

COMMISSIONING PROSPECTUS

Social & Intermediate Housing Requirements
for the period 2024/25 - 2026/27



Housing
Executive

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Foreword

Welcome to the Housing Executive's annual Commissioning Prospectus, which provides housing associations, developers and other interested stakeholders with detailed information about the requirements for the provision of new social and intermediate housing throughout Northern Ireland.

- The Prospectus presents data which will enable housing associations to make informed decisions about where to search for land and property to deliver new social and intermediate housing within assessed housing need and strategic targets. The Prospectus is updated and published annually to reflect the most recent assessment of local market issues and unmet housing needs. It forms an integral part of the Social Housing Development Programme (SHDP) approved by the Minister (Department for Communities), identifying areas with a shortage of acquired development sites, where the Housing Executive would welcome suitable scheme proposals.
- This aligns with our role as the Strategic Housing Authority and our Corporate Strategic Priorities, in particular to work with our partners to increase social housing supply to meet identified need and to deliver innovative housing solutions. It also reinforces our vision that everyone should be able to live in an affordable, sustainable and decent home that is appropriate to their needs, in a safe, attractive, and climate-resilient place.
- Working with our partners across the housing sector, there is a collective will to deliver more social housing, with waiting lists increasing and continuing affordability and cost of living pressures. We support the work of the DfC's Housing Supply Strategy, which has outlined a commitment to 100,000 new homes over its lifetime, a third of which are to be social. We are also committed to the Revitalisation agenda, and the aspiration to start building new homes again is led by the pilot project at Ballysillan of 6 new modern, low energy technology homes.
- In partnership with housing associations, through the Social Housing Development Programme, we facilitated 1,508 new build social housing starts across Northern Ireland during 2023/4. This year, and going forward, we will seek to further develop and strengthen the engagement and positive working relationships with Housing Associations in ongoing site search activity and bringing forward development sites to meet identified housing need and delivery of the rolling three-year Social Housing Development Programme.

I am grateful for the partnerships which we have built with Housing Associations across Northern Ireland and look forward to continuing to work together as we deliver against our shared goal of providing better places to live for the people and communities we serve.



A handwritten signature in black ink that reads "Grainia Long". The signature is fluid and cursive, with the first name being more prominent.

Grainia Long
CHIEF EXECUTIVE

Introduction

As the Housing Executive enters into its sixth decade, we are, through a pilot project¹, beginning to build new homes for social rent for the first time in over 20 years. These new homes will help meet the need for social housing and provide the prospect of creating new jobs and skills training that will boost the economy.

The **Housing Executive's** investment of £218m in 2022/23 in improving and maintaining its homes was the highest level of investment since 2007/08



Another major housing challenge in every Council area is the continuing demand for social housing and homelessness services. The waiting list for social housing (together with levels of homelessness) has risen significantly in recent years and shows little sign of slowing.

As we emerge from the pandemic, our focus in the coming years will be to work with our partners to lever in funding and scale-up the implementation of energy efficiency measures, across all housing tenures, in order to tackle fuel poverty and climate change and to assist our tenants in facing additional 'cost of living' and lifestyle adjustment pressures.

¹ The Housing Executive have developed a pilot new build scheme of 6 homes for a site in Ballysillan, utilising Modern Methods of Construction and Low Energy technology. Due to rising costs in the construction sector, it is necessary to re-tender the scheme, and it is hoped to start on site later this year.

Strategic Overview

This is the eighth 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 social and intermediate housing.

The Housing Executive is supportive of the new draft Housing Supply Strategy (December 2021) which sets out a pathway and framework for action until 2037, recognising that a different approach to delivering more housing is needed with a focus on the whole system and the importance of collaborative working and partnership between stakeholders.

The draft Strategy proposes upwards of 100,000 new homes over its lifetime, of which at least one third will be social. The Housing Executive supports its objectives and looks forward to the publication of the final Strategy, while also considering further approaches to unlock more housing, such as identifying sites, acquiring land and enabling more new build housing. The Housing Executive intends to play a key role in developing and implementing actions flowing from the Strategy.

The Housing Executive has prepared an action plan on the expansion of the Social Housing Development Programme, and this has been agreed with DfC. Actions are progressing including the preparation of a Housing Executive Land Acquisition Business Case which is with DfC for approval.

The Housing Executive remains committed to the Minister for Communities' programme for Revitalisation announced in November 2020.

This Revitalisation programme offers the key to a future that will deliver additional, more energy efficient and more appropriate homes for those in need, while also ensuring that we support quality of life and well-being, with the right types of homes in the right places and protecting and enhancing the homes we already have.

Discussions are ongoing between Department for Communities (DfC) and the Housing Executive on next steps.

Purpose

The Prospectus is an important document in setting out unmet need across NI, to assist and facilitate the development of social homes where they are needed. 5 year projected social housing need over the period 2023-28 is presented by Council area.

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

Three Regional Place Shaping teams cover Belfast, South and North Housing Executive Regions, these are aligned to LGDs. The Place Shaping teams are responsible for supporting Housing Associations in delivering social and intermediate schemes against the Strategic Guidelines 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 Housing Executive will roll forward the SHDP for the next three year period (2024/25 to 2026/27). The 2023 Bidding Round, already concluded, will produce a new draft SHDP for approval by DfC. This Prospectus will facilitate ongoing site search activity by Housing Associations in preparation for subsequent years bidding rounds.

Northern Ireland Housing Requirements

Context

The demographic of Northern Ireland continues to change. The population of Northern Ireland is recorded as 1,903,162 (NISRA Census 2021).

NI Population 1,903,162 (NISRA Census 2021)
This is an increase of 92,299 people or 5% since the 2011 Census



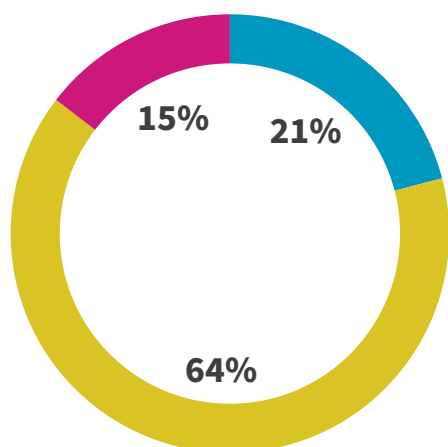
The **population continues to age**, NISRA Census 2021 shows the proportion of the population aged 65+ years was 17% compared to 15% in 2011



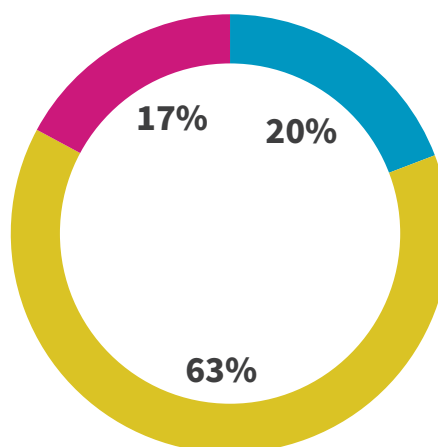
NISRA Census 2021 shows that the proportion of the population **aged 0 to 15 years is by contrast decreasing**, 20% at March 2021 down from 21% in 2011



Census 2011 Population
by Broad Age Band



Census 2021 Population
by Broad Age Band



■ 0-15 ■ 16-64 ■ 65+

In June 2023, NISRA published rebased mid-year population estimates for Northern Ireland for the period 2011-2021 and in August 2023, followed up with 2022 mid-year population estimates. These are based on the March 2021 Census results. They report that the NI population in June 2022 had increased by approximately 0.4% since the Census results in March 2021, as a result of a positive natural change (births minus deaths), and a positive net migration for the first time since mid-2019.

NISRA 2012-based household projections showed that the average household size was projected to steadily decrease, reducing from 2.54 in 2012 to 2.52 in 2022. These projections were not significantly changed by the 2016-based household projections. However, the recent 2021 Census results have shown an average household size for NI at March 2021 of 2.44 persons. The 2016-based projections had not anticipated this level to be reached until 2035. A reduced average household size is also evidenced by single person households representing the largest cohort in NI for the first time. This long term trend towards smaller households, as well as a greater number of older person households, will result in a sustained demand for smaller, often bespoke accommodation.

The Housing Executive will also commission revised household projection estimates for future years.

Housing Market Analysis (across tenures)

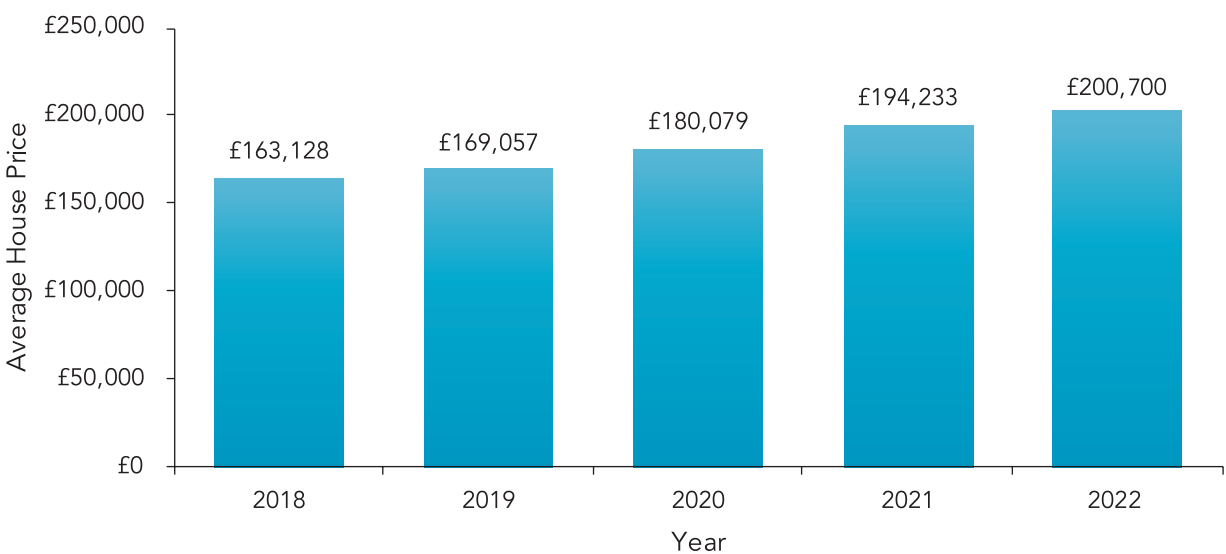
Owner Occupation

The Quarterly House Price Index (HPI), produced by Ulster University in partnership with the Northern Ireland Housing Executive and Progressive Building Society, analyses the performance of the Northern Ireland housing market.

Over the past year, the housing market has shown strong resilience in terms of pricing levels (average annual house price for 2022 was £200,700) – after successive, albeit marginal, quarter-on-quarter declines, Q3 2023 saw a small 0.59% increase in prices (NI Quarterly House Price Index, Q3 2023). The average price of a dwelling in Northern Ireland in Q3 2023 was £205,545, up from £204,331, the previous quarter, and an annual weighted increase of 4.7% compared to Q3 2022. A key factor in NI's more stable performance versus the continuing decline in the rest of the UK is down to the lack of new supply coming onto the market, which is underpinning price resilience.

While the pent up demand for housing and the desire for home ownership remains, it appears likely that effective demand will continue to be tempered by a number of factors, including cost of living, inflationary pressures, the threat of future interest rate rises and a slowing jobs market.

NI Average House Price



Source: Ulster University

Estate agents continued to report curtailed momentum, with 83% noting a slowdown in transaction volumes and associated market activity relative to the previous quarter. Notably, 56% of agents surveyed indicated that there had been a decline in new listings, while 72% of agents reported a falloff in the number of purchaser enquiries relative to the previous three months. In contrast, 61% reported that sale volumes remained strong, and on a par with the previous quarter. This may however see a decline going forward as sales will be adversely impacted by the decline in new buyer enquiries.

Other key report findings include:

- The apartment sector was the only segment of the market to experience a price decline in Q3 2023, albeit nominal (-0.4%).
- The semi-detached sector was the best performing, seeing a 3.3% rise in Q3 2023, and a 4.1% increase over the year.
- The detached sector continued to see an increase, with a 3.1% rise following the 1.6% rise in the previous quarter.

Private Rental

The private rented sector in NI is now similar in size to the social rented sector. It provides housing to a diverse group of households including a growing number of families with children.

There has been a shortfall in social new build in recent years to cope with waiting list demand and for many the unsecure tenancy options in the Private Rented sector have been the only choice, with the support of Local Housing Allowance. This is set in the context of rents having increased by almost 50% from 2015 to date, and the number of properties available to rent has decreased by around 50% over the same period.

New laws governing private tenancies came into effect from 1 April 2023, which seek to make the private rented sector a more reliable, safer and better quality tenure option, for both tenants and landlords. These include notice to quit changes, greater transparency around tenancy notices and security deposits, and provision of receipts for cash payments.

There is an increasing risk that households will no longer be able to access the private rented sector if private rents continue to increase at the rate they have been or if there are future changes to Local Housing Allowance benefits. As a result, the need for more social and affordable homes across NI is likely to increase.

The NI private rental market continues to evidence strong growth in average rents. Average rents across Northern Ireland increased by 5% over the half year to £817 per month, up by 10% compared to the same period in 2022. Against the backdrop of the sustained growth in average rents, transactional activity continues to reduce, with a 9.5% decline during the first half of 2023 compared to the latter half of 2022 (Performance of the Private Rental Market in NI H1 2023).

To address pressures on the private rental sector, the Minister in her statement advised that, alongside plans to increase the supply of social housing and improve security of private rental tenures, there would be plans to expand the available rental options, including the introduction of intermediate rent. The aim of that product is to provide ‘an additional supply of good quality, well managed and maintained homes which are affordable for lower income people and families’. DfC published an Intermediate Rent Policy in March 2023, and the Housing Executive is now working on the delivery of Intermediate Rent units for those whose needs cannot be met in the housing market.

The **average monthly rent for NI** for the first half of 2023 was £817, up 10% on the same period last year



Social Housing

The social housing share of the market in 2001 was 21.9% – by 2021, it was just 15% according to NISRA Census 2021. Tenants leaving social housing during the housing market boom and buying their own homes as well as the increased reliance on the private rented sector for those unable to access social housing over the same period are some of the reasons for this shift in tenure profile.

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

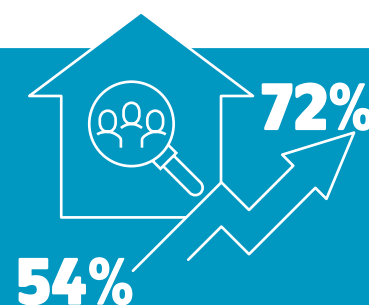
Social housing waiting lists have increased by 9% from 41,356 in March 2013 to 45,105 in March 2023



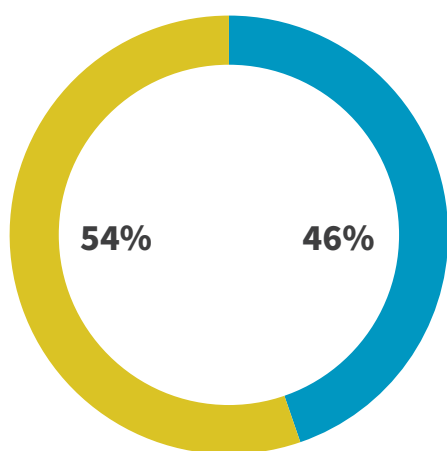
As the dynamic of the private rented market evolves, social housing new build is becoming an ever more important tenure option. Social housing waiting lists have increased by 9% from 41,356 in March 2013 to 45,105 in March 2023. It is important however to note that the percentage of applicants on the waiting list in Housing Stress (30+points) has increased significantly.

In March 2013, applicants in housing stress represented 54% of the total waiting list (22,414), by March 2023 this figure had risen to 72% (32,633). This is in part due to the historic under investment in social new build, lack of affordable private homes for ownership and, increasingly, a lack of affordable private rental.

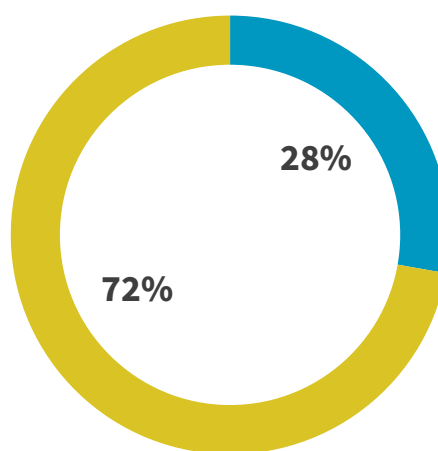
In March 2013, **applicants in housing stress** represented 54% of the total waiting list (22,414), by March 2023 this figure had risen to 72% (32,633)



Waiting List March 2013



Waiting List March 2023



■ Non Housing Stress ■ Housing Stress (30+ Points)

Rural Areas

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:

37% of the total population of NI **live in rural areas**



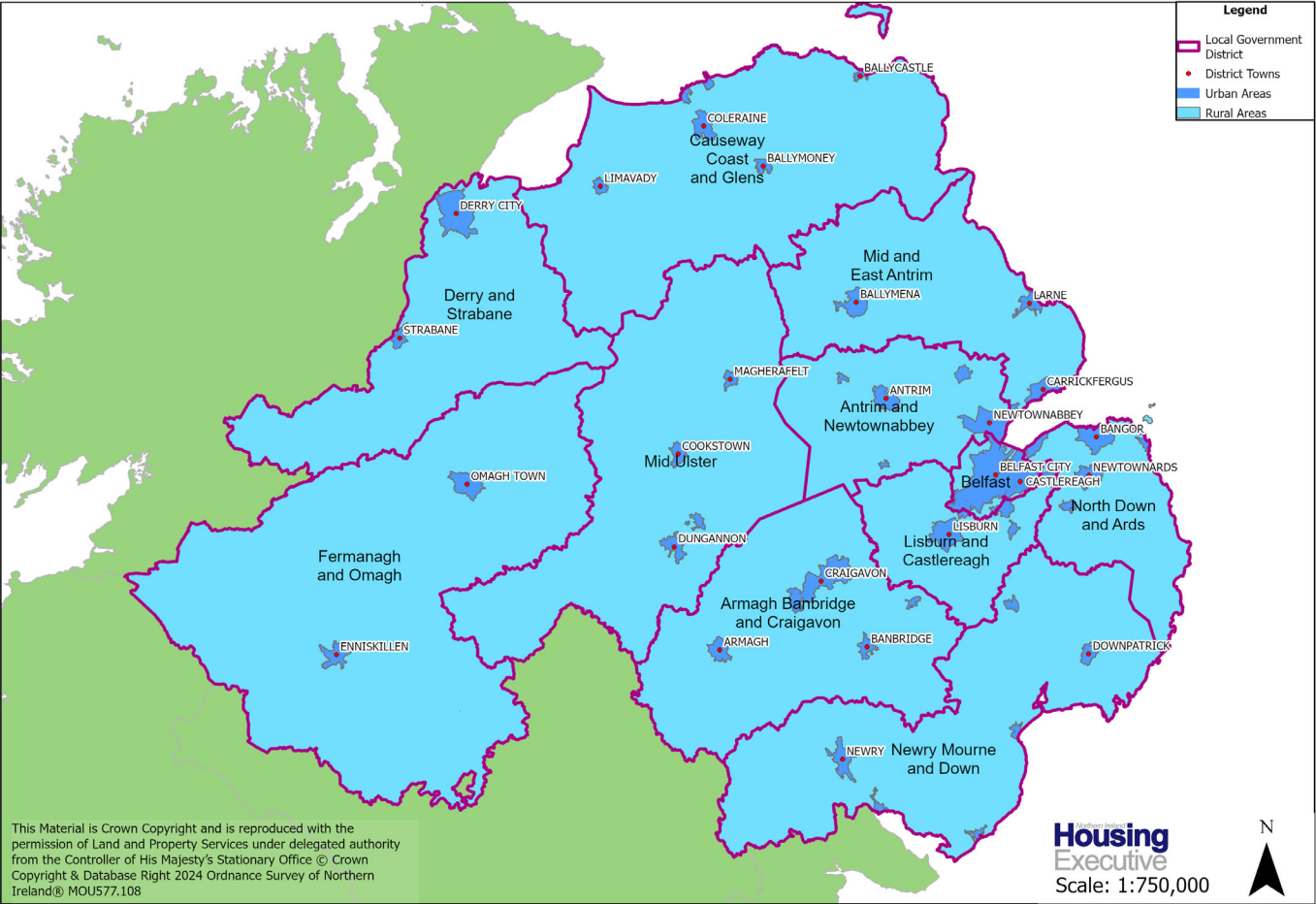
Rural applicants comprised 15% of the total **waiting list for social housing** at March 2023



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



Map 1: Northern Ireland Urban / Rural Areas



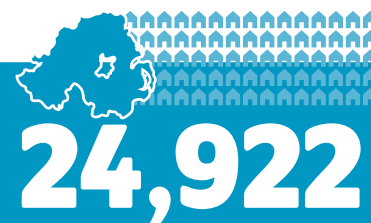
Social Housing Need & Strategic Guideline Requirements

General Needs Housing (Urban & Rural NI)

The Housing Executive has responsibility to assess social housing need (the 1981 Housing Order) and currently produces the Housing Needs Assessment (HNA) for each of the 11 Local Government Districts.

HNAs are undertaken, reviewed and updated annually, taking account of a wide range of supply and demand issues in order to identify requirements for the provision of new social housing across NI. HNAs also offer the basis for supporting Housing Association social housing development proposals, to facilitate their eventual inclusion in the 3-year Social Housing Development Programme (SHDP). The current five year projected need for NI is 24,922 (2023-2028). The districts with greatest projected need are Belfast, Derry City and Strabane and Newry, Mourne and Down.

The current **five year projected need** for NI is 24,922 (2023-2028)



24,922

Table 1: Projected Social Housing Need 2023-28 by Local Government District (LGD)

LGD	Projected Need 2023-28
Antrim & Newtownabbey	1,229
Ards & North Down	1,390
Armagh City, Banbridge & Craigavon	1,498
Belfast	8,551
Causeway Coast & Glens	1,638
Derry City & Strabane	4,066
Fermanagh & Omagh	905
Lisburn & Castlereagh	1,636
Mid & East Antrim	863
Mid Ulster	912
Newry, Mourne & Down	2,234
Northern Ireland Total	24,922

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

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

2024/25	2025/26	2026/27
2,000	2,150	2,300
TOTAL UNITS	TOTAL UNITS	TOTAL UNITS

The table below details the Social Housing Strategic Guideline Requirements for the next three years for each LGD, by Urban and Rural classification.

Table 2: Social Housing Strategic Guideline Requirement (2024/25 – 2026/27)

Local Government District	Strategic Group		
	Urban	Rural	Total
	Target Requirement	Target Requirement	Target Requirement
2024/25 2,000 Total Units			
Belfast	681	0	681
Lisburn & Castlereagh	142	14	156
Antrim & Newtownabbey	78	7	85
Causeway Coast & Glens	85	32	117
Derry & Strabane	342	30	372
Mid & East Antrim	34	14	48
Ards & North Down	84	13	97
Armagh, Banbridge & Craigavon	76	11	87
Fermanagh & Omagh	39	23	62
Mid Ulster	54	17	71

Tables continues

Local Government District	Strategic Group		
	Urban Target Requirement	Rural Target Requirement	Total Target Requirement
Newry, Mourne & Down	124	100	224
Total	1,739	261	2,000
2025/26 2,150 Total Units			
Belfast	732	0	732
Lisburn & Castlereagh	153	15	168
Antrim & Newtownabbey	83	8	91
Causeway Coast & Glens	91	35	126
Derry & Strabane	368	32	400
Mid & East Antrim	36	16	52
Ards & North Down	90	14	104
Armagh, Banbridge & Craigavon	82	11	93
Fermanagh & Omagh	42	24	66
Mid Ulster	58	18	76
Newry, Mourne & Down	134	108	242
Total	1,869	281	2,150
2026/27 2,300 Total Units			
Belfast	784	0	784
Lisburn & Castlereagh	164	16	180
Antrim & Newtownabbey	89	8	97
Causeway Coast & Glens	98	37	135
Derry & Strabane	393	34	427
Mid & East Antrim	38	18	56
Ards & North Down	97	15	112
Armagh, Banbridge & Craigavon	87	12	99
Fermanagh & Omagh	45	26	71

Tables continues

Local Government District	Strategic Group		
	Urban Target Requirement	Rural Target Requirement	Total Target Requirement
Mid Ulster	62	19	81
Newry, Mourne & Down	143	115	258
Total	2,000	300	2,300

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

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

Rural Housing

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

The Housing Executive's current Rural Strategy 'Reaching Rural' identifies, through high level outcomes and priorities, the need to support our rural customers, increase the provision of affordable housing in rural areas, and enable the sustainable growth of our rural communities. We continue to build upon the achievements of the last rural strategy, including the continuation and development of the annual programme of Rural Housing Need Tests. These highlight the need for both social and intermediate housing in rural areas to each of the local Planning Authorities. Where need is identified, this requires plan policies and land zonings that will enable the development of affordable housing in these areas and contribute to collaborative funding support for the provision and improvement of rural community infrastructure.

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

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

Information on rural housing needs in general can be obtained by contacting the Housing Executive's Rural Unit or the relevant Regional Place Shaping Team.

Housing for All

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

As at end of December 2023, the Shared Housing Programme supported 77 schemes with a total of 2,490 units (including 2023/24 programme). 44 schemes (1,290 homes) have completed & are now celebrated as Shared, and 33 schemes (1,200 homes) are under development.

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

Supported Housing Need

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

The Supporting People Programme is delivered on behalf of the DfC, in partnership with the Department of Health (DoH) and the Department of Justice (DoJ). The Programme awards grant-funding to Provider Organisations to enable them to deliver services that provide housing-related support and assistance to service users, thus enabling them to live more independently.

Housing-related support enables vulnerable people to develop and maintain the skills necessary to live as independently as possible in their own home.

Supporting People delivers housing-related support services under the Housing Support Services (2002 Order) (Commencement) Order (Northern Ireland) 2003, Articles Three and Four of which empower Supporting People to provide grant funding to eligible Housing Support Services; and the Housing Support Services Regulations (Northern Ireland) 2003.

The DfC allocates the annual budget for the Programme, has overarching policy and legislative responsibility for Supporting People, and provides an oversight role for Supporting People.

Supporting People has three broad objectives which are to:

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

The Supporting People programme is delivered under four main themes:

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

The **Supporting People** programme currently **supports over 19,000 vulnerable people**, across 15 primary client groups, providing 825 housing support services delivered by 82 service providers in accommodation based and floating support services



Supporting People has developed the Three-Year Strategic Plan and COVID-19 Recovery Plan 2022-2025. Engagement with the sector, information from the Strategic Needs Assessment and a public consultation have informed and contributed to development of the Strategic Plan's four strategic priorities namely:

- drive recovery and re-build beyond COVID-19;
- work towards closing the 14% gap between need for services and supply;
- collaborate with providers to invest in service innovation; and
- to strengthen relationships across health, criminal justice and housing with the aim of generating greater value from public funds.

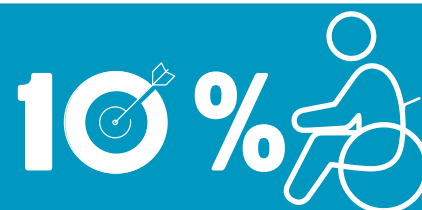
The Supporting People [Three Year Strategic Plan and COVID-19 Recovery Plan 2022-2025](#) has been informed by and supports other strategies, including the Housing Executive's Homelessness Strategy and wider strategies of Health and Criminal Justice. Year One actions in The Strategic Plan were progressed throughout 2022/2023. For more information, please refer to the [SP Annual Report 22/23](#). Supporting People continue to progress Year Two actions throughout 2023/2024.

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

Wheelchair Housing Need

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

An annual target has been set for generic **wheelchair unit provision** within the SHDP at 10%



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

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

Bespoke solutions for social housing applicants with Complex Needs are addressed directly through the Housing Executive's Complex Needs Case Management process and are therefore not identified in this Prospectus.

The Housing Need Assessment (HNA) is used to assess potential demand from wheelchair users and the need for accessible units. The table below details the generic wheelchair accommodation requirements at March 2023 by LGD.

Table 3: Wheelchair Needs Assessment as at March 2023

Local Government District	5 Year Wheelchair Needs Assessment
Antrim and Newtownabbey	51
Ards and North Down	104
Armagh, Banbridge and Craigavon	85
Belfast	50
Causeway Coast and Glens	60
Derry City and Strabane	65
Fermanagh and Omagh	30
Lisburn and Castlereagh City	46
Mid and East Antrim	41
Mid Ulster	17
Newry, Mourne and Down	120
Total	669

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

Irish Traveller 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 Irish 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 Irish Travellers may park their caravans on a temporary basis (up to a maximum of 3 months) and where electricity, water and sewerage services are provided. Transit sites are not intended for use as a permanent lease for an individual household.

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

The Housing Executive has regularly published comprehensive accommodation research in 2002, 2008 and 2015 for the Irish Traveller Community across Northern Ireland. The most recent Irish Travellers' Accommodation Survey 2018/19 was completed in 2019 and provided an important evidence base in the development of our [Irish-Traveller-Strategy 2021-2026](#). The Strategy was launched on the Housing Executive website and via our social media channels in July 2021.

The Strategy aims to provide safe and sustainable accommodation that meets the accommodation and cultural needs of the Irish Traveller community through the implementation of 12 key actions in a five year Action Plan. Progress has been made on a number of actions since the Strategy was developed. Included in the schedule for the current year, the Housing Executive aims to:

- Complete and implement research project to develop an Irish Traveller Accommodation Needs Assessment methodology;
- Implement review findings for Housing Executive owned Irish Traveller sites;
- Review housing management policies for Irish Travellers;
- Continue to progress the redevelopment of two Irish Traveller sites.

Affordability - Intermediate Housing and Demand

Intermediate Housing – Options

DfC defines affordable housing as:

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

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

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

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

The Housing Executive has continued to work closely with DfC on the provision of new affordable housing products. This includes the development of Intermediate Rent housing. Intermediate Rent aims to increase housing supply and provide a housing choice, which is of high quality, is more affordable and more secure for households. DfC published an Intermediate Rent Policy in March 2023, and the Housing Executive is now working on the delivery of Intermediate Rent units to those whose needs cannot be met by the housing market.

Further details can be found on the DfC website at the following link:
<https://www.communities-ni.gov.uk/articles/intermediate-rent>

Policy Context

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

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

All five SHMAs are published on the Housing Executive website, including an NI level summary report. Further details at the following link. [The Housing Executive - Housing market analysis \(nihe.gov.uk\)](https://www.nihe.gov.uk/housing-market-analysis)

Intermediate Housing Demand

The intermediate housing requirement by LGD for the 15 year period 2020 to 2035, as set out in the SHMA suite of reports is detailed in the table below. This assessment will be reviewed periodically.

Table 4: Intermediate Demand between 2020 and 2035

Local Government District	Intermediate Need
Antrim & Newtownabbey	910
Ards and North Down	1,060
Armagh, Banbridge & Craigavon	2,680
Belfast	2,090
Causeway Coast & Glens	930
Derry & Strabane	680
Fermanagh & Omagh	860
Lisburn & Castlereagh	2,050
Mid & East Antrim	890
Mid Ulster	1,740
Newry, Mourne and Down	1,570
Northern Ireland	15,450

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

Individual Local Government District Analysis

The following sections have been prepared by the respective Regional Place Shaping teams to provide specific ‘local’ analysis and priorities that they would like to see delivered within the SHDP and other products being developed by Associations.

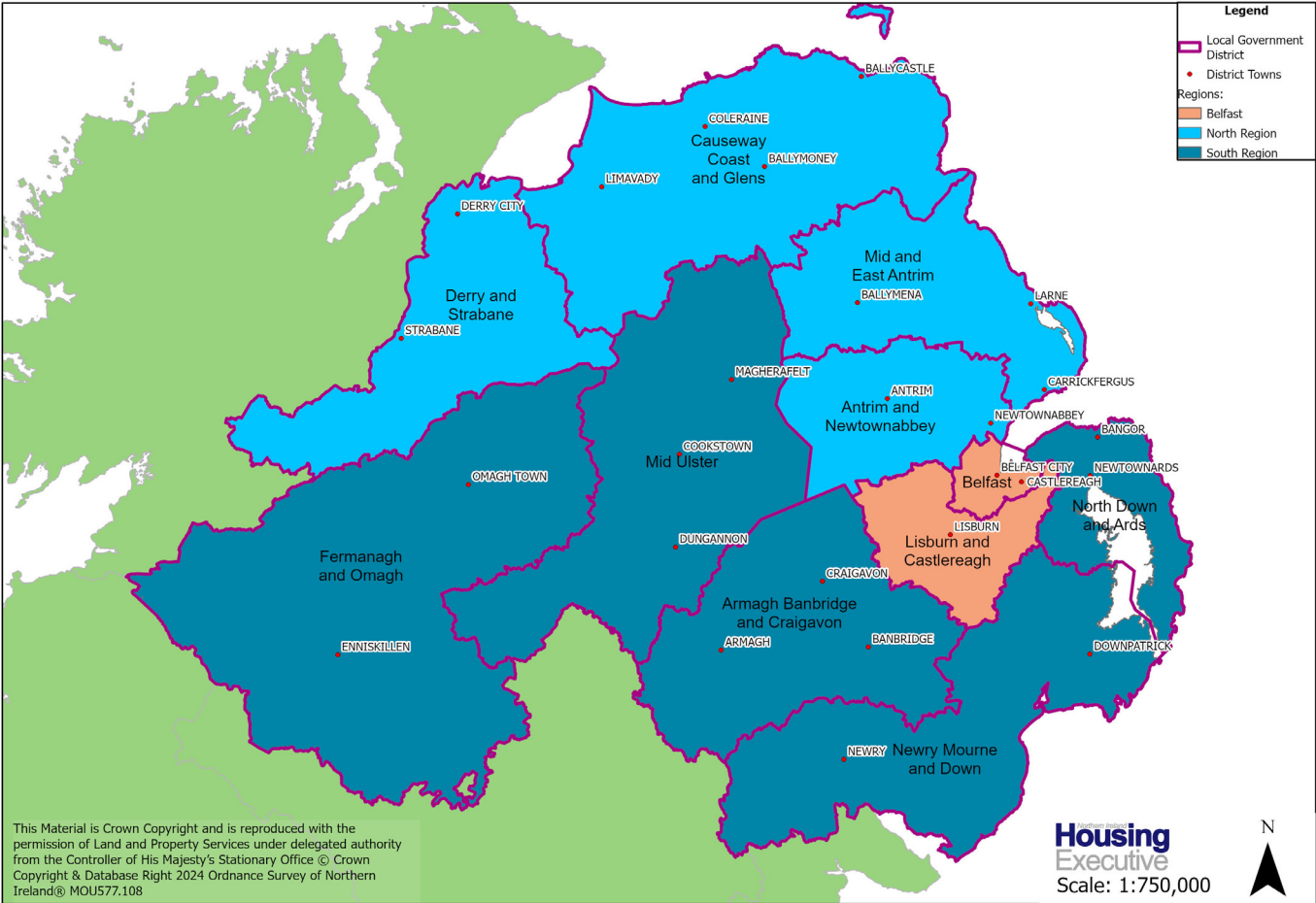
The Regional Place Shaping teams represent the main Housing Executive interface with Councils and community planning. They are also the main point of contact for those stakeholders involved in the delivery of social and intermediate housing.

Contacts

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

Head of Place Shaping, Belfast Region	Fiona McGrath	fiona.mcgrath@nihe.gov.uk
Head of Place Shaping, North Region	Louise Clarke	louise.clarke@nihe.gov.uk
Head of Place Shaping, South Region	Sinead Collins	sinead.collins@nihe.gov.uk

Map 2: Regional Place Shaping Areas



Local Government District Analysis

Antrim and Newtownabbey

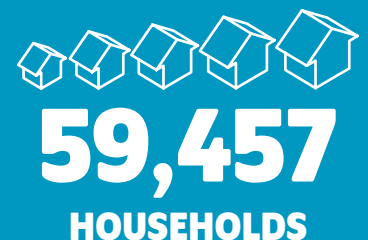
Context

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 while mostly urban, has a significant rural populace.

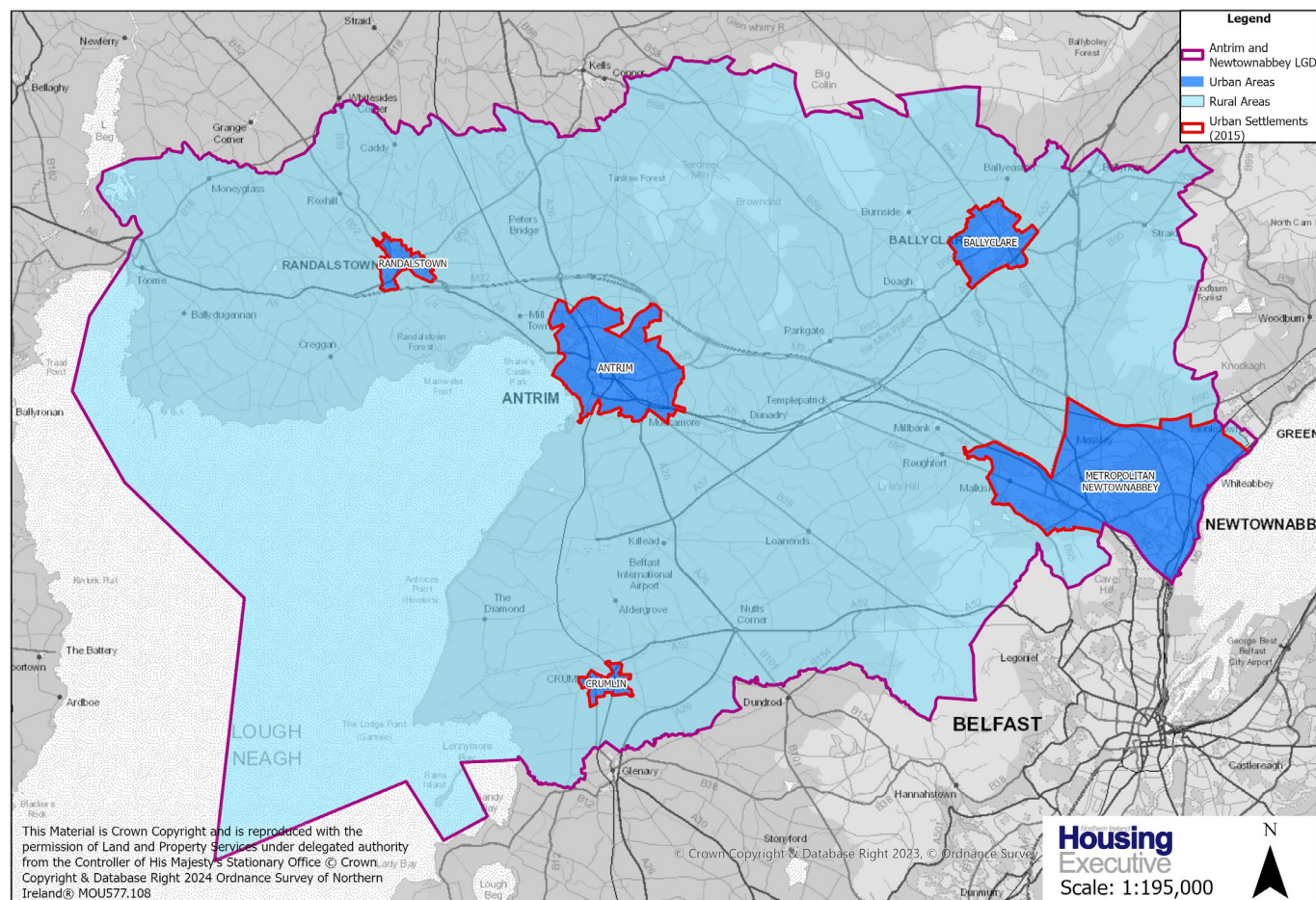
The **population** of Antrim and Newtownabbey Borough was **145,663** at Census day 2021, an increase of 5.1% since 2011 Census (NISRA)



At 2021 there were **59,457 households** in Antrim and Newtownabbey, which is an **increase of 5,422** households on the 2011 Census figure of 54,035 (NISRA)



Map 3: Antrim & Newtownabbey Urban Settlements and Rural Areas



Housing Market Analysis (across tenures)

Housing & Land Supply

During 2022/23, there were 685 new units started in Antrim and Newtownabbey (Land and Property Services), which is more than double the projected new dwelling requirement of 280 per year as estimated by the HGIs 2016-2030.

Land and Property Services (LPS) statistics show that over the 2018/19 to 2022/23 period, **3,315 new dwelling starts** commenced and there were 3,258 new dwelling completions in Antrim & Newtownabbey



There is a projected housing growth indicator **new dwelling requirement** of **4,200** for the period 2016 to 2030. The **overall NI requirement** for the same period is 84,800



Owner Occupied

The sector comprises 71.5% of total occupied stock (NISRA: NI Census 2021).

Ulster University states that the **average house price** in Antrim and Newtownabbey in 2022 was £191,095 which represents an increase of 13% on 2021 figure. This remains **below the Northern Ireland average** of £200,700 at the end of March 2022



Demand for intermediate housing aimed at low income households in Antrim and Newtownabbey is estimated at 910 units, 2020-2035 (SHMA)



During 2022, there were 10 repossessions in Antrim and Newtownabbey. This represents a 52.4% decrease since 2018 (NI Courts and Tribunals Service).

Those with existing mortgages across the borough continue to cope with the ever changing landscape with both on-going interest rate increases and inflation movements. These on-going issues have also filtered into the housing market with the result that both potential sellers and buyers are holding back and waiting to see the outcome of the recent volatility within the housing market (Ulster University House Price Index Q2 2023).

Private Rented

The private rented sector comprises 15.7% of total occupied housing stock in Antrim and Newtownabbey (NISRA: NI Census 2021).

With the continual 'Cost of Living Crisis' and rises in mortgage interest rates, affordability within the private rented sector remains an issue across the borough with an annual rental increase of over 11%. As well as this rising private rents and the lack of rental accommodation is also causing rents to further increase within Antrim and Newtownabbey (Performance of the Private Market H1 2023).

At March 2023, there were 1,682 private tenants in the borough in receipt of Housing Support Benefits.

DfC's **Landlord Registration Scheme** identified 5,023 properties registered by 3,136 landlords for Antrim and Newtownabbey at March 2023

5,023 
PROPERTIES REGISTERED

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 social rented sector comprises 12.8% of total housing stock in the borough (NISRA: NI Census 2021).

At March 2023, there were **6,315 Housing Executive owned properties** in Antrim and Newtownabbey with 10,631 Housing Executive properties sold since the introduction of the House Sales Scheme

6,315 
HOUSING EXECUTIVE
PROPERTIES

At March 2023, there were 2,948 Housing Executive and 1,137 housing association tenants in receipt of Housing Benefit. There were 2,502 Housing Executive tenants receiving the Housing Cost element of Universal Credit at this date.

There were 155 new social homes completed in year to March 2023, and 371 on-site. A further 417 units are programmed to start over the next three years.

At March 2023, there were 3,119 applicants on the waiting list for Antrim and Newtownabbey, 2,378 of whom were in housing stress with 517 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
- Irish Traveller accommodation requirements

General Housing Need (Urban & Rural)

Urban

The Strategic Guidelines target share established for Antrim and Newtownabbey indicates 4% urban units and 3% rural units of the overall three year programme. Five year projected need for the area as a whole is 1,229 and the projected need for individual settlements is detailed in the table below.

Table 5: Projected (5-Year) Social Housing Need 2023-28

Settlement	Housing Need Assessment Area*	Total 5 Year Projection
Newtownabbey Urban	Rathcoole	82
	Rushpark	38
	Whiteabbey (Abbeyville, Glenville, Abbeyglen)*	73
	Longlands/Bawnmore/Old Mill	72
	Hightown	22
	Felden	40
	Ballyduff	20
	Central Glengormley (Glenvarna, Queens Park/Avenue, Glengormley Central)*	231
	Monkstown	20
	Mossley	56
Antrim Town	Antrim Town	258
Crumlin	Crumlin	108
Randalstown	Randalstown	56
Parkgate/Templepatrick	Parkgate/Templepatrick	27

Tables continues

Settlement	Housing Need Assessment Area*	Total 5 Year Projection
Toomebridge	Toomebridge	16
Ballyclare	Ballyclare	73
Doagh/Kelburn Park	Doagh/Kelburn Park	14
Remaining Settlements (need <10)**		23
Total		1,229

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

**Remaining settlements include Rathfern, Mallusk, 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.

Social housing proposals are particularly welcome for family homes in Glengormley, Crumlin and Randalstown as are proposals for single household accommodation within Antrim town. All proposals brought forward will be assessed against local impacts on existing housing stock, turnover in adjacent social housing estates, schemes on-site and programmed within the area and access to local facilities and public services including transport links. We would also welcome the development of mixed tenure schemes across Antrim and Newtownabbey.

The population within Antrim and Newtownabbey is ageing and the number of smaller sized households is increasing. Future housing mix in new build developments should cater for single, small family and older person households. Dwelling types should therefore comprise one and two bedroom design forms with emphasis on accessibility. All proposals are required to deliver 10% as wheelchair accessible as standard. There may also be requirement for three bedroom houses, four bedroom houses and/or complex needs dwellings, these should be discussed with the relevant Place Shaper within the Housing Executive.

Site Identification Studies (SISs) will be carried out by the Housing Executive in selected areas across Antrim and Newtownabbey where there is a social housing need and a shortage of sites coming forward for development. A number of SISs have been programmed for 2023/24 including in Toomebridge and Ballynure.

A review of Housing Executive owned undeveloped land is carried out annually. The Housing Executive have a land bank within Antrim and Newtownabbey, and this is currently being reviewed for suitability of development to help meet housing need.

Rural

The provision of new social housing in rural settlements represents a strategic priority for delivery of the Social Housing Development Programme (SHDP). For 2024/25, the Strategic Guidelines rural target share of the overall SHDP for Northern Ireland is 13%, or 261 units. Of these, Antrim and Newtownabbey Council area is assigned seven units.

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.

In some rural areas there is a shortage of available sites within the development limit and a large percentage of public owned stock has been sold. As a result of this there are limited housing opportunities in these locations which has led to the development of latent need.

Based on the waiting list for social housing at March 2023, 5 year **projected housing need** for **rural areas** (2023/28) within Antrim and Newtownabbey is **62 units**

62 UNITS


Taking account of new build schemes on the current SHDP, residual housing need is focused in Toomebridge, Doagh, Ballynure and Parkgate/Templepatrick. A SIS for Toomebridge and Ballynure has been programmed for 2023/24.

At March 2023, there were **74 applicants in rural** Antrim and Newtownabbey in **housing stress**, 3.2% of the total housing stress waiting list

 **74**

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

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. A Rural Needs Test for Moneyglass has been programmed for 2023/24.

Wheelchair Housing Need (HNA)

At March 2023, there were 38 housing stress applicants and 24 transfer applicants who require wheelchair accessible accommodation with 11 allocations over the previous year. This leaves a requirement for 51 units. Need has been identified throughout Antrim and Newtownabbey.

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 the space standards included in the Housing Association Guide.

A Shared Future through ‘Housing for All’

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

Irish Traveller accommodation

Need within the Irish Traveller community continues to be monitored in Antrim and Newtownabbey.

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 an 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. Developments are required to include 10% wheelchair accessible units and there may be a requirement for accommodation for persons with complex needs. These should be discussed with the Housing Executive.

Table 6: Indicative Housing Mix for Antrim and Newtownabbey

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

* Focus on: Single and Small Family Households

Areas where need is met

Currently there is no projected need for Bleachgreen. New build schemes within adjacent areas are likely to attract Bleachgreen applicants. This will be kept under annual review.

Intermediate (Affordable) Demand

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

Co-Ownership approved **86** applications in 2022/23 for Antrim and Newtownabbey



Average house prices in Northern Ireland increased by 18.7% between 2019 and 2022.

Average house prices in Antrim and Newtownabbey are lower than the Northern Ireland average; local prices increased by 32.2% between 2019 and 2022



Table 7: Average Annual House Prices Antrim and Newtownabbey LGD & NI 2019-2022

Area	2019	2020	2021	2022	% Change 2019-2022
Antrim and Newtownabbey	£144,567	£154,737	£169,073	£191,095	32.2%
Northern Ireland	£169,057	£180,079	£194,233	£200,700	18.7%

Ulster University

Antrim and Newtownabbey Supporting Data

Table 8: Antrim and Newtownabbey Waiting List – March 2023

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	1,338	153	831	63	212	522	3,119
HS Applicants	1,022	106	666	48	160	376	2,378
Allocations	207	21	138	<10	33	109	-

Table 9: Antrim Town Waiting List – March 2023

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	382	48	188	17	38	117	790
HS Applicants	288	30	155	13	27	93	606
Allocations	38	<10	23	<10	11	19	97

Table 10: Metropolitan Newtownabbey Waiting List – March 2023

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	691	77	476	31	120	293	1,688
HS Applicants	534	58	379	24	94	201	1,290
Allocations	133	12	91	<10	17	66	-

Applicants – Housing applicants at March 2023

HS Applicants – Housing stress applicants at March 2023 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2023

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

Ards & North Down

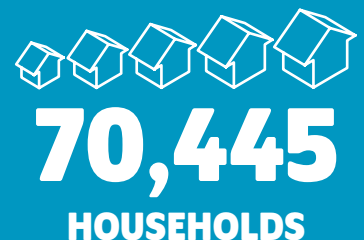
Context

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 borough covers an area of 228 square miles and approximately 115 miles of coastline. 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.

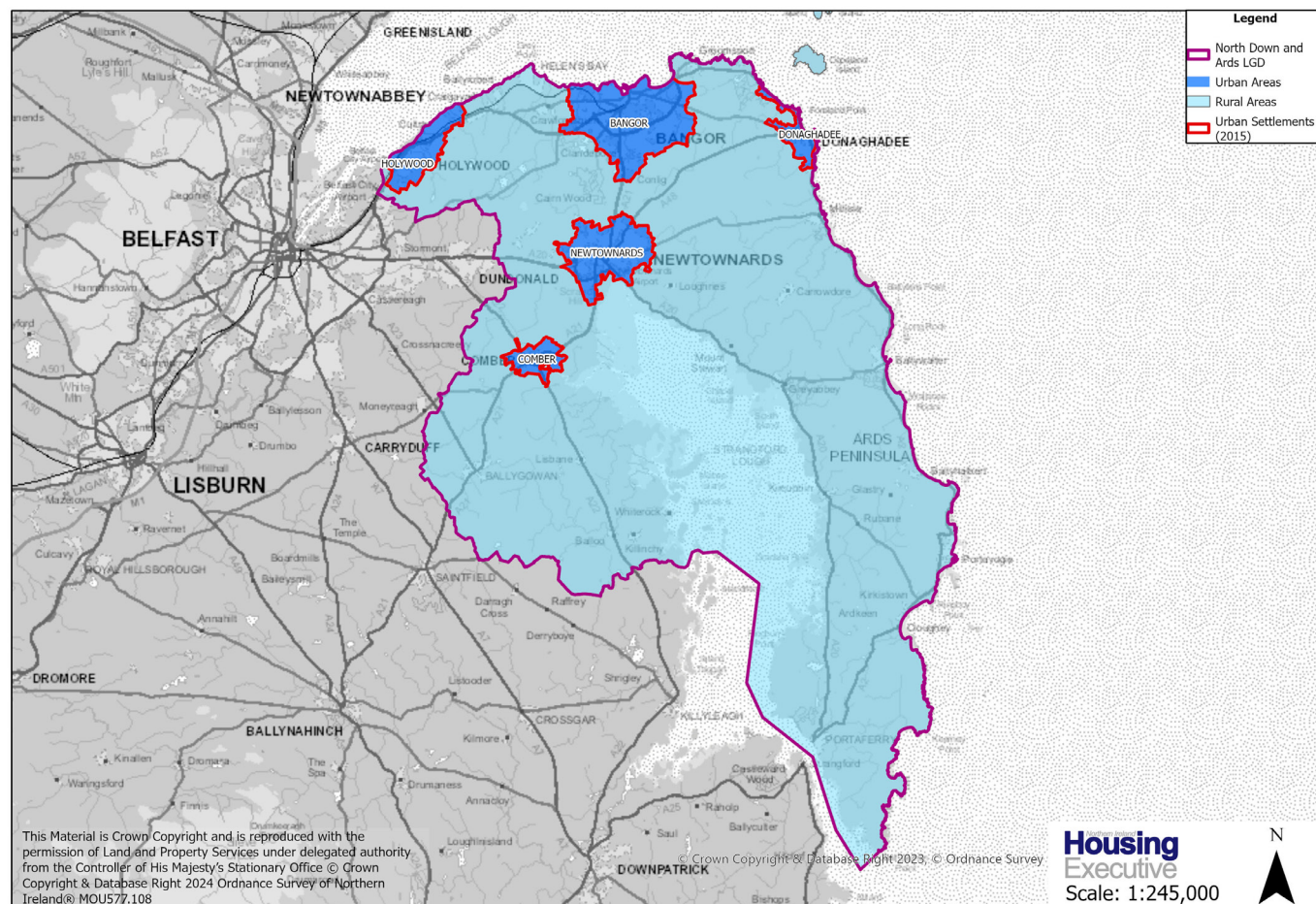
The **population** of Ards and North Down Borough was **163,657** at Census day 2021, an increase of 4.5% since the 2011 Census (NISRA)



At 2021 there were **70,445 households** in Ards and North Down, which is an **increase of 5,840** households on the 2011 Census figure of 64,605 (NISRA)



Map 4: Ards & North Down Urban Settlements and Rural Areas



Housing Market Analysis (across tenures)

Housing & Land Supply

During 2022/23, there were 482 new units started in Ards and North Down (Land and Property Services), which is more than the projected new dwelling requirement of 367 per year as estimated by the HGIs 2016-2030.

Land and Property Services (LPS) statistics show that over the 2018/19 to 2022/23 period, **2,969 new dwelling starts** commenced and there were 3,176 new dwelling completions in Ards and North Down



There is a projected housing growth indicator **new dwelling requirement** of **5,500** for the period 2016 to 2030. The **overall NI requirement** for the same period is 84,800



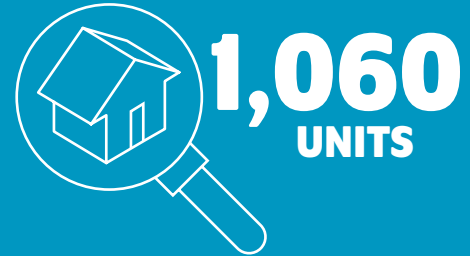
Owner Occupied

The sector comprises 72% of total occupied stock (NISRA: NI Census 2021).

Ulster University states that the **average house price** in Ards and North Down, 2022, was £220,922 which represents a decrease of 1.1% on 2021 figure. This remains **above the Northern Ireland average** of £200,700



Demand for intermediate housing aimed at low income households in Ards and North Down is estimated at **1,060 units** 2020-2035 (SHMA)



During 2022, there were 23 repossessions in Ards and North Down. This represents an increase from 11 in 2021 (NI Courts and Tribunals Service).

The general mood of positivity around the housing market during 2020/21 has been followed by a slowing during 2022 and into 2023 shown by a continued fall in house prices in Ards and North Down.

Considering the Ulster University House Price Index Q3 2023, price change statistics quarterly change from Q2 2023 into Q3 2023 seven of the eleven local government districts exhibit price increases over the quarter with prices in Ards and North Down increasing and remaining well above the Northern Ireland average.

The number of house sales in Ards and North Down had increased from 1,146 in 2010 to 3,749 in 2021 before falling to 2,966 in 2022 (LPS). Popular areas include Bangor City, Newtownards, Holywood and Comber.

Private Rented

The private rented sector comprises 15% of total occupied housing stock in the borough (NISRA: NI Census 2021).

Rented accommodation is now the accommodation of choice for many households, especially younger households on lower incomes who in previous decades would have become first time buyers.

During the first half of 2023, there were 533 lettings in Ards and North Down Borough, 16.9% of the 3,150 lettings across Local Government Districts (outside Belfast) (Performance of the Private Rental Market H1 2023 - Ulster University).

The overall average rent in the borough in H1 2023 was £886 per month, an increase of £27 from H2 2022. Average rent remains well above the Northern Ireland average of £817 per month in H1 2023 (Performance of the Private Rental Market H1 2023 - Ulster University).

Housing Benefit plays a vital role in supporting the private rented sector. At March 2023, there were 2,182 private tenants in receipt of Housing Support Benefits in the borough, a 10.8% decrease on the comparable 2022 position. A key factor in this reduction is the introduction of Universal Credit.

DfC's **Landlord Registration Scheme** identified 6,431 properties registered by 4,490 landlords for Ards and North Down at March 2023

6,431 
PROPERTIES REGISTERED

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 social rented sector comprises 13% of total housing stock in the borough (NISRA: NI Census 2021).

At March 2023, there were **6,175 Housing Executive owned properties** in Ards and North Down, with **8,161 Housing Executive properties sold** since the introduction of the House Sales Scheme

6,175 
HOUSING EXECUTIVE
PROPERTIES

At March 2023, there were 2,914 Housing Executive and 1,620 housing association tenants in receipt of Housing Benefit. There were 2,376 Housing Executive tenants receiving the Housing Cost element of Universal Credit at this date.

There were 16 new social homes completed in year to March 2023, and 162 on-site. A further 158 units are programmed to start over the next three years.

At March 2023, there were 3,257 applicants on the waiting list for Ards and North Down, 2,267 of whom were in housing stress with over 475 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
- Irish Travellers' accommodation requirements

General Housing Need (Urban & Rural)

Urban

The Strategic Guidelines target share established for Ards and North Down indicates 4.8% urban units and 5.0% rural units of the overall three year programme. Five year projected need for the area as a whole is 1,390 and the projected need for individual settlements is detailed in the table below.

Table 11: Projected (5-Year) Social Housing Need 2023-28

Settlement	Housing Need Assessment Area*	Total 5 Year Projection
Newtownards Town	Newtownards Town	209
Bangor Urban	Bangor Urban	600
Holywood	Holywood	193
Comber	Comber	163
Donaghadee	Donaghadee	60
Groomsport	Groomsport	36
Ballygowan	Ballygowan	15
Portaferry	Portaferry	20
Ballywalter	Ballywalter	15
Crawfordsburn	Crawfordsburn	14
Killinchy	Killinchy	10
Millisle	Millisle	15
Remaining Settlements (need <10)**		40
Total	Ards & North Down Borough	1,390

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

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

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

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 2023. There has been a significant increase in the assessed housing need with the figure increasing by 20.9% from 1,150 for 2022/2027 - 1,390 for 2023-2028. The areas of greatest housing need are Bangor, Newtownards, Holywood and Comber. The majority of Housing Executive land has now been utilised for new build within the district.

Within Newtownards all areas of the town are popular, Scrabo and Movilla particularly so. There is no requirement for additional apartment accommodation in Newtownards, above what has already been programmed and provided with support. Any proposals should be located away from the Regent Street area of the town because of long running letting difficulties within an existing apartment scheme.

The dwelling type in greatest need in Newtownards is houses, two and three bedroom. There is no requirement for additional Cat 1 accommodation in the town.

A very high need exists for generic bungalow accommodation in Newtownards for complex needs, with generic houses and apartments deemed unsuitable by the clients Occupational Therapists.

Within Bangor City the most popular areas are Bloomfield / Balloo, Bangor East and Bangor Central. Conlig, Kilcooley and the arterial routes of the town would be less popular and experience lesser demand.

There is a limited requirement for additional apartment accommodation in Bangor City above what has already been programmed and provided with support. The dwelling type most required in Bangor City is houses, two and three bedroom.

A mailing exercise will be undertaken during 2024 to determine the level of older person (Cat 1) need in the City.

A very high need exists for generic bungalow accommodation within Bangor City, with generic houses and apartments deemed unsuitable by the clients Occupational Therapists.

Mixed tenure schemes would be welcomed and encouraged in both Newtownards and Bangor City.

Within the towns of Comber and Holywood the need is for houses, two and three bedroom. There is no need for additional apartment accommodation in either Comber or Holywood.

Within Holywood social housing will not be supported in the Spencer Street area of the town due to letting difficulties within an existing apartment scheme. There is no requirement for Cat 1 accommodation in either Comber or Holywood.

Within Donaghadee site selection should be carefully considered to ensure that new housing does not destabilise existing estates such as Beechfield.

The Housing Executive monitors 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 (Cat 1) and wheelchair / complex needs households. There may also be a requirement for a small number of four bed properties for large families within all settlements. Increasingly there has been a requirement for the provision of five bed properties, or larger in certain areas. Consideration should be given to the inclusion of such units where identified. Any concerns regarding 'future planning' can be discussed with Place Shaping South at an early stage.

Rural

The provision of new social housing in rural settlements represents a strategic priority for delivery of the Social Housing Development Programme (SHDP). For 2024/25, the Strategic Guidelines rural target share of the overall SHDP for Northern Ireland is 13.1%, or 261 units. Of these, Ards and North Down Borough Council area is assigned 13 units.

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.

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.

Based on the waiting list for social housing, at March 2023, the **current projected need for rural areas** within Ards and North Down Council is 165 units

165 UNITS
🏠🏠🏠🏠🏠🏠🏠

Taking account of new build schemes on the current SHDP, the residual housing need is focused mainly in Groomsport, Portaferry, Ballygowan, Ballywalter, Millisle, Crawfordsburn and Killinchy.

There is also a small need in Ballyhalbert, Carrowdore, Cloughey, Greyabbey, Helen's Bay, Kircubbin, Loughries and Portavogie where need in each settlement is less than 10. Proposals for social housing in these locations will be welcomed and given due consideration.

Housing need has currently been met in Ballydrain, Cotton and Lisbane. These areas will be kept under annual review. It is recognised that there may be neighbouring rural settlements where demand has not yet been identified but where land may still be available. We continue to work closely with rural communities to identify housing need. During 2022/23 there were no requests for any rural housing needs tests to be undertaken in Ards and North Down Borough Council area. Site identification Studies will continue to be programmed as identified.

Within the rural areas of the district showing a positive projection the housing type required is two and three bedroom houses. Apartments will only be supported in rural areas where existing units are at full occupancy. To promote this type of accommodation with applicants, independent access would be preferred. Proposed sites in rural areas should be within the development limit of settlements.

There is a strong requirement for complex needs accommodation in rural areas of the borough with the dwelling type required by complex needs applicants, wheelchair bungalows.

At March 2023, there were **319 applicants** in rural Ards and North Down in housing stress, **14.1%** of the total housing stress waiting list for the borough



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

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.

Wheelchair Housing Need (HNA)

At March 2023, there were 112 housing stress applicants and 33 transfer applicants who require wheelchair accessible accommodation with 41 allocations over the previous year. This leaves a requirement for 104 units. Need has been identified throughout the borough.

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

A Shared Future through ‘Housing for All’

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

There are currently two new build social housing schemes being progressed by Ark Housing Association in Newtownards for potential shared future housing, Frances Street and Quarry Heights.

Irish Traveller accommodation

Need within the Irish Traveller community continues to be monitored in Ards and North Down.

Indicative housing mix requirements

The indicative housing mix for Ards and North Down Borough Council area should be 20% Single Persons, 70% Families and 10% Older Person (Cat 1) accommodation. Wheelchair units should make up 10% of the housing mix across all groups. Family households include two, three and four bed units. Place Shaping, South Region will provide further detail on the housing mix required for families upon request.

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

Table 12: Indicative housing mix for Ards & North Down

Older Persons	Families*	Singles	Wheelchair
10%	70%	20%	10%

* Focus on: Small Family Households

Intermediate (Affordable) Demand

The Housing Executive estimates intermediate/affordable housing demand for Ards and North Down at approximately 70 units per annum.

Co-Ownership approved **70** applications in 2022/23 for Ards and North Down



Average house prices in Northern Ireland increased by 18.7% between 2019 and 2022.

Average house prices are higher than the Northern Ireland average – local prices increased by 17.9% between 2019 and 2022



Table 13: Average Annual House Prices Ards and North Down LGD & NI 2019-2022

Area	2019	2020	2021	2022	% Change 2019-2022
Ards and North Down	£187,442	£198,468	£223,271	£220,922	17.9%
Northern Ireland	£169,057	£180,079	£194,233	£200,700	18.7%

Source: Ulster University

Ards and North Down Supporting Data

Table 14: Ards & North Down Waiting List – March 2023

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	1,348	171	668	69	232	769	3,257
HS Applicants	952	112	488	49	168	498	2,267
Allocations	203	25	112	<10	27	108	-

Table 15: Newtownards URBAN Waiting List – March 2023

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	351	31	164	<10	51	117	-
HS Applicants	247	18	125	<10	37	85	-
Allocations	75	<10	33	<10	<10	20	144

Table 16: Bangor URBAN Waiting List – March 2023

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	539	74	272	34	86	332	1,337
HS Applicants	387	55	202	25	64	216	949
Allocations	56	<10	39	0	11	45	-

Table 17: Comber Waiting List – March 2023

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	109	14	36	11	21	57	248
HS Applicants	82	10	25	<10	15	39	-
Allocations	12	0	17	0	<10	15	-

Table 18: Hollywood URBAN Waiting List – March 2023

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	106	15	44	<10	12	118	-
HS Applicants	77	<10	30	<10	11	73	202
Allocations	23	<10	<10	0	<10	<10	38

Applicants – Housing applicants at March 2023

HS Applicants – Housing stress applicants at March 2023 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2023

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

Armagh City, Banbridge and Craigavon

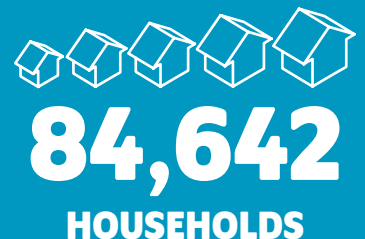
Context

Covering an area of 554 square miles, 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.

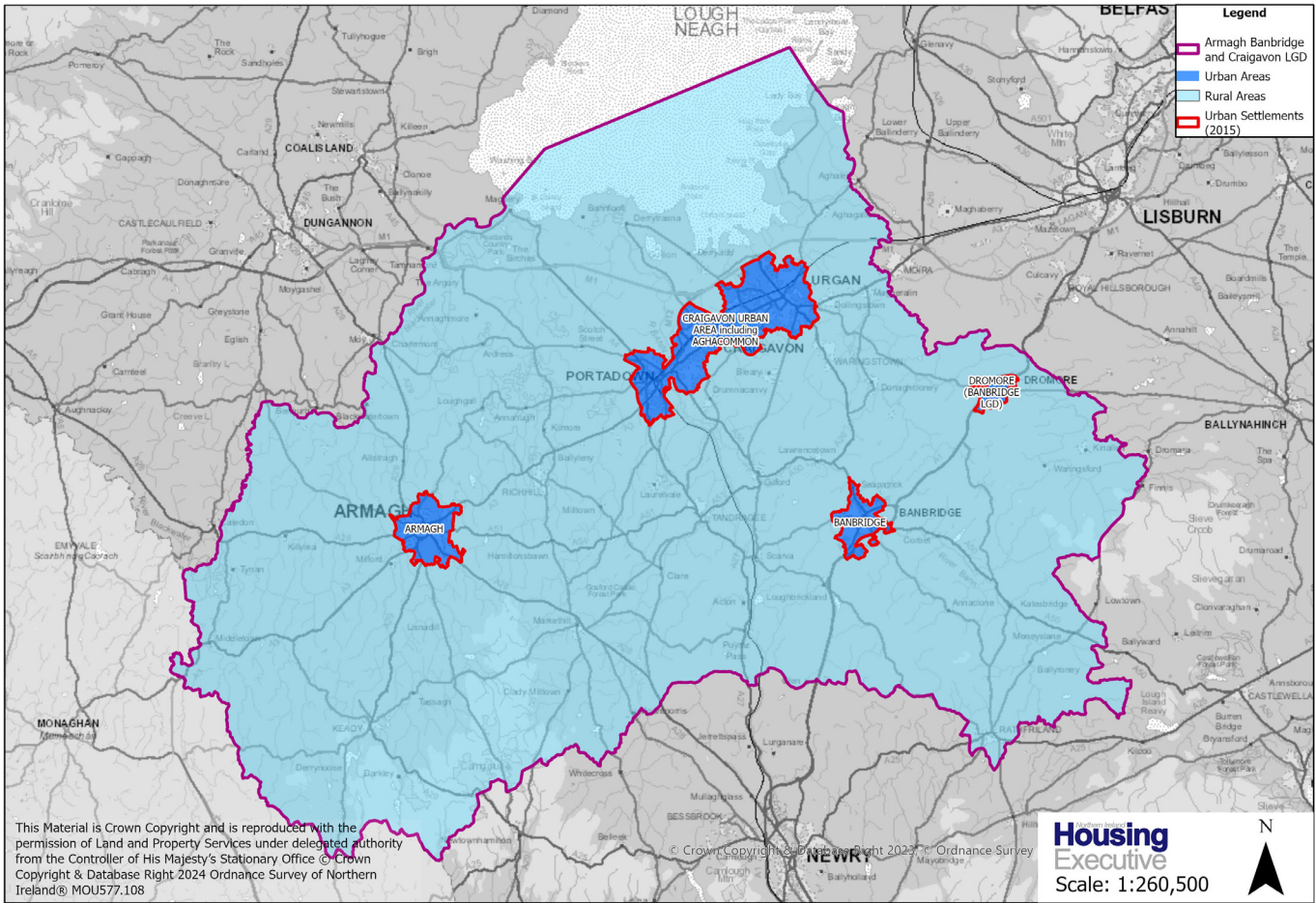
The **population** of Armagh City, Banbridge and Craigavon Borough was **218,660** at Census day 2021, an increase of 9.5% since the 2011 Census (NISRA)



At 2021 there were **84,642 households** in Armagh City, Banbridge and Craigavon, which is an **increase of 9,136** households on the 2011 Census figure of 75,506 (NISRA)



Map 5: Armagh, Banbridge & Craigavon Urban Settlements and Rural Areas



Housing Market Analysis (across tenures)

Housing & Land Supply

During 2022/23, there were 882 new units started in Armagh City, Banbridge and Craigavon (Land and Property Services), which is less than the projected new dwelling requirement of 1,147 per year as estimated by the HGIs 2016-2030.

Land and Property Services (LPS) statistics show that over the 2018/19 to 2022/23 period, **5,112 new dwelling starts** commenced and there were 4,959 new dwelling completions in Armagh City, Banbridge and Craigavon



There is a **projected housing growth indicator** new dwelling requirement of **17,200** for the period 2016 to 2030. The **overall NI requirement** for the same period is 84,800



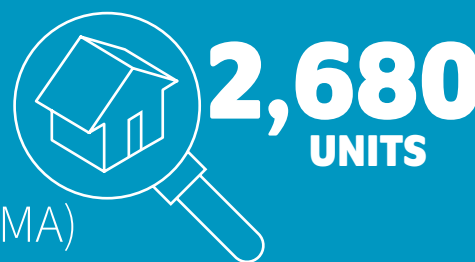
Owner Occupied

The sector comprises 69% of total occupied stock (NISRA: NI Census 2021).

Ulster University states that the **average house price** in Armagh City, Banbridge and Craigavon, 2022, was £181,058 which represents an increase of 5.9% on 2021 figure. This remains **below the Northern Ireland average** of £200,700



Demand for intermediate housing aimed at low income households in Armagh City, Banbridge and Craigavon is estimated at 2,680 units, 2020-2035 (SHMA)



During 2022, there were 25 repossessions in Armagh City, Banbridge and Craigavon. This represents a 150% increase since 2021 (NI Courts and Tribunals Service).

Considering the Northern Ireland Quarterly House Price Index - Q3 2023 price change statistics quarterly change from Q2 2023 into Q3 2023, seven of the eleven local government districts exhibit price increases over the quarter, with Armagh City, Banbridge and Craigavon Borough showing an increase of 2.2%. House prices in the borough remain well below the Northern Ireland average.

The private housing market had been showing strong signs of growth in the borough, increasing from 2,522 house sales in 2020 to 3,509 in 2021. However the trend shows 2021 as a peak with the number of sales decreasing to 2,936 in 2022 (LPS).

Popular locations include the housing need assessment areas of Armagh 1, Banbridge, Lurgan North, Lurgan South, Portadown 1, Portadown 2 and Central Craigavon.

Private Rented

The private rented sector comprises 21% of total occupied housing stock in the borough (NISRA: NI Census 2021).

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 H1 2023 there were 544 lettings in Armagh City, Banbridge and Craigavon Borough, 17.3% of the 3,150 lettings across Northern Ireland (Outside Belfast). (Performance of the Private Rental Market H1 2023 - Ulster University).

The overall average rent in the borough in H1 2023 was £685 per month, an increase of £29 from £656 in H2 2022, but well below the Northern Ireland average of £817 per month in H1 2023 (Performance of the Private Rental Market H1 2023 - Ulster University).

Housing Benefit plays a vital role in supporting the private rented sector. At March 2023, there were 3,727 private tenants in receipt of Housing Support Benefits in the borough, a 10.9% decrease on the comparable 2022 position. A key factor in this reduction is the introduction of Universal Credit.

DfC's **Landlord Registration Scheme** identified 8,411 properties registered by 4,237 landlords for Armagh City, Banbridge and Craigavon Borough at March 2023

8,411 
PROPERTIES REGISTERED

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 social rented sector comprises 10% of total housing stock in the borough (NISRA: NI Census 2021).

At March 2023, there were **7,305 Housing Executive owned properties** in Armagh City, Banbridge and Craigavon, with **14,419 Housing Executive properties sold** since the introduction of the House Sales Scheme

7,305 
HOUSING EXECUTIVE
PROPERTIES

At March 2023, there were 3,687 Housing Executive and 1,237 housing association tenants in receipt of Housing Benefit. There were 2,659 Housing Executive tenants receiving the Housing Cost element of Universal Credit at this date.

There were 38 new social homes completed in year to March 2023, and 99 on-site. A further 186 units are programmed to start over the next three years.

At March 2023, there were 3,712 applicants on the waiting list for Armagh City, Banbridge and Craigavon, 2,311 of whom were in housing stress with 384 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
- Irish Traveller accommodation requirements

General Housing Need (Urban & Rural)

Urban

The Strategic Guidelines target share established for Armagh City, Banbridge and Craigavon indicates 4.4% urban units and 4.0% rural units of the overall three year programme. Five year projected need for the area as a whole is 1,498 and the projected need for individual settlements is detailed in the table below.

Table 19: Projected (5-Year) Social Housing Need 2023-28

Settlement	Housing Need Assessment Area*	Total 5 Year Projection
Armagh 1	Armagh 1	135
Armagh 2	Armagh 2	49
Banbridge Town	Banbridge Town	197
Central Craigavon	Central Craigavon	124
North Lurgan	North Lurgan	316
South Lurgan	South Lurgan	90
Portadown 1	Portadown 1	100
Portadown 2	Portadown 2	229
Aghagallon	Aghagallon	12
Derrymacash / Derrytrasna / Kinnego*	Derrymacash / Derrytrasna / Kinnego*	20
Dromore	Dromore	57
Gilford	Gilford	13
Keady	Keady	17

Tables continues

Settlement	Housing Need Assessment Area*	Total 5 Year Projection
Loughbrickland	Loughbrickland	10
Middletown	Middletown	10
Portadown Rural	Portadown Rural	11
Rathfriland	Rathfriland	28
Richhill	Richhill	14
Remaining Settlements (need less than <10)**		66
Total		1,498

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

** Remaining settlements include Annaclone, Bleary, Charlemont / Blackwatertown / Carrickaness / Donnelly Hill*, Clady / Corran / Ballymacnab*, Dollingstown, Donaghcloney, Lawrencetown, Loughgall, Madden / Milford / Ballyards*, Magheralin, Markethill, Poyntzpass, Tandragee, Tullylish and Waringstown where need in each settlement is less than 10.

Housing need has currently been met in Anaghmore / Eglish, Annahugh, Ashfield / Tullyhenan, Ballela, Banbridge Rural Cottages, Carn, Closkelt, Corbet, Dromore Rural Cottages, Drumhillery / Darkley / Derrynoose*, Drumnacanvey, Glenanne / Mountnorris / Loughgilly*, Hamiltonsbawn / Edenaveys*, Katesbridge, Kinallen, Lenaderg, Lisnagrade / Ballyvarley*, Scarva, Seapatricks and Tynan / Killylea*. These areas will be kept under annual review.

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 2028. The housing need in the council area is concentrated within North Lurgan, Portadown 2, Banbridge Town, Armagh 1, Central Craigavon, Portadown 1 and South Lurgan.

Armagh

Housing need is highest in Armagh 1 Housing Need Assessment area (HNA). Armagh 1 HNA is located in the west of the City and comprises the Common Landlord Areas (CLA) of Banbrook / Railway Street, Callanbridge Park, Culdee, Dairies Willows, Dalton, Drumarg, Drumbreda, Dukes Grove, Emania Terrace, Legar Hill Park, Mullacreevie, Navan Street and Windmill. The most popular areas within this HNA area include Culdee / Irish Street, Cregagh, Mullanstown, Nialls Crescent and

Mullacreevie. Contact should be made with Place Shaping upon identification of a site within this HNA area. The housing need is predominantly for small family accommodation, two bedroom houses and generic bungalow accommodation for complex needs.

Through the Community Planning Partnership, the Housing Executive contributed to the development of a Place Shaping plan for Armagh City, the purpose of which is to work collectively with statutory partners and communities to create and deliver a shared vision and aspirations for the City. The 'Armagh Place Plan' was launched in May 2022. The plan includes a housing action aimed at enhancing mixed tenure housing and increasing the availability of accessible, affordable and shared housing in the city centre.

Banbridge

There is a high housing need in Banbridge town. Proposed sites should be within the development limit of the town. Demand is chiefly for two bedroom houses for small families as well as generic bungalow accommodation for complex needs.

A number of apartment proposals have been received and supported in the town. Additional apartment proposals will only be considered should previously supported schemes fail to progress.

Craigavon

Housing need is highest in North Lurgan HNA which comprises the CLA's of Lurgan Town Centre, Edward Street / Shankill, Lurgantarry, Manor Park and Taghnevan. Within North Lurgan site location is of paramount importance and Housing Associations should focus on the Kilwilkee / Lurgantarry and Taghnevan areas of the town where the need and desire for housing is highest. Any potential sites in the centre of the town should be directed towards Place Shaping, South Region before any significant work is carried out. While additional housing here would be welcomed, the location of the site will determine which HNA it falls within and whether support can be provided.

Housing need has grown substantially within Portadown 2 HNA. Portadown 2 HNA comprises the CLAs of Armagh Road, Portadown, Brownstown (Old), Clounagh Park, Corcrair, Fitzroy Street, Greenview Gardens, Kernan Hill Road, Portadown, Killicomaine, Magowan House, Old Rectory Park, Park Road, Rectory Park/ Brownstown West, Redmanville, Seagoe Park, Town Centre, Union Street, West Street Area, Annagh and Junction Row. The most in demand areas within the HNA are Killicomaine and Seagoe. Given that housing need has steadily increased in Portadown 2 since 2018 and allocations have fluctuated but have remained low, South Place Shaping will consider housing proposals outside of the traditional high demand CLAs in this area. It is hoped that this will unlock opportunity sites, contribute to wider regeneration and help to alleviate the growing need for new homes in Portadown 2.

Central Craigavon is now showing a positive general housing need. Central Craigavon HNA comprises the common landlord areas of Legahory/Drumgor/ Moyraverty, Parkmore, Tullygally / Monbrief, Burnside, Clonmeen, Drumgor Heights, Drumellan, Enniskillen, Legahory Green, Moyraverty, Rosmoyle and Westacres. There has been significant regeneration of Central Craigavon in recent years with the growth of the private housing market, the expansion of Rushmere Shopping Centre and the development of the Omniplex and South Lake Leisure Centre. The area attracts visitors and increasingly new residents from the wider Craigavon Urban Area, and this has impacted on the demand for private sector homes and also more recently, for social rented accommodation.

For the first time since the large scale demolition of NIHE homes in this area, there has been a steady increase in housing stress particularly for the CLAs of Moyraverty, Drumellan, Westacres and Clonmeen and the five unit scheme in Drumellan completed in 2022/23 has further stimulated the waiting list for this area.

South Place Shaping Planners have completed a Strategic Land Assessment of lands in Housing Executive ownership and are developing an action plan which will prioritise areas for Housing Association Transfer schemes. The most pressing requirement is the regeneration of Moyraverty Neighbourhood Centre which is an area of blight in the centre of an otherwise popular area for both private and social housing.

It is anticipated that housing led regeneration projects will further increase housing need in Central Craigavon but may also help alleviate the pressures in neighbouring settlements e.g. Lurgan and Portadown.

Portadown 1 HNA comprises the common landlord areas of Garvaghy Park/Ballrock, Ballyoran, Churchill Park/Gardens, Obins Avenue/Drive, Parkside and Woodside. Within Portadown 1 HNA demand for housing is greatest in the Ballyoran, Garvaghy Road area of the town. A number of estates experience low demand and letting difficulties, therefore it would be best for Housing Associations to contact Place Shaping South before any significant work on a site is carried out. Town centre sites should be forwarded to Place Shaping South as location will determine which HNA the site falls within and whether support can be provided.

Lurgan South HNA comprises the common landlord areas of Hill Street / Ann Street / Sloan Street, Avenue Road, Queen Street and Mourneview. Demand for housing is highest in the Avenue Road and Banbridge Road areas of the town. A number of estates experience low demand and letting difficulties, therefore it would be best for Housing Associations to contact Place Shaping South before any significant work on a site is carried out.

The Housing Executive has land remaining within Armagh City, South Lurgan and Central Craigavon. The majority of Housing Executive land has now been utilised for new build within the borough 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 borough, and we continue to engage with our partners through the Community Planning partnership with regard to the strategic review of land assets.

The development of mixed tenure schemes within Armagh City, Banbridge and Craigavon Borough Council would be welcomed and encouraged. Future housing mix in new build developments will need to cater for singles, small families, and wheelchair / complex needs households.

Moving forward, two bedroom houses for small families is the dwelling type most needed followed by three bedroom houses. There may also be a requirement for a small number of four bed properties for large families within certain HNA's throughout the borough. Place Shaping South will confirm the need for these units at site identification stage. Increasingly we are asked to source housing for larger families, five bedrooms plus, both with and without complex needs. In such instances where this need is identified it would be appreciated if consideration could be given to the provision of such dwellings. The Housing Executive will work with Housing Association's to address concerns over future use at an early stage.

There is a very high requirement for generic bungalow accommodation in many HNA areas throughout the borough. Bungalow accommodation within new build schemes can only be provided where there a nominated complex needs applicant for the unit or a planning requirement. Generic wheelchair houses and apartments have been ruled out for these applicants by their relevant Occupational Therapists. It would be appreciated if consideration could be given to the provision of these units where viable.

Rural

The provision of new social housing in rural settlements represents a strategic priority for delivery of the Social Housing Development Programme (SHDP). For 2024/25, the Strategic Guidelines rural target share of the overall SHDP for Northern Ireland is 13.1%, or 261 units. Of these, Armagh City, Banbridge and Craigavon Borough Council area is assigned 11 units.

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.

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.

Based on the waiting list for social housing, at March 2023, **5 year projected housing need for rural areas** (2023-28) within Armagh City, Banbridge and Craigavon is 201 units

201 UNITS


Taking account of new build schemes on the current SHDP, the residual housing need is focused mainly in the settlements of Rathfriland, Keady, Gilford, Richhill, Portadown Rural, Loughbrickland, and Middletown.

Remaining settlements include: Annaclone, Bleary, Charlemont / Blackwatertown / Carrickaness / Donnelly Hill, Clady / Corran / Ballymacnab, Dollingstown, Donaghcloney, Lawrencetown, Loughgall, Madden / Milford / Ballyards, Magheralin, Markethill, Poyntzpass, Tandragee, Tullylish and Waringstown where need in each settlement is less than 10. Proposals for social housing in these locations will be welcomed and given due consideration.

Housing need has currently been met in Anaghmore / Eglish, Annahugh, Ashfield / Tullyhenan, Ballela, Banbridge Rural Cottages, Carn, Closkelt, Corbet, Dromore Rural Cottages, Drumhillery / Darkley / Derrynoose*, Drumnacanvey, Glenanne / Mountnorris / Loughgilly*, Hamiltonsbawn / Edenaveys*, Katesbridge, Kinallen, Lenaderg, Lisnagrade / Ballyvarley*, Scarva, Seapatrick and Tynan / Killylea*. These areas will be kept under annual review.

At March 2023, there were **399 applicants** in rural Armagh City, Banbridge and Craigavon Borough in housing stress, **17.3%** of the total housing stress waiting list for the borough

 **399**

During 2022/23 no Site Identification Studies (SIS) or Rural Needs Tests were completed in Armagh City, Banbridge and Craigavon Borough Council area.

Within the rural areas showing a positive projection the housing type required in the majority of cases is two bedroom houses. There is no need for apartment accommodation unless indicated by Place Shaping South.

Currently there is a limited requirement for Cat 1 accommodation within the rural areas of the borough however this will be kept under review.

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

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.

Wheelchair Housing Need (HNA)

At March 2023, there were 81 housing stress applicants and 25 transfer applicants who require wheelchair accessible accommodation with 21 allocations over the previous year. This leaves a requirement for 85 units. Need has been identified throughout the borough.

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

A Shared Future through 'Housing for All'

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

There are currently two new build social housing schemes being progressed for potential shared future housing in the area. The Ark Housing Association scheme at Ogle Street, Armagh and the Arbour Housing Association scheme at Commercial Road, Banbridge are currently on-site.

Irish Traveller accommodation

Work continues on the redevelopment of our site at Legahory Close, Craigavon. NIHE have consulted with Irish Travellers and local support groups on redevelopment proposals. The redevelopment of the site is due to complete 2024/25.

Need within the Irish Traveller community continues to be monitored in Armagh City, Banbridge and Craigavon Borough.

Indicative housing mix requirements

Across Armagh City, Banbridge and Craigavon Borough the indicative housing mix should be 20% Single Persons, 70% Families and 10% Older Person (Cat 1) accommodation. Wheelchair units should make up 10% of the housing mix across all groups. Family households include two, three and four bed units. Place Shaping, South Region will provide further detail on the housing mix required for families upon request.

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

Table 20: Indicative housing mix for Armagh City, Banbridge & Craigavon Borough

Older Persons	Families*	Singles	Wheelchair
10%	70%	20%	10%

** Focus on Small Family Households.*

Intermediate (Affordable) Demand

The Housing Executive estimates intermediate/affordable housing demand for Armagh City, Banbridge and Craigavon Borough at approximately 180 units per annum.

Co-Ownership approved 155 applications in 2022/23 for Armagh City, Banbridge and Craigavon Borough



Average house prices in Northern Ireland increased by 18.7% between 2019 and 2022.

Average house prices in Armagh City, Banbridge and Craigavon Borough are lower than the Northern Ireland average – local prices **increased by 27.3%** between 2019 and 2022



Table 21: Average Annual House Prices Armagh City, Banbridge and Craigavon LGD & NI 2019-2022

Area	2019	2020	2021	2022	% Change 2019-2022
Armagh City, Banbridge and Craigavon	£142,263	£158,921	£170,980	£181,058	27.3%
Northern Ireland	£169,057	£180,079	£194,233	£200,700	18.7%

Source: Ulster University

Armagh City, Banbridge & Craigavon Borough Supporting Data

Table 22: Armagh City, Banbridge and Craigavon Borough Waiting List – March 2023

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	1,472	228	946	153	345	568	3,712
HS Applicants	920	123	606	100	215	347	2,311
Allocations	136	26	105	14	35	68	384

Table 23: North Lurgan Waiting List – March 2023

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	258	39	133	21	44	107	602
HS Applicants	157	28	96	16	30	76	403
Allocations	11	<10	<10	<10	<10	<10	31

Table 24: Banbridge Town Waiting List – March 2023

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	190	23	105	19	39	73	449
HS Applicants	132	16	64	13	26	46	297
Allocations	15	<10	11	<10	<10	<10	46

Table 25: Armagh 1 Waiting List – March 2023

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	168	21	80	10	23	49	351
HS Applicants	114	10	51	<10	16	26	-
Allocations	12	<10	<10	<10	<10	<10	32

Table 26: Portadown 1 Waiting List – March 2023

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	76	14	68	<10	36	22	-
HS Applicants	42	<10	44	<10	26	13	135
Allocations	<10	0	<10	<10	0	<10	15

Table 27: Portadown 2 Waiting List – March 2023

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	211	48	144	19	53	94	569
HS Applicants	128	23	94	10	30	50	335
Allocations	23	<10	17	<10	<10	17	66

Applicants – Housing applicants at March 2023

HS Applicants – Housing stress applicants at March 2023 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2023

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

Belfast

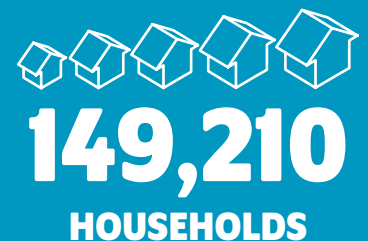
Context

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 and in common with other council areas; its older population is growing at a faster rate. Total Population at Census 2021 was 345,415. This represents just over 18% of the population and Belfast remains the largest Local Government District (NISRA). The City's Community Plan the Belfast Agenda highlights an ambition of the City to increase its population by 66,000 by 2035. This could mean an increase of 31,600 households.

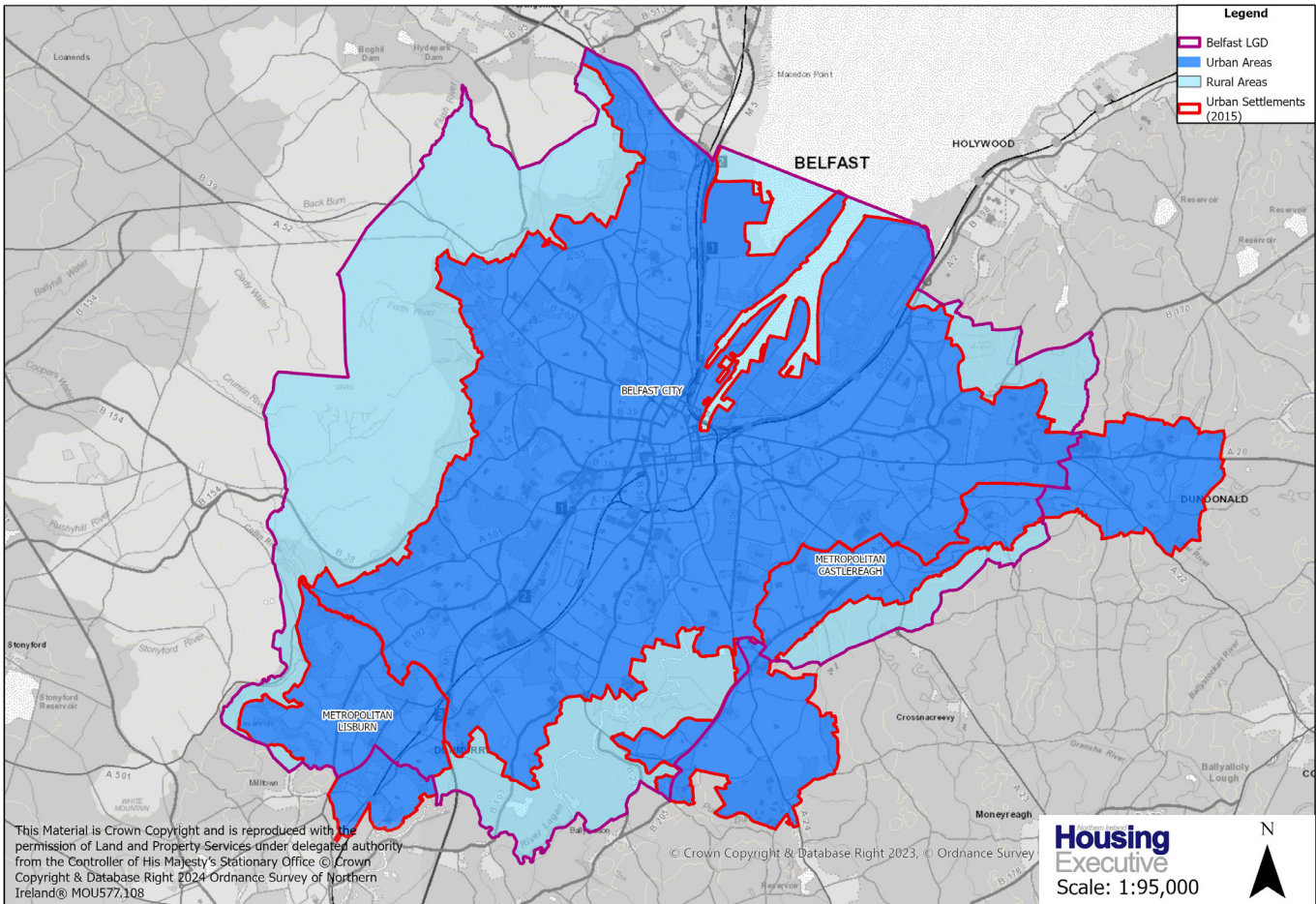
The **population** of Belfast was **345,415** at Census day 2021, an increase of 3.5% since the 2011 Census (NISRA)



At 2021 there were **149,210 households** in Belfast, which is an **increase of 7,643** households on the 2011 Census figure of 141,567 (NISRA)



Map 6: Belfast Urban Settlements and Rural Areas



Housing Market Analysis (across tenures)

Housing & Land Supply

During 2022/23 there were 632 new units started in Belfast (Land and Property Services) which is more than the projected new dwelling requirement of 493 per year as estimated by the HGIs 2016-2030.

Land and Property Services (LPS) statistics show that over the 2018/19 to 2022/23 period, **3,388 new dwelling starts** commenced and there were 3,459 new dwelling completions in Belfast



There is a projected Housing Growth Indicator (HGI) **new dwelling requirement** of **7,400** for the period 2016-2030 in Belfast. The **overall Northern Ireland requirement** for the same period is 84,800



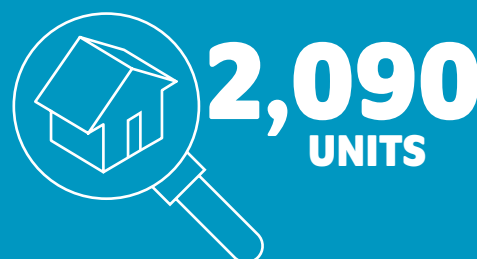
Owner Occupied

The sector comprises 51% of total occupied stock (NISRA: NI Census 2021).

Ulster University states that the **average house price** in Belfast in 2022 was £197,105 which represents an increase of 4% on 2021 figure. This remains **below the Northern Ireland average** of £200,700



Demand for intermediate housing aimed at low-income households in Belfast is estimated at 2,090 units, 2020-2035 (SHMA)



During 2022, there were 56 repossessions in Belfast. This represents a 107% increase since 2021 (NISRA).

Considering the Ulster University House Price Index Q3 2023, price change statistics quarterly change from Q2 2023 into Q3 2023, eight out of the eleven Local Government Districts saw price increases over the quarter, including Belfast at 2.3%. Evidence points to a slowdown in the market as reflected in the reduction in the number of house sales in Belfast falling from 6,034 during 2021 to 5,026 in 2022 (Land and Property Services).

Co-Ownership Housing Association had an active stock of 1,813 dwellings in Belfast at March 2023, 119 of which were purchased during 2022/23.

Private Rented

The private rented sector comprises 23% of total occupied housing stock in the City (NISRA: NI Census 2021).

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.

New purpose-built student accommodation in the city centre has provided hundreds of bed spaces, but has not, to date, reduced demand for private rentals in South Belfast as there continues to be demand from other household types. This will

continue to be monitored as more student housing is built.

Local Estate Agents report that there is strong demand for private rental accommodation across the city, with South Belfast having 45% of the market share. The average monthly rent across the city increased by 5.5% to £923, up 8.1% in annual terms (Performance of the Private Rental Market H1 2023 - Ulster University).

At March 2023, there were 6,404 private tenants in the City in receipt of Housing Support Benefits.

DfC's Landlord Registration Scheme identified 21,344 properties registered by 6,117 landlords for Belfast at March 2023

21,344 
PROPERTIES REGISTERED

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. All registered HMOs can be viewed on the Council website [HMO register](#).

Social Rented Housing Sector

The social rented sector comprises 26% of total housing stock in the City (NISRA: NI Census 2021).

At March 2023, there were 25,152 **Housing Executive owned properties** in Belfast, with **29,944 Housing Executive properties sold** since the introduction of the House Sales Scheme

25,152 
HOUSING EXECUTIVE
PROPERTIES

At March 2023, there were 11,666 Housing Executive and 9,490 housing association tenants in receipt of Housing Benefit. There were 8,453 Housing Executive tenants receiving the Housing Cost element of Universal Credit at this date.

There were 405 new social homes completed in year to March 2023, and 1,680 on-site. A further 1,985 units are programmed to start over the next three years.

At March 2023, there were 12,175 applicants on the waiting list for Belfast, 9,531 of whom were in housing stress with 1,582 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
- Irish Travellers' accommodation requirements

General Housing Need

The Strategic Guidelines target share established for Belfast indicates a 39.2% share of the overall three year programme.

Five-year projected need for the area as a whole is 8,551 and the projected need for individual settlements is detailed in the table below.

Table 28: Projected (5 Year) Social Housing Need 2023-28

Settlement	Housing Need Assessment Area*	Total 5 Year Projection
Greater West/Shankill	Inner West Belfast	1143
	Greater Shankill	179
	Middle West Belfast	984
	Outer West Belfast	803
North Belfast	North Belfast 1	2206
	North Belfast 2	376
South and East Belfast	Upper Ormeau	442
	Donegall Road	167
	Finaghy	169
	Lisburn Road	487
	Lower Ormeau and Markets	419
	Inner East Belfast	359
	Middle East Belfast	424
	Short Strand	50
	Outer East Belfast	343
Total		8,551

The largest projected need can be seen in North Belfast. The areas of greatest housing need are Ardoyne/Cliftonville, Cavehill, New Lodge. Family housing especially is in demand in these areas.

The Lisburn Road and Ormeau Road in South Belfast remain popular for all household types and supply of family homes are especially welcome.

There has been a shift in demand across East Belfast, with supply increasing in Middle East area but a growing demand in Inner East Belfast for family units and in Outer East for all household types, including Cat1 elderly housing.

Inner West Belfast has a growing need of family housing and limited opportunities to date. Middle and Outer West are reducing need due to proposed and ongoing schemes, but opportunities will continue to be considered on a case by case basis and family housing will continue to be welcomed.

Shankill is also experiencing growing demand for new social housing. While there is public sector land opportunities being considered throughout, proposals will be especially welcome in Mid Shankill.

Belfast City Centre represents an area of opportunity for all household types. While this will be high density apartment living, we especially welcome family housing, such as duplex units and larger three bed properties to ensure a sustainable mix in the city centre. All schemes will be expected to be mixed tenure.

Need is generally 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 is a high requirement for dwellings for smaller households. Two bedroom dwellings offer the flexibility required in the housing market in the coming years.

The Housing Executive supports a mix of tenures throughout all schemes, especially other forms of affordable housing. We encourage developers to make contact with Housing Associations at an early stage to achieve the preferred housing mix for each area and to ascertain what could be supported.

Wheelchair Housing Need (HNA)

At March 2023, there were 110 housing stress applicants and 90 transfer applicants who require wheelchair accessible accommodation with 80 allocations over the previous year. With 70 units on site this leaves a requirement for 50 units. Need has been identified throughout the City.

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 the space standards included in the Housing Association Guide. One bedroom wheelchair units will not normally be supported. The generic wheelchair units and the two storey option in particular are proving less than satisfactory in meeting need. Occupational Therapy recommendations often rule out the use of a through floor lift in these properties for their clients (generally not suitable for families with children).

Two bedroom ground floor accommodation is generally much more suitable for wheelchair users than two storey generic units. Ideally at least one ground floor bedroom should be provided in most cases.

A Shared Future through ‘Housing for All’

The Housing Executive actively encourages mixed tenure housing for all. Housing Associations bringing forward suitable proposals for shared future designation would be welcomed. It is expected that future city centre development will be shared housing.

Irish Traveller accommodation

There is no current need for new Irish Traveller sites in Belfast, however a new transit site is likely to be required within the next 15 years.

Indicative housing mix requirements

Singles, older persons and small family applicants comprise 87% of the total waiting list, reflecting the trend towards smaller households, evident across the city. Two bed accommodation is most flexible and there should be emphasis on accessibility. Where possible, one bed properties, while addressing the immediate requirements under Welfare Reform, should be designed flexibly to cater for household growth. Some four bed properties may be required for larger families, and these should be discussed with Housing Executive.

There is a shortage of specialist Cat1 older persons accommodation in some areas, reflecting an ageing population. This especially can be seen in the Outer East area of the city. Other areas have sufficient supply of Cat1 Accommodation for older persons should be designed flexibly with long term accessibility issues taken into consideration. Own door accommodation is most popular.

Where possible and appropriate 10% generic wheelchair units should be included in schemes. In some cases, there is a need for larger four & five bed complex needs units, and these should be considered in larger schemes. Accessible units will preferably have at least one ground floor bedroom.

Demand for some house types, such as apartments, within certain areas may be met, 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.

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

Table 29: Indicative Housing Mix for Belfast

Older Persons	Families*	Singles**	Wheelchair
10%	65%	25%	10%**

*2 and 3 bed Family houses would be welcomed
**a mix of 1 and two bed accommodation

Areas where need is met

In Lower Shankill we are meeting the need through the development of our own lands. Need for singles and apartments in general is met in parts of North Belfast, Inner East and Middle East.

Intermediate (Affordable) Demand

The Housing Executive estimates intermediate/affordable housing demand for Belfast at approximately 2,090 units between 2020 and 2035, 140 units per annum. Affordable housing can also refer to Intermediate rent, a product which DfC continues to progress.

Co-Ownership Housing Association had an active stock of 1,813 dwellings in Belfast at March 2023, 119 of which were purchased during 2022/23



Average house prices in Northern Ireland increased by 18.7% between 2019 and 2022.

Average house prices in Belfast are lower than the Northern Ireland average – local prices increased by 22.5% between 2019 and 2022



The Housing Executive continues to support 20% affordable housing in new housing schemes through the planning system. We will continue to support a mix of social and intermediate as appropriate. An increase in housing supply provides a housing choice, which is of high quality, more affordable and more secure for households.

Table 30: Average Annual House Prices Belfast & NI 2019-2022

Area	2019	2020	2021	2022	% Change 2019-2022
Belfast	£160,857	£164,796	£189,761	197,105	22.5%
Northern Ireland	£169,057	£180,079	£194,233	£200,700	18.7%

Source: Ulster University

Belfast Supporting Data

Table 31: North Belfast Waiting List – March 2023

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	1,627	120	730	34	190	254	2,955
HS Applicants	1,334	80	610	23	159	182	2,388
Allocations	217	<10	114	<10	35	39	-

Table 32: South & East Belfast Waiting List – March 2023

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	2,824	243	947	84	316	594	5,008
HS Applicants	2,197	146	685	62	260	382	3,732
Allocations	278	16	110	<10	16	101	-

Table 33: West Belfast Waiting List – March 2023

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	1,891	169	1,357	66	319	410	4,212
HS Applicants	1,522	127	1,144	54	269	295	3,411
Allocations	253	21	252	<10	42	61	-

Applicants – Housing applicants at March 2023

HS Applicants – Housing stress applicants at March 2023 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2023

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

Causeway Coast & Glens

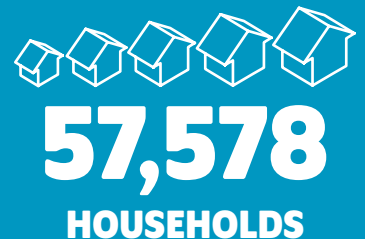
Context

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 every ten years and is lower than the average growth for Northern Ireland. Most of the growth is happening in the main towns, although most rural areas have shown a population decline between the last two Censuses.

The **population** of Causeway Coast and Glens was **141,744** at Census day 2021, an increase of 0.6% since 2011 (NISRA)

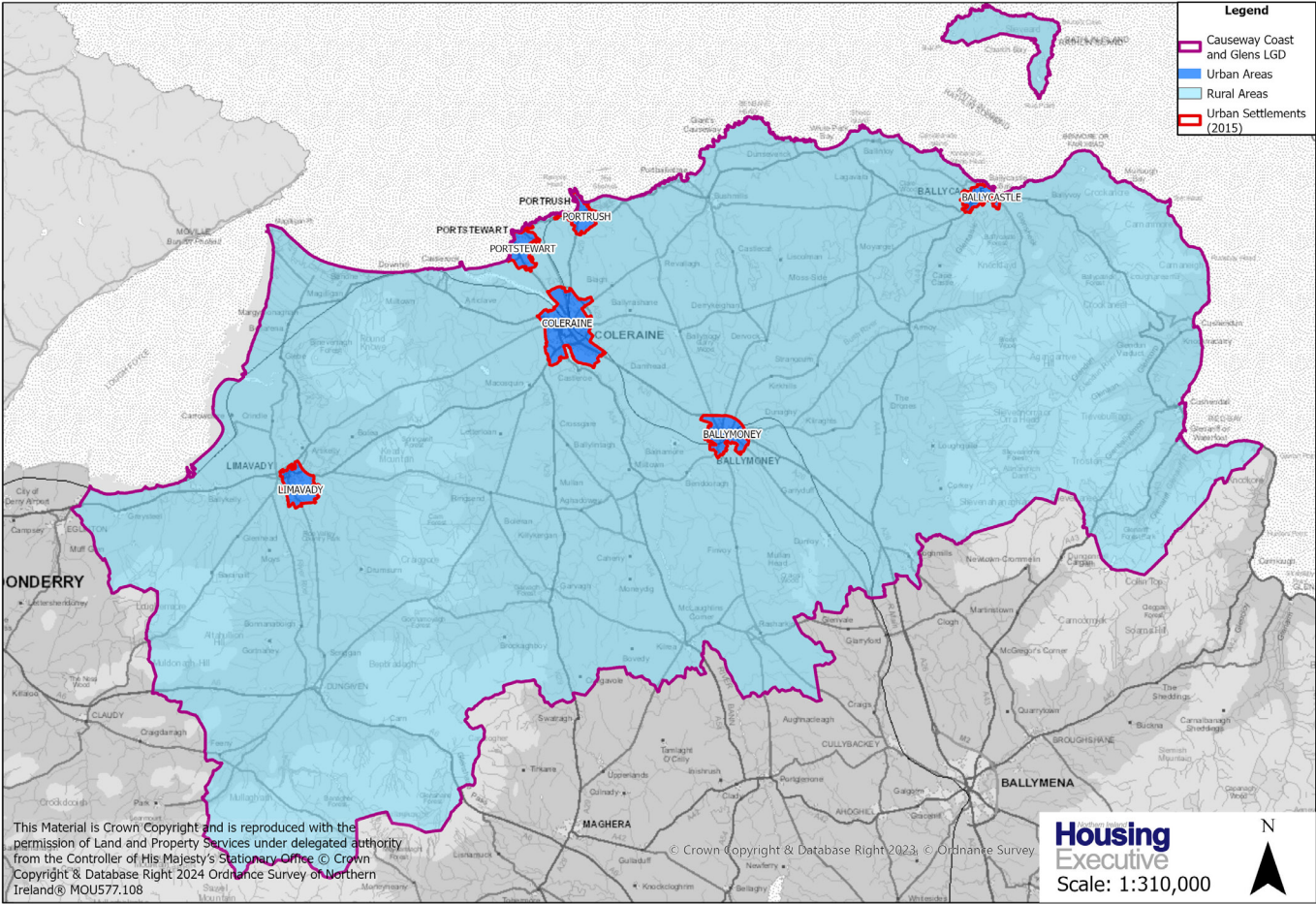


At 2021 there were **57,578 households** in Causeway Coast and Glens, which is an **increase of 3,856 households** on the 2011 Census figure of 53,722 (NISRA)



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 (NISRA).

Map 7: Causeway Coast & Glens Urban Settlements and Rural Areas



Housing Market Analysis (across tenures)

Housing & Land Supply

During 2022/23, there were 443 new units started in Causeway Coast and Glens (Land and Property Services), which is more than the projected new dwelling requirement of 373 per year as estimated by the HGIs 2016-2030.

Land and Property Services (LPS) statistics show that over the 2018/19 to 2022/23 period, **2,459 new dwelling starts** commenced and there were 2,828 new dwelling completions in Causeway Coast and Glens



There is a projected housing growth indicator **new dwelling requirement** of **5,600** for the period 2016 to 2030. The **overall NI requirement** for the same period is 84,800



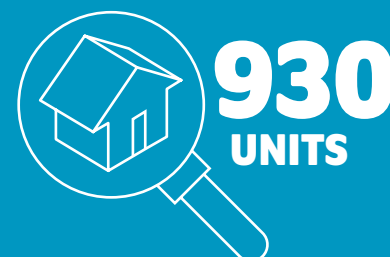
Owner Occupied

The sector comprises 66.2% of total occupied stock (NISRA: NI Census 2021).

Ulster University states that the **average house** price in Causeway Coast and Glens, 2022, was £210,767 which represents an increase of 5.4% on 2021 figure. This remains **above the Northern Ireland average** of £200,700 at the end of March 2022



Demand for intermediate housing aimed at low income households in Causeway Coast and Glens is estimated at 930 units, 2020-2035 (SHMA)



During 2022, there were 12 repossessions in Causeway Coast and Glens. This represents a 25% decrease since 2019 (NI Courts and Tribunals Service).

Causeway Coast and Glens saw a decline in property prices and fell 3.4% in Q2 2023 from Q1 2023. This is compared against eight of the eleven districts which actually saw a price increase. In Quarter 1 of 2023, the average property prices was highest for the local government district at £252,248 (Ulster University, House Price Index Q2 2023).

Private Rented

The private rented sector comprises 20.4% of total occupied housing stock in the borough (NISRA: NI Census 2021).

The average rent is £688 for Causeway Coast and Glens at H1 2023 and is considerably up by 15% over the year. For a detached house it is £808 whilst an apartment is £619. (Ulster University H1 2023, Issue number 21).

At March 2023, there were 2,486 private tenants in the borough in receipt of Housing Support Benefits.

DfC's Landlord Registration Scheme

identified 5,772 properties registered by 3,206 landlords for Causeway Coast and Glens at March 2023

5,772 
PROPERTIES REGISTERED

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 social rented sector comprises 13.4% of total housing stock in the borough (NISRA: NI Census 2021).

At March 2023, there were 6,490 Housing Executive owned properties in Causeway Coast and Glens, with 9,559 Housing Executive properties sold since the introduction of the House Sales Scheme

6,490 
HOUSING EXECUTIVE
PROPERTIES

At March 2023, there were 3,376 Housing Executive and 1,140 housing association tenants in receipt of Housing Benefit. There were 2,439 Housing Executive tenants receiving the Housing Cost element of Universal Credit at this date.

There were 67 new social homes completed in year to March 2023, and 176 on-site. A further 576 units are programmed to start over the next three years.

At March 2023, there were 3,604 applicants on the waiting list for Causeway Coast and Glens, 2,069 of whom were in housing stress with more than 350 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
- Irish Traveller accommodation requirements

General Housing Need (Urban & Rural)

Urban

The Strategic Guidelines target share established for Causeway Coast and Glens indicates 5% urban units and 12% rural units of the overall three year programme. Five year projected need for the area as a whole is 1,638 and the projected need for individual settlements is detailed in the table below.

Table 34: Projected (5-Year) Social Housing Need 2023-28

Settlement	Housing Need Assessment Area*	Total 5 Year Projection
Ballycastle	Ballycastle	70
Ballymoney	Ballymoney	206
Coleraine	Coleraine	509
Limavady	Limavady	240
Articlave	Articlave	10
Ballykelly	Ballykelly	36
Balnamore	Balnamore	14
Bushmills	Bushmills	11
Castlerock	Castlerock	14
Cloughmills	Cloughmills	12
Cushendall	Cushendall	31
Dungiven	Dungiven	61
Garvagh	Garvagh	11
Greysteel	Greysteel	11

Tables continues

Settlement	Housing Need Assessment Area*	Total 5 Year Projection
Portrush	Portrush	159
Portstewart	Portstewart	114
Remaining Settlements (need <10)**		129
Total		1,638

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

**Remaining settlements include Aghadowey, Ardgarnan, Armoy, Artikelly, Atlantic, Ballintoy, Ballybogy, Ballyrashane, Ballyvoy, Ballywoodock, Bellarena, Bendooragh, Boveedy, Burnfoot, Castelroe, Clintyfinnan, Craigmoy, Cushendun, Dernaflow, Dervock, Druckendult, Dunloy, Dunluce, Drumadraw, Drumsurn, Dunaghy, Farrenlester, Feeny, Foreglen, Glack, Glenleary, Glenkeen, Glenullin, Gortnaghey, Grove, Kilyrammer, Kilrea, Largy, Liscolman, Loughguile, Macfin, Macosquin, Maybouy, Mosside, Rasharkin, Rathlin, Portballintra, Seacon, Stranocum, Waterfoot, 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 or other marketing exercises to identify hidden additional social and mixed tenure demand.

A joint rural housing needs test was carried out in collaboration with the Community Planning Partnership during 2022/23 in Garvagh, Kilrea, Moneydig, Boleran and Glenullin.

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

Site Identification Studies (SIS) were completed for Feeny, Ballycastle and Bellarena in 2023. Registered Housing Associations are currently investigating sites in all three areas and mixes have been provided as part of the process. A SIS is programmed to be undertaken in Portrush, Portstewart, Ballintoy, Bushmills and Loughguile in 2023/24 and further studies will be completed as identified.

Social housing proposals are welcome for Coleraine, Ballymoney, Ballycastle, Cushendall, Limavady, Ballykelly, Greysteel, Portrush and Portstewart as they all have housing need and are not fully supported. Portrush and Portstewart have the highest unmet need.

A high number of units have been supported for Coleraine town and there is still an issue with the need for singles and difficulty in securing support for this household group across the Borough and particularly in Coleraine.

Proposals will be assessed against potential local impacts on existing housing stock, such as turnover in adjacent social housing estates. We would welcome the development of mixed tenure schemes within the borough.

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. The Local Development Plan (LDP) is due to publish its Draft Plan Strategy (dPS) early 2024 and there will be a revised LDP timetable before that. There will be a public consultation which we will participate in.

A review of Housing Executive owned/undeveloped land is carried out annually and we have assessed our sites in Ballycastle, Coleraine and Limavady this year. We have land at Articlave which would meet unmet need there and it is planned to transfer this land for social housing in 2024/25. We are in the process of transferring land at Macosquin, Drumsurn, Dunloy, Ardgarvan and Rochester Court to provide social housing including for complex needs.

Rural

The provision of new social housing in rural settlements represents a strategic priority for delivery of the Social Housing Development Programme (SHDP). For 2024/25, the Strategic Guidelines rural target share of the overall SHDP for Northern Ireland is 13%, or 261 units. Of these, Causeway Coast and Glens Council area is assigned 32 units.

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.

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.

Based on the **waiting list for social housing** at March 2023, 5 year projected housing need for rural areas (2023-28) within Causeway Coast and Glens is 338 units

338 UNITS


At March 2023, there were **528 applicants** in rural Causeway Coast and Glens in housing stress, 26% of the total housing stress waiting list



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

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.

Wheelchair Housing Need (HNA)

At March 2023, there were 50 housing stress applicants and 25 transfer applicants who require wheelchair accessible accommodation with less than 10 allocations over the previous year. This leaves a requirement for 68 units. Need has been identified throughout the borough.

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

A Shared Future through 'Housing for All'

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

There are currently five new build social housing schemes being progressed for potential shared future housing in the area. These include Rathmoyle, Ballycastle, Glenmanus Road, Portrush, Kilnadore Brae, Cushendall, Broombeg, Ballycastle and Ballaghmore Road, Portballintrae.

Irish Traveller accommodation

Need within the Irish Traveller community continues to be monitored in Causeway Coast and Glens.

Indicative housing mix requirements

There is a very high number of singles from the waiting list that require accommodation, but we are finding it difficult to secure support for this household group. More singles are required in new build given that nearly half the waiting list across the Borough is represented by this group.

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 mix in the table below should be discussed with the Housing Executive to avoid nugatory work.

Currently the majority of the population is in the 16-64 age category. However, a spike in the population in the next 10 years is mainly concentrated in the 65+ age group which is set to increase by 31.4%. Social stock to meet this future need will need to increase over the same period.

Table 35: Indicative Housing Mix for Causeway Coast & Glens

Older Persons	Families*	Singles	Wheelchair
17%	38%	45%	10%

* Focus on: Small Family Households

Areas where need is met

Housing need is met in Castlerock, Balnamore and Portballintrae by supported schemes.

Intermediate (Affordable) Demand

The Housing Executive estimates intermediate/affordable housing demand for Causeway Coast and Glens at approximately 60 units per annum.

Co-Ownership approved **46 applications** in 2022/23 for Causeway Coast and Glens



Average house prices in Northern Ireland increased by 18.7% between 2019 and 2022.

Average house prices in Causeway Coast and Glens are higher than the Northern Ireland average – local prices increased by 22% between 2019 and 2022



Table 36: Average Annual House Prices Causeway Coast and Glens & NI 2019-2022

Area	2019	2020	2021	2022	% Change 2019-2022
Causeway	£172,790	£189,452	£200,045	£210,767	22%
Northern Ireland	£169,057	£180,079	£194,233	£200,700	18.7%

Ulster University

Causeway Supporting Data

Table 37: Causeway Coast and Glens Waiting List – March 2023

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	1,502	237	840	109	273	643	3,604
HS Applicants	933	110	460	55	158	353	2,609
Allocations	152	18	72	<10	38	68	-

Table 38: Coleraine Town Waiting List – March 2023

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	430	48	201	30	58	162	929
HS Applicants	285	22	124	17	30	87	565
Allocations	41	<10	15	<10	<10	14	84

Table 39: Limavady Town Waiting List – March 2023

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	183	27	99	11	24	73	417
HS Applicants	111	<10	45	<10	14	37	220
Allocations	42	<10	18	<10	<10	<10	78

Table 40: Ballycastle Town Waiting List – March 2023

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	103	11	54	<10	16	70	-
HS Applicants	61	<10	27	<10	12	30	138
Allocations	<10	<10	<10	<10	<10	<10	20

Table 41: Ballymoney Town Waiting List – March 2023

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	205	32	85	13	38	76	449
HS Applicants	125	13	51	<10	21	49	-
Allocations	13	<10	12	<10	<10	<10	38

Applicants – Housing applicants at March 2023

HS Applicants – Housing stress applicants at March 2023 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2023

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

Derry City and Strabane District

Context

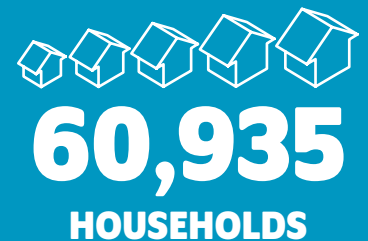
The district has a population of 150,756 (Census 2021) and while mostly urban, there is a significant rural populace. The local economy has shown scope for improvement in recent years with percentage levels of people claiming unemployment-related benefits consistently above the Northern Ireland average.

The economic performance of Derry City and Strabane District, as demonstrated through levels of unemployment, economically inactive and low incomes, continues to lag behind the rest of Northern Ireland. Pockets of the Derry City and Strabane District 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.

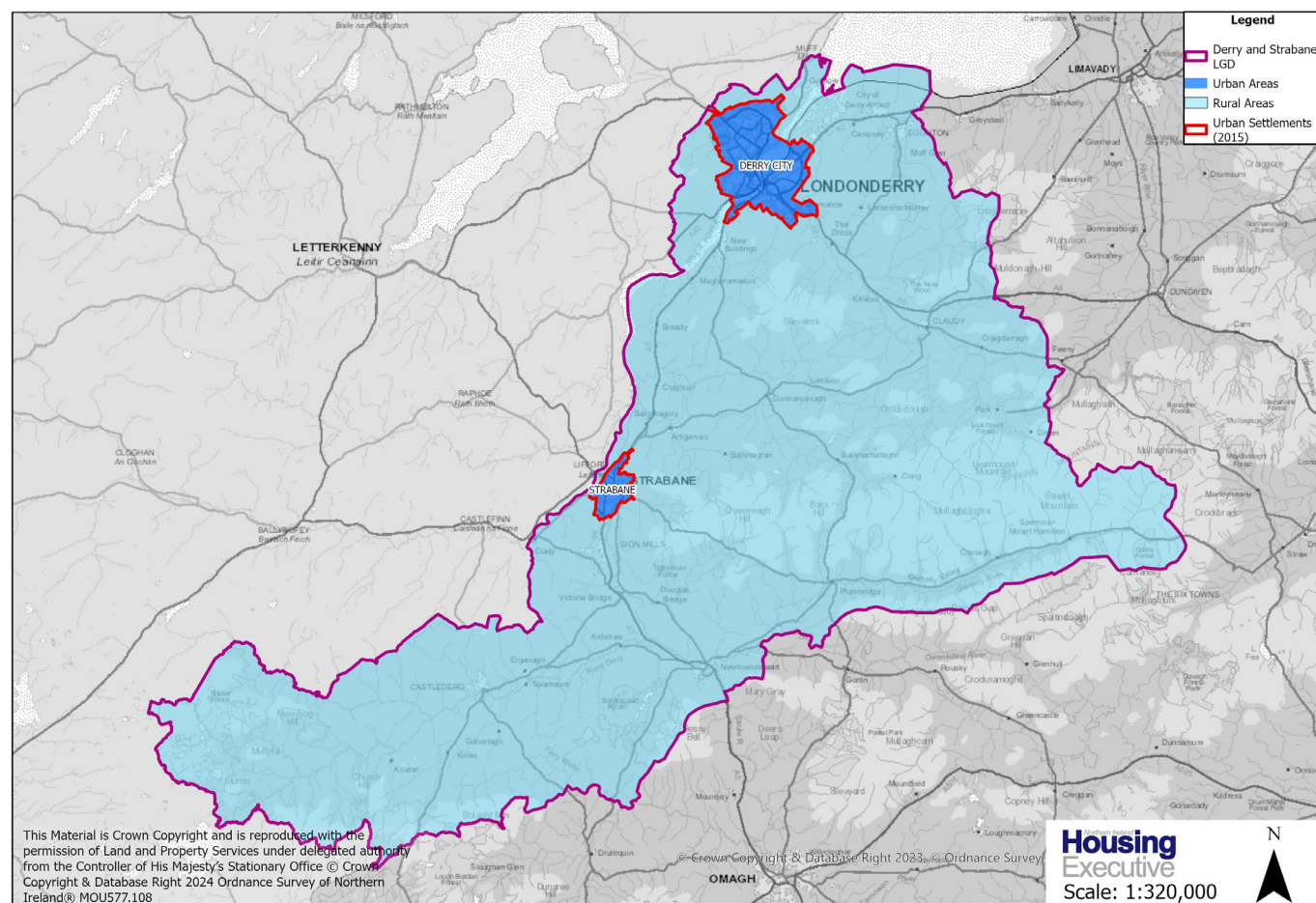
The **population** of Derry City and Strabane District was **150,756** at Census day 2021, an increase of 2.1% since the 2011 Census (NISRA)



At 2021, there were **60,935 households** in Derry and Strabane, which is an **increase of 5,339** households on the 2011 Census figure of 55,596 (NISRA)



Map 8: Derry and Strabane Urban Settlements and Rural Areas



Housing Market Analysis (across tenures)

Housing & Land Supply

During 2022/23, there were 437 new units started in Derry and Strabane (Land and Property Services), which is more than the projected new dwelling requirement of 273 per year as estimated by the HGIs 2016-2030.

Land and Property Services (LPS) statistics show that over the 2018/19 to 2022/23 period, **2,717 new dwelling starts** commenced and there were 2,947 new dwelling completions in Derry and Strabane



There is a **projected housing growth** indicator new dwelling requirement of **4,100** for the period 2016 to 2030. The **overall NI requirement** for the same period is 84,800



Owner Occupied

The sector comprises 57.1% of total occupied stock (NISRA: NI Census 2021).

Ulster University states that the **average house price** in Derry and Strabane in 2022 was £153,277, which represents an increase of 5.4% on the 2021 figure. This remains **below the Northern Ireland average** of £200,700 at the end of March 2022



Demand for intermediate housing aimed at low-income households in Derry and Strabane is estimated at 680 units, 2020-2035 (SHMA)



During 2022, there were 19 repossessions in Derry and Strabane. This represents a 20.8% decrease since 2018 (NI Courts and Tribunals Service).

As noted by Ulster University in the 'Ulster University House Price Index Q3 2023' report, there was increased activity in the terrace and semi-detached sectors of the Derry and Strabane housing market relative to the previous quarter, where there was a greater representation within the detached and semi-detached elements of the market.

Overall, the housing market in the Derry City and Strabane District Council area is showing signs of slowing activity, with a reduction in new listings and buyer enquiries, mostly due to uncertain interest and mortgage interest rate environments (Ulster University House Price Index Q3 2023).

Private Rented

The private rented sector comprises 20.3% of total occupied housing stock in the District (NISRA: NI Census 2021).

The Derry City and Strabane District Council area displays lower levels of transactional activity compared to the majority of other Council areas across Northern Ireland, as visible during the latter half of 2022 and the first half of 2023. The overall average rent has increased by 16.9% in the District over the previous year between early 2022 and early 2023 (Ulster University Performance of the Private Rental Market H1 2023).

At March 2023, there were 4,078 private tenants in the District in receipt of Housing Support Benefits.

DfC's **Landlord Registration Scheme** identified 5,738 properties registered by 2,599 landlords for Derry and Strabane at March 2023

5,738 
PROPERTIES REGISTERED

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. Belfast City Council notes that there are currently 180 properties registered in the Derry City and Strabane District Council area as HMOs.

Social Rented Housing Sector

The social rented sector comprises 22.7% of total housing stock in the District (NISRA: NI Census 2021).

At March 2023, there were **8,606 Housing Executive owned properties** in Derry and Strabane, with 11,791 Housing Executive properties sold since the introduction of the House Sales Scheme

8,606 
HOUSING EXECUTIVE
PROPERTIES

At March 2023, there were 5,197 Housing Executive and 3,464 housing association tenants in receipt of Housing Benefit. There were 3,145 Housing Executive tenants receiving the Housing Cost element of Universal Credit at this date.

There were 545 new social homes completed in year to March 2023, and 1,517 on-site. A further 1,264 units are programmed to start over the next three years.

At March 2023, there were 5,736 applicants on the waiting list for Derry and Strabane, 4,275 of whom were in housing stress with more than 750 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
- Irish Traveller accommodation requirements

General Housing Need (Urban & Rural)

Urban

The Strategic Guidelines target share established for Derry and Strabane indicates 20% urban units and 11% rural units of the overall three-year programme. Five-year projected need for the area as a whole is 4,066 and the projected need for individual settlements is detailed in the table below.

Table 42: Projected (5-Year) Social Housing Need 2023-28

Settlement	Housing Need Assessment Area*	Total 5 Year Projection
Derry City	Waterloo Place Westbank	1,040
	The Fountain	10
	Collon Terrace Westbank	1,820
	Waterside 1	232
	Waterside 2	267
	Waterside 3	120
	Curryneirin	10
	Drumahoe	18
	Coshquin, Tullyally	12
Strabane Town	Strabane Town	188
Ballymagorry	Ballymagorry	15
Castledearg	Castledearg	36
Claudy	Claudy	39
Eglinton	Eglinton	91

Tables continues

Settlement	Housing Need Assessment Area*	Total 5 Year Projection
Newbuildings	Newbuildings	21
Newtownstewart	Newtownstewart	13
Sion Mills	Sion Mills/Glebe	54
Strathfoyle	Strathfoyle	33
Remaining Settlements (need <10)**		47
Total		4,066

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

** Remaining settlements include Ardmore, Artigarvan, Clady, Donemana, Douglas Bridge, Lettershandoney, Magheramason, Maydown, Plumbridge, Nixons Corner and Spamount 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 Housing Executive has identified Strathfoyle, Sion Mills and Eglinton as locations where we would like to see sites coming forward within the settlement limits as per the relevant Local Development Plans. In Sion Mills, any development should be within the village settlement limits as opposed to the rural estate of the Glebe located 1-2 miles outside the village.

Again, it should be noted that 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 umbrellas of Planning Policy Statement 21 – Sustainable Development in the Countryside.

Strabane Town has a substantial development programme; however, increasing need/demand means that new sites may be considered within the town limits.

There also remains acute housing need throughout Derry City. However, due to the current waiting list and the significant quantity of Older Person (Cat 1) units already on-site, programmed and schemes issued letters of support within Derry City, we will not be supporting additional Older Person (Cat 1) units in the Cityside or Waterside housing areas for the foreseeable, unless in exceptional circumstances.

The proportion of single person applicants in Housing Stress has continued to increase across the District. Therefore, proposals for 1-bedroom properties at appropriate locations would be most welcome.

Available Housing Executive land across the District, including within the Magheramason and Strathfoyle housing areas, is currently being investigated and could potentially help ease current housing need in a variety of locations.

Within the Derry City and Strabane Council area, a Site Identification Study (SIS) was completed for Strabane Town in 2022/23. Two SISs were also carried out around the Strabane Town and Derry City areas to identify potential sites for Irish Travellers.

Rural

The provision of new social housing in rural settlements represents a strategic priority for delivery of the Social Housing Development Programme (SHDP). For 2024/25, the Strategic Guidelines rural target share of the overall SHDP for Northern Ireland is 13.1%, or 261 units. Of these, Derry City and Strabane District Council area is assigned 30 units.

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.

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.

Based on the waiting list for social housing at March 2023, **5-year projected housing need** for rural areas (2023-28) within Derry and Strabane is 349 units

349 UNITS


Taking account of new build schemes on the current SHDP, the residual housing need is focused mainly on the villages of Eglinton, Sion Mills and Strathfoyle. Rural Needs Testing is currently underway in the Tamnaherin area.

At March 2023, there were **596 applicants** in rural Derry and Strabane in housing stress, 14% of the total housing stress waiting list

 **596**

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

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.

Wheelchair Housing Need (HNA)

At March 2023, there were 55 housing stress applicants and 32 transfer applicants who require wheelchair accessible accommodation with 22 allocations over the previous year. This leaves a requirement for 65 units. Need has been identified throughout the District.

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

A Shared Future through 'Housing for All'

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

There are currently multiple new build social housing schemes being progressed for potential shared future housing across the District.

Irish Traveller accommodation

Need within the Irish Traveller community continues to be monitored in the Derry City and Strabane District Council area. In 2022/23, two SISs were carried out around the Strabane Town and Derry City areas to identify potential sites for Irish Travellers.

Indicative housing mix requirements

Housing mixes in new developments across the District should cater for a range of household types and sizes, including one, two and three (plus) bed units. At March 2023, single applicants comprised 50% of applicants in housing stress followed by small families (28%) and elderly (11%). The housing mix may need to differ depending on location, particularly within Derry City, both the Cityside and the Waterside, and the rural areas of the District. As such, it is strongly encouraged that there is initial contact with Place Shaping North at design stage.

Any 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, and there may be a requirement for Complex Needs accommodation dependent on the location and the site.

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

Table 43: Indicative Housing Mix for Derry and Strabane

Older Persons	Families*	Singles	Wheelchair
11%	39%	50%	10%

** Focus on: Small Family Households*

Areas where need is met

The only low demand area in Derry City is the Fountain estate. Similarly, in Strabane Town, the Fountain Street area is considered to be ‘low demand’ in comparison to other areas of the town.

Current supply is also meeting demand in the areas of Ardstraw, Erganagh, Killen/ Killeter and Park.

Intermediate (Affordable) Demand

The Housing Executive estimates intermediate/affordable housing demand for Derry and Strabane at approximately 50 units per annum.

Co-Ownership approved 32 applications in 2022/23 for Derry and Strabane



Average house prices in Northern Ireland increased by 18.7% between 2019 and 2022.

Average house prices in Derry and Strabane are considerably lower than the Northern Ireland average – local prices increased by 15.2% between 2019 and 2022



Table 44: Average Annual House Prices Derry and Strabane LGD & NI 2019-2022

Area	2019	2020	2021	2022	% Change 2019-2022
Derry and Strabane	£133,092	£129,661	£145,468	£153,277	15.2%
Northern Ireland	£169,057	£180,079	£194,233	£200,700	18.7%

Ulster University

Derry City and Strabane District Supporting Data

Table 45: Derry City and Strabane District Waiting List – March 2023

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	2,874	206	1,529	109	354	664	5,736
HS Applicants	2,127	136	1,198	82	277	455	4,275
Allocations	352	17	206	<10	58	112	-

Table 46: Derry City Waiting List – March 2023

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	2,256	140	1,115	66	242	481	4,300
HS Applicants	1,704	96	909	55	202	326	3,292
Allocations	295	14	175	<10	42	89	-

Table 47: Strabane Town Waiting List – March 2023

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	262	23	158	21	42	65	571
HS Applicants	170	13	109	16	28	51	387
Allocations	28	<10	<10	<10	<10	<10	46

Applicants – Housing applicants at March 2023

HS Applicants – Housing stress applicants at March 2023 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2023

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

Fermanagh & Omagh District

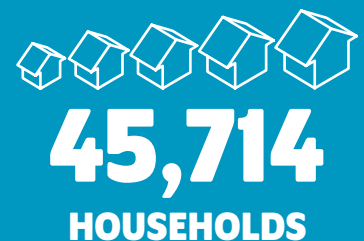
Context

Fermanagh and Omagh is widely recognised as a place of outstanding natural beauty. The Council is Northern Ireland's largest area in terms of land mass covering approximately 3,000 Km² and smallest in terms of population density (39 people per Km²). According to the Northern Ireland Census 2021, there are a total of 116,814 residents, in the District living in 45,714 households within this mainly rural district.

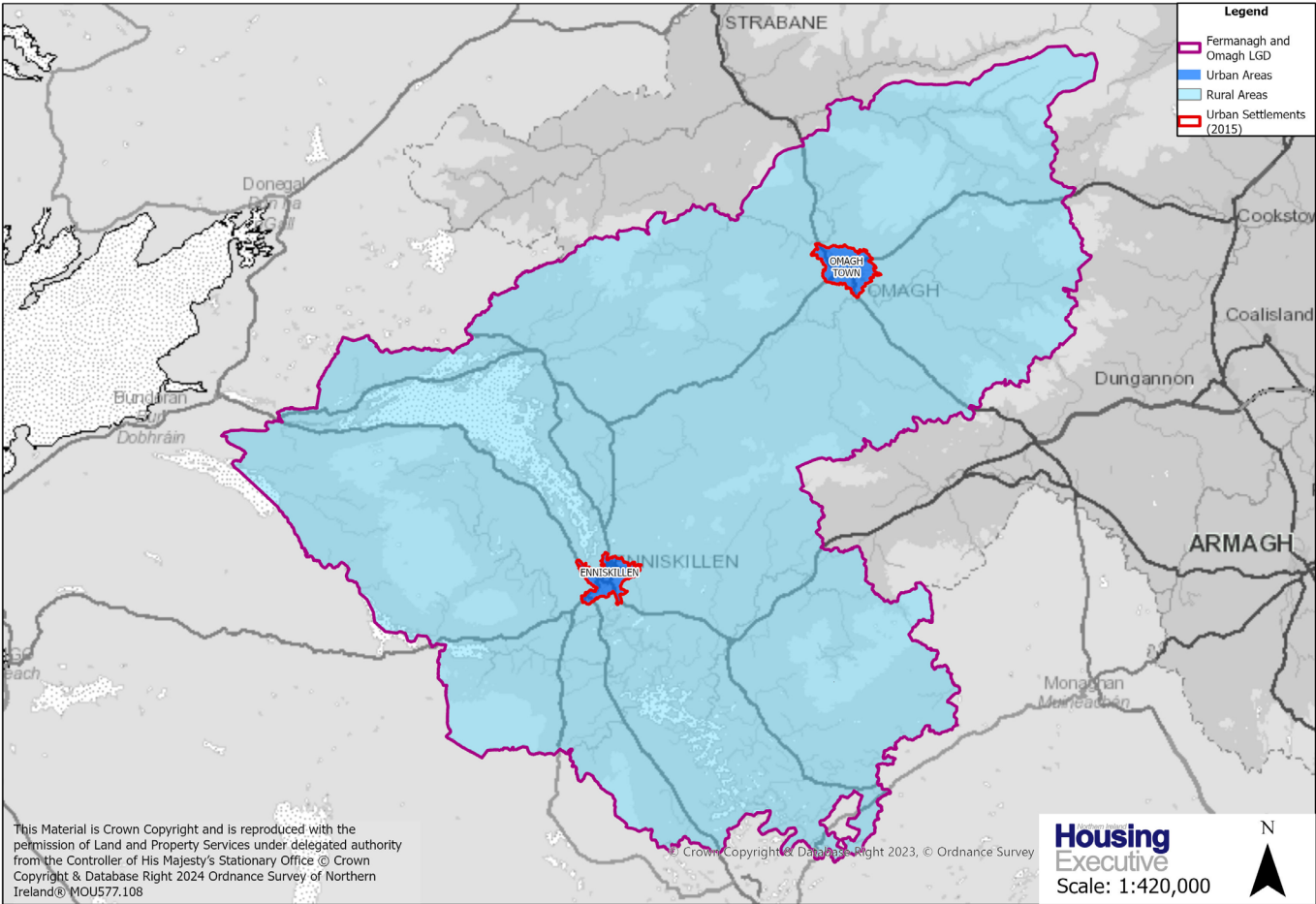
The **population** of Fermanagh and Omagh District was **116,814** at Census day 2021, an increase of 3.2% since the 2011 Census (NISRA)



At 2021 there were **45,714 households** in Fermanagh and Omagh, which is an **increase of 4,202** households on the 2011 Census figure of 41,512 (NISRA)



Map 9: Fermanagh & Omagh Urban Settlements and Rural Areas



Housing Market Analysis (across tenures)

Housing & Land Supply

During 2022/23, there were 404 new units started in Fermanagh and Omagh (Land and Property Services), which is more than the projected new dwelling requirement of 287 per year as estimated by the HGIs 2016-2030.

Land and Property Services (LPS) statistics show that over the 2018/19 to 2022/23 period, **2,157 new dwelling starts** commenced and there were 1,777 new dwelling completions in Fermanagh and Omagh



There is a projected housing growth indicator **new dwelling requirement** of **4,300** for the period 2016 to 2030. The **overall NI requirement** for the same period is 84,800



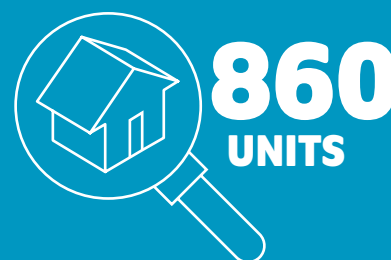
Owner Occupied

The sector comprises 69% of total occupied stock (NISRA: NI Census 2021).

Ulster University states that the **average house price** in Fermanagh and Omagh, 2022, was £172,962 which represents a decrease of 3.7% on 2021 figure. This remains **below the Northern Ireland average** of £200,700



Demand for intermediate housing aimed at low income households in Fermanagh and Omagh is estimated at 860 units, 2020-2035 (SHMA)



During 2022, there were six repossessions in Fermanagh and Omagh. This represents a slight decrease from seven in 2021 (NI Courts and Tribunals Service).

Considering the Ulster University House Price Index Q3 2023, price change statistics quarterly change from Q2 2023 into Q3 2023, three of the eleven local government districts exhibit price decreases over the quarter with the largest price decrease notable in Fermanagh and Omagh (12.1%).

This slowdown is also reflected in the reduction in the number of house sales in Fermanagh & Omagh falling from 1,237 during 2021 to 1,055 in 2022 (LPS).

Popular locations include Enniskillen and Omagh towns as well as the rural villages spread across the council area.

Private Rented

The private rental sector comprises 22% of total occupied housing stock in the district (NISRA: NI Census 2021).

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 H1 2023 there were 183 lettings in Fermanagh and Omagh District, 5.8% of the 3,150 lettings across Local Government Districts (outside Belfast) (Performance of the Private Rental Market H1 2023 - Ulster University).

The overall average rent in the district in H1 2023 was £615 per month, an increase of £16 on H2 2022. However this figure still remains well below the Northern Ireland average of £817 per month (Performance of the Private Rental Market H1 2023).

Housing Benefit plays a vital role in supporting the private rented sector. At March 2023, there were 2,430 private tenants in receipt of Housing Support Benefits in the borough, a 14.3% decrease on the comparable 2022 position. A key factor in this reduction is the introduction of Universal Credit.

DfC's **Landlord Registration Scheme** identified 4,227 properties registered by 2,531 landlords for Fermanagh and Omagh at March 2023

4,227 
PROPERTIES REGISTERED

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 social rented sector comprises 9% of total housing stock in the district (NISRA: NI Census 2021).

At March 2023, there were **3,564 Housing Executive owned properties** in Fermanagh and Omagh, with 6,591 Housing Executive properties sold since the introduction of the House Sales Scheme

3,564 
HOUSING EXECUTIVE
PROPERTIES

At March 2023, there were 2,128 Housing Executive and 725 housing association tenants in receipt of Housing Benefit. There were 1,491 Housing Executive tenants receiving the Housing Cost element of Universal Credit at this date.

There were 61 new social homes on-site at March 2023. A further 284 units are programmed to start over the next three years.

At March 2023, there were 2,054 applicants on the waiting list for Fermanagh and Omagh, 1,396 of whom were in housing stress with over 210 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
- Irish Traveller accommodation requirements

General Housing Need (Urban & Rural)

Urban

The Strategic Guidelines target share established for Fermanagh and Omagh indicates 2.2% urban units and 8.7% rural units of the overall three year programme. Five year projected need for the area as a whole is 905 and the projected need for individual settlements is detailed in the table below.

Table 48: Projected (5-Year) Social Housing Need 2023-28

Settlement	Housing Need Assessment Area	Total 5 Year Projection
Enniskillen Town	Enniskillen Town	329
Omagh Town	Omagh Town	287
Belleek	Belleek	11
Beragh	Beragh	11
Derrylin	Derrylin	15
Dromore	Dromore	20
Drumquin	Drumquin	10
Fintona	Fintona	17

Tables continues

Irvinestown	Irvinestown	29
Lisbellaw / Tamlaght	Lisbellaw / Tamlaght*	26
Lisnaskea	Lisnaskea	35
Maguiresbridge	Maguiresbridge	21
Remaining Settlements (less than 10)**		94
Fermanagh & Omagh Total Social New Build Requirement		905

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

** Remaining settlements include Aghadrumsee, Arney / Bellanaleck*, Ballinamallard, Belcoo, Brookeborough, Carrickmore, Clanabogan, Derrygonnelly, Donagh, Ederney / Lack*, Florencecourt, Garrison, Gortin, Greencastle, Kesh, Kinawley, Newtownbutler, Omagh Cottages, Roslea and Tempo where need in each settlement is less than 10. Housing need has currently been met in Lisnarick, Magheraveely, Mountjoy, Teemore and Trillick. These areas will be kept under annual review.

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 21% from 748 for the period from 2022 to 2027 to 905 for the 2023 to 2028 period. The housing need in the council area is concentrated within Enniskillen and Omagh towns. There is also a moderate need in Lisnaskea, Irvinestown, Lisbellaw / Tamlaght, Maguiresbridge, Dromore, Fintona and Derrylin. The majority of Housing Executive land has now been utilised for new build within the district towns. Remaining sites are subject to planning regulations, lack of development potential or financial unviability.

Within Enniskillen Town, the most popular areas would be Hillview and Cornagrade. There is a very high requirement for two and three bedroom houses and generic bungalow accommodation for complex needs in the town. There is also a need for apartment accommodation however the preference is for smaller developments or schemes which will offer both houses and apartments. To help make apartments more attractive to potential applicants, independent access would be preferred for these units. There is a requirement for Cat 1 accommodation in the town. The provision of mixed tenure schemes in the town and within the district as a whole would be encouraged.

Within Omagh Town, Lammy and Tamlaght would be the most popular areas for housing. Lisanelly and Strathroy would be considered less popular although the situation has improved in these areas. We have received a very high volume of proposals for Omagh town and have supported up to apartment need. The requirement in the town is for two and three bedroom houses for small / large families and generic bungalow accommodation for complex needs. There is a

limited requirement for additional Cat 11 accommodation in the town. Some four bed properties may be required for larger families, and these should be discussed with the Housing Executive. There may also be a requirement for five bedroom plus properties both for general and complex needs. Place Shaping South will make the housing associations aware at an early stage if such a need exists and help address any concerns over future planning.

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.

During 2022 a Site Identification Study (SIS) was completed for Newtownbutler focusing on derelict sites within the town centre. During 2022/23, rural housing needs tests took place in Newtownbutler, Mountfield and Clabby. There were positive responses to all three tests, and we are now working with Housing Associations on the identification of suitable sites to take forward small schemes.

Rural

The provision of new social housing in rural settlements represents a strategic priority for delivery of the Social Housing Development Programme (SHDP). For 2024/25, the Strategic Guidelines rural target share of the overall SHDP for Northern Ireland is 13.1%, or 261 units. Of these, Fermanagh and Omagh Council area is assigned 23 units.

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.

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.

Based on the waiting list for social housing at March 2023, **5 year projected housing need** for rural areas (2023-28) within Fermanagh and Omagh is 289 units

289 UNITS


Taking account of new build schemes on the current SHDP, the residual housing need is focused in the settlements of Lisnaskea, Irvinestown, Lisbellaw / Tamlaght, Maguiresbridge, Dromore, Fintona and Derrylin.

Remaining settlements include: Aghadrumsee, Arney / Bellanaleck, Ballinamallard, Belcoo, Brookeborough, Carrickmore, Clanabogan, Derrygonnelly, Donagh, Ederney / Lack, Florencecourt, Garrison, Gortin, Greencastle, Kesh, Kinawley, Newtownbutler, Omagh Cottages, Roslea and Tempo where need in each settlement is less than 10. Proposals for social housing in these locations will be welcomed and given due consideration.

Housing need has currently been met in Lisnarick, Magheraveely, Mountjoy, Teemore and Trillick. These areas will be kept under annual review.

During 2022 a Site Identification Study (SIS) was completed for Newtownbutler focusing on derelict sites within the town centre. During 2022/23, rural housing needs tests took place in Newtownbutler, Mountfield and Clabby. There were positive responses to all three tests, and we are now working with Housing Associations on the identification of suitable sites to take forward small schemes.

Within the rural areas of the district the requirement is largely for two and three bedroom houses for general needs. Apartments will only be considered where there is an identified housing need.

There is a limited requirement for Cat 1 accommodation throughout the rural settlements of the district.

At March 2023, there were **449 applicants** in rural Fermanagh and Omagh in housing stress, 32.2% of the total housing stress waiting list for the district



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

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

There are a number of complex needs applicants in rural settlements who require generic wheelchair bungalow accommodation. In these areas, where a site is identified, it would be appreciated if a unit of this type could be factored into the housing mix, if viable.

Wheelchair Housing Need (HNA)

At March 2023, there were 32 housing stress applicants and less than ten transfer applicants who require wheelchair accessible accommodation over the previous year. There were less than ten allocations over the March 2022-March 2023 period.

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

A Shared Future through 'Housing for All'

The Housing Executive actively encourages mixed tenure housing for all. The Housing Executive is a partner in the delivery of Community Planning led Place Shaping Plans for both Omagh and Enniskillen. Both plans have an emphasis on promoting inclusivity through urban design and partnership. Housing Associations proposals for shared future designation would be welcomed and would be promoted through the delivery of these plans.

There are currently two new build social housing schemes included within the Social Housing Development Programme that have been designated potential 'Housing for All'. These are the Alpha Housing Association scheme at Derry Road in Omagh and the Arbour Housing Association scheme at Mountjoy in Omagh. Start dates for both are to be confirmed.

Irish Traveller accommodation

Need within the Irish Traveller community continues to be monitored in Fermanagh and Omagh.

Indicative housing mix requirements

Across Fermanagh and Omagh district the indicative housing mix should be 20% Single Persons, 65% Families and 15% Older Person (Cat 1) accommodation. Wheelchair units should make up 10% of the housing mix across all groups. Housing Associations should be aware that the majority of remaining need is now for generic bungalow accommodation of varying sizes, with wheelchair apartments and houses ruled out by the client's occupational therapists. The Housing Support Officer will provide all relevant information regarding specific requirements. Family households include two, three and four bed units. Place Shaping, South Region will provide further detail on the housing mix required for families upon request.

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

Table 49: Indicative Housing Mix for Fermanagh and Omagh

Older Persons	Families*	Singles	Wheelchair
15%	65%	20%	10%

* Focus on Small Family Households.

Intermediate (Affordable) Demand

The Housing Executive estimates intermediate/affordable housing demand for Fermanagh and Omagh at approximately 60 units per annum.

Co-Ownership approved 17 applications in 2022/23 for Fermanagh and Omagh



Average house prices in Northern Ireland increased by 18.7% between 2019 and 2022.

Average house prices in Fermanagh and Omagh are lower than the Northern Ireland average – local prices increased by 13.6% between 2019 and 2022



Table 50: Average Annual House Prices Fermanagh and Omagh LGD & NI 2019-2022

Area	2019	2020	2021	2022	% Change 2019-2022
Fermanagh and Omagh	£152,241	£165,877	£179,683	£172,962	13.6%
Northern Ireland	£169,057	£180,079	£194,233	£200,700	18.7%

Ulster University

Fermanagh & Omagh Supporting Data

Table 51: Fermanagh & Omagh Waiting List – March 2023

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	1,022	96	431	39	153	313	2,054
HS Applicants	715	62	282	23	91	223	1,396
Allocations	81	10	43	<10	13	64	-

Table 52: Enniskillen Town Waiting List – March 2023

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	311	29	127	<10	37	99	-
HS Applicants	228	18	83	<10	24	72	-
Allocations	<10	<10	<10	0	0	15	35

Table 53: Omagh Town Waiting List – March 2023

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	366	33	155	20	49	106	729
HS Applicants	273	20	103	11	33	78	518
Allocations	28	<10	<10	<10	<10	20	67

Applicants – Housing applicants at March 2023

HS Applicants – Housing stress applicants at March 2023 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2023

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

Lisburn and Castlereagh

Context

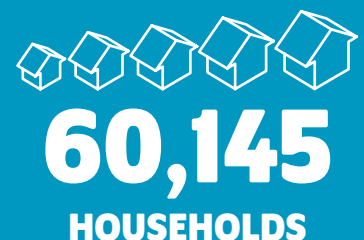
Lisburn and Castlereagh has a population of 149,108 (Census 2021) and while mostly urban, there is a significant rural populace. Lisburn and Castlereagh is easily accessible from anywhere in Northern Ireland, with roads, rail, and bus networks to this region. Lisburn and Castlereagh is one of Northern Ireland's fastest growing regions and has a strong manufacturing, engineering, and agri-food presence. Population increased by over 10.6 %, the highest increase in NI.

The Housing Executive will continue to work with the Council, through the Community Planning Partnership, to ensure that local housing needs are met, and that housing investment is targeted where it is most needed.

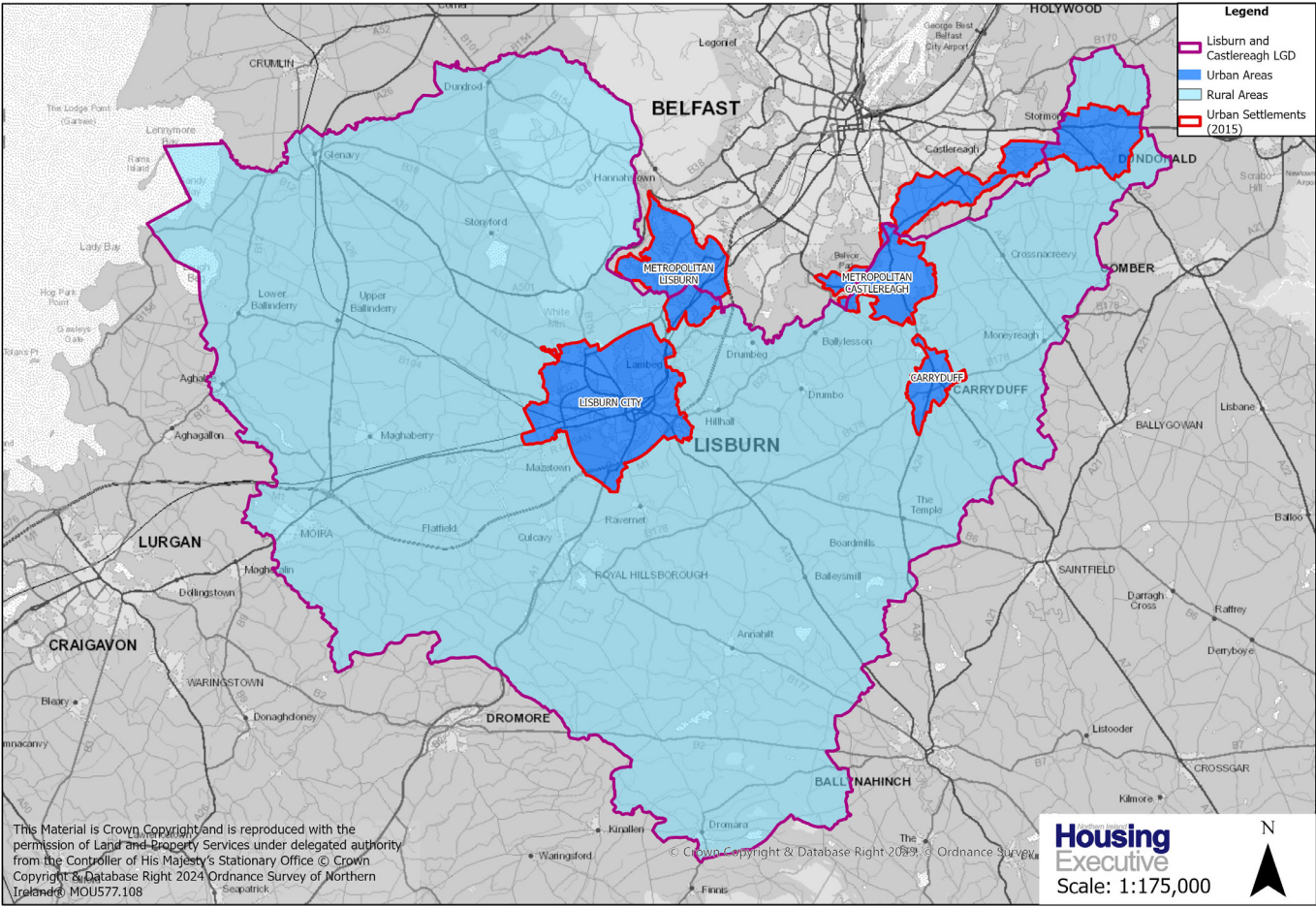
The **population** of Lisburn and Castlereagh was **149,108** at Census day 2021, an increase of 10.6% since the 2011 Census (NISRA)



At 2021 there were **60,145 households** in Lisburn and Castlereagh, which is an **increase of 7,497** households on the 2011 Census figure of 52,648 (NISRA)



Map 10: Lisburn & Castlereagh Urban Settlements and Rural Areas



Housing Market Analysis (across tenures)

Housing & Land Supply

During 2022/23, there were 493 new units started in Lisburn and Castlereagh (Land and Property Services). This is lower than the projected Housing Growth Indicator (HGI) new dwelling requirement of 713 per year as estimated by the HGIs 2016-2030 in Lisburn and Castlereagh.

Land and Property Services (LPS) statistics show that over the 2018/19 to 2022/23 period, **3,590 new dwelling** starts commenced and there were 3,814 new dwelling completions in Lisburn and Castlereagh



There is a projected housing growth indicator **new dwelling requirement** of **10,700** for the period 2016 to 2030. The **overall NI requirement** for the same period is 84,800



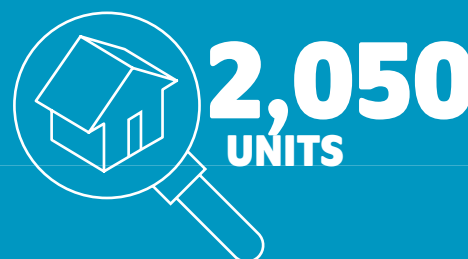
Owner Occupied

The sector comprises 74.7% of total occupied stock (NISRA: NI Census 2021).

Ulster University states that the **average house** price in Lisburn and Castlereagh, 2022, was £221,714 which represents an **increase of 4.3%** on 2021 figure. This remains above the Northern Ireland average of £200,700.



Demand for intermediate housing aimed at low income households in Lisburn and Castlereagh is estimated at 2,050 units, 2020-2035 (SHMA)



During 2022, there were 12 repossessions in Lisburn and Castlereagh. This represents a 100% increase since 2021 (NI Courts and Tribunals Service).

In 2022 Lisburn and Castlereagh was the Council area with the highest average house prices therefore affordability remains an issue. Considering the 'Ulster University House Price Index Q3 2023', price change statistics quarterly change from Q2 2023 into Q3 2023, eight out of the eleven Local Government District market areas exhibited price increases over the quarter, with the largest in Lisburn and Castlereagh (6.2%). There has been a slow down in the number of house sales in Lisburn and Castlereagh falling from 2,947 during 2021/22 to 2,194 in 2022/23 (LPS). Lisburn and Castlereagh remains in the highest bracket of houses prices.

Private Rented

The private rented sector comprises 13% of total occupied housing stock in the borough (NISRA: NI Census 2021).

At March 2023, there were 1,336 private tenants in the borough in receipt of Housing Support Benefits.

DfC's **Landlord Registration Scheme** identified 4,293 properties registered by 3,861 landlords for Lisburn and Castlereagh at March 2023

4,293 
PROPERTIES REGISTERED

Rented accommodation is now the accommodation of choice for many households, especially younger households on lower incomes who in previous decades would have become first time buyers. During the first six months (H1) of 2023 there were 438 captured lettings in Lisburn and Castlereagh, 13.9% of the 3,150 lettings across Local Government Districts outside Belfast (Performance of the Private Rental Market H1 2023 - Ulster University). The overall average rent in the district in H1 2023 was £872 per month, a significant increase of £114 on H1 2022. This figure still remains well above the Northern Ireland average of £817 per month (Performance of the Private Rental Market H1 2023).

Housing Benefit plays a vital role in supporting the private rented sector. At March 2023, there were 1,336 private tenants in receipt of Housing Support Benefits in the borough, a 14.1% decrease on the comparable 2022 position. A key factor in this reduction is the introduction of Universal Credit.

Social Rented Housing Sector

The social rented sector comprises 12% of total housing stock in the borough (NISRA: NI Census 2021).

At March 2023, there were **5,286 Housing Executive owned properties** in Lisburn and Castlereagh, with 8,004 Housing Executive properties sold since the introduction of the House Sales Scheme

5,286 
HOUSING EXECUTIVE
PROPERTIES

At March 2023, there were 3,168 Housing Executive and 1,663 housing association tenants in receipt of Housing Benefit. There were 1,697 Housing Executive tenants receiving the Housing Cost element of Universal Credit at this date.

There were 97 new social homes completed in year to March 2023, and 330 on-site. A further 763 units are programmed to start over the next three years.

At March 2023, there were 2,392 applicants on the waiting list for Lisburn and Castlereagh, 1,817 of whom were in housing stress with over 430 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
- Irish Traveller accommodation requirements

General Housing Need (Urban & Rural)

Urban

The Strategic Guidelines target share established for Lisburn and Castlereagh indicates 8.2% urban units and 5.3% rural units of the overall three year programme. Five year projected need for the area as a whole is 1,636 and the projected need for individual settlements is detailed in the table below.

Table 54: Projected (5-Year) Social Housing Need 2023-28

Settlement	Housing Need Assessment Area*	Total 5 Year Projection
Lisburn/Dunmurry Urban	Dunmurry Greenwood Hill Hall Lisburn City Centre Lisburn North Old Warren	1042
Castlereagh Urban	Dundonald Small Estates Dundonald Urban Newtownbreda	281
Carryduff		77
Dromara		10
Glenavy		23
Hillsborough		43
Lambeg		78
Milltown		10

Tables continues

Settlement	Housing Need Assessment Area*	Total 5 Year Projection
Moirá		45
Remaining Settlements (need less than <10)**		27
Total		1,636

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

** Remaining settlements include Aghalee, Anahilt, Ballynadally, Boardmills, Culcavey, Drumbo, Dundrod, Lower and Upper Ballinderry, Maze, Megaherry, Moneyrea, Purdysburn, Ravarnette, Stoneyford 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 largest projected need can be evidenced in Lisburn / Dunmurry Urban. The area of greatest housing need is Lisburn City Centre, however singles dominate the waiting list here and we are receiving a high number of proposals in this area. There is a limited requirement for further Cat 1 elderly accommodation as we are considering numerous requests for support. Independent own door access is most popular and attractive to potential applicants. Lisburn North also has a high demand.

There are fewer proposals and increasing need in Castlereagh urban areas, where land availability continues to be a significant constraint.

The Housing Executive welcomes policy HOU10 Affordable Housing in Settlements which relates to all residential development on sites of more than 0.5 hectares or comprising five residential units or more whereby provision is made for a minimum of 20% of all units to be affordable. The predominant need is for smaller accommodation although there are instances of requirement for larger four and five bed units for general and complex needs. Especially for larger schemes, such a need should be discussed with Place Shaping Belfast.

Rural

The provision of new social housing in rural settlements represents a strategic priority for delivery of the Social Housing Development Programme (SHDP). For 2024/25, the Strategic Guidelines rural target share of the overall SHDP for Northern Ireland is 13.1%, or 261 units. Of these, Lisburn & Castlereagh City Council area is assigned 14 units.

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.

During 2022/23 a rural needs test was carried out in Anahilt. This suggested a latent demand for social housing in the settlement. A Site Identification Study was subsequently carried out. Several suitable sites were identified, and we are now working with a Housing Association to assess further and bring forward an available site in the village.

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.

Based on the waiting list for social housing at March 2023, **5 year projected housing need** for rural areas (2023-28) within Lisburn and Castlereagh is 313 units

313 UNITS
🏠🏠🏠🏠🏠🏠

At March 2023, there were **268 applicants** in rural Lisburn and Castlereagh in housing stress, 14.7% of the total housing stress waiting list

🏠
🌊 **268**

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

It is recognised that there may be rural settlements where demand is low but where land may be available. The Housing Executive will take account of the potential for 'hidden' or 'latent' demand within such areas if and when potential sites are presented. The Housing Executive will also continue to work with rural communities to identify hidden or 'latent' housing need through rural housing needs tests. These rural locations will be determined following the annual review of the Housing Need Assessment and consideration is also given to requests from community representatives.

Need, where it does exist, tends to be for family households rather than single or Cat 1 accommodation.

Wheelchair Housing Need (HNA)

At March 2023, there were 45 housing stress applicants and 23 transfer applicants who require wheelchair accessible accommodation with less than 10 allocations over the previous year. There are 16 units under construction. 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. In general, generic wheelchair units should be for two and three bed units, preferably with at least one ground floor bedroom, and built in line with the space standards included in the Housing Association Guide.

A Shared Future through 'Housing for All'

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

There is currently one new build social housing scheme of 11 units being progressed for potential shared future housing in the area at Hillsborough Road, Lisburn. Other schemes are under consideration.

Irish Traveller accommodation

Need within the Irish Traveller community continues to be monitored in Lisburn and Castlereagh.

Indicative housing mix requirements

In most areas there is sufficient supported Cat 1 older persons accommodation, and any new proposals will need to be carefully considered in the context of balanced communities.

Single and small family applicants comprise 71% of the total waiting list, reflecting the trend towards smaller households across Lisburn and Castlereagh. There were a total of 1,817 applicants in Housing Stress at March 2023.

Where possible, one bed properties, while addressing the immediate requirements under Welfare Reform, should be designed flexibly to cater for household growth. Some four bed properties may be required for larger families, and these should be discussed with Housing Executive.

10% Generic Wheelchair units should be included in all schemes where possible and include a mix of unit types. There is an increase for four bed or more accessible units, and these should be considered in larger schemes.

Accommodation for older persons should be designed flexibly with long term accessibility issues taken into consideration. Own door accommodation is most popular.

Alternative mixes can be considered by Housing Association in relation to specific sites or schemes. However, significant changes from the below mix should be discussed with the Housing Executive to avoid nugatory work.

Table 55: Indicative Housing Mix for Lisburn and Castlereagh

Older Persons **	Families*	Singles**	Wheelchair
10%	65%	25%	10%

* Focus on 2 and 3 bed Family Houses would be welcome.
** mix of one and two bed accommodation.

Areas where need is met

Much of Lisburn and Castlereagh is a popular place to live and this is reflected in the high projected need. There are however a small number of areas where demand of certain house types, such as Cat 1 apartments, is largely met by existing proposals and turnover. These areas will be kept under review. Discussion with Place Shapers will confirm if this is the case on a site by site basis. Proposals of family houses are most in demand throughout the whole Council Area.

Intermediate (Affordable) Demand

The Housing Executive estimates intermediate/affordable housing demand for Lisburn and Castlereagh at approximately 140 units per annum.

Co-Ownership approved 53 applications in 2022/23 for Lisburn and Castlereagh



Average house prices in Northern Ireland increased by 18.7% between 2019 and 2022.

Average house prices in Lisburn and Castlereagh are higher than the Northern Ireland average – local prices increased by 15.8% between 2019 and 2022



Table 56: Average Annual House Prices Lisburn and Castlereagh LGD & NI 2019-2022

Area	2019	2020	2021	2022	% Change 2019-2022
Lisburn and Castlereagh	£191,393	£199,017	£212,508	£221,714	15.8%
Northern Ireland	£169,057	£180,079	£194,233	£200,700	18.7%

Ulster University

Lisburn and Castlereagh Supporting Data

Table 57: Lisburn & Castlereagh Waiting List – March 2023

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	1,081	155	610	43	151	352	2,392
HS Applicants	847	101	479	30	118	242	1,817
Allocations	186	22	105	<10	26	87	-

Table 58: Lisburn / Dunmurry Waiting List – March 2023

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	712	79	351	25	68	166	1,401
HS Applicants	579	59	281	18	54	122	1,113
Allocations	122	11	72	<10	18	57	-

Table 59: Castlereagh Urban Waiting List – March 2023

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	138	41	96	<10	28	68	-
HS Applicants	88	23	66	<10	22	42	-
Allocations	34	<10	13	<10	<10	10	63

Applicants – Housing applicants at March 2023

HS Applicants – Housing stress applicants at March 2023 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2023

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

Mid and East Antrim

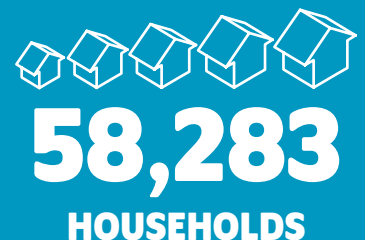
Context

Mid and East Antrim 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 while mostly urban, has a significant rural populace.

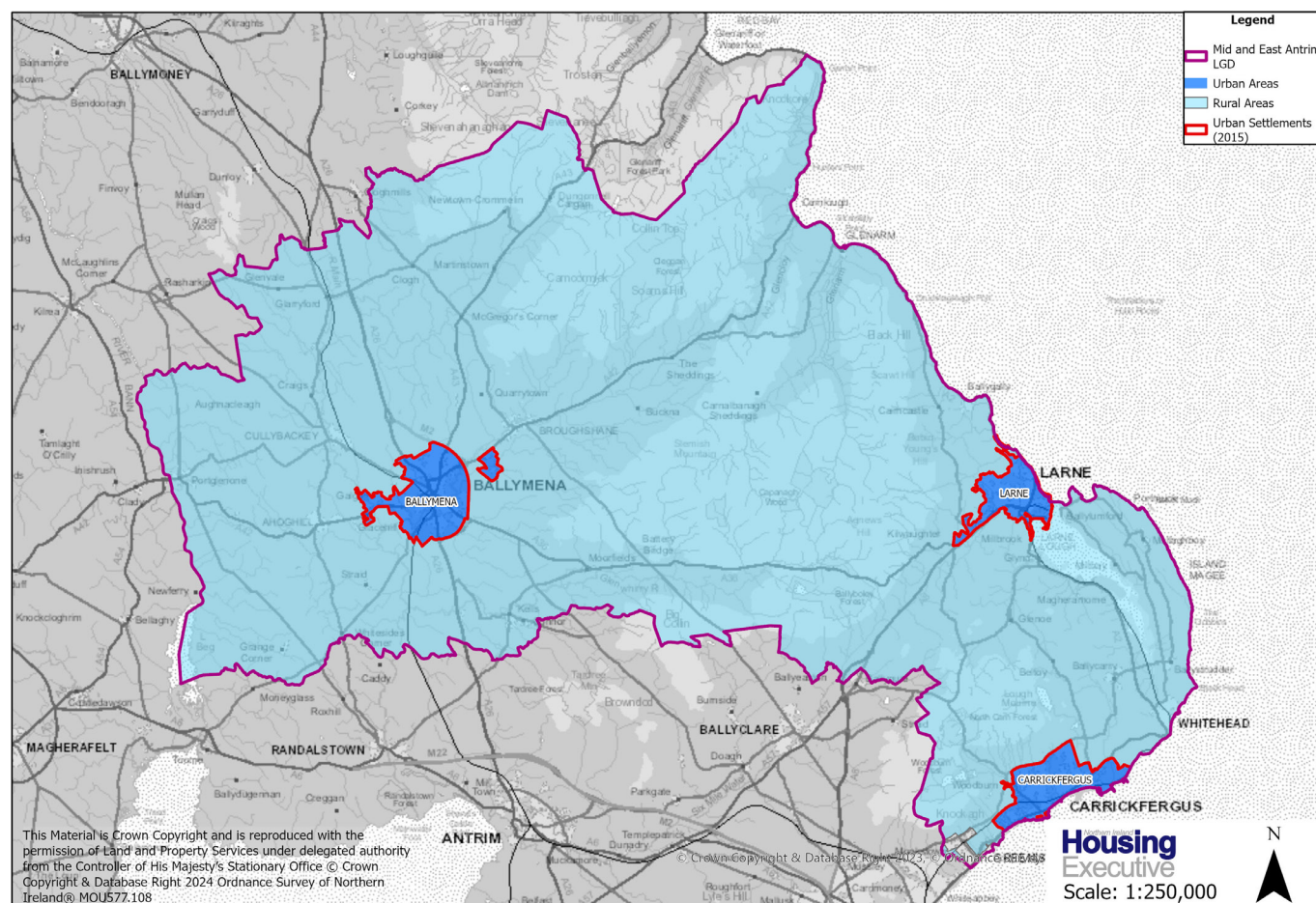
The **population** of Mid and East Antrim Borough was **138,995** at Census day 2021, an increase of 2.7% since the 2011 Census (NISRA)



At 2021 there were **58,283 households** in Mid and East Antrim, which is an **increase of 3,969** households on the 2011 Census figure of 54,314 (NISRA)



Map 11: Mid & East Antrim Urban Settlements and Rural Areas



Housing Market Analysis (across tenures)

Housing & Land Supply

During 2022/23, there were 524 new units started in Mid and East Antrim (Land and Property Services), which is more than the projected new dwelling requirement of 360 per year, estimated by the HGIs 2016-2030.

Land and Property Services (LPS) statistics show that over the 2018/19 to 2022/23 period, **2,658 new dwelling starts** commenced and there were 2,484 new dwelling completions in Mid and East Antrim



There is a projected housing growth indicator **new dwelling requirement** of **5,400** for the period 2016 to 2030. The **overall NI requirement** for the same period is 84,800



Owner Occupied

The owner-occupied sector comprises 69.3% of total occupied stock (NISRA: NI Census 2021).

Ulster University states that the **average house price** in Mid and East Antrim in 2022 was £182,027 which represents an **increase of 11.5%** on the 2021 figure of £163,185. This remains below the Northern Ireland average of £200,700 at the end of March 2022



Demand for intermediate housing aimed at low income households in Mid and East Antrim is estimated at 890 units, 2020-2035 (SHMA)



During 2022, there were 15 repossessions in Mid and East Antrim. This represents a 40% decrease since 2018 when there were 25 repossessions (NI Courts and Tribunals Service).

Adoption of the Mid and East Antrim Local Development Plan in October 2023 will affect house building and social housing provision. Application of Policy HOU 5 (Affordable Housing in Settlements) requires that where a need for affordable housing is established by the Housing Executive, proposals for housing developments of 10 units or more, or on a site of 0.2 hectares or more will only be permitted subject to meeting the following quota – main and small towns 20% affordable housing, villages and small settlements 10% affordable housing. The Housing Executive have the opportunity to add to affordable housing stock via housing gain, however, dedicated social housing developments will still be provided by registered Housing Associations. Any and all developers should review the Department for Communities Housing Association Guide before submitting plans for social housing.

House prices have not risen as sharply in Mid and East Antrim than other areas of the country, however issues with NI waste water in Larne and Carrickfergus have affected potential development. Ballymena, Carrickfergus and Larne have seen increased

social housing programmes in recent years, although many of these sites tend to be town centre, infill apartment sites. Housing need is determined by the waiting list, but a sustainable approach to development is needed to ensure development is balanced toward all household groups. Demolitions of tower blocks in Larne have increased short-term need as allocations tended to be met by tower blocks. Regeneration sites (St Patrick's Barracks, Ballymena, McKeens Avenue, Carrickfergus and Gardenmore House, Larne) in the three main towns are progressing on site, and will provide a mix of housing types in areas with high social housing need and low site availability.

Private Rented

The private rented sector comprises 18.4% of total occupied housing stock in the borough (NISRA: NI Census 2021).

There was a decrease in the number of rental properties let in Mid and East Antrim – 407 to 301 rental properties in H2 2022 and H1 2023 respectively. (Source: Ulster University Performance of the Private Rental Market in Northern Ireland, H1 2023). Additionally, average rents for the Council area were £666 in 2023, up 11% from £600 in 2022.

At March 2023, there were 2,173 private tenants in the borough in receipt of Housing Support Benefits. This is a reduction from the March 2022 figure of 2,471.

DfC's **Landlord Registration Scheme** identified 6,348 properties registered by 3,417 landlords for Mid and East Antrim at March 2023

6,348 
PROPERTIES REGISTERED

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 the licensing of HMOs.

Social Rented Housing Sector

The social rented sector comprises 12.3% of total housing stock in the borough (NISRA: NI Census 2021).

At March 2023, there were **5,632 Housing Executive owned properties** in Mid and East Antrim, with 10,149 Housing Executive properties sold since the introduction of the House Sales Scheme

5,632
HOUSING EXECUTIVE
PROPERTIES 

At March 2023, there were 2,692 Housing Executive and 1,317 housing association tenants in receipt of Housing Benefit. There were 2,270 Housing Executive tenants receiving the Housing Cost element of Universal Credit at this date. The number of tenants in receipt of Housing Costs via Universal Credit has increased year-on-year as the rollout of Universal Credit continues. Similarly, the number of applicants in receipt of Housing Benefit has decreased year-on-year as Universal Credit replaces the former Housing Benefit scheme.

There were 60 new social homes completed in year to March 2023, and 473 on-site. A further 154 units are programmed to start over the next three years.

At March 2023, there were 2,959 applicants on the waiting list for Mid and East Antrim, 2,076 of whom were in housing stress with approximately 460 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
- Irish Traveller accommodation requirements

General Housing Need (Urban & Rural)

Urban

The Strategic Guidelines target share established for Mid and East Antrim indicates 1.9% urban units (108) and 5.7% rural units (48) of the overall three year programme across Northern Ireland. Five year projected need for the area as a whole is 863 and the projected need for individual settlements is detailed in the table below.

Table 60: Projected (5-Year) Social Housing Need 2023-28

Settlement	Housing Need Assessment Area*	Total 5 Year Projection
Ballymena Town	Ballymena Town	305
Carrickfergus Town	Carrickfergus Town	145
Larne Town	Larne Town	106
Whitehead	Whitehead	46
Ahoghill	Ahoghill	10
Broughshane	Broughshane	73
Kells	Kells	14
Carnlough	Carnlough	22
Portglenone	Portglenone	26
Cullybackey	Cullybackey	42
Glenravel	Glenravel	12
Greenisland	Greenisland	40
Remaining Settlements (need <10**)		22
Total		863

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

** Remaining settlements include Clough, Glynn, Glenarm, Islandmagee, Magheramourne and Ballycarry 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 demand has increased since 2022 but with a more robust social housing programme, projected housing need has mostly decreased across Mid and East Antrim. Singles represent 41% of the waiting list, with families (both large and small) representing 31% of the total waiting list. Housing Associations should base any future housing proposals on both these household groups across the Council area.

The projected housing need for Larne increased approximately 41% over the previous year (75 in 2022 to 106 in 2023), indicating insufficient programme delivery. At 31st March 2023, there were 23 units on site, with 34 units programmed. Larne is approaching Cat 1 capacity; schemes will be determined on an individual basis. Larne is still affected by the NI Water waste water treatment capacity issues and new developments are increasingly rare.

The housing need in Broughshane increased approximately 40% compared to the 2022 projected need (54 in 2022 and 76 in 2023); there are no forthcoming schemes, with just one Cat 1 scheme completing in recent years. Singles and elderly represent over 60% of the waiting list (29 single households and 39 elderly households), although there is a growing demand for small families. Proposals for schemes in Broughshane are particularly welcome.

Due to a high number of units programmed in concentrated areas, new proposals for Carrickfergus and Ballymena will be assessed on a case-by-case basis. Programmed schemes and relets will continue to meet the Cat 1 need for all three towns (Ballymena, Carrickfergus and Larne); no further Cat 1 schemes will be supported until programmed schemes have completed and been allocated.

Two Site Identification Studies have been prepared for Carnlough and Glynn. The results of these studies are expected in late 2023/early 2024. A Site Identification Study for Islandmagee is currently being prepared.

Mid and East Antrim Council's Development Plan Strategy includes the application of HOU 5, Affordable Housing. Where a need for Affordable Housing is established by the Housing Executive or other relevant housing authority through a Housing Needs Assessment, proposals for housing developments of 10 dwellings or more, or on a site 0.2 hectares or more, will only be permitted subject to providing a proportion of affordable housing (10-20%, dependent on settlement size and subject to viability).

Rural

The provision of new social housing in rural settlements represents a strategic priority for delivery of the Social Housing Development Programme (SHDP). For 2024/25, the Strategic Guidelines rural target share of the overall SHDP for Northern Ireland is 13.1%, or 261 units. Of these, Mid and East Antrim Council area is assigned 15 units.

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.

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.

Based on the waiting list for social housing at March 2023, **5 year projected housing** need for rural areas (2023-28) within Mid and East Antrim is 277 units

277 UNITS


At March 2023, there were **447 applicants** in rural Mid and East Antrim in housing stress, 22% of the total housing stress waiting list

 **447**

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

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.

Wheelchair Housing Need (HNA)

At March 2023, there were 33 housing stress applicants and 20 housing stress transfer applicants who require wheelchair accessible accommodation with 12 allocations over the previous year. This leaves a requirement for 44 units. Need has been identified throughout the borough.

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

A Shared Future through 'Housing for All'

The Housing Executive actively encourages mixed tenure housing for all. 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. This is part of a larger redevelopment project in Doury Road, Ballymena.

Irish Traveller accommodation

Need within the Irish Traveller community continues to be monitored in Mid and East Antrim.

Indicative housing mix requirements

Housing developments should continue to provide single, and a range of family accommodation as outlined in previous Commissioning Prospectus. The elderly housing need has been met in the three main towns, and any proposed elderly housing development will be assessed individually against the needs of the particular settlement. No new elderly housing developments will be supported for Ballymena, Carrickfergus or Larne at this time.

Ballymena and Carrickfergus both have a large number of singles on the waiting list. The Housing Executive have approved and committed to several one-bedroom apartment schemes in the town centres of both towns. We will continue to monitor the waiting lists, however, future town centre development should contain a mix of house types and sizes to avoid overdevelopment of any particular housing type. Developments are required to include 10% wheelchair accessible units and there may be a requirement for accommodation for persons with complex needs. These should be discussed with the Housing Executive.

Table 61: Indicative Housing Mix for Mid and East Antrim

Older Persons	Families*	Singles	Wheelchair
20%	39%	41%	10%

* Focus on: Small Family Households

Areas where need is met

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

Ballymena town centre and Carrickfergus central both have programmed and completed a number of one-bedroom apartment schemes. While there is single need in both towns, a high concentration of schemes have been registered in a small area. Future schemes should be future proofed with a number of transferrable house types (e.g. two bedroom flats) to ensure long-term sustainability.

A number of buybacks of Housing Executive stock have been proposed for the Sunnylands area of Carrickfergus. This will increase the number of social units held in a popular, heavily developed area. It is hoped that the acquisition and improvements to former stock will help meet local housing demand before committing to new development sites.

Intermediate (Affordable) Demand

The Housing Executive estimates intermediate/affordable housing demand for Mid and East Antrim at approximately 60 units per annum.

Co-Ownership approved 56
applications in 2022/23 for
Mid and East Antrim



Average house prices in Northern Ireland increased by 18.7% between 2019 and 2022.

Average house prices in Mid and East Antrim are lower than the Northern Ireland average – local prices increased by 32.9% between 2019 and 2022



Table 62: Average Annual House Prices Mid and East Antrim LGD & NI 2019-2022

Area	2019	2020	2021	2022	% Change 2019-2022
Mid and East Antrim	£136,997	£158,168	£163,185	£182,027	32.9%
Northern Ireland	£169,057	£180,079	£194,233	£200,700	18.7%

Ulster University

Mid and East Antrim Supporting Data

Table 63: Mid and East Antrim Waiting List – March 2023

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	1,202	146	723	93	186	609	2,959
HS Applicants	869	98	524	58	130	397	2,076
Allocations	223	19	78	<10	28	111	-

Table 64: Ballymena Town Waiting List – March 2023

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	441	40	255	34	59	147	976
HS Applicants	336	28	185	23	34	101	707
Allocations	114	10	26	<10	13	27	-

Table 65: Carrickfergus Town Waiting List – March 2023

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	271	49	217	27	45	194	803
HS Applicants	191	33	166	18	38	120	566
Allocations	39	<10	21	<10	0	25	88

Table 66: Larne Town Waiting List – March 2023

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	176	21	80	13	30	96	416
HS Applicants	120	13	54	<10	21	67	-
Allocations	24	<10	<10	0	<10	15	53

Applicants – Housing applicants at March 2023

HS Applicants – Housing stress applicants at March 2023 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2023

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

Mid Ulster

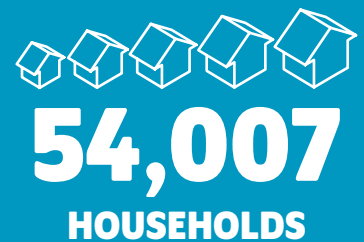
Context

The Mid Ulster District Council area covers an area extending to 1,714 Km² from Swatragh and Bellaghy in the north to Fivemiletown, Aughnacloy and Moy in the South. One third of the population lives in urban areas while two thirds inhabit rural areas. The principal towns within the district are Cookstown, Coalisland, Dungannon, Magherafelt and Maghera.

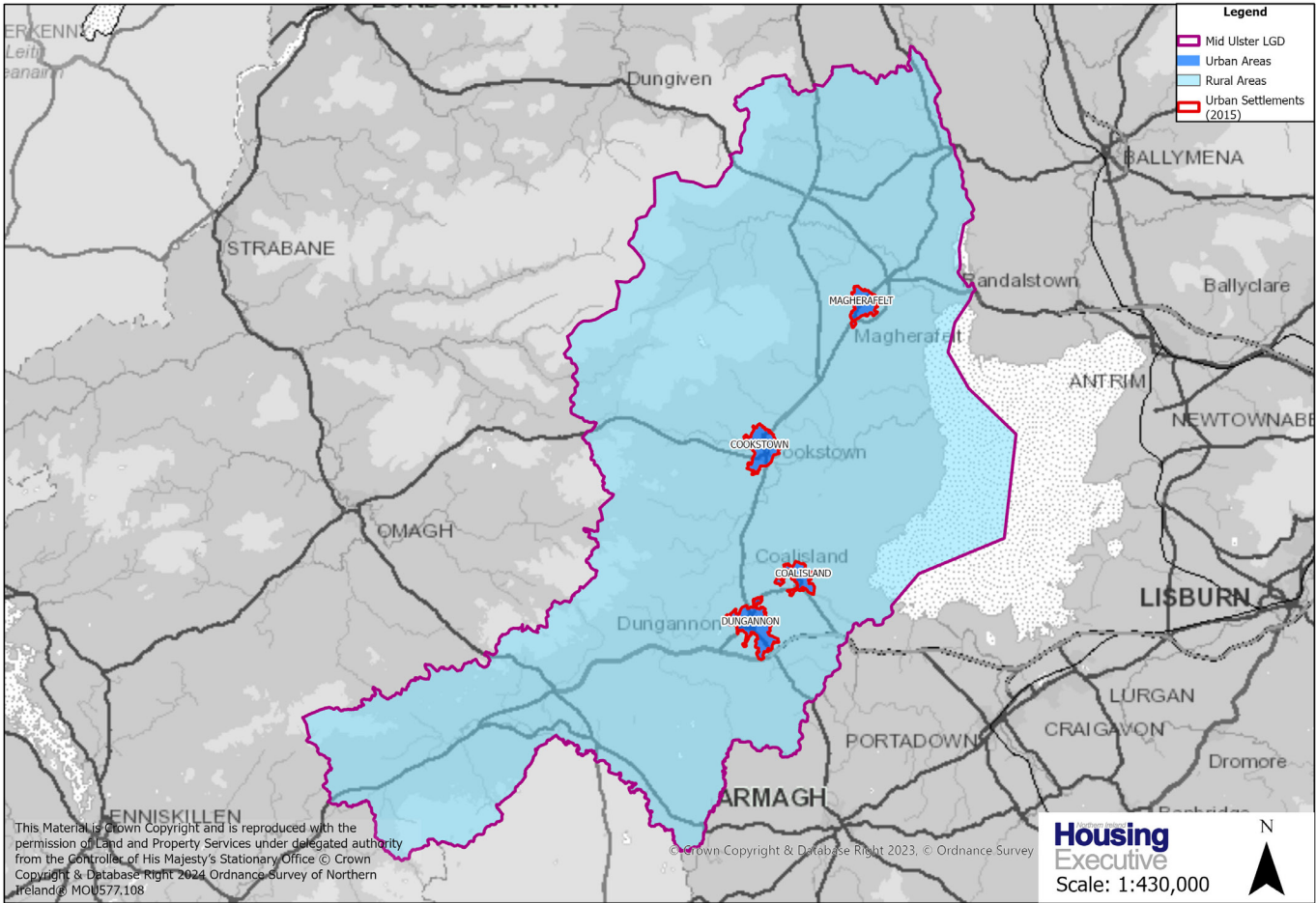
The **population** of Mid Ulster District was **150,282** at Census day 2021, an increase of 8.4% since the 2011 Census (NISRA)



At 2021 there were **54,007 households** in Mid Ulster, which is an **increase of 6,235** households on the 2011 Census figure of 47,772 (NISRA)



Map 12: Mid Ulster Urban Settlements and Rural Areas



Housing Market Analysis (across tenures)

Housing & Land Supply

During 2022/23, there were 467 new units started in Mid Ulster (Land and Property Services), which is less than the projected new dwelling requirement of 687 per year as estimated by the HGIs 2016-2030.

Land and Property Services (LPS) statistics show that over the 2018/19 to 2022/23 period, **3,269 new dwelling starts** commenced and there were 3,203 new dwelling completions in Mid Ulster



There is a projected housing growth indicator **new dwelling requirement** of **10,300** for the period 2016 to 2030. The **overall NI requirement** for the same period is 84,800



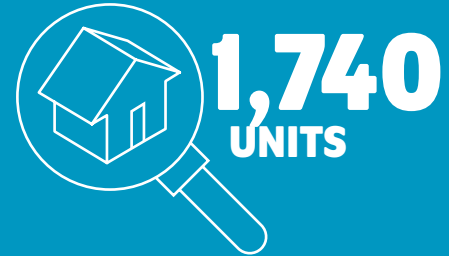
Owner Occupied

The sector comprises 69% of total occupied stock (NISRA: NI Census 2021).

Ulster University states that the **average house price** in Mid Ulster, 2022, was £181,208 which represents a **decrease of 1%** on 2021 figure. This remains below the Northern Ireland average of £200,700



Demand for intermediate housing aimed at low income households in Mid Ulster is estimated at 1,740 units, 2020-2035 (SHMA)



During 2022, there were 18 repossessions in Mid Ulster. This represents a significant increase from two in 2021 (NI Courts and Tribunals Service).

Considering the Ulster University House Price Index Q3 2023, price change statistics quarterly change from Q2 2023 into Q3 2023, seven of the eleven local government districts exhibit price increases over the quarter, Mid Ulster prices grew by 3.4% .

The number of house sales in Mid Ulster has increased from 720 in 2012 to 1,407 in 2019 before decreasing to 1,138 in 2020 due to the impact of the COVID-19 pandemic. In 2021 there was a significant recovery in sales peaking at 1,548 before adjusting downwards to 1,312 in 2022 (LPS).

Popular locations in the district include the urban centres of Dungannon, Cookstown and Magherafelt.

Private Rented

The private rented sector comprises 22% of total occupied housing stock in the district (NISRA: NI Census 2021).

Rented accommodation is now the accommodation of choice for many households, especially younger households on lower incomes who in previous decades would have become first time buyers.

During the first half of 2023, there were 283 lettings in Mid Ulster District, 9.0% of the 3,150 lettings across Local Government Districts (outside Belfast) (Performance of the Private Rental Market H1 2023 - Ulster University).

The overall average rent in the district in H1 2023 was £639 per month, an increase of £12 from £627 in H2 2022. The average rent remains well below the Northern Ireland average of £817 per month in H1 2023. (Performance of the Private Rental Market H1 2023).

Housing Benefit plays a vital role in supporting the private rented sector. At March 2023, there were 2,229 private tenants in receipt of Housing Support Benefits in the district, a 16.7% decrease on the comparable 2022 position. A key factor in this reduction is the introduction of Universal Credit.

DfC's **Landlord Registration Scheme** identified 4,214 properties registered by 2,980 landlords for Mid Ulster at March 2023

4,214 
PROPERTIES REGISTERED

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 social rented sector comprises 9% of total housing stock in the district (NISRA: NI Census 2021).

At March 2023, there were **3,835 Housing Executive owned properties** in Mid Ulster, with 7,833 Housing Executive properties sold since the introduction of the House Sales Scheme

3,835 
HOUSING EXECUTIVE
PROPERTIES

At March 2023, there were 2,075 Housing Executive and 773 housing association tenants in receipt of Housing Benefit. There were 1,154 Housing Executive tenants receiving the Housing Cost element of Universal Credit at this date.

There were 15 new social homes completed in year to March 2023, and 164 on-site. A further 137 units are programmed to start over the next three years.

At March 2023, there were 2,212 applicants on the waiting list for Mid Ulster, 1,380 of whom were in housing stress with over 270 allocations made during 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
- Irish Traveller accommodation requirements

General Housing Need (Urban & Rural)

Urban

The Strategic Guidelines target share established for Mid Ulster indicates 3.1% urban units and 6.4% rural units of the overall three year programme. Five year projected need for the area as a whole is 912 and the projected need for individual settlements is detailed in the table below.

Table 67: Projected (5-Year) Social Housing Need 2023-28

Settlement	Housing Need Assessment Area	Social Housing Need 2023-28
Cookstown	Cookstown North	46
	Cookstown South	126
Dungannon	Dungannon 1	266
	Dungannon 2	28
Magherafelt	Magherafelt	127
Coalisland	Coalisland	92
Maghera	Maghera	35
Ardboe / Moortown / Ballinderry*	Ardboe / Moortown / Ballinderry*	11
Ballygawley	Ballygawley	12
Bellaghy	Bellaghy	10
Castledawson	Castledawson	27
Donaghmore	Donaghmore	12
Draperstown	Draperstown	17

Tables continues

Settlement	Housing Need Assessment Area	Social Housing Need 2023-28
Moy	Moy	36
Stewartstown	Stewartstown	10
Swatragh	Swatragh	10
Remaining Settlements (less than <10)**		47
Total		912

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

** Remaining settlements include Moygashel, Augher, Aughnacloy, Ballyronan, Benburb, Castlecaulfield, Coagh / Lisnahull, Fivemiletown, Gulladuff, Killyman/Laghey, Lissan / Dunamore, Moneymore, Mountjoy, Newmills, Pomeroy and Tobermore/ Ballinahone, Desertmartin / Longfield* where each settlement is less than 10.

Housing need has currently been met in Ackinduff/ Sheer's Place*, Ballymaguigan, Bush, Caledon, Cappagh, Clogher, Cookstown Rural Cottages, Granville / Brantry*, Innishrush, Knockloughrim, Loup, Magherafelt Rural, Sandholes, The Rock, Tullyhogue and Upperlands. These areas will be kept under annual review.

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 2013 and 2023. Need is concentrated mainly in urban areas including the west of Dungannon town, Magherafelt, Cookstown South and Coalisland.

Dungannon 1 Housing Need Assessment area (HNA) lies to the western side of the town and 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 two bedroom houses for small families.

The Housing Executive is working in partnership with Mid Ulster Community Planning team in finalising the Place Shaping Plan for Dungannon town centre. The purpose of the plan is to examine the housing issues which have been experienced across the town, to identify opportunities for development of quality, affordable and sustainable housing which will address identified need and contribute to the wider regeneration of the town centre. It is anticipated that once finalised, the Plan will provide a material consideration for the identification of suitable sites for social and affordable housing schemes which will compliment the character and building forms of the historic market town. We remain unable to support apartment proposals within Dungannon town centre until the plan is ratified.

There is a high housing need in Coalisland, and we would welcome any proposals for the town. The optimum housing mix requires a high percentage of small unit accommodation (one and two bed apartments / houses), to reflect the high demand shown by those household groupings on the waiting list. There is also a very strong demand for generic wheelchair bungalow accommodation for complex needs in the town. Demand for larger unit accommodation in Coalisland, three bedroom and above, is much lower than in other towns throughout the district.

Within Magherafelt, the Leckagh area of the town should be excluded because of letting difficulties. The demand in Magherafelt is for two and three bedroom general needs houses. We have no requirement for additional apartment accommodation, above what has already been provided with support, at this time.

Cookstown North HNA lies north of Fairhill Road and Molesworth Street within the town boundary, Cookstown South HNA lies to the south. Within Cookstown South HNA there is the potential for 'Housing for All' and the sourcing of sites for this purpose would be welcomed. The demand in Cookstown South HNA is for two and three bedroom houses for families with no further requirement for apartment accommodation at this time.

The development of mixed tenure schemes would be welcomed and encouraged in Mid Ulster.

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 one and two bedroom design forms with emphasis on accessibility. Where possible dwellings should be designed flexibly to cater for potential household growth. Where possible the provision of independent access for one bedroom units is preferred to limit possible issues with anti-social behaviour and to make the units more attractive to potential applicants. Some four bed properties may be required for families, and these should be discussed with the Housing Executive.

Increasingly we are being asked to source housing for larger families, five bedrooms plus both with and without complex needs. In such instances, where this need is identified, consideration should be given to the provision of such dwellings. The Housing Executive will work with Housing Associations to address concerns over future use at an early stage.

Rural

The provision of new social housing in rural settlements represents a strategic priority for delivery of the Social Housing Development Programme (SHDP). For 2024/25, the Strategic Guidelines rural target share of the overall SHDP for Northern Ireland is 13.1%, or 261 units. Of these, Mid Ulster District Council area is assigned 17 units.

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.

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.

Based on the waiting list for social housing at March 2023, **5 year projected housing need** for rural areas (2023-28) within Mid Ulster is 221 units

221 UNITS
🏠🏠🏠🏠🏠🏠🏠

Taking account of new build schemes on the current SHDP, the residual housing need is focused mainly in the settlements of Ardboe / Moortown / Ballinderry, Ballygawley, Bellaghy, Castledawson, Donaghmore, Draperstown, Moy, Stewartstown and Swatragh.

Remaining settlements include: Moygashel, Augher, Aughnacloy, Ballyronan, Benburb, Castlecaulfield, Fivemiletown, Gulladuff, Killyman/Laghey, Lissan / Dunamore, Moneyneeny, Mountjoy, Newmills, Pomeroy and Tobermore/ Ballinahone, Desertmartin / Longfield where need in each settlement is less than 10. Proposals for social housing in these locations will be welcomed and given due consideration.

Housing need has currently been met in Ackinduff/ Sheer's Place*, Ballymaguigan, Bush, Caledon, Cappagh, Clogher, Cookstown Rural Cottages, Granville / Brantry*, Innishrush, Knockloughrim, Loup, Magherafelt Rural, Sandholes, The Rock, Tullyhogue and Upperlands. These areas will be kept under annual review.

During 2022/23, a Rural Housing Needs test took place in Draperstown with a reasonable level of interest received. This resulted in a small number of applicants in housing stress being added to the waiting list for the area. Moneyneeny was not the subject of a test during the past year because of the settlement's proximity to Draperstown.

Place Shaping has been working in partnership with Apex Housing Association on the progression of the Coalisland and Donaghmore Site Identification Studies (SIS) during 2022/23. The Loup, Clady / Innishrush / Portglenone, Lissan and Moneyneeny SIS's have been reprogrammed.

Within the rural areas showing a positive projection the housing type required in the majority of cases is two bedroom houses. There is no need for apartment accommodation unless indicated by Place Shaping South.

At March 2023, there were **384 applicants** in rural Mid Ulster in housing stress, 28% of the total housing stress waiting list for the district



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

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

There are a number of complex needs applicants in rural settlements who require generic wheelchair bungalow accommodation. In these areas, where a site is identified, it would be appreciated if a unit of this type could be factored into the housing mix, if viable.

Wheelchair Housing Need (HNA)

At March 2023, there were 13 housing stress applicants and 15 transfer applicants who require wheelchair accessible accommodation with 11 allocations over the previous year. This leaves a requirement for 17 units. Need has been identified throughout the district.

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 the space standards included in the Housing Association Guide.

A Shared Future through 'Housing for All'

The Housing Executive actively encourages mixed tenure housing for all. 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 ‘Housing for All’ at Killymeal Road (Sycamore Drive) Phase 2, Dungannon (Apex HA). Recently completed schemes in Mid Ulster include:

- Mullaghmore Road, Dungannon (Choice HA)
- Molesworth Plaza, Cookstown (Clanmil HA)
- Killymeal Road (Sycamore Drive), Dungannon Phase 1 (Apex HA).

Irish Traveller accommodation

A scheme to upgrade the 16 amenity units at the Housing Executive Irish Traveller serviced site at An Tearmann, Coalisland is due to commence. A full review of the site is scheduled to commence upon completion of the scheme. The Housing Executive are seeking to develop a new site in Mid Ulster District Council area after identifying a need for two additional pitches.

Indicative housing mix requirements

At March 2023 there were 384 applicants in rural Mid Ulster in housing stress (28% of the total waiting list for the district). 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.

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

Table 68: Indicative Housing Mix for Mid Ulster

Older Persons	Families*	Singles	Wheelchair
10%	20%	70%	10%

** Focus on: Small Family Households*

Intermediate (Affordable) Demand

The Housing Executive estimates intermediate/affordable housing demand for Mid Ulster at approximately 120 units per annum.

Average house prices in Northern Ireland increased by 18.7% between 2019 and 2022.

Average house prices in Mid Ulster are lower than the Northern Ireland average – local prices increased by 15.5% between 2019 and 2022



15.5%

Co-Ownership approved 50 applications in 2022/23 for Mid Ulster



50
APPLICATIONS APPROVED

Table 69: Average Annual House Prices Mid Ulster LGD & NI 2019-2022

Area	2019	2020	2021	2022	% Change 2019-2022
Mid Ulster	£156,879	£164,016	£183,074	£181,208	15.5%
Northern Ireland	£169,057	£180,079	£194,233	£200,700	18.7%

Ulster University

Mid Ulster Supporting Data

Table 70: Mid Ulster Waiting List – March 2023

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	855	142	648	82	224	261	2,212
HS Applicants	557	82	392	53	141	155	1,380
Allocations	116	11	76	<10	22	41	-

Table 71: Dungannon 1 Waiting List – March 2023

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	197	47	209	31	87	40	611
HS Applicants	135	26	122	21	52	28	384
Allocations	15	<10	18	0	<10	<10	39

Table 72: Magherafelt Waiting List – March 2023

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	112	21	77	10	31	40	291
HS Applicants	80	12	53	<10	22	17	-
Allocations	12	0	<10	0	<10	<10	22

Table 73: Coalisland Waiting List – March 2023

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	76	<10	61	<10	14	11	175
HS Applicants	52	<10	43	<10	<10	10	124
Allocations	11	<10	<10	0	<10	<10	26

Table 74: Cookstown South Waiting List – March 2023

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	97	16	78	<10	26	33	-
HS Applicants	66	<10	45	<10	19	21	167
Allocations	<10	0	<10	0	<10	0	<10

Applicants – Housing applicants at March 2023

HS Applicants – Housing stress applicants at March 2023 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2023

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

Newry, Mourne and Down

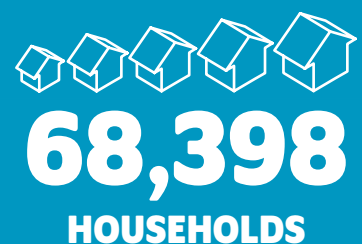
Context

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.

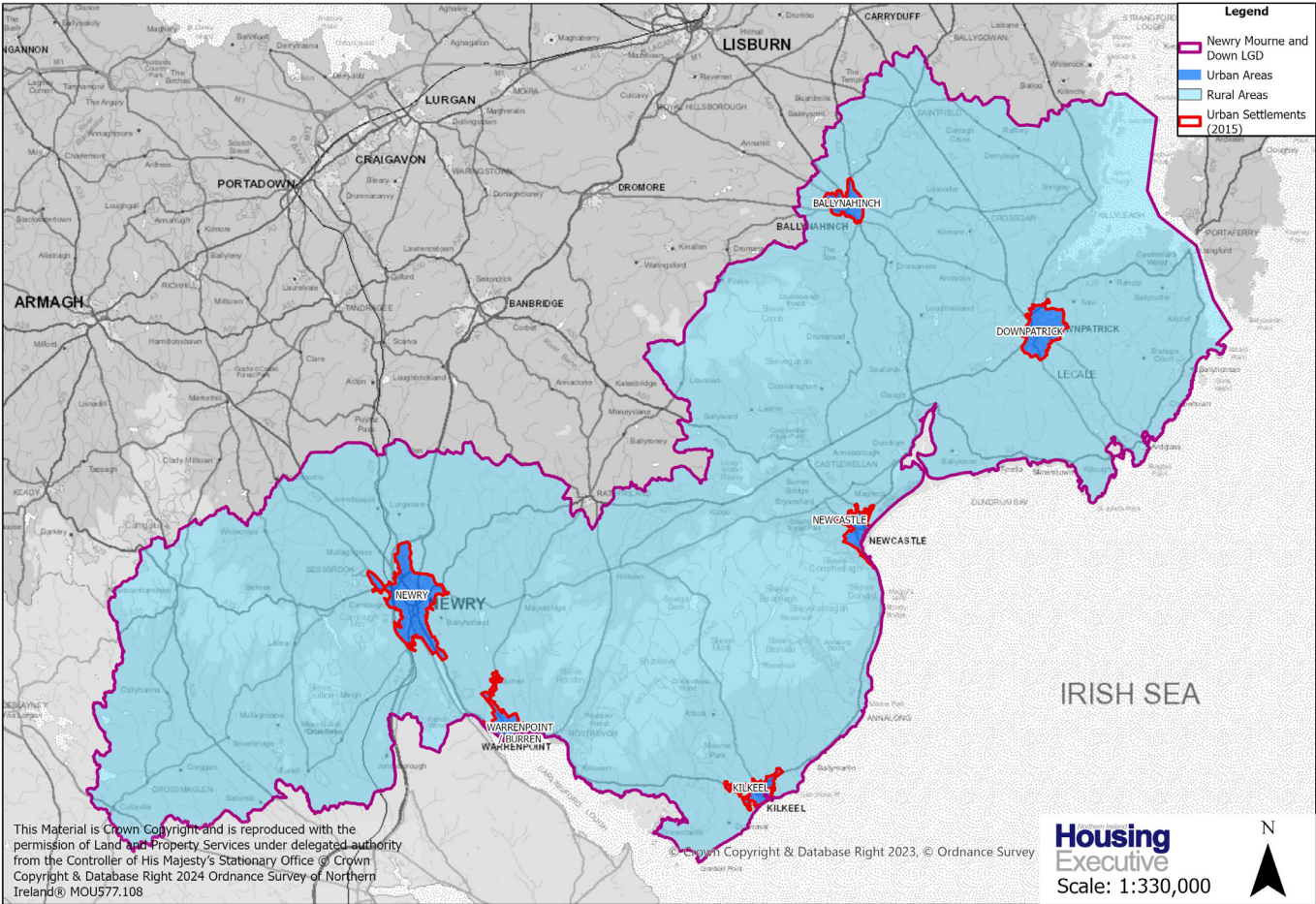
The **population** of Newry, Mourne and Down District was **182,068** at Census day 2021, an increase of 6.1% since the 2011 Census (NISRA)



At 2021 there were **68,398 households** in Newry, Mourne and Down, which is an **increase of 6,400** households on the 2011 Census figure of 61,998 (NISRA)



Map 13: Newry, Mourne & Down Urban Settlements and Rural Areas



Housing Market Analysis (across tenures)

Housing & Land Supply

During 2022/23, there were 602 new units started in Newry, Mourne and Down (Land and Property Services), which is less than the projected new dwelling requirement of 667 per year as estimated by the HGIs 2016-2030.

Land and Property Services (LPS) statistics show that over the 2018/19 to 2022/23 period, **3,822 new dwelling starts** commenced and there were 3,353 new dwelling completions in Newry, Mourne and Down



There is a projected housing growth indicator **new dwelling requirement** of **10,000** for the period 2016 to 2030. The **overall NI requirement** for the same period is 84,800



Owner Occupied

The sector comprises 68.7% of total occupied stock (NISRA: NI Census 2021).

Ulster University states that the **average house price** in Newry, Mourne and Down, 2022, was £210,277 which represents an **increase of 9.3%** on the 2021 figure. This remains above the Northern Ireland average of £200,700



Demand for intermediate housing aimed at low income households in Newry, Mourne and Down is estimated at 1,570 units, 2020-2035 (SHMA)



During 2022, there were 16 repossessions in Newry, Mourne and Down. This represents an increase from five in 2021 (NI Courts and Tribunals Service).

Considering the Ulster University House Price Index Q3 2023, price change statistics quarterly change from Q2 2023 into Q3 2023, seven of the eleven local government districts exhibit price increases over the quarter. Newry, Mourne and Down was one of these local government districts showing an increase, at 3.1%. House prices in the district remain above the Northern Ireland average.

The number of house sales in Newry, Mourne and Down had been on an upward trend increasing from 920 in 2012 to 2,090 in 2021 before decreasing slightly to 1,872 during 2022 (LPS).

Popular locations include Newry City, Newcastle, Downpatrick, Warrenpoint, Castlewellan and Bessbrook.

Private Rented

The private rented sector comprises 20.5% of total occupied housing stock in the district (NISRA: NI Census 2021).

Rented accommodation is now the accommodation of choice for many households, especially younger households on lower incomes who in previous decades would have become first time buyers.

During the first half of 2023, there were 171 lettings in Newry, Mourne and Down District, 5.4% of the 3,150 lettings across Local Government Districts (outside Belfast) in this period (Performance of the Private Rental Market H1 2023 - Ulster University).

The overall average rent in the district in H1 2023 was £765 per month, an increase of £36 on H2 2022 and below the Northern Ireland average of £817 per month (Performance of the Private Rental Market H1 2023).

Housing Benefit plays a vital role in supporting the private rented sector. At March 2023, there were 3,435 private tenants in receipt of Housing Support Benefits in the borough, a 12.9% decrease on the comparable 2022 position. A key factor in this reduction is the introduction of Universal Credit.

DfC's **Landlord Registration Scheme** identified 5,209 properties registered by 3,845 landlords for Newry, Mourne and Down at March 2023

5,209 
PROPERTIES REGISTERED

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 social rented sector comprises 10.8% of total housing stock in the district (NISRA: NI Census 2021).

At March 2023, there were **5,197 Housing Executive owned properties** in Newry, Mourne and Down, with 12,384 Housing Executive properties sold since the introduction of the House Sales Scheme

5,197
HOUSING EXECUTIVE
PROPERTIES



At March 2023, there were 2,981 Housing Executive and 1,517 housing association tenants in receipt of Housing Benefit. There were 1,636 Housing Executive tenants receiving the Housing Cost element of Universal Credit at this date.

There were 51 new social homes completed in year to March 2023, and 631 on-site. A further 237 units are programmed to start over the next three years.

At March 2023, there were 3,885 applicants on the waiting list for Newry, Mourne and Down, 3,133 of whom were in housing stress with over 340 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
- Irish Traveller accommodation requirements

General Housing Need (Urban & Rural)

Urban

The Strategic Guidelines target share established for Newry, Mourne and Down indicates 7.2% urban units and 38.4% rural units of the overall three year programme. Five year projected need for the area as a whole is 2,234 and the projected need for individual settlements is detailed in the table below.

Table 75: Projected (5-Year) Social Housing Need 2023-28

Settlement	Housing Need Assessment Area	Total 5 Year Projection
Newry City	Newry City	508
Downpatrick	Downpatrick	222
Annalong / Longstone / Glassdrumman*	Annalong / Longstone / Glassdrumman*	18
Ardglass	Ardglass	38
Ballynahinch	Ballynahinch	95
Bessbrook / Derramore*	Bessbrook / Derramore*	100
Camlough	Camlough	26
Castlewellan	Castlewellan	115
Crossgar	Crossgar	64
Crossmaglen	Crossmaglen	63
Culloville	Culloville	13
Drumaness	Drumaness	18
Dundrum / Seaforde / Clough*	Dundrum / Seaforde / Clough*	33
Forkhill	Forkhill	19
Hilltown	Hilltown	40

Tables continues

Settlement	Housing Need Assessment Area	Total 5 Year Projection
Kilkeel	Kilkeel	78
Killough	Killough	16
Killyleagh	Killyleagh	44
Mayobridge	Mayobridge	14
Meigh	Meigh	24
Mullaghbawn	Mullaghbawn	12
Newcastle	Newcastle	244
Newtowncloghogue	Newtowncloghogue	22
Rostrevor	Rostrevor	44
Saintfield	Saintfield	58
Strangford	Strangford	22
The Commons / Ballyholland*	The Commons / Ballyholland*	14
Warrenpoint	Warrenpoint	211
Remaining Settlements (need <10)**		59
Total	Newry, Mourne and Down Total Social New Build Requirement	2,234

*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, Ballyward, Belleek, Burren, Cullyhanna, Drumintee, Granite View, Jonesborough, Kilcoo, Killeen, Kilmore (including Loughinisland), Lurganare / Barnmeen*, Newtownhamilton, Shrigley, Silverbridge, Spa and Whitecross where need in each settlement is less than 10.

Housing need has currently been met in Annsborough, Attical, Ballyrone, Burrenbridge, Creggan and Mullaghglass. These areas will be kept under annual review.

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 2013 and 2023. Need is concentrated in the main urban settlements and some of the larger rural areas.

Following Housing Conferences in 2019 and 2021, a Housing Action Plan was developed for the district, which focuses on addressing the key housing issues identified by stakeholders. During 2022/23, the Housing Needs Working Group carried out a review of the progress of each of the 12 actions and have drafted an updated plan which will detail achievements to date, highlight emerging issues and

identify new actions and priorities. This plan due to be published and launched during 2023/24, will discuss issues such as promoting town/city living, addressing housing need in rural areas, targeting homelessness, and ensuring appropriate provision of those with complex housing requirements.

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. Contact should be made with Place Shaping upon identification of a site within this HNA area. The housing need is predominately for small family accommodation, two bedroom houses and generic bungalow accommodation for complex needs. Please note bungalow accommodation in new build schemes can only be supported in instances where the local council has made this a stipulation within the Planning Application or where the dwelling is being built for a nominated complex needs applicant.

Housing Associations should also be aware that the need for apartment accommodation has been met in the City at this time. We will only be able to consider further apartment proposals should a previously supported proposal fail to progress and where existing units are at full occupancy. There is also no requirement for additional Cat 1 accommodation in the City at this time.

We welcome and encourage the development of mixed tenure schemes in the City. 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.

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.

We particularly welcome proposals for the towns and larger villages throughout the district, chiefly, Newcastle, Downpatrick, Warrenpoint, Castlewellan, Bessbrook, Ballynahinch, Saintfield and Rostrevor. The preference is for sites that can provide houses and / or complex needs accommodation.

There is a requirement for generic wheelchair and bespoke (bungalow) units for complex needs in Newry City and throughout the district. Proposed schemes should include the provision of generic units within the housing mix (DfC target 10%) unless financially unviable. Housing Associations should be aware that the majority of remaining need is now for generic bungalow accommodation of varying sizes, with wheelchair apartments and houses ruled out by the clients OT's. The Housing Support Officer will provide all relevant information regarding specific requirements.

Future housing mix in new build developments will need to cater for small families in particular, and wheelchair / complex needs households along with any potential changes associated with Welfare Reform. In settlements where apartment accommodation is required, it would be preferred if the units offered independent access, particularly one bedroom units. This will assist with housing management

and make the accommodation more attractive to prospective tenants. Increasingly, we are faced with families who require very large properties, five bedroom and above, to meet their housing needs. A number of these applicants also have complex needs which need to be taken into consideration. The majority of these applicants have also taken on legal representation, are the subject of judicial reviews and have the support of local representatives. Any proposals that are able to include larger dwellings within the overall housing mix would be welcomed, where the need has been identified.

Throughout the district, the need for older person accommodation has largely been met. The limited remaining need is within areas where Housing Associations experience difficulty in securing social housing of any kind. Design solutions that make apartment accommodation more attractive to older person applicants (HAPPI) are also welcomed, in particular independent access, gardens and no communal areas.

Site Identification Studies (SIS) have been completed for Bessbrook, Forkhill, Rostrevor and Warrenpoint over the past year and passed to Housing Associations for action. Desktop SIS were also completed for Ballymartin, Clough Killeen and Spa during 2022/23. A SIS List containing Registered Housing Associations areas of interest and rank by scheme delivery has been drawn up. The allocation of SIS's will be made on this basis.

Rural

The provision of new social housing in rural settlements represents a strategic priority for delivery of the Social Housing Development Programme (SHDP). For 2024/25, the Strategic Guidelines rural target share of the overall SHDP for Northern Ireland is 13.1%, or 261 units. Of these, Newry, Mourne and Down Council area is assigned 100 units.

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.

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.

Based on the waiting list for social housing at March 2023, **5 year projected housing need** for rural areas (2023-28) within Newry, Mourne and Down is 776 units

776 UNITS
🏠🏠🏠🏠🏠🏠

Taking account of new build schemes on the current SHDP, the residual housing need is focused mainly in the settlements of Annalong / Longstone / Glassdrumman, Ardglass, Bessbrook / Derramore, Camlough, Castlewellan, Crossgar, Crossmaglen, Culloville, Drumaness, Dundrum / Seaforde / Clough, Forkhill, Hilltown, Killough, Killyleagh, Mayobridge, Meigh, Mullaghbawn, Newtowncloghogue, Rostrevor, Saintfield, Strangford and The Commons / Ballyholland.

Remaining settlements includes Ballykinler, Ballymartin, Ballyward, Belleek, Burren, Cullyhanna, Drumintee, Granite View, Jonesborough, Kilcoo, Killeen, Kilmore (including Loughinisland), Lurganare / Barnmeen*, Newtownhamilton, Shrigley, Silverbridge, Spa and Whitecross where need in each settlement is less than 10.

Housing need has currently been met in Annsborough, Attical, Ballyrone, Burrenbridge, Creggan and Mullaghglass. These areas will be kept under annual review. These rural settlements exhibit no projected housing need and do not accept overspill from nearby settlements.

During 2022/23, a successful rural housing needs test took place in Leitrim, and we are currently working with Housing Associations on the identification of a suitable site to take forward a small scheme. Site Identification Studies were completed for Bessbrook, Forkhill, Rostrevor and Warrenpoint over the past year and passed to Housing Associations for action. Proposals for social housing in these locations will be welcomed and given due consideration.

Within the rural areas showing a positive projection the housing type required in the majority of cases is two bedroom houses.

There is a limited need for apartment accommodation within the rural areas of the district. Where apartments are required, we would prefer smaller numbers and independent access where possible to help make the properties more attractive to applicants and assist with housing management.

Castlewellan is a particularly popular rural location and an overspill area for Newcastle. The need in the village is largely for houses, two and three bedroom and complex needs accommodation (bungalows).

Two sites within Rostrevor received social housing zonings as per the Banbridge, Newry and Mourne Area Plan 2015. Neither has progressed to date. There is a need for all types of accommodation in Rostrevor.

There is a high housing need in Saintfield however a building ban remains in place as the sewage infrastructure has reached capacity.

At March 2023, there were **995 applicants** in the district in housing stress, 31.8% of the total housing stress waiting list for the district



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

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.

Wheelchair Housing Need (HNA)

At March 2023, there were 96 housing stress applicants and 38 transfer applicants who require wheelchair accessible accommodation with 14 allocations over the previous year. This leaves a requirement for 120 units. Need has been identified throughout the district.

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 the space standards included in the Housing Association Guide.

A Shared Future through 'Housing for All'

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

There are currently three new build social housing schemes being progressed for shared future housing in the district, The Promenade, Newcastle (Radius HA), Rourkes Link, Ballyhornan (Ark Housing Association) and Dundrum Road, Newcastle (Arbour HA).

The following schemes have recently completed and been designated 'Housing for All':-

- Ardmore Road, Newry City (Radius HA)
- Castlewellan Road, Newcastle (Clanmil HA)
- Belfast Road, Newry City (Arbour HA)

Irish Traveller accommodation

Need within the Irish Traveller community continues to be monitored in Newry, Mourne and Down.

Indicative housing mix requirements

At March 2023 there were 995 applicants in rural Newry, Mourne and Down in housing stress (31.8% 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.

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 Newry, Mourne and Down

Older Persons	Families*	Singles	Wheelchair
10%	20%	70%	10%

* Focus on: Small Family Households

Intermediate (Affordable) Demand

The Housing Executive estimates intermediate/affordable housing demand for Newry, Mourne and Down at approximately 100 units per annum.

Co-Ownership approved 31 applications in 2022/23 for Newry, Mourne and Down



Average house prices in Northern Ireland increased by 18.7% between 2019 and 2022.

Average house prices in Newry, Mourne and Down are **higher** than the Northern Ireland average – local prices increased by 29.7% between 2019 and 2022



Table 77: Average Annual House Prices Newry, Mourne and Down LGD & NI 2019-2022

Area	2019	2020	2021	2022	% Change 2019-2022
Newry, Mourne and Down	£162,181	£180,132	£192,392	£210,277	29.7%
Northern Ireland	£169,057	£180,079	£194,233	£200,700	18.7%

Ulster University

Newry, Mourne and Down Supporting Data

Table 78: Newry, Mourne and Down Waiting List – March 2023

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	1,746	158	1,064	52	359	506	3,885
HS Applicants	1,440	121	857	41	282	392	3,133
Allocations	139	10	91	<10	30	74	-

Table 79: Newry City Waiting List – March 2023

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	505	43	277	12	86	85	1,008
HS Applicants	416	31	232	<10	67	70	-
Allocations	35	<10	27	0	<10	18	87

Table 80: Newcastle Waiting List – March 2023

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	224	16	91	<10	24	109	-
HS Applicants	185	12	72	<10	22	84	-
Allocations	<10	<10	<10	0	<10	<10	22

Table 81: Warrenpoint Waiting List – March 2023

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	75	<10	57	<10	31	47	220
HS Applicants	65	<10	49	<10	26	36	186
Allocations	10	0	<10	0	<10	<10	20

Table 82: Bessbrook / Derramore Waiting List – March 2023

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	62	<10	45	0	16	<10	133
HS Applicants	53	<10	38	0	14	<10	115
Allocations	<10	0	<10	0	<10	0	14

Table 83: Castlewellan Waiting List – March 2023

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	71	11	57	<10	14	13	-
HS Applicants	59	<10	49	<10	<10	11	135
Allocations	<10	0	0	0	<10	<10	<10

Applicants – Housing applicants at March 2023

HS Applicants – Housing stress applicants at March 2023 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2023

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

Land & Housing Analytics
Housing Centre,
2 Adelaide Street, Belfast BT2 8PB

Tel: 03448 920 900
Next Generation Text (NGT): 18001 03448 920 900
Email: housing.analytics@nihe.gov.uk

nihe.gov.uk   

Housing
Executive