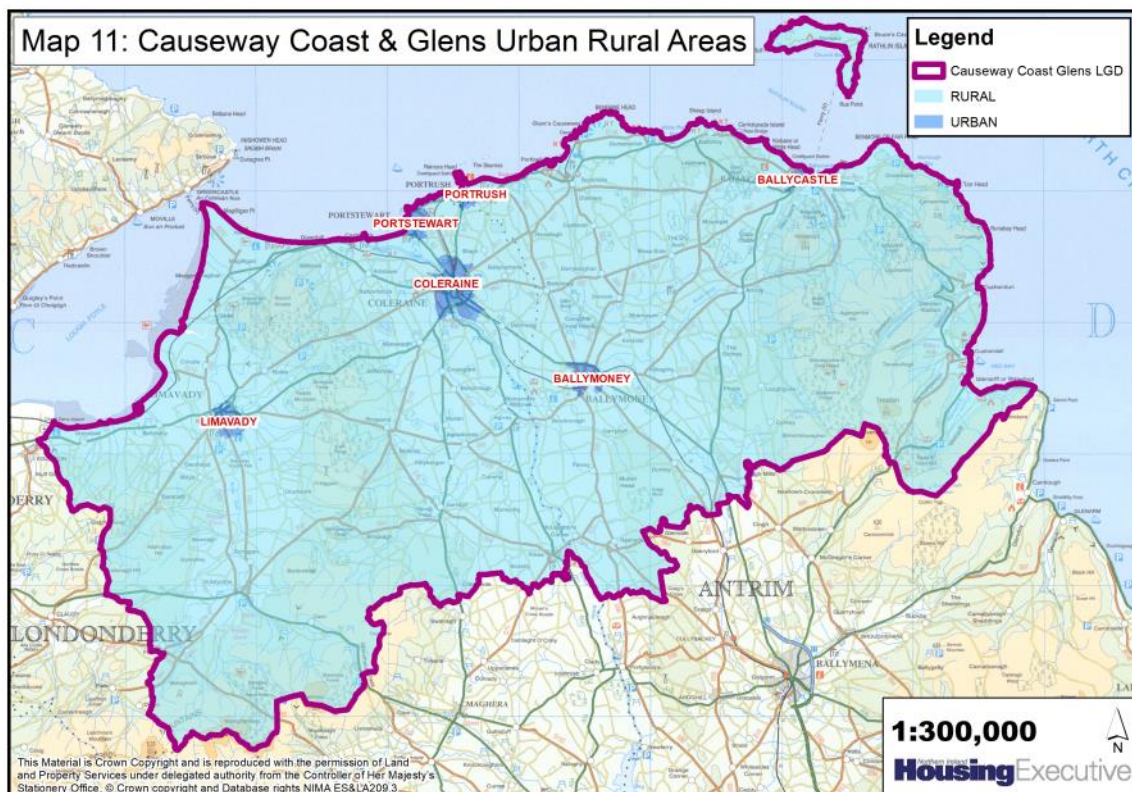
- Social housing proposals are particularly welcome in locations such as Portrush where there is a persistent unmet need (except for Dhu Varren and Glenmanus); Coleraine, Ballymoney, Limavady and Ballykelly;
- Proposals will be assessed against potential local impacts on existing housing stock, such 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 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.
- A review of Housing Executive owned/undeveloped land is carried out annually.

## Rural

The provision of new social housing in rural settlements represents a strategic priority for delivery of the SHDP. At 2020/21, the rural target share of the SHDP is 16.3% of the overall programme based on average levels of housing stress in rural areas.

**Map 11: Causeway Coast & Glens rural map**



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, formerly latent demand and marketing.



## Indicative housing mix requirements

- The overall demographic trend is for an ageing population and for small household size (1-3 persons). Future need is predominantly for one and two bedroom design forms and with 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;
- 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 45: Indicative housing mix for Causeway Coast and Glens**

Elderly	Families*	Singles	Wheelchair
18%	34%	48%	10%

\* Focus on: Small Adult and Small Family Households

## Areas where need is met

- Social housing proposals are particularly welcome in locations such as Portrush, Coleraine, Ballymoney, Limavady and Ballykelly;
- A lot of new build has taken place in the Coleraine, Dungiven, Ballymoney and Ballycastle

## 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.

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, Glack 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 NIHE 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)*

There is a projected need for 55 wheelchair units for the five year period 2020-25 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 two and three bed units, although there is a need for four bedroom units in Coleraine Town and built in line with 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.

### *Traveller's accommodation*

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

## Intermediate (Affordable) Demand

- The Housing Executive estimates intermediate housing demand for the borough at approximately 51 units per annum for the 2019 to 2029 period.
- Co ownership had an active stock of 482 dwellings at March 2020, 56 of which were purchased during 2019/20.

**Table 46: Average Annual House Prices Causeway Coast and Glens & NI 2015-2019**

Area	2015	2016	2017	2018	2019	% Change 2015-2019
<b>Causeway</b>	£145,594	£145,453	£150,410	£158,604	£172,790	19
<b>Northern Ireland</b>	£149,449	£154,028	£155,049	£163,128	£169,057	13

## Causeway Supporting Data

**Table 47: Causeway Waiting List – March 2020**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	1,200	172	643	78	199	541	2,833
<b>HS Applicants</b>	731	67	329	39	104	310	1,580
<b>Allocations</b>	163	17	106	<10	46	53	-

Applicants – Housing applicants at March 2020

HS Applicants – Housing stress applicants at March 2020 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2020

**Table 48: Coleraine Waiting List – March 2020**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	322	49	143	16	39	145	714
<b>HS Applicants</b>	206	21	78	<10	15	86	-
<b>Allocations</b>	45	<10	32	<10	16	<10	104

Applicants – Housing applicants at March 2020

HS Applicants – Housing stress applicants at March 2020 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2020

**Table 49: Limavady Waiting List – March 2020**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	161	20	70	12	33	59	355
<b>HS Applicants</b>	99	<10	34	<10	18	34	193
<b>Allocations</b>	22	<10	14	<10	<10	<10	48

Applicants – Housing applicants at March 2020

HS Applicants – Housing stress applicants at March 2020 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2020

**Table 50: Ballycastle Waiting List – March 2020**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	88	<10	42	<10	17	60	217
<b>HS Applicants</b>	54	<10	21	<10	11	26	113
<b>Allocations</b>	11	<10	<10	<10	<10	<10	30

Applicants – Housing applicants at March 2020

HS Applicants – Housing stress applicants at March 2020 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2020

**Table 51: Ballymoney Waiting List – March 2020**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	158	22	65	<10	22	48	-
<b>HS Applicants</b>	92	<10	31	<10	14	28	<b>176</b>
<b>Allocations</b>	28	<10	10	<10	<10	19	<b>67</b>

Applicants – Housing applicants at March 2020

HS Applicants – Housing stress applicants at March 2020 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2020

**Table 52: Housing Stress applicants time on list March 2020**

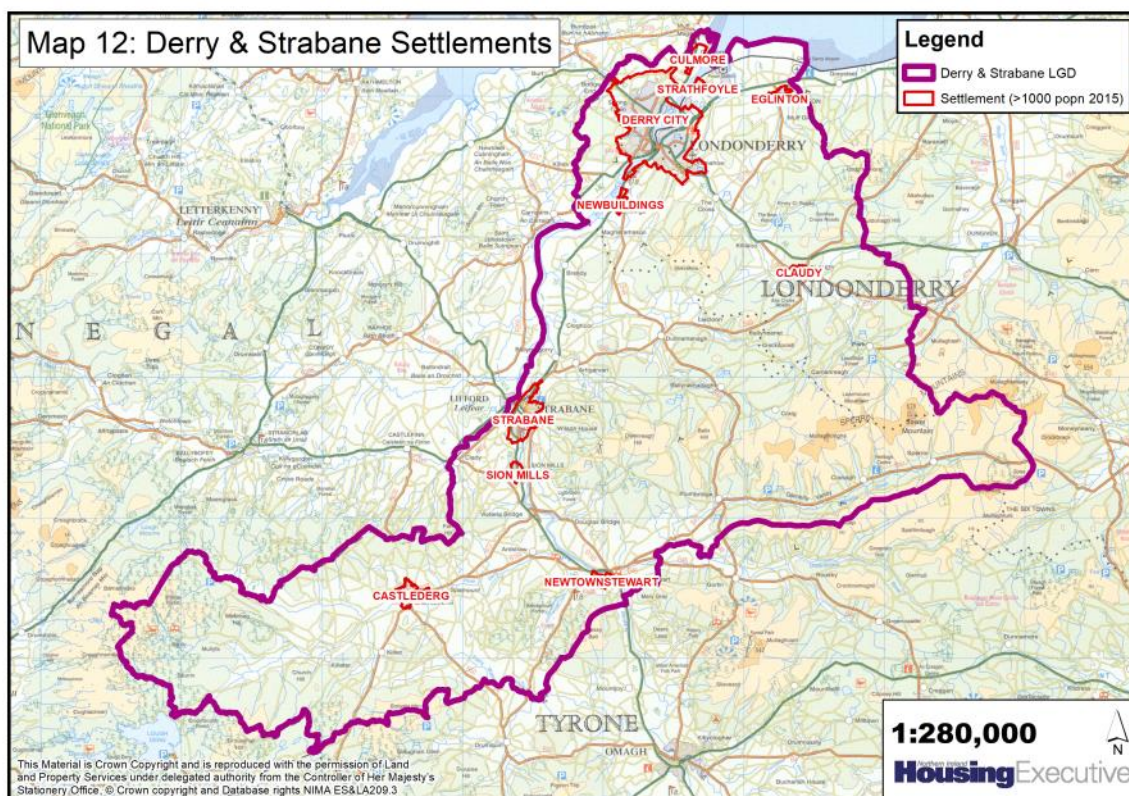
Household	0-6 mths	6-12 mths	1-2 years	2-4 years	4+ years	Total	Average Months
<b>Single</b>	118	81	157	173	202	<b>731</b>	<b>40</b>
<b>Small Adult</b>	<10	10	14	14	24	-	<b>39</b>
<b>Small Family</b>	58	30	67	86	88	<b>329</b>	<b>39</b>
<b>Large Adult</b>	<10	<10	<10	12	20	<b>39</b>	<b>38</b>
<b>Large Family</b>	16	12	21	22	33	<b>104</b>	<b>39</b>
<b>Older Person</b>	34	41	54	62	119	<b>310</b>	<b>40</b>
<b>Total</b>	<b>233</b>	-	-	<b>369</b>	<b>468</b>	-	<b>39</b>

## Derry City & Strabane

### Context

The district has a growing population of approximately 150,697 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.

**Map 12: Derry City & Strabane District Council with main settlements**



The economic performance of Derry City & 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 & 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.

The population continues to increase and has a high propensity for growth with a relatively young population. Similar to other councils, the older population is growing, albeit at a relatively low rate. 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.

## Housing Market Analysis (across tenures)

### Housing & Land Supply

- The Derry City & Strabane 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 & Strabane households were one person and 27.71% of households were two person;
- The district has a Housing Growth Indicator of 4,100 units, 2016-31 which is below the NI average.

### Owner Occupied Housing Sector

- As per NI House Condition Survey the tenure share in Derry City & Strabane was approximately 56% owner occupied;
- In 2019 there were 1,573 residential property sales in the district sales in the district (DoF);
- House prices have slightly increased in the past year with an average price of £133,091 in recorded for Derry City & Strabane in 2019 compared with £132,276 in 2018;
- Demand for intermediate housing aimed at low income households in Derry City & Strabane is estimated at 370 units between 2019-2029;
- Prior to Covid19, feedback from local estate agents indicated that demand is highest in urban and suburban locations with three and four 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 Housing Sector

- As per 2016 House Condition Survey private rented properties was estimated to make up approximately 20% of housing stock in Derry City & 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;
- The DfC's Landlord Registration Scheme identified 5,986 tenancies registered in Derry City & Strabane at February 2020;
- Housing benefit continues to play a vital role in supporting the private rented sector. At March 2019, 5,746 private tenants in Derry City & 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 1 April 2019, Belfast City Council has assumed responsibility for licensing of HMOs.

## Social Rented Housing Sector

- The sector comprises 24% of total housing stock (Source Northern Ireland House Condition Survey 2016);
- At March 2020, there were 8,742 Housing Executive owned properties in the borough;
- 11,663 Housing Executive properties have been sold through the House Sales Scheme, with 59 sold during 2019/20;
- There were 505 new social housing homes completed in year to March 2020, and 818 on-site. A further 1,557 units are programmed to start over the next three years;
- At March 2020, there were 4,661 applicants on the waiting list for Derry City & Strabane, 3,603 of whom were in housing stress with 764 allocations made over the previous 12 months.

## 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)

The Strategic Guidelines target share established for Derry City & Strabane indicates 23.1% urban units and 10.2% rural units of the overall three year programme. Five year projected need for the area as a whole is 3,890 and the projected need for individual settlements is detailed in Table 53.

**Table 53: Projected (5 Year) Social Housing Need 2020-25**

Settlement	Housing Need Assessment Area*	Total 5 Year Projection 2020-25
<b>Derry City</b>	Waterloo Place Westbank	<b>1,304</b>
	Collon Terrace Westbank	<b>1,390</b>
	Waterside 1	<b>318</b>
	Waterside 2	<b>211</b>
	Waterside 3	<b>138</b>
	Coshquin	<b>5</b>
	Curryneirin	<b>4</b>
	Drumahoe	<b>14</b>
	Tullyally	<b>3</b>
<b>Strabane Town</b>	Strabane Town	<b>276</b>
<b>Ballymagorry</b>	Ballymagorry	<b>14</b>
<b>Castledearg</b>	Castledearg	<b>14</b>
<b>Claudy</b>	Claudy	<b>25</b>
<b>Eglinton</b>	Eglinton	<b>54</b>
<b>Newbuildings</b>	Newbuildings	<b>12</b>
<b>Sion Mills</b>	Sion Mills/Glebe	<b>45</b>
<b>Strathfoyle</b>	Strathfoyle	<b>25</b>
<b>Nixons Corner</b>	Nixons Corner	<b>10</b>
<b>Remaining Settlements (need &lt;10)**</b>		<b>28</b>
<b>Total</b>		<b>3,890</b>

*NB. Please note that need is met for any locations not included on this list.*

*\*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 Artigarvan, Clady, Lettershandoney, Magheramason, Ardmore, Douglas Bridge and 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 (Latent Demand) 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:

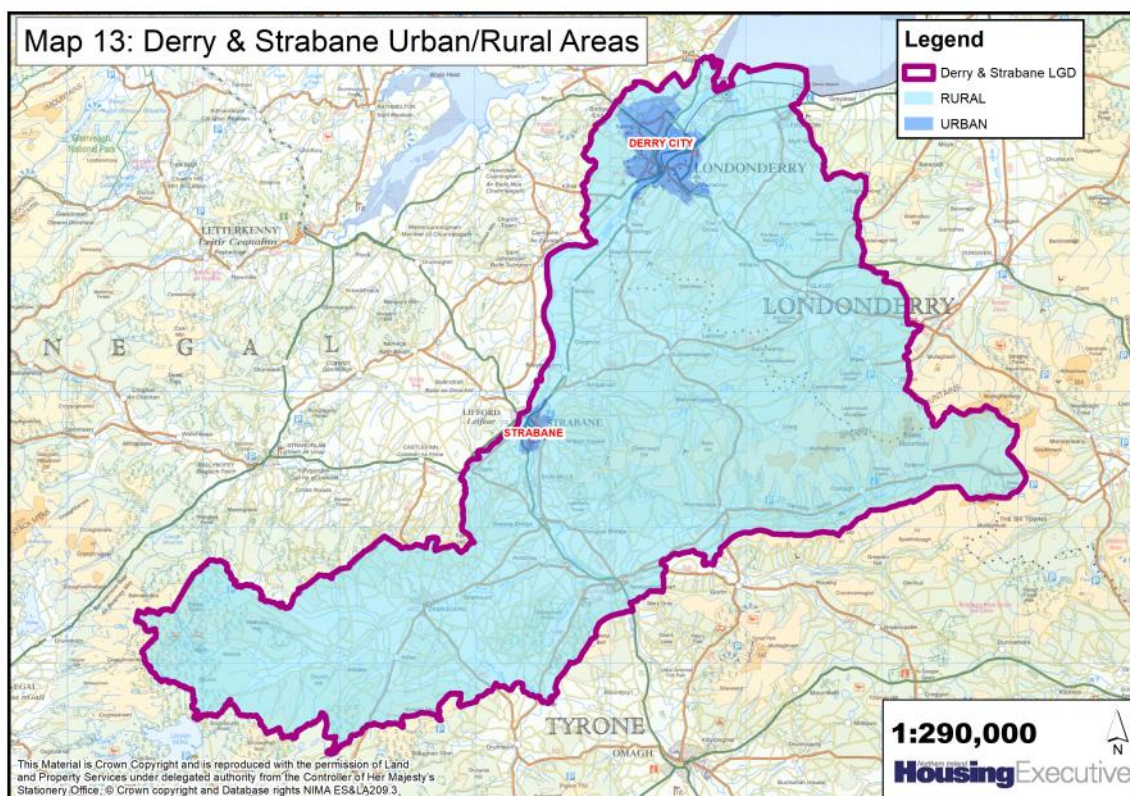
- The Housing Executive has identified Claudy village, Strathfoyle and Ballymagorry as locations where we would like to see small sites brought forward within the settlement limits as per the relevant Local Development Plans. Larger sites can be considered for Eglinton and Sion Mills;
- In Claudy and Sion Mills any development proposal should be within the village 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 within the auspices of Planning Policy Statement 21 – Sustainable Development in the Countryside;
- Strabane Town now has a substantial development programme which will meet current need if there are no slippages;
- 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.

## Rural

The provision of new social housing in rural settlements represents a strategic priority for delivery of the SHDP. At 2020/21, the rural target share of the SHDP is 12.3% 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.

Map 13: Derry City & Strabane rural map



### Indicative housing mix requirements

- Singles comprised 48% of applicants in housing stress followed by small families (29%) and elderly (13%);
- The housing mix may need to differ depending on location and initial contact with Place Shaping North is 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 54: Indicative housing mix for Derry City & Strabane

Elderly	Families*	Singles	Wheelchair
15%	40%	45%	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 2020, the current projected need for rural areas within Derry City & Strabane is for 227 units which is an increase of 50 from 177 units in 2019. 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 NIHE 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)

There is an identified need for 29 wheelchair units, 2020-25, 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. In general, generic wheelchair units should be for two and three 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 shared future housing. Housing Associations bringing forward suitable proposals for shared future designation would be welcomed. There is currently one new build social housing scheme being progressed for potential shared future housing in the area.

## Traveller's accommodation

There is no current identified need for additional traveller's 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 & Strabane at approximately 37 units per annum;
- In Derry City & Strabane 45 properties were purchased through Co-ownership in 2018/19.

**Table 55: Average Annual House Prices Derry City & Strabane and NI 2014-2019**

Area	2014	2015	2016	2017	2018	2019	% Change 2014- 2019
<b>Derry City &amp; Strabane</b>	£105,460	£105,458	£104,291	£118,473	£132,276	£133,092	26.2
<b>Northern Ireland</b>	£140,217	£149,499	£154,028	£155,049	£163,128	£169,057	20.6

## Derry City & Strabane Supporting Data

**Table 56: Derry City & Strabane Waiting List – March 2020**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	2,228	161	1,338	68	273	593	<b>4,661</b>
<b>HS Applicants</b>	1,714	109	1,092	48	212	422	<b>3,603</b>
<b>Allocations</b>	328	28	245	14	60	89	<b>764</b>

Applicants – Housing applicants at March 2020

HS Applicants – Housing stress applicants at March 2020 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2020

**Table 57: Derry City Waiting List – March 2020**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	1,796	118	1,042	34	198	444	<b>3,605</b>
<b>HS Applicants</b>	1,445	80	926	32	167	330	<b>2,980</b>
<b>Allocations</b>	254	19	192	<10	51	66	-

Applicants – Housing applicants at March 2020

HS Applicants – Housing stress applicants at March 2020 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2020

**Table 58: Housing Stress applicants time on list March 2020**

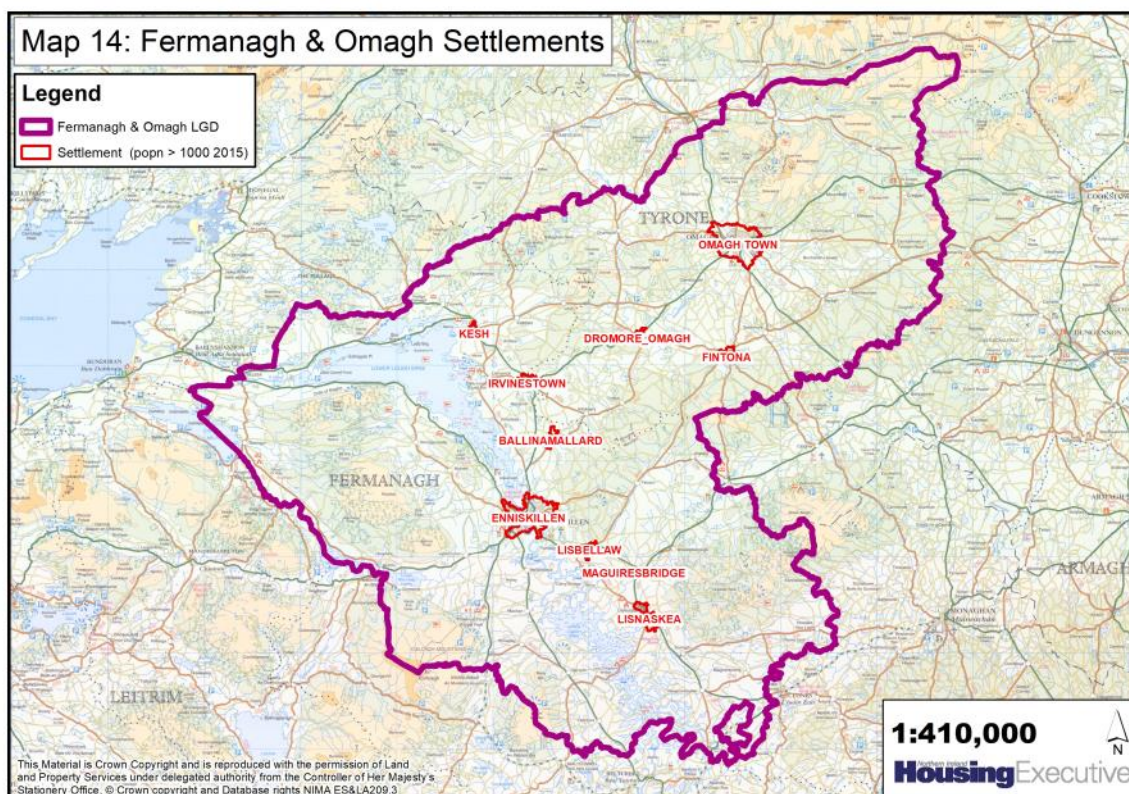
Household	0-6 mths	6-12 mths	1-2 years	2-4 years	4+ years	Total	Average Months
<b>Single</b>	201	220	361	381	551	<b>1,714</b>	<b>40</b>
<b>Small Adult</b>	10	15	24	25	35	<b>109</b>	<b>39</b>
<b>Small Family</b>	103	100	199	287	409	<b>1,098</b>	<b>40</b>
<b>Large Adult</b>	<10	<10	10	11	21	<b>48</b>	<b>39</b>
<b>Large Family</b>	22	34	38	48	70	<b>212</b>	<b>39</b>
<b>Older Person</b>	47	36	76	99	164	<b>422</b>	<b>40</b>
<b>Total</b>	-	-	<b>708</b>	<b>851</b>	<b>1,250</b>	<b>3,603</b>	<b>40</b>

## Fermanagh & Omagh

### 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 open countryside which provides challenges to service delivery.

**Map 14:** Fermanagh & Omagh District with main settlements



The population of the district is projected to increase by 2.4% to 119,582 between 2018 and 2018. Population growth will be mainly concentrated in the 65 plus age group which is projected to grow by 30% over the ten-year period. In contrast, the population of children 0 – 15 years is projected to decrease by 6.5% and the working age population will decrease by 2.1%.

According to the Annual Survey of Hours and Earnings (ASHE), within the district, there are 44,000 jobs, 5% of the 867,000 jobs across Northern Ireland in 2019. The most recently available Labour Market Structure statistics at the end of 2018 shows 73% of the working age population were economically active in line with the 73% across

Northern Ireland. In 2019, the annual full-time median wage for residents in the area was £457.80 per week, an increase of 7% on the previous year. This compares to the overall Northern Ireland weekly basic full-time median wage of £483.40, an increase of 0.9% on the 2018 figure (ASHE).

## COVID-19

The Coronavirus pandemic will obviously have a significant impact on the socio-economic development of the local area moving forward. The labour market will change significantly given the challenging economic forecasts and changes to the way society operate 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 DOE's Northern Ireland Housing Land Availability Report for 2013 (Planning NI:2014) shows potential capacity for 15,623 additional dwellings;
- The district has a HGI projected new dwelling requirement of 4,300 for 2016-2030;
- During 2019 there were 463 new dwelling starts in Fermanagh and Omagh which is more than the projected new dwelling requirement as estimated by the housing growth indicators 2016/30 of 307;
- Over the April 2015 to March 2020 period, 2,066 new dwelling starts commenced in Fermanagh and Omagh district, the lowest of all eleven council areas;
- Over the same period there were 1,706 new dwelling completions in the district, again the lowest of all eleven council areas.

### Owner Occupied Housing Sector

- Census 2011 demonstrates the continued desire of residents to own their own home;
- The private housing market had been showing signs of recovery – the number of house sales in Fermanagh & Omagh has increased from 376 in 2010 to 1,045 in 2018 before falling slightly to 1,027 in 2019 (LPS.) Obviously there will be a significant impact on the housing market and house sales during 2020 due to the impact of COVID-19, the full impact of which is yet to emerge;
- The average house price for Fermanagh & Omagh has been increasing from £129,501 in 2015 to £152,241 in 2019. House prices are consistently lower than the Northern Ireland average over the years. The Northern Ireland average was almost £11,000 higher, £163,128 in 2019. Again, COVID-19 will



have a major impact on house prices across Northern Ireland during 2020 and beyond;

- Popular locations include Enniskillen and Omagh towns as well as the rural villages spread across the council area;
- From a general mood of positivity in 2019 and local estate agents reporting a local housing market in steady ascent the mood has shifted to uncertainty due to COVID-19. Detached followed by semi-detached houses comprise the majority of property sales within the district;
- 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. 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 2018, there were 22 repossessions within Fermanagh and Omagh District, a slight increase over the previous year.

## Private Rented Housing Sector

- The private rented sector across Fermanagh & Omagh has seen an unprecedented increase in its tenure share between 2001 and 2019 and 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 2019 there were 9,734 lettings in LGDs outside of Belfast, 3.9% (381) of those were within Fermanagh & Omagh. (Performance of the Private Rental Market in Northern Ireland H2 2019 Ulster University). This is consistent with the finding that more rural areas throughout Northern Ireland experience a lower volume of rental transactions;
- The overall average rent in the district in 2019 was £491 per month, an increase of £23 (4.9%) from £468 over the year, but well below the Northern Ireland average of £627 per month in 2019;
- Within Fermanagh and Omagh, 4,321 private rented properties were registered by 2,901 landlords under DfC's Landlord Registration scheme at February 2020;
- Housing Benefit continues to play a vital role in supporting the private rented sector. At March 2020, there were 3,351 private tenants in receipt of Housing Benefit in the district, a 10.9% decrease on the 2019 figure. A key factor in this reduction is the introduction of Universal Credit. At March 2020, there were 749 Housing Executive tenants in receipt of the Housing Cost element 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;
- Housing Executive stock at March 2020 was 3,606 with 6,555 properties sold since the commencement of the 'Right to Buy' scheme;
- There were two schemes for nine units on-site at March 2020 with three schemes for 25 units completed over the year;
- Nineteen Housing Executive properties were sold in the year March 2020;
- COVID-19 will undoubtedly 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.

## 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 Fermanagh & Omagh indicates 34 urban units (1.7%) and 8 rural units (0.4%) of the overall three year programme. Five year projected need for the area as a whole is 469 and the projected need for individual settlements is detailed in Table 59.

**Table 59: Projected (5 Year) Social Housing Need 2020-2025**

Settlement	Social Housing Need 2020-25
Enniskillen Town	211
Omagh Town	154
Lisbellaw	12
Lisnaskea	12
Maguiresbridge	12
Derrylin	10
Remaining Settlements *	58
<b>Fermanagh &amp; Omagh Total Social New Build Requirement</b>	<b>469</b>

*Housing need has currently been met in Aghadrumsee, Belcoo, Clanabogan, Derrygonnelly, Donagh, Ederney / Lack, 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 Arney / Bellanaleck, Ballinamallard, Belleek, Beragh, Brookeborough, Carrickmore, Dromore, Drumquin, Fintona, Florencecourt, Gortin Irvinestown, Kesh, Kinawley, Roslea and Tempo.*

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:

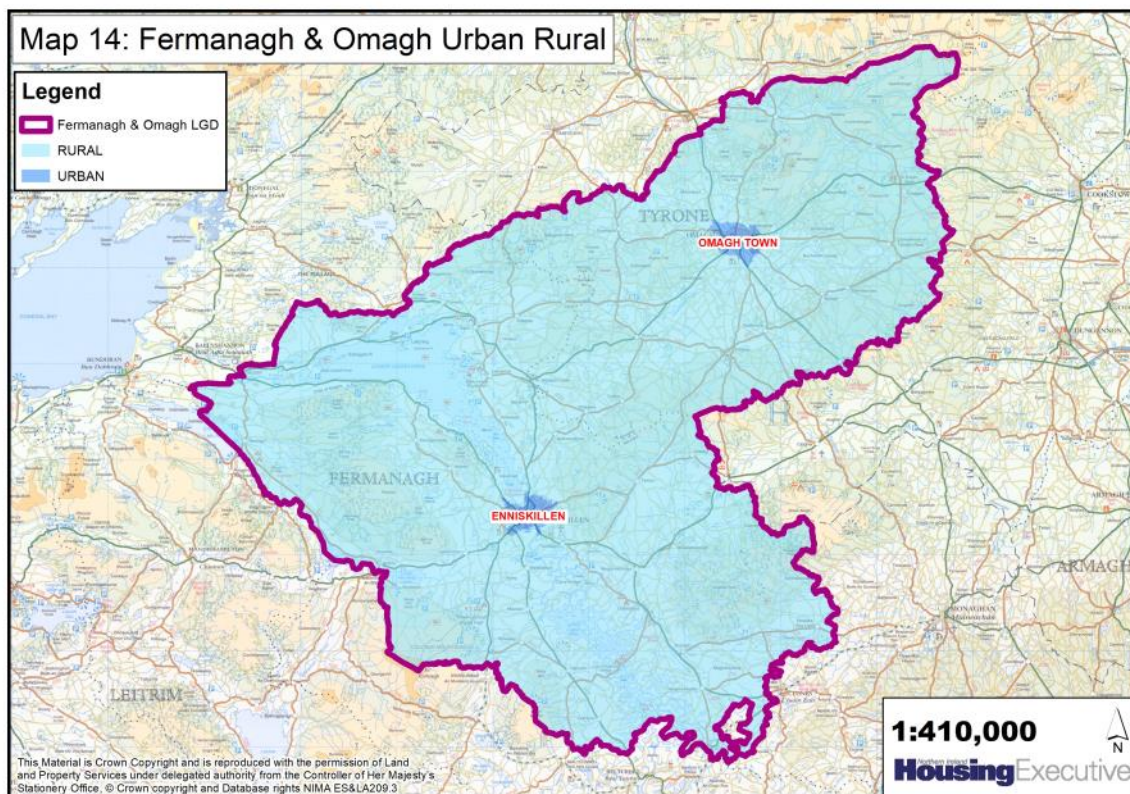
- Housing need for Fermanagh & Omagh has increased by 40% from 334 for the period from 2019 to 2024 to 469 for the 2020 to 2025 period. The housing need in the council area is concentrated within Enniskillen and Omagh towns. There is a small emerging need of <10 in a number of settlements across the district;
- Historically, much of the social housing need in Fermanagh & Omagh has been delivered by housing associations on Housing Executive land in Enniskillen and Omagh towns;
- 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;
- There is landbank available within some rural areas however there is no projected social housing need;
- 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, both for older 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 Placeshaping, 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. Lisanally 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 three 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 four 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 2018/19 site identification studies were completed in Trillick and Maguiresbridge;
- 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. Placeshaping, 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 SHDP. The rural target share for Year 1 of the Social Housing Development Programme, 2021/24 is 12.3% of the overall programme based on average levels of housing stress in rural areas.

**Map 15:** Fermanagh & Omagh rural map



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 desktop 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 2020 there were 399 applicants in rural Fermanagh & Omagh in housing stress (67% 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;
- Site identification studies have been programmed for Enniskillen, Omagh and Donagh during 2020/21;
- During 2019/20 rural housing need tests were programmed for Dromore, Drumquin and Gortin. Donagh and Brookeborough were nominated for testing during 2020/21. Due to the impact of Covid-19 some of the 2019/20 tests had to be postponed and rolled over into 2020/21. There were no expressions of interest to the test in Dromore. The test in Gortin was positive and a small projected need has been given to allow HA's to provide a small scheme. Expressions of interest for the test in Donagh have just ended with the local office currently working through the responses. The Drumquin test is underway, having been postponed due to Covid-19;
- 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;
- 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 60: Indicative housing mix for Fermanagh & Omagh**

Elderly	Families*	Singles	Wheelchair
10%	60%	30%	10%

\* Family households include 2, 3 and 4 bed units. Placeshaping, 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 Aghadrumsee, Belcoo, Clanabogan, Derrygonnelly, Donagh, Ederney / Lack, 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 2020, the current projected need for rural areas within Fermanagh & Omagh Council is for 100 units. Taking account of new build schemes on the current SHDP, the residual housing need is focused in the settlements of Arney / Bellanaleck, Ballinamallard, Belleek, Beragh, Brookeborough, Carrickmore, Derrylin, Dromore, Drumquin, Florencecourt, Gortin, Irvinestown, Kesh, Kinawley, Lisbellaw, Lisnaskea, Maguiresbridge, 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. 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 NIHE 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 30 units.

At 1 April 2020 there were 30 housing stress applicants who require wheelchair accommodation with only 6 allocations over the last year. This leaves a residual need of 24 applicants. 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 two and three bed units and built in line with space standards included in the Housing Association Guide.

## Shared Future Demand (Housing for All)

The Housing Executive continues to support the Northern Ireland Executive's Together Building a United Community (TBUC) Programme through the facilitation of new build Shared Housing schemes. Having initially supported the delivery of 10 Shared Housing schemes under the TBUC programme, the Housing Executive is now

working with DfC to bring forward up to 200 new Shared Housing units annually through the SHDP under the Housing for All programme.

Housing Associations bringing forward suitable proposals for housing for all designation would be welcomed.

### Traveller's accommodation

Travellers' accommodation needs will continue to be reviewed and monitored.

### Intermediate (Affordable) Demand

- The Housing Executive estimates intermediate/affordable housing demand for Fermanagh & Omagh is 50 units per annum;
- In general house prices in Fermanagh & Omagh are lower than Northern Ireland;
- Co-ownership had an active stock of 90 dwellings at March 2019, 13 of which were purchased during 2019/20. This reflects the opportunities this scheme provides in the current housing market environment;
- Average house prices in Northern Ireland increased by 28.9% between 2013 and 2019;
- Average house prices in Fermanagh & Omagh have increased by 43.6% over the 2013/19 period and 1.8% over the past year. Fermanagh is particularly popular with retirees and those seeking to relocate with local estate agents receiving frequent enquiries from those living in England and further afield who wish to buy property in the area.

**Table 61: Average Annual House Prices Fermanagh & Omagh & NI 2013-2019**

Area	2013	2014	2015	2016	2017	2018	2019	% Change 2013-2019
<b>Fermanagh &amp; Omagh</b>	106,007	113,779	129,501	135,181	134,959	149,476	152,241	43.6
<b>Northern Ireland</b>	131,204	140,217	149,449	154,028	155,049	163,128	169,057	28.9



## Fermanagh & Omagh Supporting Data

**Table 62: Fermanagh & Omagh Waiting List – March 2020**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	785	82	343	39	125	302	<b>1,676</b>
<b>HS Applicants</b>	579	45	197	26	88	218	<b>1,153</b>
<b>Allocations</b>	124	15	67	<10	30	42	-

Applicants – Housing applicants at March 2020

HS Applicants – Housing stress applicants at March 2020 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2020

**Table 63: Enniskillen Town Waiting List – March 2020**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	263	19	84	<10	36	109	-
<b>HS Applicants</b>	200	13	53	<10	26	85	-
<b>Allocations</b>	30	<10	12	0	<10	<10	<b>61</b>

Applicants – Housing applicants at March 2020

HS Applicants – Housing stress applicants at March 2020 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2020

**Table 64: Enniskillen Town Housing Stress applicants time on list March 2020**

Household	0-6 mths	6-12 mths	1-2 years	2-4 years	4+ years	Total	Average Months
<b>Single</b>	38	32	36	52	42	<b>200</b>	<b>32</b>
<b>Small Adult</b>	<10	0	<10	<10	<10	<b>13</b>	<b>22</b>
<b>Small Family</b>	<10	11	11	16	8	<b>53</b>	<b>25</b>
<b>Large Adult</b>	<10	<10	<10	0	<10	-	<b>56</b>
<b>Large Family</b>	<10	<10	<10	<10	<10	<b>26</b>	<b>20</b>
<b>Older Person</b>	24	12	14	17	18	<b>85</b>	<b>37</b>
<b>Total</b>	<b>81</b>	<b>63</b>	<b>73</b>	<b>92</b>	<b>74</b>	-	<b>32</b>

**Table 65: Omagh Town Waiting List – March 2020**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	254	32	115	16	41	110	<b>568</b>
<b>HS Applicants</b>	188	13	63	<10	27	76	-
<b>Allocations</b>	34	<10	21	<10	12	<10	<b>80</b>

Applicants – Housing applicants at March 2020

HS Applicants – Housing stress applicants at March 2020 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2020

**Table 66: Omagh Town Housing Stress applicants time on list March 2020**

Household	0-6 mths	6-12 mths	1-2 years	2-4 years	4+ years	Total	Average Months
<b>Single</b>	31	35	44	40	38	<b>188</b>	<b>30</b>
<b>Small Adult</b>	<10	<10	<10	<10	<10	<b>13</b>	<b>24</b>
<b>Small Family</b>	15	<10	16	19	<10	<b>63</b>	<b>25</b>
<b>Large Adult</b>	<10	0	<10	<10	<10	-	<b>35</b>
<b>Large Family</b>	<10	<10	<10	0	10	<b>27</b>	<b>34</b>
<b>Older Person</b>	<10	13	15	13	29	-	<b>56</b>
<b>Total</b>	<b>62</b>	<b>64</b>	<b>84</b>	<b>76</b>	<b>88</b>	<b>374</b>	<b>34</b>

## Lisburn and Castlereagh City

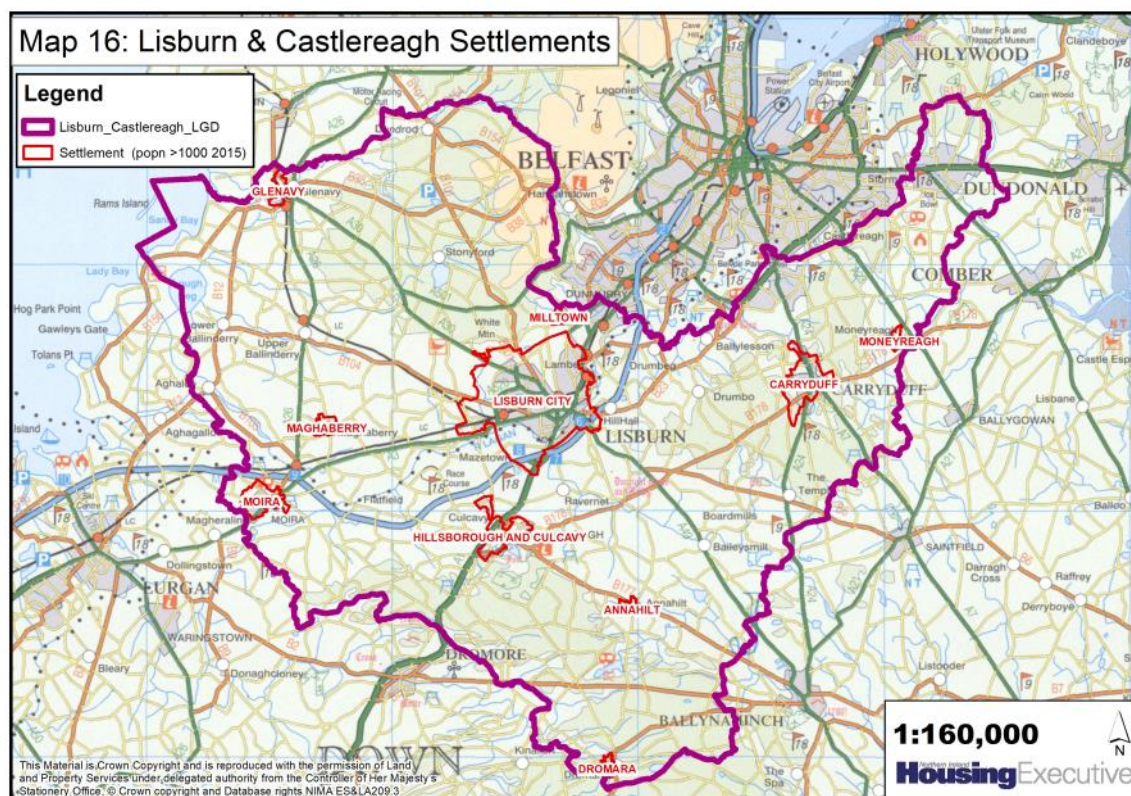
### Context

Lisburn & Castlereagh City Council (LCCC) 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 145,000 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.

**Map 16: Lisburn and Castlereagh City District with settlements**



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

While the housing market has improved over the past number of years, structural issues remain that could adversely affect the economy and household finances in the

near future. High levels of negative equity remain an issue. While rising house prices mean more homeowners are coming out of negative equity, higher levels of inflation and a rise in interest rates could lead to higher housing costs.

The population of Lisburn & Castlereagh City Council area is projected to grow by 7.4% from 2018 to 2028. This growth will be concentrated mainly in children and working age profiles. The older people population is expected to grow by 3.7% in the years to 2028. While the need for small family accommodation remains strong, there will still be a requirement to design and construct suitable accommodation for older persons.

## Housing Market Analysis (across tenures)

### Housing & Land Supply

- Population expected to grow by 7.4% from 2018-2028;
- The 2011 census shows that 24.9% of Lisburn & Castlereagh City households were one person and 31.2% of households were two person;
- The average household size in LCCC was 2.51;
- Projected new dwelling requirement of 10,700 for period 2016-2030.

### Owner Occupied Housing Sector

- At 2016 there were 58,300 households in LCCC, 78% of these are owner occupied;
- During 2019/20, 98 properties were purchased through Co-ownership in LCCC;
- Co-ownership had an active stock of 1,081 dwellings at March 2020;
- The average house price for Lisburn & Castlereagh was £191,393 in 2019, this represents an increase of 3.2% on 2018 figures;
- Demand is highest in urban and suburban areas as households leave the countryside to be closer to work and services;
- 10 year Intermediate Housing Demand 2019-2029 is 1,460.

### Private Rented Housing Sector

- At 2016 9% of households in LCCC were privately rented;
- Local estate agents also indicated that rents have maintained a consistent level in the past 12 months, the average weekly rent is £150 across LCCC;
- The DfC's Landlord Registration Scheme identified 4,398 tenancies registered for LCCC in February 2020;
- Local estate agents have indicated that key drivers affecting the PRS in LCCC 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, 2,048 private tenants in Lisburn & Castlereagh were in receipt of Housing Benefit.

## Social Rented Housing Sector

- Housing Executive stock at March 2020 was 5,327 with the majority being two bed units. A total of 7,950 properties have been sold since the commencement of the ‘Right to Buy’ scheme;
- There were 199 social housing units on site, of which 21 units started in 2019/20;
- There were 173 social units completed in 2019/20;
- 20 Housing Executive properties were sold in the 2018/19;
- 5 year social housing requirement for 2020-2025 shows a need for 1,450 units.

## 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

There are 861 units planned in the 3 year Social Housing Development Programme. The five-year projected need for the area as a whole is 1,450 units. The projected need for individual settlements is detailed in Table 67.

**Table 67: Projected (5 Year) Social Housing Need 2020-2025**

Settlement	Social Housing Need (Units) 5 Year (2020-2025)
Lisburn/Dunmurry Urban	1133
Castlereagh Urban	105
Aghalee	5
Annahilt	0
Ballynadolly	0
Boardmills	0
Carryduff	31
Culcavy	6
Dromara	5

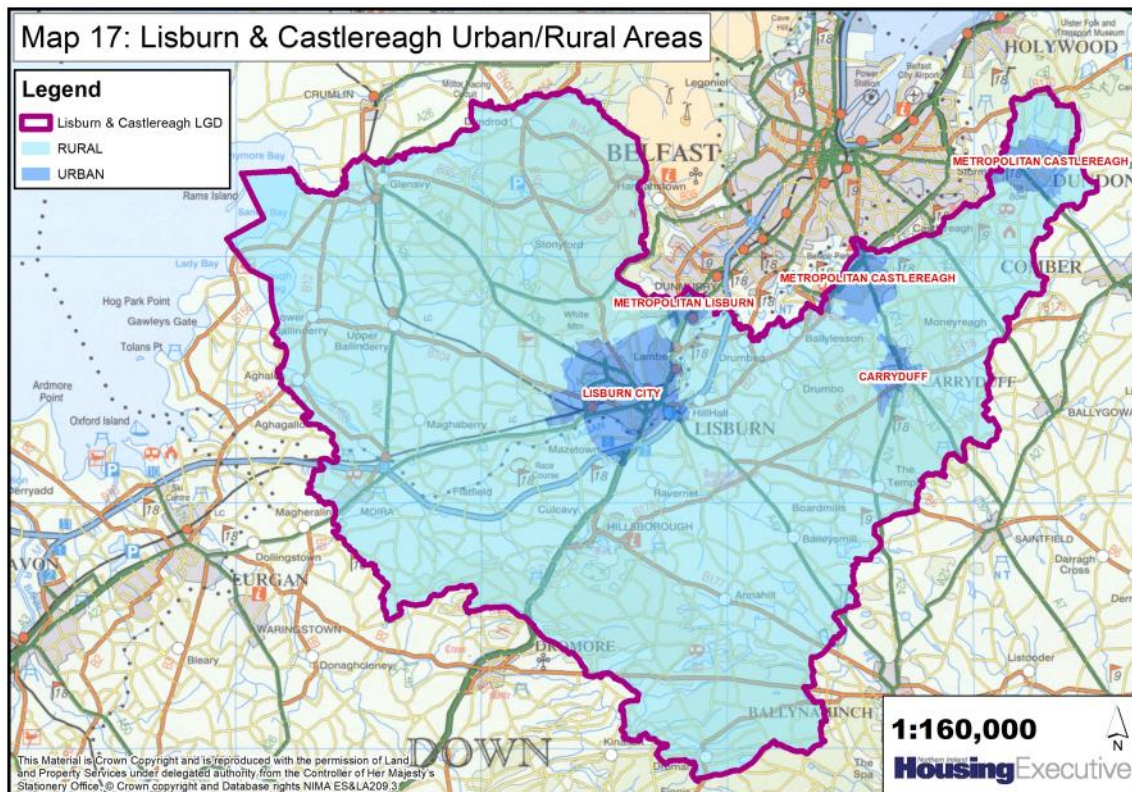
Settlement	Social Housing Need (Units) 5 Year (2020-2025)
Drumbo	0
Dundrod	1
Glenavy	36
Hillsborough	33
Lambeg	52
Lisburn Rural	0
Lower and Upper Ballinderry	3
Maze	0
Meghaberry	4
Milltown	4
Moira	27
Moneyreagh	3
Purdysburn	0
Ravarnette	2
Stoneyford	0
<b>Total Social New Build Requirement Lisburn and Castlereagh</b>	<b>1,450</b>

## Rural

Outside of the urban settlements, the LCCC 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 205 rural applicants in housing stress at March 2020.

The Housing Executive has long recognised that in rural areas, housing needs can be hidden or dispersed and that a different approach is often required to ensure that we deliver our statutory housing functions in both urban and rural Areas. The introduction of the Rural Needs Act (NI) 2016, has presented an opportunity for us to reaffirm our commitment to rural communities by ensuring that we pay due regard to their needs through the delivery of a fair and equitable housing service which takes account of local issues and circumstances.

Map 17: Lisburn and Castlereagh rural map



For many rural households, housing choices can be more limited due to unsuitable stock, unaffordable prices and a lack of rental accommodation. Our Rural Strategy and Action Plan 2016-20 identifies in particular, the need to increase the provision of affordable housing in rural areas in order to help protect and sustain rural communities. Through the Housing Executive’s Annual Programme of rural housing need tests, we engage with communities who wish to examine the need for new housing in their area and with housing associations to encourage the delivery of new rural housing where it is required.

The Housing Executive’s contribution to rural regeneration extends beyond the provision and maintenance of housing to the capital funding invested for the development and improvement of local community facilities and services. In 2020/21, the Housing Executive will also continue to celebrate the invaluable contribution of the rural community groups through the Annual Rural Community Awards Competition.

Please note that in relation to those settlements with low 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:

- Housing need has remained at a consistently high level in Lisburn and Castlereagh and is focussed 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. Housing Associations report difficulties in obtaining sites in areas of housing need throughout the LCCC area. This results in Housing Associations having to acquire sites on the open market and therefore subject to market price fluctuations;
- Land availability remains a problem and we are working closely with LCCC in its preparations 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 small household size (1-3 persons);
- The future need is predominantly for one and two bedroom design forms and with emphasis on accessibility;
- Wheelchair applicants seeking accessible units are increasing in the area.

### Indicative Housing Mix Requirements

- Single, older and family households comprise 87% 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 68: Indicative Housing Mix for Lisburn and Castlereagh City**

Elderly	Families*	Singles	Wheelchair
17%	40%	43%	10%

\* Focus on: Small Adult and Small Family Households

- The trend for new dwellings in LCCC is for smaller households. Where possible one bed properties, whilst 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 Head of Place Shaping, Belfast Region;
- 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 LCCC 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 team, Belfast Region will confirm if this is the case on a site by site basis.

### *Wheelchair Housing Need (HNA)*

DfC has agreed a Wheelchair Standard Accommodation target of 10% of General Needs, New Build by 2020.

Demand for wheelchair accommodation is concentrated in the urban areas of LCCC 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.

Generic wheelchair units provided should be two and three bed units and built in line with 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.

### *Travellers Accommodation*

Traveller accommodation needs will be reviewed and monitored.

### *Intermediate (Affordable) Demand*

- Co-ownership is the most recognised provider of intermediate housing in Northern Ireland. In 2019/20 a total 98 applications were approved in the

LCCC area, there is an active stock of 1,081 dwellings in co-ownership at March 2020; reflecting the opportunities that this scheme provides;

- Average house prices in Lisburn & Castlereagh have fluctuated since 2014, but have consistently remained higher than the Northern Ireland average. In 2019 the average house price increased to £191,393, 4.7% higher than in 2015.

**Table 69: Average Annual House Prices Lisburn and Castlereagh City & NI 2015-2019**

Area	2015	2016	2017	2018	2019	% Change 2015-2019
<b>Lisburn &amp; Castlereagh</b>	£182,750	£177,298	£179,317	£185,484	£191,393	4.7%
<b>Northern Ireland</b>	£149,499	£154,028	£155,049	£163,128	£169,057	13.1%

## Lisburn & Castlereagh City Supporting Data

**Table 70: Castlereagh Rural Waiting List – March 2020**

	Single	Small Adult	Small Family	Large Adult	Large Family	Elderly	Total
<b>Applicants</b>	33	<10	43	<10	<10	13	107
<b>HS Applicants</b>	30	<10	38	<10	<10	11	91
<b>Allocations</b>	<10	0	<10	0	<10	<10	<10

**Table 71: Castlereagh Urban Waiting List – March 2020**

	Single	Small Adult	Small Family	Large Adult	Large Family	Elderly	Total
<b>Applicants</b>	136	26	90	<10	28	78	-
<b>HS Applicants</b>	104	11	54	<10	21	52	-
<b>Allocations</b>	38	<10	22	<10	<10	17	82

**Table 72: Lisburn Rural Waiting List – March 2020**

	Single	Small Adult	Small Family	Large Adult	Large Family	Elderly	Total
<b>Applicants</b>	132	26	114	<10	30	98	-
<b>HS Applicants</b>	97	14	87	<10	22	69	-
<b>Allocations</b>	<10	<10	<10	0	<10	13	35

**Table 73: Lisburn Urban Waiting List – March 2020**

	Single	Small Adult	Small Family	Large Adult	Large Family	Elderly	Total
<b>Applicants</b>	650	91	324	17	75	193	1350
<b>HS Applicants</b>	510	61	265	11	61	137	1045
<b>Allocations</b>	117	13	88	<10	28	27	-

Applicants – Housing applicants at March 2020

HS Applicants – Housing stress applicants at March 2020 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2020

**Table 74: Lisburn & Castlereagh Council Housing Stress applicants time on list  
March 2020**

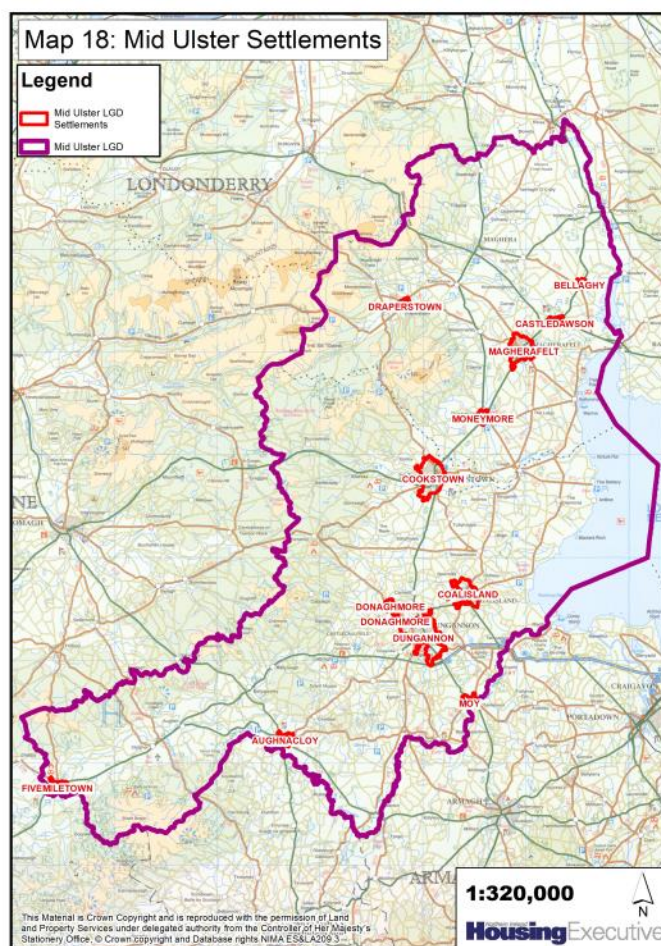
Comp HH HIP	0-6 mths	6-12 mths	1-2 years	2-4 years	4+ years	Grand Total	Average of Mths
<b>Elderly</b>	40	27	42	54	106	269	<b>57</b>
<b>Family</b>	82	97	141	168	179	667	<b>36</b>
<b>Single</b>	87	140	163	198	153	741	<b>35</b>
<b>Grand Total</b>	209	264	346	420	438	1677	<b>39</b>

## Mid Ulster

### 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 8% to 159,239 in 2028. The estimated population in 2018, 147,392, represents 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.

**Map 18: Mid Ulster District with main settlements**



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.

The population of the district is projected to increase by 8% to 159,239 between 2018 and 2028. Population growth will be mainly concentrated in the 65 plus age group which is projected to grow by 34% over the ten-year period. In contrast, the population

of children 0 – 15 years is projected to decrease by 0.1% and the working age population will decrease by 5.1%.

According to the Annual Survey of Hours and Earnings (ASHE), within the district, there are 64,000 jobs, 7.4% of the 867,000 jobs across Northern Ireland in 2019. The most recently available Labour Market Structure statistics at the end of 2018 shows 76.5% of the working age population were economically active above the 73% recorded Northern Ireland. In 2019, the annual full-time median wage for residents in the area was £445.90 per week, an increase of 9.9% on the previous year. This compares to the overall Northern Ireland weekly basic full-time median wage of £483.40, an increase of 0.9% on the 2018 figure (ASHE).

## COVID-19

The Coronavirus pandemic will obviously have a significant impact on the socio-economic development of the local area moving forward. The labour market will change significantly given the challenging economic forecasts and changes to the way society operate 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 DOE's Northern Ireland Housing Land Availability Report for 2013 (Planning NI:2014) shows potential capacity for 15,294 additional dwellings;
- The borough has a HGI projected new dwelling requirement of 10,300 for 2016-2030;
- During 2019 there were 677 new dwelling starts in Mid Ulster which is less than the projected new dwelling requirement as estimated by the housing growth indicators 2012/25 of 736;
- Over the April 2015 to March 2020 period, 3,861 new dwelling starts commenced in Mid Ulster, the fourth highest of all eleven council areas.
- Over the same period there were 3,644 new dwelling completions in the district, the third highest of all eleven council areas.

### Owner Occupied Housing Sector

- Census 2011 demonstrates the continued desire of residents to own their own home;
- The private housing market had been showing signs of recovery – the number of house sales in Mid Ulster has increased from 720 in 2012 to 1,380 in 2019 (LPS.) Obviously there will be a significant impact on the housing

market and house sales during 2020 due to the impact of COVID-19, the full impact of which is yet to emerge;

- The average house price for Mid Ulster fluctuated between 2012 and 2019. House prices have increased to £156,879 in 2019, an increase of 1.4% over the past year. Properties in Mid Ulster are £12,178 lower than the Northern Ireland average figure of £169,057. Again, COVID-19 will have a major impact on house prices across Northern Ireland during 2020 and beyond;
- Popular locations in the district include the urban centres of Dungannon, Cookstown and Magherafelt;
- From a general mood of positivity in 2019 and local estate agents reporting a local housing market in steady ascent, the mood has shifted to uncertainty due to COVID-19. Semi-detached followed by detached houses comprise the majority of property sales within the district;
- 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. 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 2018, there were 25 repossessions within Mid Ulster District a slight increase over the previous year.

## Private Rented Housing Sector

- The private rented sector across Mid Ulster has seen an unprecedented increase in its tenure share between 2001 and 2019 and 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 2019 there were 9,734 lettings in LGDs outside of Belfast, 8.1% (787) of those were within Mid Ulster District. (Performance of the Private Rental Market in Northern Ireland H2 2019 Ulster University).
- The overall average rent in the district in 2019 was £536 per month, a decrease of £17 (-2.9%) from £553 over the year, but well below the Northern Ireland average of £627 per month in 2019;
- Within Mid Ulster, 4,609 private rented properties were registered by 3,411 landlords under the DfC's Landlord Registration scheme at February 2020. The registration scheme will provide evidence to assist monitoring and regulation of the sector;
- Housing Benefit continues to play a vital role in supporting the private rented sector. At March 2020, there were 3,246 private tenants in receipt of Housing Benefit in the district, an 11.6% decrease on the 2019 figure. A key factor in this reduction is the introduction of Universal Credit. At March

2020, there were 563 Housing Executive tenants in receipt of the Housing Cost element of Universal Credit.

## 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);
- Housing Executive stock at March 2020 was 3,875 with 7,654 properties sold since the commencement of the 'Right to Buy' scheme;
- There were 42 new social housing units completed and a further 76 social housing units on site in the year to March 2020;
- Twenty six Housing Executive properties were sold in the year March 2020;
- COVID-19 will undoubtedly 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.

## 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 has established that, of the overall three year programme, 3.9% of the urban and 6.5% of the rural units has been allocated to Mid Ulster. Five year projected need for the area as a whole is 718 and the projected need for individual settlements is detailed in Table 75.



**Table 75: Projected (5 Year) Social Housing Need 2020-2025**

Settlement	Social Housing Need 2020-25
Cookstown North	20
Cookstown South	51
Dungannon 1	257
Dungannon 2	36
Magherafelt	92
Coalisland	132
Ardboe / Moortown / Ballinderry*	11
Donaghmore	21
Draperstown	16
Moy	26
Remaining Settlements**	56
<b>Total</b>	<b>718</b>

Housing need has currently been met in Ackinduff/ Sheer's Place\*, Augher, Ballymaguigan, Bush, Caledon, Cappagh, Coagh / Lisnahull\*, Clogher, Cookstown Rural Cottages, Fivemiletown, Granville / Brantry\*, Gulladuff, Innishrush, Knockloughrim, Lissan / Dunamore\*, Loup, Magherafelt Rural, Moneymore, Pomeroy, 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: - Maghera, Moygashel, Aughnacloy, Ballygawley, Ballyronan, Bellaghy, Benburb, Castlecaulfield, Castledawson, Mountjoy, Newmills, 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 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 Mid Ulster has remained at a consistently high level between 2012 and 2020. Need is concentrated mainly in urban areas chiefly the west of Dungannon town, Coalisland and Magherafelt;
- Historically, much of the social housing need in Mid Ulster has been delivered by housing associations on Housing Executive land in Dungannon, Cookstown and Magherafelt;
- The majority of Housing Executive land has now been utilised for new build within the district. Remaining sites in areas of housing need are subject to planning regulations, lack of development potential or financial unviability;
- Dungannon 1, which lies to the western side of the town, continues to demonstrate the highest demand. Sites close to Ballygawley Road in particular and also Lisnahull should be precluded as there are letting

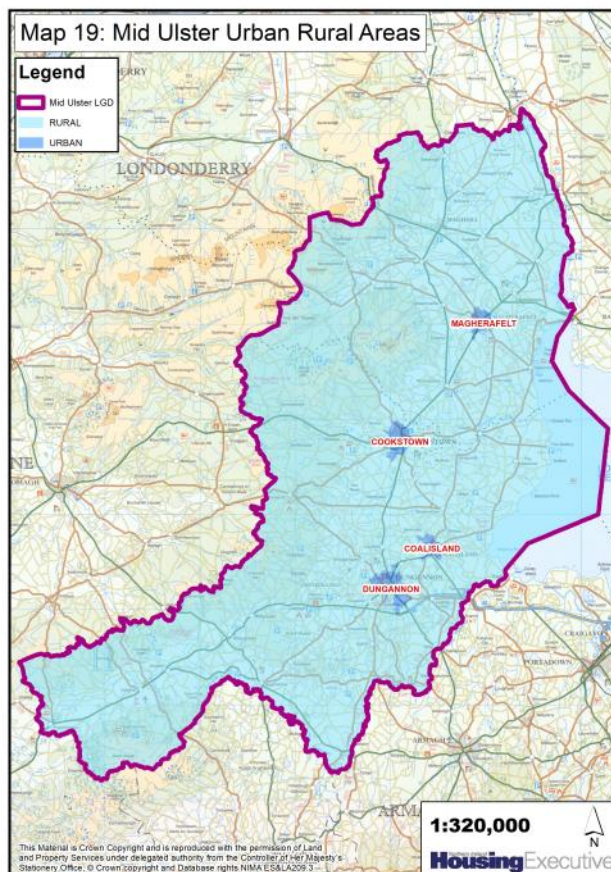
difficulties in both areas. There is a high requirement for small unit accommodation plus wheelchair and bespoke complex needs units;

- Within Magherafelt the Leckagh area of the town should be precluded because of letting difficulties and housing management issues. Upperlands within Magherafelt had a Rural Housing Needs test carried out during 2019/20 with no expressions of interest received;
- Knockloughrim and Tobermore were also subject to rural needs testing however in both cases no expressions of interest were received;
- During 2020/21, rural needs tests have been programmed for Ballyronan, Clonoe and Longfield / Desertmartin;
- Cookstown North lies north of Fairhill Road and Molesworth Street within the town boundary, Cookstown South lies to the south;
- Future housing mix in new build developments will need to cater for singles, small families, older persons and wheelchair / complex needs households;
- Within Cookstown South there is the potential for Housing for All and the sourcing of sites for this purpose would be welcomed;
- Site Identification Studies have been completed for Ballyronan, Donaghmore and Moy over the past year. Site identification studies for the seven district electoral areas have been scheduled for the final quarter of 2020;
- The development of mixed tenure schemes would be welcomed and encouraged in Mid Ulster;
- Due to concerns raised by elected representatives over vacant properties in town centres throughout Mid Ulster, particularly Dungannon, being used to provide alternate patterns of use, chiefly housing, the Housing Executive is working with the Planning Service and the Council in evaluating the requirement for further apartments;
- There is a limited need remaining for Cat 1 accommodation throughout the district. Contact should be made with Placeshaping 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;

- Some three 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 four 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 requirement for a number of bespoke (bungalow) units for complex needs applicants;
- 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. Placeshaping, 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

Map 19: Mid Ulster rural map



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 Social Housing Development Programme, 2020/23 is 12.3% 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 2020 there were 279 applicants in rural Mid Ulster in housing stress (14.3% of the total 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;
- 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;
- 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 76: Indicative housing mix for Mid Ulster**

Elderly	Families*	Singles	Wheelchair
10%	60%	30%	10%

\* Family households include 2, 3 and 4 bed units. Placeshaping, 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 Ackinduff/ Sheer's Place, Augher, Ballymaguigan, Bush, Caledon, Cappagh, Coagh / Lisnahull, Clogher, Cookstown Rural Cottages, Fivemiletown, Granville / Brantry, Gulladuff, Innishrush, Knockloughrim, Lissan / Dunamore, Loup, Magherafelt Rural, Moneymore, Pomeroy, 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 2020, the current projected need for rural areas within Mid Ulster Council is for 130 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, Ballyronan, Bellaghy, Benburb, Castlecaulfield, Castledawson, Donaghmore, Draperstown, Mountjoy, Moy, Maghera, Newmills, Stewartstown, Swatragh and Tullyhogue. Proposals for social housing in these locations will be welcomed and given due consideration.

Site Identification Studies have been completed for Ballyronan, Donaghmore and Moy over the past year. Site identification studies for the seven district electoral areas have been scheduled for the final quarter of 2020.

Ballyronan, Clonoe and Longfield / Desertmartin will be subject to rural needs testing during 2020/21.

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 NIHE 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 Mid Ulster is 32 units.

At April 2020 there were 24 housing stress applicants who require wheelchair accommodation with only 5 allocations over the last year. This leaves a residual need of 19 applicants. 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 two and three bed units and built in line with space standards included in the Housing Association Guide.

## Shared Future Demand (Housing for All)

The Housing Executive continues to support the Northern Ireland Executive’s Together Building a United Community (TBUC) Programme through the facilitation of new build Shared Housing schemes. Having initially supported the delivery of 10 Shared Housing schemes under the TBUC programme, the Housing Executive is now working with DfC to bring forward up to 200 new Shared Housing units annually through the SHDP under the Housing for All programme. Housing Associations bringing forward suitable proposals for housing for all designation would be welcomed.

## Traveller’s accommodation

A need has been identified for a serviced site in Magherafelt. We continue to assess demand for Traveller accommodation across the district.

## Intermediate (Affordable) Demand

- The Housing Executive estimates intermediate/affordable housing demand for Mid Ulster is 133 units per annum;
- Co-ownership had an active stock of 528 dwellings at March 2020, 105 of which were purchased during 2019/20;
- In general house prices in Mid Ulster are lower than Northern Ireland;
- Average house prices in Northern Ireland increased by 28.9% between 2013 and 2019;
- Average house prices in Mid Ulster have increased by 38.9% over the past 6 years and 1.4% over the past year.

**Table 77: Average Annual House Prices Mid Ulster & NI 2013-2019**

Area	2013	2014	2015	2016	2017	2018	2019	% Change 2013-2019
<b>Mid Ulster</b>	112,922	113,787	125,503	140,339	141,988	154,706	156,879	38.9
<b>Northern Ireland</b>	131,204	140,217	149,449	154,028	155,049	163,128	169,057	28.9

## Mid Ulster Supporting Data

**Table 78: Mid Ulster Waiting List – March 2020**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	671	124	577	84	178	265	<b>1,899</b>
<b>HS Applicants</b>	436	61	345	51	104	172	<b>1,169</b>
<b>Allocations</b>	125	18	87	<10	27	42	-

Applicants – Housing applicants at March 2020

HS Applicants – Housing stress applicants at March 2020 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2020

**Table 79: Dungannon 1 Waiting List – March 2020**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	161	50	192	35	78	33	<b>549</b>
<b>HS Applicants</b>	120	25	123	22	55	28	<b>373</b>
<b>Allocations</b>	12	<10	17	<10	<10	<10	<b>38</b>

Applicants – Housing applicants at March 2020

HS Applicants – Housing stress applicants at March 2020 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2020

**Table 80: Dungannon 1 Housing Stress applicants time on list March 2020**

Household	0-6 mths	6-12 mths	1-2 years	2-4 years	4+ years	Total	Average Months
<b>Single</b>	21	17	31	19	32	<b>120</b>	<b>36</b>
<b>Small Adult</b>	<10	<10	11	<10	<10	<b>25</b>	<b>31</b>
<b>Small Family</b>	16	14	22	35	36	<b>123</b>	<b>38</b>
<b>Large Adult</b>	<10	<10	<10	<10	<10	<b>22</b>	<b>29</b>
<b>Large Family</b>	<10	<10	10	10	22	<b>55</b>	<b>39</b>
<b>Older Person</b>	<10	0	<10	<10	17	<b>28</b>	<b>93</b>
<b>Total</b>	<b>47</b>	<b>46</b>	<b>84</b>	<b>80</b>	<b>116</b>	<b>373</b>	<b>41</b>

**Table 81: Magherafelt Waiting List – March 2020**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	89	14	66	15	21	47	<b>252</b>
<b>HS Applicants</b>	49	<10	33	10	13	23	-
<b>Allocations</b>	13	<10	10	0	<10	<10	<b>38</b>

Applicants – Housing applicants at March 2020

HS Applicants Housing stress applicants at March 2020 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2020

**Table 82: Magherafelt Housing Stress applicants time on list March 2020**

Household	0-6 mths	6-12 mths	1-2 years	2-4 years	4+ years	Total	Average Months
Single	11	<10	<10	10	16	49	41
Small Adult	0	0	0	<10	<10	<10	93
Small Family	<10	<10	11	<10	11	33	36
Large Adult	<10	<10	<10	<10	<10	10	28
Large Family	<0	<10	<10	<10	<10	13	21
Older Person	<10	<10	<10	<10	<10	23	62
<b>Total</b>	<b>20</b>	<b>15</b>	<b>24</b>	<b>31</b>	<b>44</b>	-	<b>43</b>

**Table 83: Coalisland Waiting List – March 2020**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	69	<10	72	<10	10	18	<b>183</b>
<b>HS Applicants</b>	49	<10	50	<10	<10	16	<b>131</b>
<b>Allocations</b>	14	<10	19	<10	<10	<10	<b>44</b>

Applicants – Housing applicants at March 2020

HS Applicants – Housing stress applicants at March 2020 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2020

**Table 84: Coalisland Housing Stress applicants time on list March 2020**

Household	0-6 mths	6-12 mths	1-2 years	2-4 years	4+ years	Total	Average Months
Single	<10	<10	17	<10	15	49	29
Small Adult	<10	0	<10	<10	<10	<10	38
Small Family	<10	<10	<10	14	20	50	48
Large Adult	0	0	<10	0	<10	<10	123
Large Family	0	0	<10	<10	0	<10	21
Older Person	<10	<10	<10	<10	10	16	81
<b>Total</b>	<b>15</b>	<b>11</b>	<b>34</b>	<b>20</b>	<b>51</b>	<b>131</b>	<b>47</b>

**Table 85: Cookstown South Waiting List – March 2020**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	78	12	63	10	19	20	<b>202</b>
<b>HS Applicants</b>	54	<10	33	<10	<10	11	<b>118</b>
<b>Allocations</b>	<10	<10	<10	<10	<10	<10	<b>15</b>

Applicants – Housing applicants at March 2020

HS Applicants – Housing stress applicants at March 2020 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2020



**Table 86: Cookstown South Housing Stress applicants time on list March 2020**

Household	0-6 mths	6-12 mths	1-2 years	2-4 years	4+ years	Total	Average Months
<b>Single</b>	<10	<10	14	12	15	<b>54</b>	<b>40</b>
<b>Small Adult</b>	<10	0	0	0	<10	<b>&lt;10</b>	<b>65</b>
<b>Small Family</b>	<10	<10	<10	<10	14	<b>33</b>	<b>40</b>
<b>Large Adult</b>	0	0	0	<10	<10	<b>&lt;10</b>	<b>57</b>
<b>Large Family</b>	<10	<10	<10	<10	<10	<b>&lt;10</b>	<b>35</b>
<b>Older Person</b>	<10	0	<10	<10	<10	<b>11</b>	<b>59</b>
<b>Total</b>	<b>15</b>	<b>13</b>	<b>22</b>	<b>24</b>	<b>44</b>	<b>118</b>	<b>44</b>

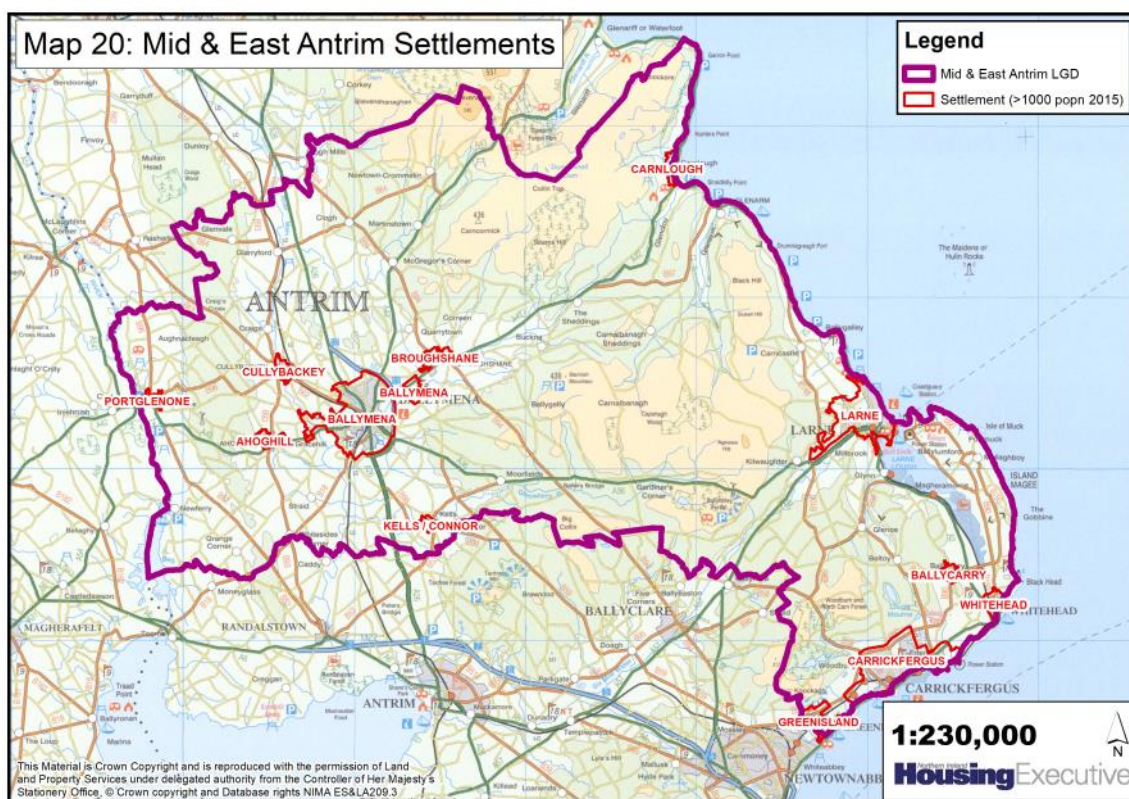
## Mid and East Antrim

### 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.

The population of Mid and East Antrim Borough is projected to grow by 2.2% from 138,773 in 2018 to 141,821 in 2028. It represents 7.4% of the NI population at 2018 (source NISRA).

**Map 20: Mid and East Antrim Borough with main settlements**



This growth will be mainly concentrated in the 65+ age group, with the older populations projected to increase by 25.4%. In the same period, 2018 to 2028, the working age population is projected to decrease by 2.2%. Household size is predicted to reduce from 2.45 to 2.38, while the number of households is projected to increase by 2,831 from 56,040 to 58,871 over the ten years to 2028. Though the need for small family 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

- Between 1st April 2018 and 31st October 2019, a total of 557 units were completed with a total of 21.75 hectares of land used. (Source: Mid and East Antrim Housing land Availability Report 2018)
- 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 2019 was £136,997, which represents a decrease of 3.8% on 2018 figures; However, this is significantly below the Northern Ireland average of £169,057;
- During 2018, there were 25 repossessions in Mid and East Antrim. While repossessions have reduced overall by 69.5% since 2014, there was an increase of 66.7% between 2017 and 2018;
- Demand for intermediate housing aimed at low income households in Mid and East Antrim is estimated at 570 units between 2019-2029;
- Prior to the COVID-19 lockdown, 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. The number of enquiries and sales increased. As the lockdown eased buyers were showing an interest in larger properties with outdoor space. Ulster Bank reports that in Northern Ireland first time buyers are still the most common property purchaser. The full impact of the epidemic 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 will 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 6,544 properties registered by 3,923 landlords in Mid and East Antrim at February 2020;
- At March 2020, there were 3,265 Private Housing Benefit claimants in the borough, a decrease of 17.2% 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 2020, there were 5,716 Housing Executive owned properties in the borough;
- 10,158 Housing Executive properties have been sold through the House Sales Scheme, with 30 sold during 2019/20;
- There were 181 new social housing homes completed in year to March 2020, and 219 on-site. A further 323 units are programmed to start over the next three years;
- At March 2020, there were 2,663 applicants on the waiting list for Mid and East Antrim, 1,837 of whom were in housing stress with 546 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 2.9% urban units and 7.3% rural units of the overall three year programme. Five year projected need for the area as a whole is 1,065 and the projected need for individual settlements is detailed in Table 87.

**Table 87: Projected (5 Year) Social Housing Need 2020-2025**

Settlement	Social Housing Need 2020-2025
Ballymena Town	341
Carrickfergus Town	448
Larne Town	54
Whitehead	25
Ahoghill	21
Broughshane	50
Carnlough	14
Cullybackey	20
Greenisland	30
Glenravel	13
Kells	15
Portglenone	19
Islandmagee	13
*Remaining Settlements <10	2
<b>Total Social New Build Requirement Mid and East Antrim</b>	<b>1,065</b>

\*Remaining Settlements include: Glynn 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 apartments have been supported for Ballymena town, additional apartments will be held in reserve until supported units completed;
- Projected need for Larne town will be met through a programmed scheme and transfer of Housing Executive land;

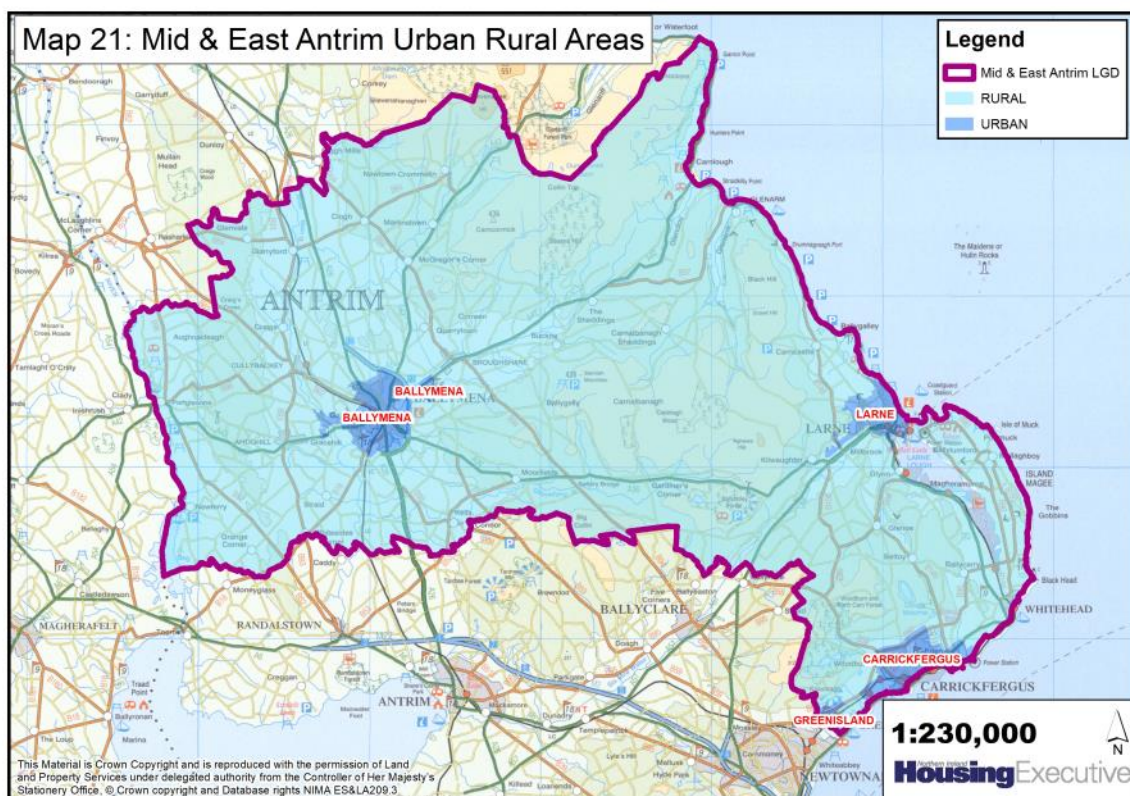
- Proposals will be assessed against potential local impacts on existing housing stock, such as turnover in adjacent social housing estates;
- The population is ageing; the number of smaller sized households is increasing. Future housing mix in new build developments should cater for single, small family 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;
- 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 Dunloskin in Carrickfergus.

## *Rural*

The provision of new social housing in rural settlements represents a strategic priority for delivery of the SHDP. At 2020/23, the rural target share of the SHDP is 12.3% 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.

Map 21: Mid and East Antrim Rural Map



### 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 above mix should be discussed with the Housing Executive to avoid nugatory work.

**Table 88: Indicative housing mix for Mid and East Antrim**

Elderly	Families*	Singles	Wheelchair
23%	34%	43%	10%

\* Focus on: Single and Small Family Households

### Areas where need is met

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

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: Ballykeel 2 in Ballymena; Castlemara, Glenfield and Dunloskin in Carrickfergus.

### Rural areas

At March 2020, there were 374 applicants in rural Mid and East Antrim in housing stress; 20% of the total housing stress waiting list. Whilst we 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 2020, projected housing need for rural areas within Mid and East Antrim is 192 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 NIHE 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 2020, there were 34 housing stress applicants and 28 transfer applicants who require wheelchair accessible accommodation with 16 allocations over the previous



year. This leaves a requirement for 46 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, North Region. In general, generic wheelchair units should be for two and three 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.

### Traveller's accommodation

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 57 units per annum;
- Co-Ownership approved 81 applications in 2019/20 for Mid and East Antrim;
- Average house prices in Northern Ireland increased by 20.6% between 2014 and 2019;
- Although average house prices in Mid and East Antrim are lower than the Northern Ireland average these increased by 18.1% over the same period.

**Table 89: Average Annual House Prices for Mid and East Antrim & NI 2014-2019**

Area	2014	2015	2016	2017	2018	2019	% Change 2014-2019
<b>Mid and East Antrim</b>	£115,983	£119,072	£123,538	£130,007	£142,366	£136,997	18.1
<b>Northern Ireland</b>	£140,217	£149,449	£154,028	£155,049	£163,128	£169,057	20.6

## Mid and East Antrim Supporting Data

**Table 90: Mid and East Antrim Waiting List – March 2020**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	1,128	157	548	80	143	607	<b>2,663</b>
<b>HS Applicants</b>	795	97	381	49	87	428	<b>1,837</b>
<b>Allocations</b>	256	18	111	12	53	96	<b>546</b>

Applicants – Housing applicants at March 2020

HS Applicants – Housing stress applicants at March 2020 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2020

**Table 91: Ballymena Town Waiting List – March 2020**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	464	59	174	23	57	148	<b>925</b>
<b>HS Applicants</b>	348	37	120	16	38	105	<b>664</b>
<b>Allocations</b>	112	<10	50	<10	32	26	<b>233</b>

Applicants – Housing applicants at March 2020

HS Applicants – Housing stress applicants at March 2020 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2020

**Table 92: Carrickfergus Town Waiting List – March 2020**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	244	45	182	28	30	203	<b>732</b>
<b>HS Applicants</b>	170	31	139	19	17	140	<b>516</b>
<b>Allocations</b>	32	<10	16	<10	<10	29	<b>89</b>

Applicants – Housing applicants at March 2020

HS Applicants – Housing stress applicants at March 2020 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2020

**Table 93: Larne Town Waiting List – March 2020**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	133	20	57	<10	18	96	-
<b>HS Applicants</b>	78	<10	28	<10	10	73	<b>201</b>
<b>Allocations</b>	44	0	18	<10	<10	13	<b>86</b>

Applicants – Housing applicants at March 2020

HS Applicants – Housing stress applicants at March 2020 (i.e. 30 points or more)

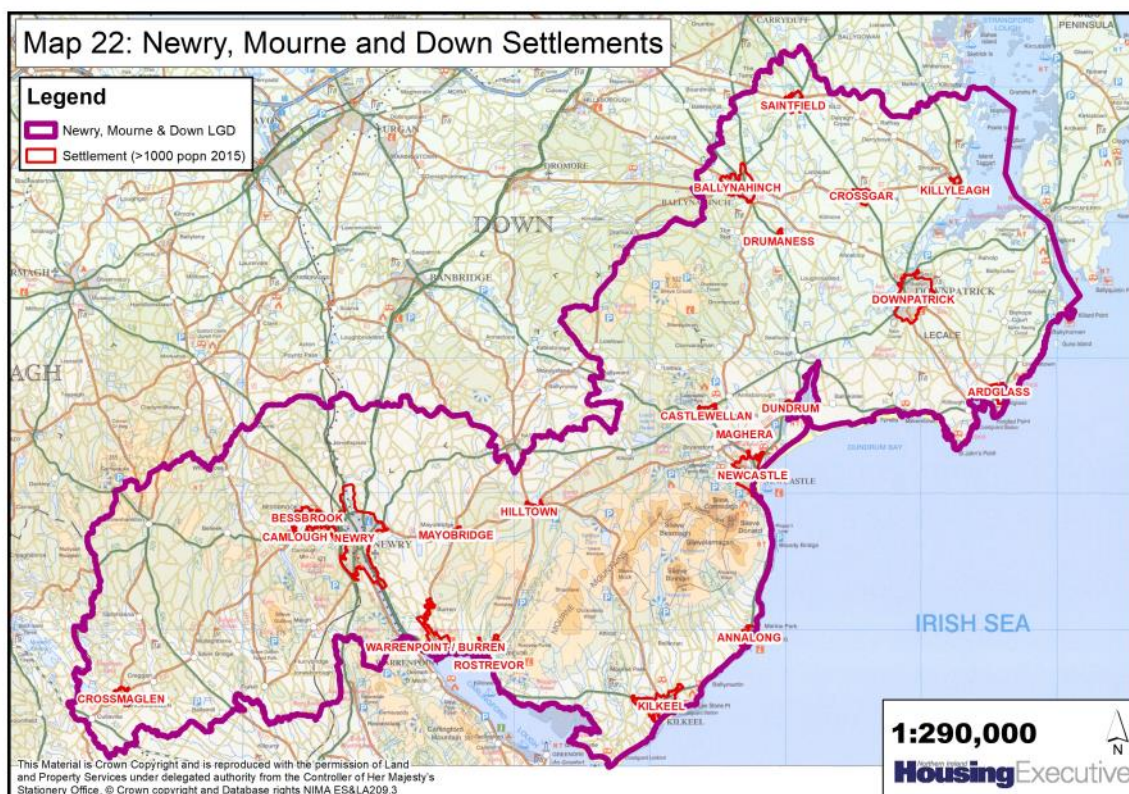
Allocations – Annual allocations for year ending March 2020

## 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.

**Map 22: Newry, Mourne and Down District with main settlements**



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 5.8% to 190,516 in 2028. The district accounts for 9.6% of the overall Northern Ireland population at 2018 and is the third most highly populated local government district behind Belfast and Armagh City, Banbridge and Craigavon. Projected population growth in the district will be concentrated mainly in the 65 plus age group which is projected to increase by 33.2% over the ten-year period. This compares to a projected decrease in 0-15 year olds by 0.55% and a slight increase by 1.33% in the working age population.

According to the Annual Survey of Hours and Earnings (ASHE), within the district, there are 65,000 jobs, 7.5% of the 867,000 jobs across Northern Ireland in 2019. The most recently available Labour Market Structure statistics at the end of 2018 shows 69% of the working age population were economically active compared to 73% across Northern Ireland. In 2019, the annual full-time median wage for residents in the area was £470 per week, an increase of 10.4% on the previous year. This compares to the overall Northern Ireland weekly basic full-time median wage of £483.40, an increase of 0.9% on the 2018 figure (ASHE).

## Housing Market Analysis (across tenures)

### Housing & Land Supply

- The DOE's Northern Ireland Housing Land Availability Report for 2013 (Planning NI:2014) shows potential capacity for 13,762 additional dwellings;
- The district has a HGI projected new dwelling requirement of 10,300 for 2016-2030;
- During 2019 there were 678 new dwelling starts in Newry, Mourne and Down which is less than the projected new dwelling requirement as estimated by the housing growth indicators 2016/30 of 736;
- Over the April 2015 to March 2020 period, 3,815 new dwelling starts commenced in Newry, Mourne and Down district, the fifth highest of all eleven council areas;
- Over the same period there were 3,180 new dwelling completions in the district.

### Owner Occupied Housing Sector

- Census 2011 demonstrates the continued desire of residents to own their own home;
- The private housing market is showing signs of recovery – the number of house sales in Newry, Mourne and Down has increased from 919 in 2012 to 1,865 in 2018, but has fallen slightly to 1,845 in 2019 (LPS.) Obviously there will be a significant impact on the housing market and house sales during 2020 due to the impact of COVID-19, the full impact of which is yet to emerge;
- The average house price for Newry, Mourne and Down fluctuated between 2012 and 2019. House prices decreased by 1.4% to £162,181 in the past year. The Northern Ireland figure was almost £7,000 higher in 2019. Again, COVID-19 will have a major impact on house prices across Northern Ireland during 2020 and beyond;
- Popular locations include Newry City, Newcastle, Warrenpoint, Bessbrook, Castlewellan and Downpatrick;

- From a general mood of positivity in 2019 and local estate agents reporting a local housing market in steady ascent, the mood has shifted to uncertainty due to COVID-19. Semi-detached followed by detached houses comprise the majority of property sales within the district;
- 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. 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 2018, there were 39 repossessions within Newry, Mourne and Down District a slight increase over the previous year.

## Private Rented Housing Sector

- The private rented sector across the district has seen an unprecedented increase in its tenure share between 2001 and 2019 and now accounts for 21% of all housing;
- During 2019 there were 9,734 lettings in LGDs outside of Belfast, 8.4% (817) of those were within Newry, Mourne and Down District. (Performance of the Private Rental Market in Northern Ireland H2 2019 Ulster University).
- The overall average rent in the district in 2019 was £556 per month, an increase of £5 (0.9%) from £551 over the year, but well below the Northern Ireland average of £627 per month in 2019;
- Within Newry, Mourne and Down 5,767 private rented properties were registered by 4,440 landlords under DfC's Landlord Registration scheme at February 2020. The registration scheme will provide evidence to assist monitoring and regulation of the sector;
- Housing Benefit continues to play a vital role in supporting the private rented sector. At March 2020, there were 4,839 private tenants in receipt of Housing Benefit in the district, a 16.4% decrease on the 2019 figure. A key factor in this reduction is the introduction of Universal Credit. At March 2020, there were 761 Housing Executive tenants in receipt of the Housing Cost element 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;
- Housing Executive stock at March 2020 was 5,245 with 12,354 properties sold since the commencement of the 'Right to Buy' scheme;

- There were 52 new social housing units completed and a further 295 social housing units on site in the year to March 2020;
- Twenty Four Housing Executive properties were sold in the year March 2020.
- COVID-19 will undoubtedly 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.

## Social Housing Need

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

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

### General Housing Need (Urban & Rural)

#### Urban

The Strategic Guidelines has established that, of the overall three year programme, 9.0% of the urban and 47.2% of the rural units has been allocated to Newry, Mourne and Down. Five year projected need for the area as a whole is 1,626 and the projected need for individual settlements is detailed in Table 94.

**Table 94: Projected (5 Year) Social Housing Need 2020-2025**

Settlement	Social Housing Need 2020-25
Newry City	534
Downpatrick	59
Annalong / Longstone / Glasdrumman*	15
Ardglass	32
Ballynahinch	10
Bessbrook / Derramore*	105
Camlough	31
Castlewellan	65
Crossgar	52
Crossmaglen	49
Drumaness	13
Forkhill	17
Hilltown	12
Kilkeel	20
Killough	10
Killyleagh	24
Mayobridge	12
Meigh	29
Mullaghbawn	11
Newcastle	217
Newtowncloghogue	15
Rostrevor	43
Saintfield	29
Strangford	13
The Commons / Ballyholland*	14
Warrenpoint	144
Remaining Settlements**	51
<b>Newry, Mourne and Down Total Social New Build Requirement</b>	<b>1,626</b>

Housing need has currently been met in Annsborough, Attical, Ballyrone, Ballyward, Belleeks, Burrenbridge, Creggan, Dundrum / Seaforde / Clough\*, 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 Ballykinler, Ballymartin, Burren, Culloville, Cullyhanna, Drumintee, Jonesborough, Kilcoo, Killeen, Kilmore (including 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 2020. 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, with the City demonstrating a very high one and two bed requirement. Single person households comprise over half of those in housing stress. No further Cat 1 accommodation will be considered until existing units are at full occupancy;
- There is a very high requirement for generic wheelchair and bespoke (bungalow) units for complex needs. Proposed schemes should include the provision of generic units within the housing mix (DfC target 10%) unless financially unviable;
- Site identification studies for each district electoral area within the City were completed during 2019/20;
- 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 we would encourage Housing Associations to investigate those remaining for potential development opportunities;
- Mixed tenure schemes within the 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;
- 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;

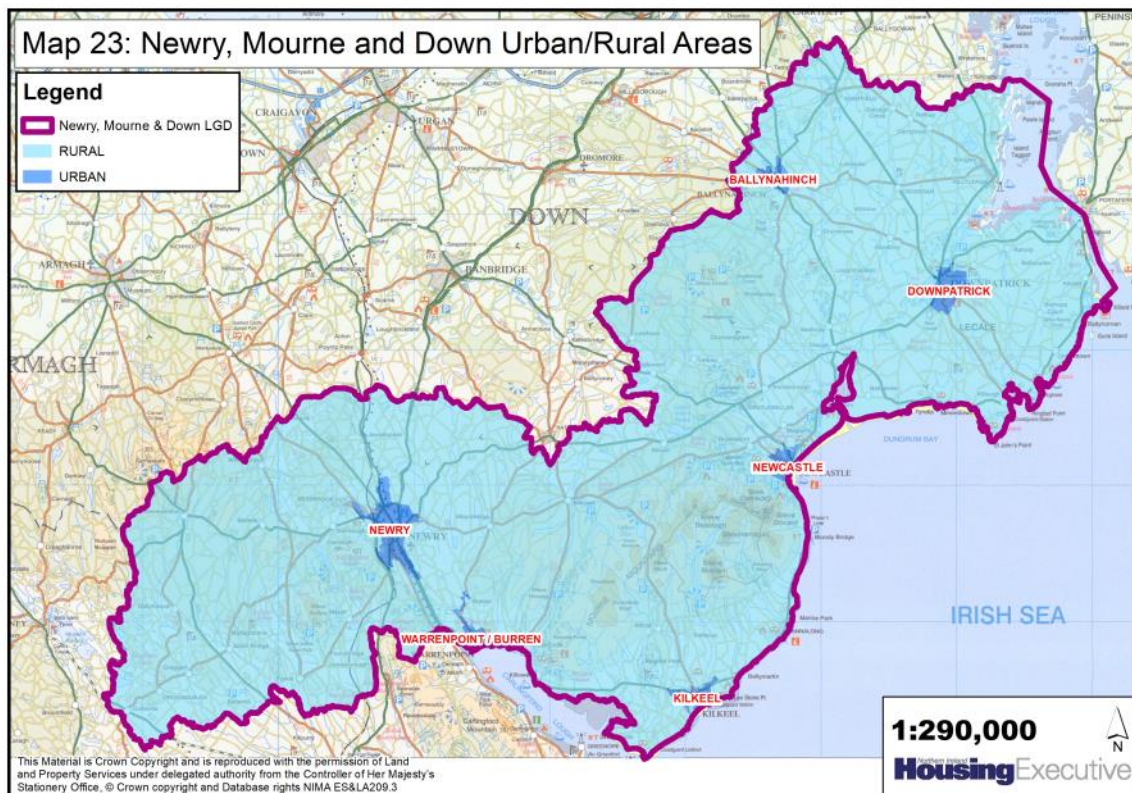


- Dwelling type should therefore comprise 1 and 2 bedroom design forms with emphasis on accessibility. Where possible dwellings should be designed flexibly to cater for potential household growth;
- Some three bed properties may be required for families and these should be discussed with the Housing Executive. There may also be a requirement for a small number of four 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, 10% of overall unit numbers;
- 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 have been completed for Newry, Warrenpoint, Ardglass, Killough, Crossgar, Saintfield, Crossmaglen, Rostrevor, Newtowncloghogue, Mayobridge, Hilltown, Strangford, Ballyholland, Bessbrook, and Camlough;
- Site identification studies are ongoing for Newcastle, Crossgar and Raholp / Saul;
- The Planning Service has placed a key site requirement for social housing on a number of sites in the Newry and Mourne area. 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 30% Single Persons, 60% Families and 10% Older Persons. Wheelchair units should make up 10% of the housing mix across all groups. Family accommodation includes 2, 3 and 4 bed units and Placeshaping, 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 Social Housing Development Programme, 2021/24 is 12.3% of the overall programme based on average levels of housing stress in rural areas.

**Map 23: Newry, Mourne and Down Rural map**



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 2020 there were 939 applicants in rural Newry, Mourne and Down in housing stress (29% 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;

- 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;
- 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 95: Indicative housing mix for Newry, Mourne and Down**

Elderly	Families*	Singles	Wheelchair
10%	60%	30%	10%

\* Family households include 2, 3 and 4 bed units. Placeshaping, 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, Attical, Ballyrone, Ballyward, Belleeks, Burrenbridge, Creggan, Dundrum/Seaforde/Clough, 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 are scheduled to take place in Raholp / Saul and Bryansford;
- During 2019/20 a rural housing need test took place in Darragh Cross and yielded a positive response rate, allowing support to be given to a HA proposal for the village.

### Rural areas

Based on the waiting list for social housing, at March 2020, the current projected need for rural areas within Newry, Mourne and Down Council is for 672 units. Taking account of new build schemes on the current SHDP, the following settlements have a residual housing need of six or above:-

- Annalong/Longstone/Glassdrumman;

- Ardglass;
- Bessbrook;
- Camlough;
- Castlewellan;
- Crossgar;
- Crossmaglen;
- Culloville;
- Drumaness;
- Forkhill;
- Hilltown;
- Jonesborough;
- Killough;
- Killyleagh;
- Kilmore/Loughinisland;
- Mayobridge;
- Meigh;
- Mullaghbawn;
- Newtowncloghogue;
- Rostrevor, Saintfield;
- Strangford;
- The Commons/Ballyholland.

The remaining rural settlements of Ballykinler, Ballymartin, Burren, Cullyhanna, Drumintee, Kilcoo, Killeen, Lurganare, Mullaghglass, Silverbridge and Whitecross have a residual need of below six.

Proposals for social housing in these locations will be welcomed and given due consideration. Housing need is highest in Bessbrook, Castlewellan, Crossgar, Crossmaglen and Rostrevor.

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 NIHE 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 Newry, Mourne and Down is 77 units.

At 1 April 2020 there were 58 housing stress applicants who require wheelchair accommodation with only 10 allocations over the last year. This leaves a residual need of 48 applicants. Housing need for wheelchair units is concentrated mainly in Downpatrick, Newry City, Newcastle and Saintfield.

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

## **Shared Future Demand (Housing for All)**

The Housing Executive continues to support the Northern Ireland Executive's Together Building a United Community (TBUC) Programme through the facilitation of new build Shared Housing schemes. Having initially supported the delivery of 10 Shared Housing schemes under the TBUC programme, the Housing Executive is now working with DfC to bring forward up to 200 new Shared Housing units annually through the SHDP under the Housing for All programme. Housing Associations bringing forward suitable proposals for housing for all designation would be welcomed.

## **Traveller's accommodation**

A requirement for a transit site in Newry was identified as part of the Traveller Needs Assessment 2013/18. Our Research Unit has recently completed the Irish Travellers' Accommodation Survey 2018/19 which will inform the development of our Irish Travellers Accommodation Strategy 2020 – 2025. The Strategy includes proposals for a Travellers housing needs assessment. The Strategy was submitted to the Housing Executive Board for approval in May 2020 and released for formal consultation.

## **Intermediate (Affordable) Demand**

- The Housing Executive estimates intermediate/affordable housing demand for Newry, Mourne and Down is 136 units per annum;
- Co-ownership had an active stock of 520 dwellings at March 2020, 53 of which were purchased during 2019/20;

- In general house prices in Newry, Mourne and Down are lower than Northern Ireland;
- Average house prices in Northern Ireland increased by 28.9% between 2013 and 2019;
- Average house prices in Newry, Mourne and Down have increased by 32.3% over the past 6 years and decreased by 1.4% over the past one.

**Table 96: Average Annual House Prices Newry, Mourne and Down & NI 2013-2019**

Area	2013	2014	2015	2016	2017	2018	2019	% Change 2013-2019
<b>NMDDC</b>	122,547	132,029	145,304	145,228	157,674	164,496	162,181	32.3
<b>N.I.</b>	131,204	140,217	149,449	154,028	155,049	163,128	169,057	28.9

## Newry, Mourne and Down Supporting Data

**Table 97: Newry, Mourne and Down Waiting List – March 2020**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	1,510	142	864	35	313	445	<b>3,309</b>
<b>HS Applicants</b>	1,251	107	666	22	234	361	<b>2,641</b>
<b>Allocations</b>	172	18	105	10	55	65	<b>425</b>

Applicants – Housing applicants at March 2020

HS Applicants – Housing stress applicants at March 2020 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2020

**Table 98: Newry City Waiting List – March 2020**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	416	40	223	10	79	92	<b>860</b>
<b>HS Applicants</b>	350	32	183	<10	64	79	-
<b>Allocations</b>	28	<10	26	<10	11	13	<b>86</b>

Applicants – Housing applicants at March 2020

HS Applicants – Housing stress applicants at March 2020 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2020

**Table 99: Newry City Housing Stress applicants time on list March 2020**

Household	0-6 mths	6-12 mths	1-2 years	2-4 years	4+ years	Total	Average Months
<b>Single</b>	46	37	80	68	119	<b>350</b>	<b>43</b>
<b>Small Adult</b>	<10	<10	<10	11	15	<b>32</b>	<b>60</b>
<b>Small Family</b>	19	19	29	47	69	<b>183</b>	<b>48</b>
<b>Large Adult</b>	0	0	<10	<10	<10	<b>&lt;10</b>	<b>70</b>
<b>Large Family</b>	<10	<10	14	14	21	<b>64</b>	<b>45</b>
<b>Older Person</b>	12	<10	17	17	29	<b>79</b>	<b>52</b>
<b>Total</b>	<b>84</b>	<b>70</b>	<b>145</b>	-	-	<b>715</b>	<b>47</b>

**Table 100: Newcastle Waiting List – March 2020**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	179	15	61	<10	22	70	-
<b>HS Applicants</b>	148	13	46	0	17	54	<b>278</b>
<b>Allocations</b>	30	<10	<10	0	<10	17	<b>61</b>

Applicants – Housing applicants at March 2020

HS Applicants – Housing stress applicants at March 2020 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2020

**Table 101: Newcastle Housing Stress applicants time on list March 2020**

Household	0-6 mths	6-12 mths	1-2 years	2-4 years	4+ years	Total	Average Months
<b>Single</b>	21	17	31	37	42	<b>148</b>	<b>38</b>
<b>Small Adult</b>	<10	0	<10	0	<10	<b>13</b>	<b>82</b>
<b>Small Family</b>	<10	<10	10	<10	20	<b>46</b>	<b>53</b>
<b>Large Adult</b>	0	0	0	0	0	<b>0</b>	<b>0</b>
<b>Large Family</b>	<10	<10	<10	<10	<10	<b>17</b>	<b>54</b>
<b>Older Person</b>	10	<10	11	<10	15	<b>54</b>	<b>44</b>
<b>Total</b>	<b>39</b>	<b>32</b>	<b>58</b>	<b>56</b>	<b>93</b>	<b>278</b>	<b>45</b>

**Table 102: Warrenpoint Waiting List – March 2020**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	85	<10	46	<10	14	43	<b>199</b>
<b>HS Applicants</b>	77	<10	35	<10	11	37	<b>168</b>
<b>Allocations</b>	13	0	<10	<10	<10	<10	<b>24</b>

Applicants – Housing applicants at March 2020

HS Applicants – Housing stress applicants at March 2020 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2020

**Table 103: Warrenpoint Housing Stress applicants time on list March 2020**

Household	0-6 mths	6-12 mths	1-2 years	2-4 years	4+ years	Total	Average Months
<b>Single</b>	10	<10	<10	18	35	<b>77</b>	<b>55</b>
<b>Small Adult</b>	<10	0	0	<10	<10	-	<b>62</b>
<b>Small Family</b>	<10	<10	<10	<10	18	<b>35</b>	<b>57</b>
<b>Large Adult</b>	0	0	0	0	<10	-	<b>123</b>
<b>Large Family</b>	0	<10	<10	<10	<10	<b>11</b>	<b>54</b>
<b>Older Person</b>	<10	<10	<10	11	10	<b>37</b>	<b>42</b>
<b>Total</b>	<b>19</b>	<b>13</b>	<b>26</b>	<b>34</b>	<b>76</b>	<b>168</b>	<b>54</b>

**Table 104: Bessbrook / Derramore Waiting List – March 2020**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	46	<10	58	0	18	<10	<b>131</b>
<b>HS Applicants</b>	43	<10	46	0	13	<10	<b>111</b>
<b>Allocations</b>	<10	<10	<10	0	<10	<10	<b>19</b>

Applicants – Housing applicants at March 2020

HS Applicants – Housing stress applicants at March 2020 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2020



**Table 105: Bessbrook / Derramore Housing Stress applicants time on list March 2020**

Household	0-6 mths	6-12 mths	1-2 years	2-4 years	4+ years	Total	Average Months
<b>Single</b>	<10	<10	<10	<10	19	<b>43</b>	<b>59</b>
<b>Small Adult</b>	0	0	0	<10	<10	-	<b>73</b>
<b>Small Family</b>	<10	<10	<10	16	23	<b>46</b>	<b>66</b>
<b>Large Adult</b>	0	0	0	0	0	<b>0</b>	<b>0</b>
<b>Large Family</b>	0	0	<10	<10	<10	<b>13</b>	<b>67</b>
<b>Older Person</b>	<10	0	0	<10	<10	-	<b>65</b>
<b>Total</b>	<b>&lt;10</b>	<b>&lt;10</b>	<b>14</b>	<b>27</b>	<b>53</b>	<b>111</b>	<b>64</b>

**Table 106: Castlewellan Waiting List – March 2020**

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
<b>Applicants</b>	68	<10	47	<10	16	<10	<b>150</b>
<b>HS Applicants</b>	58	<10	36	<10	<10	<10	<b>118</b>
<b>Allocations</b>	<10	0	13	0	<10	<10	<b>28</b>

*Applicants – Housing applicants at March 2020*

*HS Applicants – Housing stress applicants at March 2020 (i.e. 30 points or more)*

*Allocations – Annual allocations for year ending March 2020*

**Table 107: Castlewellan Housing Stress applicants time on list March 2020**

Household	0-6 mths	6-12 mths	1-2 years	2-4 years	4+ years	Total	Average Months
<b>Single</b>	<10	<10	17	11	17	<b>58</b>	<b>44</b>
<b>Small Adult</b>	<10	0	0	<10	<10	<b>&lt;10</b>	<b>38</b>
<b>Small Family</b>	<10	<10	<0	<10	10	<b>36</b>	<b>39</b>
<b>Large Adult</b>	0	0	0	<10	<10	-	<b>65</b>
<b>Large Family</b>	<10	0	<10	<10	<10	<b>&lt;10</b>	<b>40</b>
<b>Older Person</b>	0	<10	<10	<10	<10	<b>&lt;10</b>	<b>69</b>
<b>Total</b>	<b>15</b>	<b>13</b>	<b>30</b>	<b>24</b>	<b>36</b>	<b>118</b>	<b>44</b>

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