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PAPER 7

# **Housing Supply Strategy Developing a New Executive Strategy**

**NORTHERN IRELAND HOUSING  
MARKET REVIEW** 2024/25

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# Foreword

I am delighted to introduce this first edition of our refreshed Northern Ireland Housing Market Review, which we are pleased to re-establish as an annual publication and a resource for the collation and dissemination of housing-related data.

In developing the new format, the Housing Executive's Research Team consulted with colleagues and stakeholders in the housing sector; we are grateful for their input, and that of the editorial team, which provided both feedback and content.

Alongside this report, a series of data tables will be made available, which will allow for all data contained in the publication to be downloaded and used by the reader. These data tables will be updated throughout the year, as and when new figures are released.

This report is published against a backdrop of acute housing supply challenges, however we welcome the specific priority attached to housing supply in the new Programme for Government, coupled with the Housing Supply Strategy. It places important emphasis on the development of the right kind of housing in the right places. As well as providing much-needed homes for those in housing need, this focus on delivery will also make a significant contribution to the local economy and the stability of the construction sector for years to come. Reducing homelessness and housing stress are a key NI Executive priority with a welcome focus on prevention and collaboration across departments.

Our mission – as set out in our Corporate Strategy for 2025/26 – 2027/28 is to ensure that housing helps resolve some of our greatest challenges. Through good housing, we aim to help end health inequalities, prioritise early intervention and prevention, protect our communities from climate change, and drive sustainable economic growth.

We are ambitious about what can be achieved over the next ten years. As we plan future activities, the data, research and information brought together in this comprehensive document provides a critical evidence base for us as an organisation. We trust that it will also be a useful reference point for our partners and stakeholders across and beyond the housing sector.

**Grainia Long**  
Chief Executive

# Introduction

The Northern Ireland Housing Market Review consists of a series of papers covering a range of housing topics, market data, analysis and commentary which is designed to provide important background and contextual information for the development of housing strategies and housing policy as well as direct intervention in the housing market.

It draws together key statistics compiled by the Housing Executive, Government departments, universities, and the private sector. The intention is that this document will become an annual publication and will contribute to the formation of the Housing Executive's Corporate and Business Plans, thereby helping to guide the organisation's intervention in the housing market and providing an important means of monitoring the strategic impact of this intervention.

Papers 1 & 2 (Economic Overview and Review of NI households) provide a summary of trends in the economy and key demographic indicators from the most recent Census (2021).

Papers 3, 4 and 5 (House Sales and Affordability, Private Rented Sector and Affordable Housing) examine trends and developments in each of the three main housing tenures: social housing, the private rented sector and owner occupation. Each paper highlights the key issues emerging from the analysis, research gaps and the strategic perspective.

Paper 6 provides an overview of the assessment of housing need.

Paper 7 focuses on the development process for the new Housing Supply Strategy.

Additional papers will be released over the coming months via the Housing Executive website.

I would like to take this opportunity to extend my thanks to the editorial team members and our team of Housing Executive researchers who have dedicated considerable time to the production of this report and associated data tables. I hope you find the papers of this report useful and informative.

**Ursula McAnulty**  
Head of Research

# Acknowledgements

We would like to thank the members of the editorial team and all those who contributed to the compilation of the data and commentary contained in the Northern Ireland Housing Market Review 2024/25.

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The content of this report does not necessarily reflect the official opinion of the Housing Executive.

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# 7. Housing Supply Strategy

## Developing a New Executive Strategy

**Author: Chris Mills -Housing Strategy & Co-Ordination Branch, Department for Communities**

### Introduction

The recently published Housing Supply Strategy marks an important milestone in how we think about delivering the supply of homes we need. It is the first time an Executive strategy for housing has been agreed and is recognition of the vital role that good housing plays in our society and the priority that needs to be given to it.

The strategy sets out a strategic framework for how this can be delivered through a ‘whole-system’ approach. It is the product of a significant process of consultation and collaborative development. This paper will review the process to develop the Strategy, provide an overview of the approach to stakeholder engagement, and explore the key factors that have contributed to its final form. It will also look briefly at the strategic framework of the Strategy.

### Context and need for a Strategy

The Departments previous housing strategy ‘Facing the Future’ ran from 2012-2017. The need for a new strategy with a focus on all-tenure supply was identified in 2019. It was intended as a response to substantial and deep-rooted housing supply challenges that were starting to become entrenched here. Issues such as increasing levels of housing stress and homelessness, the widening gap between housing requirements and new housing supply and the growing affordability and accessibility problems facing both first-time buyers and renters in Northern Ireland.

Early development work on the Strategy was directly linked to the objectives of New Decade New Approach (2020) and three of the draft Programme for Government Outcomes at that time. It was clear from this point that issues impacting on housing supply cut across the range of Northern Ireland Executive responsibilities and would require a whole system approach. Given this, the

intention for it to be an Executive strategy was established early-on and maintained throughout its development. The strategy has been developed in such a way that it can be responsive to new and future Programmes for Government that may be initiated during its lifetime.

The expansive role that good housing plays in the well-being of people and the economy, as well as the scope of issues impacting on supply meant it was important that the development of the Housing Supply Strategy needed to be a multifaceted and collaborative effort. This required the work to reach out as far as possible to a wide range of stakeholders and to take an iterative approach to development, that could help identify ideas and refine options.

## Development Process

The stages of development can be broadly outlined as follows:

### Initial Research and Data Gathering

There is a considerable wealth of housing data and information available, but alongside this existed considerable gaps in data and understanding in several areas. A thorough assessment of the housing landscape in Northern Ireland was carried out, with a view to focussing on addressing those gaps through consultation, including:

- **Statistical Analysis:** Gathering and analysing data on housing need and demand, supply, affordability, and demographic trends. Reviewing housing need projections such as the Housing Growth Indicators (HGI's) and the Strategic Housing Market Assessment (SHMA) modelling from the Northern Ireland Housing Executive (NIHE).
- **Housing Market Review:** Examining the state of the housing market across all tenures, including private rental and ownership sectors as well as wider economic conditions.
- **Identifying gaps in data:** Recognising gaps in existing data, seeking out and obtaining this information where possible, through engagement with other government departments, statisticians, and experts. Data gaps identified included a need for clarity around certain terminologies, the role of housing in communities, the extent of housing inequalities and evidence on a range of issues perceived to be impacting on supply.

## **Consultation and Draft Strategy Development**

The impact of housing issues is considerable and reaches into many areas of society. It was clear that a wide reaching and truly collaborative approach to engagement would be the cornerstone to informing the development of a comprehensive strategy.

There was also a need to test assumptions, verify existing evidence and to source any data available that may fill the gaps identified. Given this, a two-phase approach was developed that would provide the opportunity for a truly co-designed strategy. The first phase would be a call for evidence which would be used to fully develop the baseline evidence and assumptions to inform the strategy development. The second phase would be a full public consultation on the draft.

### **Phase 1 - Call for Evidence and Strategic Framework**

The Department launched an eight-week Call for Evidence (CfE) consultation in May 2021. Initially, the intent was to host traditional face to face consultation sessions in venues across the country, alongside the online survey that was available to the public.

However, with ongoing Covid-19 restrictions the Department considered an alternative 'remote' approach that would ensure as broad as possible stakeholder access to the consultation. In all, forty-two public stakeholder workshop consultation sessions took place via online video events.

Events were designed as a combination of stakeholder specific and open public sessions. The CfE was promoted widely via the Department's Twitter page and hosted on a dedicated Departmental webpage. A number of organisations also referenced or promoted the CfE on their respective websites

Key contributors included various local governmental departments, housing organisations, community groups, and members of the public. The workshop sessions typically ran for up to two hours and opened with Departmental personnel providing an overview of context and purpose of both the CfE and wider Strategy development processes.

What became clear was that the use of remote meetings, whilst losing some of the face-to-face element of consultation, actually became extremely beneficial in allowing for a significant variety of events at different times of day. In particular, this approach appeared to engage members of the public more readily and likely provided many more people with the opportunity to participate, than would have been the case with fixed venue events.

The CfE presented several questions around a proposed strategic framework and potential vision and objectives for the strategy. It also presented where gaps



had been identified through the initial research phase. Responses to the CfE ranged from short personal opinions on specific topics to academic reports and research. The focus of the consultation sessions was to work through options with stakeholders and the public and from this derive a common consensus on the core aspects of the strategy framework.

From the outset of involvement with stakeholders and the public, it was clear that there was a genuine will to work constructively on finding the best possible direction for the new strategy. The CfE and associated consultation events, were successful in providing a strong evidence base providing a robust platform for the work to progress on drafting the strategy.

Drawing on the insights from the initial assessment and call for evidence stage of stakeholder engagement, the core components of the draft strategy began to be formulated:

- **Vision and Objectives:** Defining a clear vision and timeframe for the supply of housing in Northern Ireland that could be achieved with specific, measurable objectives, such as increasing affordable housing options, improving housing quality, and preventing homelessness. The consultation process was critical in establishing a consensus on wording that represented a widely accepted vision and the objectives to achieve it.
- **Long term policy commitments:** Each objective was reviewed in the context of long-term policy priorities and commitments across all areas of Government, that were deemed necessary to achieve that objective.
- **Enabling Actions:** Whilst a strategy is an important approach in its own right, specific actions are crucial to making progress on issues. This feeling around the importance of seeing the detail of actions was made clear across the spectrum of stakeholders. Therefore, the inclusion of initial enabling actions within the draft strategy was an important step in bringing some initial detail to the strategy which not only highlighted work already underway, but which could also be used to kickstart future implementation phases.

## Phase 2 – Full Public Consultation

Following on from the Call for Evidence, the Department launched a nine-week consultation on the resultant draft strategy in December 2021. Officials also held 20 parallel stakeholder sessions following the same virtual format as used in the call for evidence. Alongside this, a full Equality Impact Assessment (EQIA) into the strategy was published and was subject to its own 12-week consultation.

This consultation reflected the value it was felt had been achieved in the call for evidence phase, with broad and positive support for the draft Strategy including the vision, objectives and the key policy commitments. Additional comments made were mostly focused on how to enhance the Strategy framework, most notably, potential additional objectives or guiding principles and tweaks to longer term policy commitments.

The extent and quality of engagement throughout the development of the Housing Supply Strategy has been a defining feature of the process. Several factors contributed to this high level of engagement:

- **Inclusivity** - Efforts were made to ensure that all sections of society had an opportunity to contribute to the strategy. This included specific outreach to organisations that had representation across all Section 75 groups. This also incorporated working with several organisations which were able to facilitate consultation with vulnerable service users and those who might normally have been reluctant to engage in public discussions. These approaches were instrumental in bringing some very unique and useful insights to the overall process. The strategy is supported by a full EQIA which will be a living document to help guide the implementation of work from the strategy, throughout its lifetime.
- **Transparency** - The process was marked by a high degree of transparency, with regular updates provided to the public and stakeholders to help build trust and foster a sense of shared ownership over the strategy.
- **Collaboration** - Effective collaboration among various government departments, private sector stakeholders, and community organisations was crucial to ensure that the strategy was comprehensive and reflective of a wide range of perspectives.

## Conclusion

The Executive's Housing Supply Strategy represents a comprehensive and forward-looking approach to addressing our housing challenges. It will support the current PfG in working towards the increased supply of affordable and social homes, but also provide direction for the next 15 years.

The development process was marked by extensive stakeholder engagement, robust data analysis, and genuine collaborative and positive efforts to find solutions. These factors have played a vital role in shaping the Strategy and for achieving the wide support that has been seen for the overall whole system approach and strategic framework.

The vision that 'Everybody has access to a good quality, affordable and sustainable home that is appropriate for their needs and is located within a thriving and inclusive community' is now firmly embedded in our approach to addressing housing issues here.

This vision, alongside the five key objectives and range of policy commitments will now drive the Strategy as it moves into the implementation and action planning phase. We know that continued collaboration and effective monitoring will be essential to achieving the strategy vision and we encourage all those in the housing system to continue to engage with this work where possible.

## List of abbreviations

BRMA	Broad Rental Market Areas
DFC	Department for Communities
DPG	Development Programme Group
EQIA	Equality Impact Assessment
EU	European Union
FDA	Full Duty Applicant
FRA	Fundamental Review of Allocations
FRS	Family Resource Survey
FTB	First Time Buyer
FTC	Financial Transactions Capital
HAG	Housing Association Grant
HCS	House Condition Survey
HMA	Housing Market Area
LA	Local Authority
LDP	Local Development Plan
LPP	Local Policies Plan
LPS	Land and Property Services
MMC	Modern Methods of Construction
NHBC	National Housing Building Council
NI	Northern Ireland
NICEI	Northern Ireland Composite Economic Index
NIHE	Northern Ireland Housing Executive
NISRA	Northern Ireland Statistics and Research Agency
ONS	Office for National Statistics
PBMSA	Purpose Built Managed Student Accommodation
PRS	Private Rented Sector
SES	Socioeconomic Status
SHDP	Social Housing Development Programme
SHMA	Strategic Housing Market Area
T:BUC	Together: Building a United Community
UK	United Kingdom
UU	Ulster University

