

DRAFT RESEARCH & INTELLIGENCE PROGRAMME 2018/19

Carried forward from 2017/18			
Project	Client	Lead Researcher	Completion
House Price Index/Private Rental Index/ Affordability	Land & Regeneration	Ulster University	2018/19
2016 House Condition Survey	Land & Regeneration	BRE	2018/19
Cavity Wall Insulation	Asset Management	BBA	2018/19
Review of Housing Market Area Boundaries	Land & Regeneration	Newhaven	2018/19
Broad Rental Market Areas	Welfare Reform/DfC	TBC	2018/19
Continuous Tenant Omnibus Survey (CTOS)	Housing Services	Perceptive Insight	2018/19
2018 Public Attitudes Survey	Communications	TBC	2018/19

New Projects 2018/19	The projects below have been requested by key stakeholders internally and externally	
	Client	Estimated timing
Welfare Reform		
Impacts of Social Sector Size Criteria (Post Mitigation)	Welfare Reform Team	Start 2018/19
Impacts of Social Sector Size Criteria (Current)	Welfare Reform Team	Start 2018/19
Universal Credit: The Customer Experience	Welfare Reform Team	Start 2018/19
Welfare Reform: DLA, PIP and NIHE tenants	Welfare Reform Team	Start 2018/19
Welfare Reform: Awareness and Challenges (Private Tenants)	DfC/Welfare Reform Group	Start 2018/19
Welfare Reform: Awareness and Challenges (Private Landlords)	DfC/Welfare Reform Group	Start 2018/19
Housing Services		
Review of Temporary Accommodation	Housing Services	2018/19
Homelessness: Acceptances/Accom not Reasonable	Housing Services	2018/19
Homelessness: User Journeys and outcomes	Housing Services	2018/19
Customer Segmentation (Phase 1: Data Audit)	Housing Services	Start 2018/19
Research to inform review of the House Sales Scheme	Housing Services	Start 2018/19
Brexit and the Housing Market	Housing Services	Start 2018/19
Community Surveys Programme marker	Housing Services	
Regional Services/DfC		
Traveller Housing Needs Assessment	Supporting People	2018/19
Housing Market Analysis	Land & Regeneration	Start 2018/19
Northern Ireland Household Projections	Land & Regeneration	2018/19
15-year Social Housing Need Assessment	Land & Regeneration	2018/19
Comparison of new build social and private housing	DfC	Start 2018/19
Affordable Warmth	PSIS	
Older People: Housing Issues and Needs	Regional Services	Start 2018/19
Net stock model	Land & Regeneration	2018/19
The Roma Community in NI and Housing Need	Equality Services	
Other		
Corporate Surveys marker	Internal clients	
Sundries (Insight Exchange etc)	Regional Services	2018/19

The planned 2018/19 Research Programme as outlined above has been developed in consultation with internal and external clients (including the Department for Communities), the Welfare Reform Research Group and the Research Committee, which monitors the Housing Executive's research activity. This programme is subject to budget availability and projects are due to commence during the financial year, in line with client priorities.

15/1.12 House Price Index/Private Rental Index/Affordability Indices (2015-18)

Key Client: Land & Regeneration

This suite of interlinked research projects is being undertaken in partnership with the University of Ulster, PropertyNews.com and Spataleest. The ongoing releases of data and analysis will continue to provide key information for policy makers seeking evidence on housing market trends and addressing the issue of affordability in both the owner-occupied and private rental sectors.

The overall project comprises four main component parts:

1) Northern Ireland Quarterly House Price Index

A comprehensive, mix-adjusted analysis of a large sample of open market transactions gathered from a Northern Ireland-wide network of estate agents. The information from this analysis will continue to inform the Housing Executive's analysis of the market, its Housing Investment Plans and its affordability index.

2) Private Rental Index

This project will continue to produce a biannual index of private sector rents for Northern Ireland using comprehensive data from a website-based lettings company, combined with data from the Housing Executive's Local Housing Allowance database disaggregated on the basis of the Housing Market Area boundaries defined by Glasgow University/Newhaven Limited as part of a research project completed in 2009.

3) Asking Price House Price Index

This project is the equivalent of the Rightmove and Hometrack price indices, which are produced for GB but not for Northern Ireland. Asking Price indices provide a much earlier warning of changes in the housing market than indices based on completed sales (DCLG, UU, LPS) or mortgage-based indices (Halifax and Nationwide).

4) Composite Affordability Index

The Housing Executive's Affordability Index for first-time buyers has used a typical Bank/Building Society annuity formula to calculate the maximum price a household with a median household income can afford to pay, assuming a typical interest rate, a 90% mortgage (loan to value ratio) and a 25 year repayment period. The model provides a useful indicator of the degree of difficulty experienced by first time buyers purchasing a property with a ten per cent deposit. Given the changes in house price to income ratios in Northern Ireland and greater caution on the part of lenders in relation to loan-to-value ratios, this index was considered no longer as meaningful. The new Composite Affordability Index developed brings together two measures (house price to income ratio and the savings ratio / percentage of annual disposable income required as a deposit) to reflect both the much lower house price to income ratios on the one hand and the need for larger deposits on the other.

Expected Impact/Outcome

The reports on the owner-occupied and private rented sectors provide important insights into trends in the housing market, where possible disaggregated by geographical regions and by property type. Comparisons with the market as a whole and with performance in previous years are provided, giving a longer term view of past trends, and an insight into possible future trends, in house prices/rents and transaction rates. Affordability measures provide a valuable insight into where there is evidence of hot spots or market failure. Key findings are included in the annual Review of the Housing Market and in the Housing Market Analysis which underpins Housing Investment Plans, and have been shared at *Insight* events. Data is also used to inform the DfC's ongoing affordability work and its strategy for the Private Rented Sector.

16/1.1 2016 House Condition Survey

Key Client: Strategic Planning & Research

House Condition Surveys have been conducted every five years in Northern Ireland since 1974 and Interim Surveys were conducted in 2004 and 2009.

The Surveys provide key information that underpins the development of housing policy, informs housing strategies and plans and guides the effective use of resources. The time series data allow an insight into the dynamics of the housing market and an assessment of the impact of government policies and strategies. All types and tenures of housing are included: owner occupied, private and social rented housing, vacant dwellings, apartments, houses in multiple occupation, and urban and rural.

In January 2016 the Board gave its approval for the 2016 House Condition Survey to be carried out with the following key objectives:

- To provide a comprehensive picture of the dwelling stock and its condition in 2016 for Northern Ireland and each of the 11 council areas;
- To facilitate a comparative analysis of housing conditions in Northern Ireland with other parts of the UK;
- To examine the association between dwelling conditions and the social and economic circumstances of households;
- To examine changes in the condition of the stock over time in terms of key government measures: Decent Homes and the Housing Health and Safety Rating Standard;
- To provide a reliable assessment of the energy efficiency of the stock and the level of Fuel Poverty in Northern Ireland on a comparable basis with the rest of the UK.

The objectives have remained broadly consistent with those in 2001, 2004, 2006, 2009 and 2011.

The fieldwork stage of the 2016 HCS was completed during 2016/2017 and headline figures on the dwelling stock and tenure, dwelling age and location and unfitness (at Northern Ireland level) were published in March 2017. From 2016, House Condition Survey findings have National Statistics status, which denotes that they have been assessed by the Office for Statistics Regulation as fully compliant with the Code of Practice for National Statistics.

Data modelling work has been undertaken during 2017/2018 to produce updated indicators on a number of Government measures comparable with the English Housing Survey and Scottish model and consistent with previous Northern Ireland House Condition Surveys, including:

- Repair Costs.
- SAP and Thermal Comfort.
- Decent Homes.
- Fuel Poverty.
- Housing Health and Safety Rating System.
- CO₂ emissions consistent with HECA.
- Cost of Poor Housing update for 2016.
- Scottish Tolerable Standard variable.

The Research Unit is in the process of quality assuring and compiling these figures and indicators into a full report which will provide detailed insights on the findings and will be published in late spring 2018. A budget has been earmarked for additional modelling work which may be required during 2018/19 to inform energy conservation initiatives and the review of the housing fitness standard in Northern Ireland.

Expected Impact/Outcome

Undertaking the House Condition Survey fulfils a statutory duty to examine housing conditions and helps fulfil another statutory duty: to determine housing need. In addition, however, the

statistics are used in a wide range of other research and market intelligence projects, including: Annual Review of the Housing Market, Housing Investment Plans, Community Planning, Home Energy Conservation Authority (HECA) Report; Fuel Poverty Strategy; Empty Homes Strategy and Welfare Reform. The DfC will also utilise the HCS findings in their current housing reviews and development of a unique Northern Ireland housing condition standard. The information emerging from the 2016 HCS will therefore underpin and guide a considerable number of housing strategies, policies and interventions in the housing market.

16/1.3 Cavity Wall Insulation

Key Client: Asset Management

The Housing Executive is Northern Ireland's Home Energy Conservation Authority. In this capacity, and in response to concerns raised by elected representatives, tenants and the insulation industry, it commissioned research to assess the degree and prevalence of poor quality cavity wall insulation (CWI) – and any related under-performance in terms of energy efficiency – across the three main types of insulation in Housing Executive dwellings. The resulting report, published in 2014, was based on a survey of 206 properties and estimated that approximately two thirds (66%) of all Housing Executive homes with cavity walls had CWI that was classified as either 'severe with critical needs (39.3%) or 'unsatisfactory with grave needs' (26.2%).

While this report provided an insight into the quality of CWI in Housing Executive homes, it did not touch upon the private sector. The Housing Executive's Asset Management division has subsequently commissioned a Northern Ireland-wide survey of 1,000 Housing Executive dwellings to gain further insight into the quality of CWI. In addition to the Housing Executive sample, this study has incorporated a sample of around 300 homes in the private sector whose occupants had indicated as part of the 2016 House Condition Survey that they would be willing to take part in further research. The Research Unit has provided support and advice to the Asset Management division in terms of sampling and methodology, as well as part-funding the project, which commenced during 2017/18 and is due to be completed in the 2018/19 financial year.

Expected Impact/Outcome

To give policy makers a broad overview of any quality issues with cavity wall insulation, therefore providing an evidence base for developing policies and/or allocating funding to address them.

17/1.2 Review of Northern Ireland Housing Market Area Boundaries

Key Client: Land & Regeneration

In 2010, the Housing Executive published the findings of a study into the structure of Housing Market Areas (HMAs) across Northern Ireland. The study was commissioned to provide a suitable spatial framework for subsequent housing analysis and strategy development, and identified 11 major HMAs in the region.

The overall aim of the research project commissioned in 2017 is to prepare an updated set of functionally-based housing market area boundaries for Northern Ireland that takes account of Travel to Work Areas (TTWA) and migration data that have become available since 2011, including Census data. The revised boundaries will also take account of the new Local Authority boundaries that came into force in 2015.

The key objectives of the research project are:

- to undertake a review of the 2010 methodology and advise on its current suitability in the light of data availability;
- to examine the potential of additional data sources which may help inform and refine the proposed new HMA boundaries;

- to develop new functionally-based HMA boundaries, drawing on analysis of available data, including 2011 Census Travel to Work Area data and the origin/destination of 'migrating' households; and
- to evaluate these revised HMA boundaries in the light of the new Local Authority boundaries to advise on a pragmatic approach to future data collection and analysis.

Expected Impacts/Outcomes

As well as informing Local Development Plans, the outputs of this project will play a key role in community planning and will assist in the Housing Executive's duty to provide information to the new 11 local councils.

17/1.7 Housing Association Post-Occupancy Survey

Key Client: Department for Communities

Through the Social Housing Development Programme (SHDP), which is managed by the Housing Executive, the Department for Communities invests around £100 million each year in new social housing. There is a need to ensure that this funding contributes to good quality, well-designed homes that meet residents' needs within sustainable, successful places that will remain attractive in the longer term. The Department asked the Housing Executive to undertake a survey of residents to obtain feedback on the quality and design of homes funded through the SHDP. This research will build on the work already carried out by individual housing associations – which tends to cover a wide range of management and services issues – by engaging with a range of tenants from a number of developing associations and focusing on design elements.

Expected Impact/Outcome

The research, which is being undertaken as a census survey among residents living in all new social dwellings completed during 2015/16, will help the Department to gain an understanding of how residents feel about their homes and neighbourhoods, thus highlighting good practice and identifying which design elements make the most impact on satisfaction and quality of life. This will inform the future direction of the Design Guide for new social housing and help support continuing improvement of scheme designs.

17/2.0 Broad Rental Market Areas (BRMAs)

Key Client: Welfare Reform Project Team/DfC

Under the legislation accompanying the Local Housing Allowance (LHA) scheme for those who rent accommodation in the private sector, the rate of LHA paid is based on the rent levels for eight specified areas in Northern Ireland ('Broad Rental Market Areas') and how many people live in the household. The BRMAs in Northern Ireland were identified on the basis of analysis carried out by the DSD Statistical Research Unit in 2006. This study will update the previous analysis and consider scenarios of updated BRMAs based on statistical data.

Expected Impact/Outcome

The findings of the research will provide an evidence base to help policy-makers determine whether the BRMAs that were delineated in 2006 remain a suitable geographical basis on which to determine LHA rates in Northern Ireland.

18/2.1 Continuous Tenant Omnibus Survey (2018 calendar year)

Key Client: Housing Services

The Housing Executive has carried out a comprehensive annual survey among its tenants each year since 1994, facilitating comparative analysis of tenants' views over time and allowing collection of specific information for various client groups (internal and external). The 'omnibus'

2018/19 New Projects

Welfare Reform

Impacts of Social Sector Size Criteria: Post Mitigation

Key Client: Welfare Reform Project Team

The Social Sector Size Criteria (SSSC; sometimes referred to as the 'bedroom tax') came into effect in Northern Ireland as part of the broader programme of welfare reform on 20 February 2017 and applies to Housing Executive and housing association tenants considered to be 'under-occupying' their homes. If a working age household is considered to be 'under-occupying', the eligible rent used to calculate Housing Benefit will reduce by 14% if under-occupying by one bedroom, or 25% if the household is under-occupying by two rooms.

Most households that are likely to be impacted by the SSSC, and whose circumstances have not changed, are currently receiving Welfare Supplementary Payment (WSP) as part of a mitigation package which is in place until 31 March 2020. However, the Housing Executive's analysis indicates that, when this mitigation ends, around 26,000 of its tenant households are likely to experience a reduction in Housing Benefit. As it would not be practical for many of these households to move to a smaller property (even if the size profile of the social stock allowed it) many will therefore face a shortfall between Housing Benefit (or Universal Credit housing element) received and the rent payable. A sample survey will be carried out among tenants who have been identified as likely to be impacted by SSSC, to gain insights into their awareness of how their situation may change when WSP ends and how they plan to deal with a drop in HB income and shortfall between HB/UC housing element and rent.

Expected Impacts/Outcomes

This research will assist the Housing Executive in planning how best to communicate with and support tenants to address the post-mitigation impacts of the SSSC, ensuring that tenancies and income streams are maintained as much as possible.

Impacts of Social Sector Size Criteria: Current

Key Client: Welfare Reform Project Team

The Social Sector Size Criteria (SSSC; sometimes referred to as the 'bedroom tax') came into effect in Northern Ireland as part of the broader programme of welfare reform on 20 February 2017 and applies to Housing Executive and housing association tenants considered to be 'under-occupying' their homes. If a household is considered to be 'under-occupying', the eligible rent used to calculate Housing Benefit will reduce by 14% if under-occupying by one bedroom, or 25% if the household is under-occupying by two rooms.

Most households that are likely to be impacted by the SSSC, and whose circumstances have not changed, are currently receiving Welfare Supplementary Payment (WSP) as part of a mitigation scheme that is in place until 31 March 2020. However, in a number of cases – for example where an under-occupying household has chosen to transfer or exchange (without management transfer status) to another property in the social rented sector where they continue to under-occupy to the same level or perhaps greater – households already no longer receive a Welfare Supplementary Payment. To date, it is estimated that around 60 households have lost SSSC mitigation through changes in circumstances. The proposed qualitative research will focus on the experiences of these households and how they have dealt with the impact of losing WSP for under-occupation, as well as looking at the size/type of dwelling in comparison with the stock profile in the area.

Expected Impact/Outcome

The research will assist the Housing Executive in planning how best to communicate with and support:

- Existing tenants who experience a shortfall between HB and rent due to changes in circumstances; and
- The larger group of tenants who will have to make up the shortfall between HB and rent from other sources when WSP ceases.

It will also provide initial indications of how the needs of under-occupying households compare with the available social housing stock in the locality and the extent to which there would be an option for people to move to a smaller property, if they were willing to do so.

Universal Credit: The Customer Journey

Key Client: Welfare Reform Project Team

As part of the Government's wider programme of welfare reform, a number of working age benefits, including the rental element of Housing Benefit, are being replaced by Universal Credit (UC). Introduction of UC for new claims in Northern Ireland commenced on a phased basis from September 2017, and at the time of writing UC had been rolled out to 12 Social Security offices.

During the phasing-in period, if a household living in a UC area and receiving one of the benefits/credits being replaced experiences a significant change in circumstance which means they are reassessed for the 'legacy' benefit/credit, it is likely they will claim UC. From July 2019 until March 2022, claimants receiving any of the six benefits being replaced by UC (including the HB rental element) will be moved to the new benefit. UC must be claimed online and, for those who rent, the housing element will be paid directly to the landlord.

In addition, for households receiving UC, Housing Benefit for rates is being replaced by the Rate Rebate. Rate Rebate can only be claimed once UC is awarded and, like UC, must be claimed online. The Housing Executive will receive Rate Rebate payment monthly in arrears.

As the move to UC represents a substantial change in the welfare benefits system, not least in terms of how claims are made and administered, and the need for a separate Rate Rebate claim, the Housing Executive has identified a need for initial qualitative research to help gain an understanding of the customer journey experienced by tenants who have claimed UC.

Expected Impact/Outcome

The research will help the Housing Executive plan for the broader roll-out of UC for all new cases and the eventual migration of all existing cases to UC, ensuring that correct advice and support mechanisms are in place to help tenants understand and negotiate the online application process within appropriate timescales.

Welfare Reform: DLA, PIP and the impacts on NIHE tenants

Key Client: Welfare Reform Project Team

Personal Independence Payment (PIP) was introduced in Northern Ireland in June 2016, replacing Disability Living Allowance (DLA) for new claims made by people aged between 16 and 64. Existing DLA claimants in this age group whose benefit is due to come to an end, or who report a change in their care or mobility needs, will be invited to claim PIP, while DLA claimants who have an indefinite or lifetime award for DLA, are being randomly selected and invited to claim PIP over the two year period from December 2016 to December 2018. However, there is no automatic transfer from DLA to PIP.

An award of PIP affects Housing Benefit in a similar way to an award of DLA, and can provide an entitlement to certain premiums. Thus, if PIP is not awarded, disability premium and non-dependent deduction protection in Housing Benefit will be lost. In addition, the Single Room Rent Protection for those renting privately may be lost for those under 35 years. A Welfare Supplementary Payment will be available (and paid directly to the claimant) for a period of one

year to offset the financial impact for some people who are financially worse off as a result of their PIP assessment. The Housing Executive does not know in advance when claimants will be invited for PIP assessment, and housing staff have been advised to monitor claimants' circumstances and be vigilant for indicators on the rent account which suggest a reduction in HB.

Evidence gathered by the Welfare Reform Project Team indicates that some tenants who had previously been eligible for DLA have not been awarded PIP, with implications for their liability – and ability – to pay rent. As the CTOS indicated that 34% of household reference persons were in receipt of a disability benefit in 2016, the change from DLA to PIP has the potential to have implications for a sizeable minority of tenants, and this research would explore in more detail the implications of this change.

Expected Impact/Outcome

The research will help the Housing Executive devise ways to support its tenants to maintain rent payments and sustain tenancies by providing an insight into the impacts of changes in entitlement to disability benefits and the implications for different types of households.

Welfare Reform: Awareness and Challenges (Two strands: Private Rented Tenants and Private Landlords)

Key Client: Department for Communities/Welfare Reform Cross-Sector Research Group

As part of the 2017/18 Research Programme, the Research Unit set up and co-ordinated the (still ongoing) work of a cross-sectoral Welfare Reform Research Group, comprising representatives from the Housing Executive, Department for Communities, NIFHA, CIH, the Law Centre, Citizens Advice, Advice NI and Housing Rights. The purpose of the group was to bring together representatives of all stakeholders with an interest and expertise in housing and welfare reform, in order to:

- Collate existing research evidence;
- Scope out gaps in research; and
- Minimise overlap in welfare reform-related research activity.

The Group has met on several occasions, and an initial scoping/briefing paper is due to be produced later in the spring of 2018. Given the important role of the private rented sector in Northern Ireland's housing market and the fact that around half of private tenants are estimated to be in receipt of Housing Benefit, both the Welfare Reform Research Group (WRRG) and the Department for Communities have identified the need for research on how welfare reform may impact the private rented sector. Two separate strands of proposed research will use quantitative approaches to gain insights into:

- Tenants' experiences and awareness of changes to how welfare benefits are administered, including issues such as Universal Credit and the replacement of DLA with PIP; and
- Landlords' knowledge and experience of welfare reform, including: impacts on rental income; the introduction of Universal Credit; and issues around LHA and any impacts on willingness to let to tenants in receipt of benefits, especially in relation to the rental cover requirements of buy-to-let mortgages, which can call for rental income to be around 125% to 130% of the monthly mortgage payment.

Expected Impact/Outcome

The research will help the Housing Executive, Department for Communities and other key stakeholders devise ways to support the private rented sector to maintain rent payments and sustain tenancies, ensuring the ongoing availability of affordable and accessible accommodation to meet the needs of a range of households.

Housing Services

Review of Temporary Accommodation

Key Client: Housing Services

For some 'Full Duty' homeless applicants, an immediate permanent housing solution may not be available. In such circumstances, the Housing Executive will seek to discharge its duty in stages, via temporary accommodation placements where necessary. Currently a range of temporary accommodation solutions is available, including:

- Housing Executive hostels;
- Voluntary Sector hostels;
- Single Lets (houses/flats etc. made available under licence agreement to households on a short term basis);
- Dispersed Intensively Managed Accommodation (DIME) - for individuals with complex issues and potential behavioural issues which require higher levels of management and support;
- Short-term B&B or similar (used only in exceptional circumstances and for as short a duration as possible).

Households are placed in temporary accommodation appropriate to their circumstances and with the necessary level of support. Households' support needs range from none to high, and these needs can be met either within their accommodation placement or through provision of floating support in a private single let where support needs are low.

The Homelessness Strategy 2012-17 acknowledged the need for a review of temporary accommodation provision to ensure strategic relevance and cost effectiveness. Although an evaluation of accommodation-based services was carried out (RSM McClure Watters, 2015), the full strategic review was put on hold due to the redesign of Housing Executive frontline services: it was considered important to defer any further review allowing for the analysis of any implications arising from service redesign.

Expected Impact/Outcome

The research will help the Housing Executive make best use of limited resources and meet the objectives of the Homelessness Strategy for Northern Ireland 2017-2022 (implementation of which is a target in the draft Programme for Government) by providing evidence on the strategic relevance, financial viability and access criteria of the temporary accommodation portfolio.

Homelessness: Acceptances and incidence of 'Accommodation not Reasonable'

Key Client: Housing Services

The 2017 Northern Ireland Audit Office report on homelessness in Northern Ireland made a number of recommendations, including that the Housing Executive needs to be more innovative in its analysis, interpretation and presentation of the homelessness data it collects. Specifically, the Audit Office recommended that, to fully understand the causes of homelessness, the Housing Executive should:

- Carry out research to determine why the level of statutory homelessness acceptances in Northern Ireland is significantly higher than in other UK regions;
- Analyse the reasons for variation in acceptances across its regions; and
- Analyse the data relating to the 'accommodation not reasonable' category.

The Housing Executive, in collaboration with the Department for Communities, has already taken initial steps to review the type and format of homelessness data that are regularly collated for release in statistical publications. However, additional research is required to provide more in-depth analysis on some of the points raised by the Audit Office.

Households present (and are assessed) as homeless for a wide variety of reasons. However, each year for more than a decade, more than 2,000 households accepted as full duty homeless applicants had been assessed as homeless because it was no longer reasonable for them to continue to live in their current accommodation. In 2016/17, the figure reached 3,652, accounting for 31% of the 11,889 households that had been awarded full duty status during the year. The proposed research would include a more in-depth quantitative and qualitative analysis of 'accommodation not reasonable' cases to ascertain the circumstances that tend to lead to an FDA award for this reason and the types of households involved.

Expected Impact/Outcome

The proposed research would seek to provide insight on whether there are any systemic or structural reasons for the higher incidence of statutory homelessness in Northern Ireland and analysis of the reasons for acceptance, particularly in relation to 'accommodation not reasonable'. It will also assist the Housing Executive in delivering the Homelessness Strategy for Northern Ireland.

Homelessness: User Journeys and Outcomes

Key Client: Housing Services

The 2017 Northern Ireland Audit Office report on homelessness in Northern Ireland recommended that the Housing Executive should systematically evaluate performance in dealing with homelessness against its strategic objectives and regularly report progress to the Board and other key stakeholders. An improved understanding of user journeys within the homelessness process – particularly within the context of the housing solutions approach – will help inform future plans and strategies and understanding of the dynamics of homelessness.

Expected Impact/Outcome

The proposed research will seek to provide insight on how the various stages and aspects of the homeless process meet the needs of users. It will also assist the Housing Executive in delivering the Homelessness Strategy for Northern Ireland, which is a key target in the draft Programme for Government.

Customer Segmentation (Phase 1: Data Audit)

Key Client: Housing Services

Segmentation techniques have been used across a range of sectors to provide better insights into the best ways to communicate and interact with different groups of customers and thus improve customer satisfaction and service delivery. Over the last decade, this customer profiling approach has increasingly been applied by housing organisations in order to gain a better understanding of their customers' needs and expectations, with the aim of designing and delivering better services, in the knowledge that a 'one-size-fits-all' approach does not benefit either the service provider or the customer.

Customer (in this case, specifically *tenant*) profiling brings together the available demographic, behavioural and perceptive information that organisations hold on their customers, then uses statistical analysis to identify 'segments' of relatively homogenous groups of residents, which can be measured, analysed and targeted to drive service improvement and increase satisfaction.

A critical first step is to undertake an audit to establish existing data and processes and any additional data that may be required. Recognising the value of this approach to gain greater insight on its customers, the Housing Services division has requested the initial data audit to be carried out during 2018/19, with a view to carrying out the subsequent segmentation analysis the following year.

Expected Impact/Outcome

The data audit will form the basis for a customer segmentation exercise which will help the Housing Executive gain a better understanding of customers' needs and expectations, with the aim of designing and delivering better services.

Research to inform the Review of the House Sales Scheme

Key Client: Housing Services

The Housing Executive has been operating a House Sales Scheme (HSS) since 1979, initially on a voluntary basis prior to the introduction of the current statutory scheme which was introduced under the Housing (NI) Order 1983. By October 2017, around 120,000 former Housing Executive dwellings in total had been sold to tenants since the inception of the scheme. House sales have been an important source of capital receipts for the Housing Executive, and the sale of Housing Executive dwellings provided an affordable route to owner occupation for thousands of households, effectively creating mixed tenure estates right across Northern Ireland.

However, the Housing Executive has not been in a position to replace the sold dwellings with newly built properties, with the result that the organisation has an ageing and gradually decreasing stock. There is anecdotal evidence that many former Housing Executive dwellings are now in the private rented sector, and while this has created an accessible housing option for many households, it can also create management challenges within mixed estates. In addition, there is growing concern across the UK and in Northern Ireland about ensuring that a supply of social housing is retained to meet housing need.

The Department for Communities is currently considering the Office of National Statistics (ONS) classification of housing associations in Northern Ireland, and this involves looking at ending the Right to Buy scheme for housing associations. In view of these wider issues, Housing Services has therefore begun scoping a review of the Housing Executive's House Sales Scheme.

In 2004, the Housing Executive published research on the House Sales Scheme and the housing market. The proposed project would update this research in the light of current policy issues including the availability of funding for social housing, any evidence on the prevalence of former Housing Executive dwellings in the private rented sector, the Social Housing Reform Programme, Welfare Reform, investment in adaptations, housing need and Programme for Government targets, and policy developments elsewhere in the UK and Ireland.

Expected Impact/Outcome

In providing new and updated data and insights on the outcomes of the House Sales Scheme, the research will help inform consideration of options for possible changes to the Scheme, thus guiding the development of policy for future approaches.

Brexit and the Housing Market

Key Client: Housing Services

When the UK-wide referendum on EU membership was held in 2016, the majority of voters in Northern Ireland (56%) opted to remain in the EU. As the only part of the UK that shares a land border (totalling some 310 miles) with an EU member state, the region is in a unique position, and many of the practical implications for trade, day-to-day movement and cross-border bodies and services that have been developed over the last two decades to meet the needs of largely rural communities on both sides of the border remain unclear.

Some initial research on the implications of Brexit for specific border regions of Northern Ireland and the Irish Republic has already been carried out. One such study considered the situation in the North West (Derry/Donegal) border region – home to around 350,000 people – which would be one of the few city regions within Europe bisected by an EU/non-EU international frontier

(UUEPC & Gallagher, 2017). The study showed high levels of cross-border movement on a daily basis as part of a picture of complex cross-border relationships that existed across trade, retail, commuting, tourism and access to public services. Similarly, a qualitative study carried out for the Irish Central Border Area Network (ICBAN) (Hayward, 2017) sought to give a voice to residents on both sides of the border in this predominantly rural area. Again, there was a strong focus on the movement of people and goods, and the report noted that some respondents had already decided to move to the other side of the border in anticipation of future difficulties in cross-border work. Although neither of these reports, and little of the analysis to date, has focused specifically on housing, it seems reasonable to assume that the UK's withdrawal from the EU may have some impact on housing markets, at least at a localised level.

The amount of 'imported labour' in Northern Ireland increased substantially between 2001 and 2011, when the Census showed that approximately 81,500 Northern Ireland residents (4.5%) had been born outside the UK and RoI, around 36,000 of whom had been born in one of the 12 countries that joined the EU after 2004. Research carried out for the Housing Executive in 2014 by O'Sullivan used the contrasting experience of Dungannon and Larne to consider the influence of migrant workers on local housing markets. It indicated that housing demand (particularly for private rented accommodation) from concentrations of migrant workers had helped certain areas avoid the worst of the housing market slump and prevented new developments from being left unfinished or unoccupied. It follows that any large-scale exodus of migrant workers could equally have consequences for housing markets in specific localities in Northern Ireland. It is therefore considered that it would be useful to carry out research with to scope:

- The future (post-Brexit) intentions of migrant workers currently living in Northern Ireland;
- What any large scale departure of migrant workers currently living in Northern Ireland might mean for housing markets;
- Whether there are typologies of housing markets within Northern Ireland that are more or less likely to be impacted by Brexit.

Expected Impact/Outcome

The research would help the Housing Executive and other stakeholders scope and plan for any possible housing supply and demand issues that may arise in certain locations as a result of the United Kingdom's withdrawal from the European Union.

Community Surveys Programme (Circa three areas)

Key Client: Housing Services

To inform delivery of BRIC and other community cohesion programmes and/or respond to area-specific issues identified by local managers. Surveys carried out independently by the Research Unit provide a valuable insight into residents' views on issues and needs in estates and their levels of satisfaction with their area. These estate-based surveys will help build information on attitudes to the physical environment, community relations, community safety and the facilities that are available locally.

Expected Impact/Outcome

Housing Services will use the survey findings to inform programme delivery. Residents will use the findings to shape a series of activities at the community level and to build better relations in their area. Community groups will be able to use the research outputs when accessing future funding opportunities.

Regional Services/Department for Communities

Traveller Housing Needs Assessment

Key Client: Regional Services (Supporting People)

The Housing Executive is responsible for the provision and management of accommodation for the Traveller Community and also for establishing the accommodation needs of the Traveller Community across Northern Ireland. In fulfilling this role, the Housing Executive carried out comprehensive assessments to establish the accommodation needs (for social housing, Traveller-specific 'Group' housing, serviced sites and transit sites) of the Traveller Community across Northern Ireland in 2002, 2008 and 2014.

This work was partly a response to the final report of the Promoting Social Inclusion Working Group on Travellers (December 2000), which recommended that: 'The Housing Executive should undertake a comprehensive strategic needs assessment of current and projected accommodation requirements of all Travellers in consultation with Traveller organisations, members of the Traveller communities and District Councils'.

More recently, the Equality Commission *Statement on Key Inequalities in Housing and Communities in Northern Ireland* (April 2017) noted that access to appropriate accommodation for Irish Travellers was limited, while the Northern Ireland Human Rights Commission *Out of Sight, Out of Mind* report (March 2018) made a series of recommendations in relation to the Housing Executive's roles and responsibilities on provision and management of accommodation and services for Travellers in Northern Ireland.

This updated Traveller Accommodation Need Assessment will once again involve wide engagement with Travellers and Travellers' Groups to gather as much information as possible on Travellers' current housing circumstances and future housing needs.

Expected Impact/Outcome

The research will help the Housing Executive continue to fulfil its statutory responsibilities in relation to provision and management of accommodation for the Traveller Community by providing updated information on Travellers' housing circumstances and needs, and will also form part of the Housing Executive's response to the reports by the Equality Commission and Human Rights Commission.

Housing Market Analysis

Key Client: Land & Regeneration

As part of the 2017/18 Research Programme, the Housing Executive commissioned research to prepare an updated set of functionally-based housing market area boundaries for Northern Ireland, taking account of Travel to Work Areas, migration data that have become available since 2011 (including Census data) and the new Local Authority boundaries that came into force in 2015.

On completion of this work, it will be necessary to carry out a detailed Housing Market Analysis for each of the newly delineated Housing Market Areas (HMAs). As was the case for the first iteration of the HMA research in Northern Ireland, which was completed in 2010, it is proposed that the full scale Housing Market Analysis report for at least the first – and possibly two – of the new HMAs should be carried out as a pilot study on a commissioned basis.

Completion of these exemplar projects would include production of guidance to provide Housing Executive Planning, Place-Shaping and Data Analytics officers with a template and the tools to facilitate completion of further, similar work in-house.

Expected Impact/Outcome

The proposed project will result in fully completed Housing Market Analysis reports for two of the newly-delineated Housing Market Areas in Northern Ireland, thus informing Housing Investment Plans, Community Planning activity, Local Development Plans and a range of other policies and strategies, and providing Housing Executive staff with the tools and expertise to carry out further analysis.

Northern Ireland Household Projections

Key Client: Land & Regeneration

The Housing Executive has a statutory responsibility to regularly examine housing need, and draws on a wide range of data in fulfilling this duty, including household projections. While population projections provide a useful insight into likely demographic trends, the rate of household formation is a more important driver of the housing market and determinant of the level and location of future housing requirements.

The most recent, 2012-based, household projections, which were based on the trends in household formation during the period 2001 to 2011, were published in 2015. Given the imminent availability of 2016-based population projections at local government district level, it is timely, for planning purposes, to commission an updated set of household projections to inform housing need assessment and investment decisions.

Expected Impact/Outcome

Updated household projections are a key building block to inform decision-making on future investment in new social housing provision, and will form the basis for an updated iteration of the Net Stock Model, as well as informing Housing Investment Plans, Housing Market Analysis and other planning activity.

Net Stock Model

Key Client: Land & Regeneration

Since 1994 the Housing Executive has used a Net Stock Model to estimate the need for new social housing at the Northern Ireland level. The model provides a starting point for developing the Social Housing Development Programme. It estimates the total extra number of new social dwellings required over a 10-year period based on a combination of demographic data (e.g. household projections) and housing stock information (e.g. housing starts, demolitions and vacancy rates).

The model assumes that most dwellings constructed in Northern Ireland will continue to be for the private sector and that the average annual rate of construction for the model's 10-year period will be approximately the same as the rate that prevailed during the previous ten years. The residual requirement – the difference between housing need in total and construction for the private sector – equates to the projected need for social housing. The most recent iteration of the model was produced in 2015 and used the 2012-based household projections. Updated household projections and the availability of data from the 2016 House Condition Survey will facilitate a revised iteration of the Net Stock Model.

Expected Impact/Outcome

An updated iteration of the Net Stock Model will assist the Housing Executive in fulfilling its statutory obligation to assess housing need in Northern Ireland, and guide the Social Housing Development Programme by ensuring that estimates of the overall scale of social housing need are based on the most up-to-date household and stock data.

15-Year Social Housing Need Assessment

Key Client: Land & Regeneration

The 1981 Housing Order states that the Housing Executive must regularly examine housing need, while the 2011 Planning Act names the Housing Executive as a Statutory Consultee in the Development Plan Process. In fulfilling these roles, the Housing Executive provides planning authorities with a Housing Need Assessment (HNA) as evidence to inform Local Development Plans (LDPs), which:

- Set out the long-term spatial strategy for each area;
- Allocate appropriate land for different uses; and
- Set out the main planning requirements to be met in respect of particular zoned sites.

However, while the HNAs currently provided to planning authorities by the Housing Executive project social housing need forward by five years, LDPs have a 15-year assessment framework. The current five-year HNA only provides the necessary evidence to provide for the social housing need identified for five years, and not the 15 years required by planning policy. As the test of soundness states that strategies, policies and allocations must be realistic and appropriate and founded on a robust evidence base, without longer, 15-year evidence, the local development plan cannot allocate social housing for the life of the plan.

To date, this discrepancy has been addressed by multiplying the five-year assessment by three; however, the Housing Executive is concerned that this approach is not sufficiently robust, particularly in view of the test of 'soundness', which is a key feature of the local development plan system and requires the plan document to be tested in terms of content, conformity and the process by which it is produced, at independent examination. The Planning Appeals Commission, which will hold the independent examination, criticised the seven-year social housing projections in previous Area Plans because they did not cover the whole plan period.

In view of these issues, the Housing Executive wishes to commission development of a transparent, longer-term social housing need assessment methodology to act as an evidence base for LDP purposes and strategic housing policies.

Expected Impact/Outcome

This research would generate a step-by-step guide and rationale for assessing long-term social housing need in line with current planning requirements, informing local development plan policy and the development of housing strategies.

Comparison of new build social and private housing in Northern Ireland

Key Client: Department for Communities

Anecdotal evidence suggests that social housing in Northern Ireland is built to a higher standard and costs more to develop than housing built for the private market. This assertion tends to be associated with a wide range of factors, including the requirement to build to Lifetime Homes and Secured by Design standards. Reflecting the objective within the action plan for the *Facing the Future* Housing Strategy (2012-2017) that standards for social housing construction should be harmonised with those used for private housing development, the Housing Association Guide has already been made less prescriptive on a number of aspects. However, a number of higher standards, including Lifetime Homes, were retained in order to reflect key areas of concern.

The Department for Communities wishes to investigate and provide an understanding, from evidence to be collected, of how social housing compares with private developments and, in particular, whether the cost of new social/affordable housing is higher than for private housing, with a range of objectives, including:

- To identify the differences between social and private housing in terms of design and specification;
- To establish conclusively whether there is a cost premium in developing social housing compared with private housing and the extent of any difference;
- To ascertain potential areas for improved value for money within the SHDP with regards to design specification;
- To inform future reviews of design standards, e.g. space standards, Lifetime Homes, Secured by Design, density etc.

Expected Impact/Outcome

The research findings will be used to:

- Guide improved value for money within the SHDP;
- Provide evidence for future reviews (e.g. space standards and Lifetime Homes) and;
- Provide definitive answers to queries from elected officials, etc.

Affordable Warmth

Key Client: Department for Communities/PSIS

The 2017/18 Research Programme included plans to carry out a survey of households who had used the Affordable Warmth Scheme. This project was completed in-house by the Research Unit, with the full report, published in February 2018, showing high levels of satisfaction with the Scheme. A further survey will be carried out during 2018/19 to evaluate ongoing satisfaction with the scheme and monitor customers' views on the overall process, including engagement with local councils, the timeliness of implementation and satisfaction with their contractor.

Expected Impact/Outcome

This research will enable DfC to develop benchmarks and ensure the highest level of satisfaction is being achieved and to monitor this bi-annually/annually (TBC). It will also reveal what works well and any improvements required to maintain a high level of satisfaction.

Older People: Housing Issues and Needs

Key Client: Regional Services

As part of the Housing Executive's Older People Housing Policy Review Action Plan 2008-2010, the Housing Executive commissioned a suite of research on the future housing and support needs of older people, which was completed during the two-year period of the action plan. In common with most western societies, the population in Northern Ireland is continuing to age, with an ongoing shift towards an older age structure. While increased longevity has many benefits, it also brings challenges in terms of care and support needs and finding ways to help people live independently for as long as possible.

The draft Programme for Government framework 2016-2021 includes the outcomes: 'We enjoy long, healthy, active lives' and 'we care for others and we help those in need'. Both include an indicator on improving the supply of suitable housing, with a view to reducing the level of housing stress. As older people consistently account for around 16% of all applicants in housing stress, it is important to understand more about the reasons for older people's housing need and the solutions that could be put in place to meet this need and/or help alleviate older people's housing stress in future. The proposed research would provide an update on some of the key themes explored in the previous suite of research to take account of subsequent trends and policy developments.

Expected Impact/Outcome

The proposed research will help the Housing Executive and other stakeholders take account of issues in relation to older people's housing and support needs as it contributes to the overall

targets and outcomes set out in the Programme for Government in terms of reducing housing stress, ensuring appropriate housing supply and helping people to live long, healthy, active lives.

The Roma Community in Northern Ireland and Housing Need

Key Client: Equality Unit

Roma families, who have moved to Northern Ireland from the EU Accession countries, have established significant communities in the Belfast area and are present in smaller numbers in towns and cities across the country. This is a relatively new community to Northern Ireland and public bodies, service providers and practitioners have very limited information on the needs of these communities. This is particularly relevant in relation to housing; although some limited information is available through the activity of the Houses in Multiple Occupation Department, a number of issues have been raised through equality-based organisations which include:

- Renting from unregistered landlords.
- Very large households and overcrowding.
- Ambiguity around definitions of households.
- Multiple Occupancy.
- Exploitative and coercive practices by landlords.
- Community Cohesion issues and racial harassment.

Expected Impact/Outcome

This study will document the existing research on this subject, examine the issues particular to Northern Ireland and identify the current communities, estimated numbers and housing eligibility, choice and opportunity.

Corporate Surveys (Annual Conference etc)

Key Client: Finance, IT and HR

To design, analyse and report on staff satisfaction and provide feedback on specific events (e.g. the Annual Conference). This can include an overall employee engagement survey to further understand staff wellbeing and use this to understand the impact on customers.

Expected Impact/Outcome

This will enable the organisation to understand staff satisfaction and wellbeing. It will also provide feedback on conferences and events to ensure that employees get the most out of them and objectives are met.