

Commissioning Prospectus

Affordable Social & Intermediate Housing

**For Social Housing Development Programme Period
(2018/19-2020/21)**

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Introduction

Overview and Purpose

The purpose of the Housing Executive's Commissioning Prospectus (the Prospectus) is to provide a strategic overview of housing need and demand in Northern Ireland. It also provides housing associations and other stakeholders with the information they require to make informed decisions about where to search for land and property to deliver new affordable social and intermediate housing.

The Prospectus sets out the key priorities and locations for affordable social and intermediate housing in Northern Ireland and for each council area and within the context of community planning, taking into account feedback received from local stakeholders.

Three Regional Place Shaping teams cover Belfast, South and North NIHE Regions. These are aligned to LGD council areas, and are responsible for supporting housing associations in delivering social and affordable schemes against the Strategic Guidelines and the needs identified in this Prospectus.

The Prospectus is expected to be updated and published annually (January). However, it is important that associations and other interested stakeholders discuss specific proposals and any queries with the relevant head of place shaping (see Contacts).

Programme Commissioning and Formulation

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

The Housing Executive will roll forward the SHDP for the next three Year period (2017/18 to 2019/20). The 2016 Bidding Round already concluded, between 23rd June 2017 and 4th August 2017 will produce a new draft SHDP for approval by the Minister in early 2018. This Prospectus will facilitate the ongoing site searches by housing associations in preparation for subsequent year's bidding round.

Northern Ireland Housing Requirements

Context

The demographic of Northern Ireland continues to change. Between 2001 and 2011, the population increased by 7.5% to 1.8 million. The age profile is becoming older as people live longer and household sizes are getting smaller. This long term trend towards smaller households and a greater number of older person households will result in a sustained demand for smaller accommodation.

Housing Market Analysis (across tenures)

Northern Ireland continues to emerge from the crash in the housing market which impacted on the social and private rental markets, the land market and the wider economy.

The housing market is however showing signs of recovery. House prices are stabilising, with an average house price in Northern Ireland in 2016 of £154,028¹. Confidence is returning to the market with the number of house sales in Northern Ireland increasing by 70% from 12,728 in 2010 to 21,669 in 2016², although this figure represents a slight decrease from 2015.

Negative equity and bank lending practices have constrained the housing market with many first time buyers experiencing problems gaining access to owner occupation. Banks have however eased lending restrictions and help to buy schemes are offering a means of accessing owner occupation for some households.

The private rented sector conversely has risen significantly over recent years, increasing from 6.7% share of the market in 2001 to 15.1% in 2011. Reasons for this include rising levels of temporary employment; pressure on wages; growing social housing waiting lists and a lack of affordability in the owner occupied sector.

While there has been a steady fall in the number of private lettings over the past few years, it is still a vibrant market throughout Northern Ireland, with 19,842 dwellings let in 2016. The recent decrease in private lets may be indicative of a slowdown in the number of properties coming into the sector via 'accidental landlords' and 'buy to let' investors. Longer more secure tenancies being offered to tenants is also likely to result in lower turnover of lettable stock.

Nevertheless, it is likely that the private rented sector in Northern Ireland will continue to play an important role which is increasingly viewed as a longer term housing solution for many entrants to the housing market.

The social housing sector has experienced a decrease in tenure share from 21.2% in 2001 to 14.9% in 2011 with many tenants leaving social housing during the housing market boom for the private rented and owner occupied sectors. Despite this shift in tenure profile, the relatively insecure nature of private tenancies and continuing difficulties accessing home ownership indicate that many households still seek housing within the social sector.

Social housing stress waiting lists have increased by 20% from 19,708 in March 2007 to 23,694 in March 2017 and as the supply of private rented properties continues to slow, social housing new build is becoming an ever more important tenure option.

Within the Social Housing Need Assessment, it is recognised that rural areas have unique issues which require different approaches. The definition of rural now includes '**settlements with a population below 5,000**' and based on this:

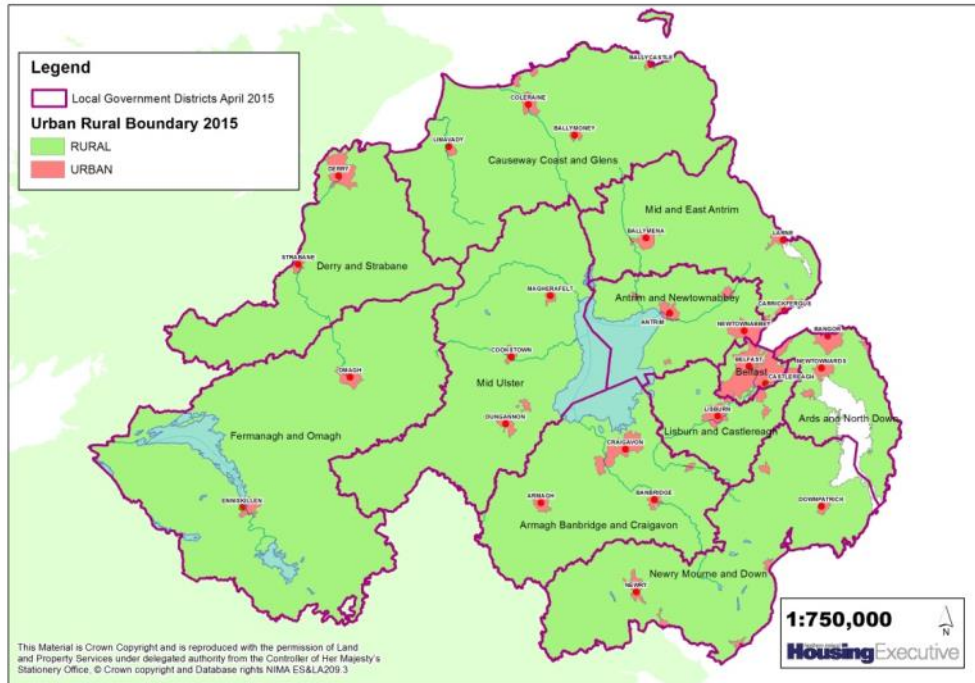
- 667,000 people (35% of the total population of NI) live in rural areas;

¹ Source: University of Ulster

² Source: Land & Property Services

- Rural applicants comprise 13.5% of the total waiting list for social housing;
- The proportion of social housing stock in rural areas (7%) remains significantly lower than in urban areas (18%).

Map 1: Northern Ireland urban/rural areas



Social Housing Need & Strategic Guideline requirements

General Needs Housing (Urban & Rural NI)

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

The Housing Executive is committed to ensuring that housing need is targeted equitably throughout Northern Ireland and has developed Strategic Guidelines to distribute the new build social housing requirement (as set by the PfG budget) at a LGD council 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).

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- 2018/19 – 2,200 Total Units
- 2019/20 – 2,200 Total Units
- 2020/21 – 1,850 Total Units

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

Table 1: Social Housing Strategic Guideline Requirement (2018/19 – 2020/21)

Local Government District	Strategic Group		
	Urban Target Requirement	Rural Target Requirement	Total Target Requirement
2018/19 2,200 Total Units			
Belfast	776	0	776
Lisburn & Castlereagh	81	13	94
Antrim & Newtownabbey	120	4	124
Causeway Coast & Glens	46	23	69
Derry & Strabane	408	14	422
Mid & East Antrim	73	19	92
Ards & North Down	114	18	132
Armagh, Banbridge & Craigavon	20	6	26
Fermanagh & Omagh	7	0	7
Mid Ulster	70	17	87
Newry, Mourne & Down	233	138	371
	1,948	252	2,200
2019/20 2,200 Total Units			
Belfast	776	0	776
Lisburn & Castlereagh	81	13	94
Antrim & Newtownabbey	120	4	124
Causeway Coast & Glens	46	23	69
Derry & Strabane	408	14	422
Mid & East Antrim	73	19	92
Ards & North Down	114	18	132
Armagh, Banbridge & Craigavon	20	6	26
Fermanagh & Omagh	7	0	7
Mid Ulster	70	17	87
Newry, Mourne & Down	233	138	371
	1,948	252	2,200
2020/21 1,850 Total Units			
Belfast	651	0	651
Lisburn & Castlereagh	68	11	79
Antrim & Newtownabbey	101	3	104
Causeway Coast & Glens	39	19	58
Derry & Strabane	343	11	354
Mid & East Antrim	62	16	78
Ards & North Down	96	16	112
Armagh, Banbridge & Craigavon	17	5	22

Local Government District	Strategic Group		
	Urban Target Requirement	Rural Target Requirement	Total Target Requirement
Fermanagh & Omagh	6	0	6
Mid Ulster	59	15	74
Newry, Mourne & Down	196	116	312
	1,638	212	1,850

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

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

It is recognised that within rural areas there are unique issues and difficulties in securing social housing delivery. The Housing Executive will seek to use its rural enabling function to deliver the Rural Strategy and Action Plan 2016-2020 to address rural housing needs.

To support the delivery of Objective 1 of the Rural Strategy *“to plan and enable the provision of affordable homes which meet rural housing needs”*, the Housing Executive will review and enhance the rural housing enabler service to assist rural communities wishing to examine the provision of affordable housing in their locality. This service will incorporate:

- Identifying, testing and assessing rural housing need;
- Monitoring of the percentage target of the Social Housing Development Programme for rural new build schemes;
- Highlighting specific, priority rural housing requirements in the Prospectus;
- Identifying land in rural areas with potential for housing development; and
- Working with housing providers to address the increasing demand for mixed tenure and intermediate housing in rural areas.

Further information on the [Rural Strategy and Action Plan 2016 - 2020](#) or rural housing needs can be obtained by contacting the Housing Executive’s Rural Unit or the relevant Regional Place Shaping Team.

Shared Future Demand and Regeneration

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

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All proposed TBUC schemes will be assessed against the following overarching criteria, approved by the Housing Executive for the selection of shared housing schemes:

- Religious mix of the local community;
- The waiting list should demonstrate that the scheme delivered would not have one community in the dominance of more than 70%;
- A history of good relations in the area;
- Potential size of development (not less than 25 units). Exceptions in rural areas will be considered;
- Local political/community issues/views indicate support for sharing.

The Housing Executive continues to work with housing associations to fulfil the NI Executive ambition to deliver new build shared housing schemes as part of the TBUC programme. Housing associations will be encouraged to take forward schemes under a TBUC designation through the availability of additional funding at both on-site stage and completion stage.

The Building Successful Communities (BSC) programme is a strand of the 'Facing the Future – Housing Strategy for Northern Ireland' and aims to use housing interventions as one of the main catalysts for local regeneration. The objectives of the programme are to:

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

The BSC Programme aims to test a housing-led approach to regeneration in five urban areas across Belfast and one area in Ballymena. These areas suffer from a range of issues associated with dereliction and social housing market failure, such as blight, decline, high unemployment, low educational attainment, anti-social behaviour, empty housing stock, and vacant land; each BSC area will also have a nominated housing association to deliver any identified housing schemes. Currently the BSC areas are:

- Lower Shankill / Browns Square, Belfast (Helm HA);
- Lenadoon and Glen Colin, Belfast (Choice HA);
- Lower Falls, Belfast (Fold HA);
- Lower Oldpark and Hillview, Belfast (Clanmil HA);
- Tigers Bay, Belfast (Apex HA);
- Doury Road, Ballymena (Helm HA and Triangle HA).

Supported Housing Need

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

These services meet the needs of a wide range of vulnerable people including elderly people (sheltered and housing with care provision), clients with learning disabilities, clients with mental health issues, clients with physical disabilities, vulnerable women, clients with drug/alcohol issues and young people leaving care.

A review of the Supporting People programme was carried out by the Department and the report was published in December 2015. Work commenced in April 2016 on the three year implementation plan that reflects the recommendations within this report.

It is anticipated that as the review is implemented and as new methods of assessing supported housing need and commissioning services are developed, the new priorities/plans which arise will be reflected within the SHDP as appropriate.

Any new or additional opportunities identified by housing associations for potential supported housing should, in the first instance, be discussed and agreed with the local Head of Place Shaping and Supporting People Team (see Contacts).

Wheelchair Housing Need

The Housing Executive is working closely with the DfC to increase the supply of wheelchair accessible accommodation in Northern Ireland. An initial annual target has been set for generic wheelchair units provision within the SHDP at 6% (for the 17/18 year), rising incrementally to an annual figure of 10%, by the end of the PfG period in 2020/21.

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

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

The Housing Need Assessment is used to assess potential demand from wheelchair users and the need for accessible units. Table 2 details the generic wheelchair accommodation requirements at March 2017 by Council LGD.

Table 2: Wheelchair Needs Assessment as at March 2017

Local Government District	5 Year Wheelchair Needs Assessment
Antrim and Newtownabbey	26
Ards and North Down	49
Armagh, Banbridge and Craigavon	33
Belfast	131
Causeway Coast and Glens	32
Derry City and Strabane	37
Lisburn and Castlereagh City	34

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Local Government District	5 Year Wheelchair Needs Assessment
Mid Ulster	19
Mid and East Antrim	39
Fermanagh and Omagh	22
Newry, Mourne and Down	37
	459

Housing associations are encouraged to include generic wheelchair units within all suitable schemes and seek support for these from regional place shapers when discussing specific housing mixes.

Travellers' Accommodation

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:** A range of managed accommodation where Traveller families have a permanent base to park caravans or erect timber framed sectional buildings; electricity, water and sewerage disposal are provided together with other facilities such as communal or individual amenity units.
- **Transit Site:** A relatively basic facility where Travellers may park caravans on a temporary basis and where electricity, water and sewerage disposal are provided.

Housing associations input is generally only required in the provision of Group Housing. Serviced Sites and Transit Sites are provided and managed by the Housing Executive. For further information please contact the Travellers Unit.

Affordability - Intermediate Housing and Demand

Intermediate Housing Options

The Housing Executive considers **affordable housing** to include both **Social Housing** and **Intermediate Housing**.

Intermediate Housing generally consists of shared ownership/rented housing provided through a Registered Housing Association and helps households who can afford a small mortgage, but that are not able to afford to buy a property outright. The property is acquired using part mortgage/finance by the householder and part social renting from the Registered Housing Association. The proportion of property ownership and renting can vary depending on householder circumstances and preferences. The current eligibility criterion for shared ownership is set out on the DfC website. In addition, the definition of

intermediate affordable housing used for the purposes of this policy may change over time to incorporate other forms of housing tenure below open market rates and the model of shared ownership may also be reviewed. Co-ownership Housing is the best known scheme in Northern Ireland for people who want to buy a home but who cannot afford to purchase 100% of the property.

Facing the Future Housing Strategy 2012/17 identified the need to 'ensure access to decent, affordable, sustainable homes across all tenures in Northern Ireland (Theme 1). As a result, the Affordable Home Loans Fund was launched in March 2014 (Action 7), represents a £19 million scheme which could potentially deliver 600 new affordable homes by 2020. The outcome from this was the introduction of a new shared ownership scheme called FairShare operating in Northern Ireland. This scheme allows people to partner with a housing association to buy a property. Currently, Apex, Choice and Clanmil housing associations are participating in this scheme. Further information is available at:

<http://fairshare.org.uk/>

Intermediate Housing Demand

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

The Housing Executive has been working with the DfC on affordable housing pilots on surplus NIHE land which require intermediate housing need to be identified. Currently the Housing Executive assesses the potential annual demand for intermediate housing based on a model adopted by the Welsh Assembly created by Professor Glen Bramley (Welsh Model).

The model uses the number of households in a council area, their median income levels and the lower quartile house prices for a 2/3 bedroom house in the council area to determine the level of income needed to be able to afford to purchase a house within that council area.

The calculation determines households who can afford to buy a house and those who cannot, leaving a remainder who could avail of intermediate housing. Newly arising household formation is then taken into consideration as a means to project for future years.

Table 3 details the annual intermediate housing requirement for the 10 year period 2016 to 2026. This assessment is reviewed and updated on an annual basis.

Table 3: Annual Intermediate Demand between 2016 and 2026

Local Government District	Intermediate Need
Antrim & Newtownabbey	70
Ards and North Down	67
Armagh, Banbridge & Craigavon	173

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Local Government District	Intermediate Need
Belfast	102
Causeway Coast & Glens	48
Derry & Strabane	44
Fermanagh & Omagh	59
Lisburn & Castlereagh	114
Mid & East Antrim	44
Mid Ulster	133
Newry, Mourne and Down	144
	1,016

NB. Revised figures based on updated CACI data at December 2017

The Leishman Model commissioned by the Housing Executive and the DfC has also been developed and has been available for use since early 2016 - to date this has not been utilised pending outcome of policy development.

Housing associations are also encouraged to carry out their own research into the market and should discuss possible locations for future intermediate/affordable housing schemes with the regional place shaping teams.

Individual Local Government Analysis

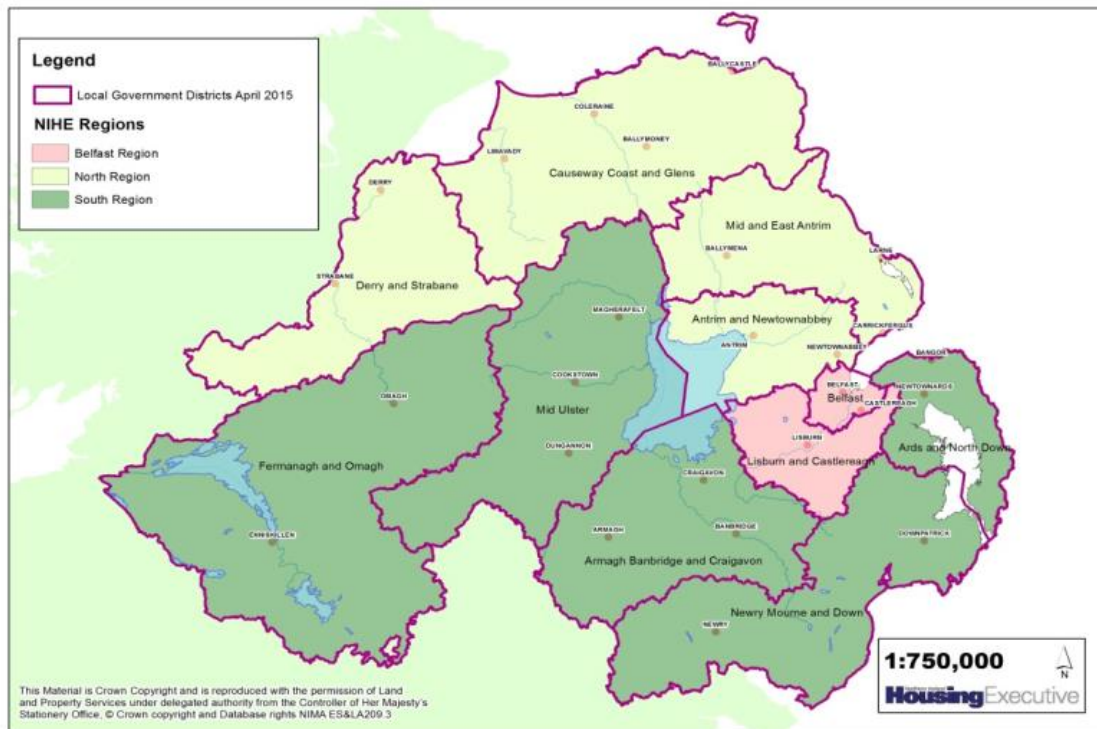
The following sections have been prepared by the respective local place shaping teams to provide specific 'local' analysis and priorities that they would like to see delivered within the SHDP and other products being developed by associations.

The regional place shaping teams represent the main NIHE interface with councils and community planning. They also are the main point of contact for those stakeholders involved in the delivery of social and affordable housing.

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

Belfast Regional Place Shaper	Robin Hawe	robin.hawe@nihe.gov.uk
North Regional Place Shaper	Fiona McGrath	fiona.mcgrath@nihe.gov.uk
South Regional Place Shaper	Ailbhe Hickey	ailbhe.hickey@nihe.gov.uk

Map 2: Regional place shaping areas



Individual Local Government District Analysis

Housing Market Analysis (across tenures)

Housing & Land Supply

- The DOE's Northern Ireland Housing Land Availability Report for 2013 (Planning NI: 2014) shows potential capacity for 13,107 additional dwellings in Antrim and Newtownabbey;
- The borough has a HGI projected new dwelling requirement for 2012-2025 of 7,200 units;
- Between 2010 and 2016 construction commenced on 3,573 new homes, 86% of which were private sector dwellings;
- During the same period, 2,914 new homes were completed; 71% private sector dwellings.

Owner Occupied Housing Sector

- Census 2011 demonstrated the continued desire of residents to own their own home; 73.3% of residents were owner occupiers at this date, a slight decrease (0.1%) from 2001;
- The private housing market continues to recover; the number of house sales in Antrim and Newtownabbey increased from 999 in 2010 to 1,915 in 2016. This is a 3% decrease from the 2015 figure which peaked at 1,973;
- The average house price for Antrim and Newtownabbey stabilised at £130k over the past three years; £24k below the Northern Ireland average at 2016;
- Local estate agents report that the number of sales and enquiries has improved. Popular locations in the borough include Glengormley, Ballyclare, Antrim, Crumlin and Templepatrick.

Private Rented Housing Sector

- The private rented sector is an increasingly important sector in the borough, with an unprecedented increase in tenure share between 2001 and 2011 (4.1% - 11.9%);
- Local estate agents report that there is continuing strong demand for private rental accommodation across the borough. This is sustained by high demand and low turnover in the social housing sector and a slowdown of supply in the private rental sector;
- The DFC's Landlord Registration Scheme identified 6,958 tenancies for Antrim and Newtownabbey at March 2017;
- Housing benefit continues to play a vital role in supporting the private rented sector. At March 2017, there were 3,743 private tenants in receipt of housing benefit;
- There are currently an estimated 5,836 Houses of Multiple Occupation (HMOs) in Northern Ireland, 221 of which are in Antrim and Newtownabbey. All identified HMOs have been registered as complying with regulations.

- Census 2011 showed that social rented stock in the borough (6,862 units) has fallen by 27% compared to the 2001 figure;
- Housing Executive stock at 2017 was 6,517 with 10,385 properties sold since the commencement of the 'right to Buy' scheme;
- There were 123 social housing units completed and a further 177 social housing units on site in year to March 2017. Three hundred and sixty-eight units are planned over the period 2017-2020;
- Thirty-eight Housing Executive properties were sold to tenants in year to March 2017;
- There are around 1,700 housing association units in the borough (inclusive of shared stock and bedspaces).

Social Housing Need

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

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

General Housing Need (Urban & Rural)

Urban

Five year projected need for the area as a whole is 912 and the projected need for individual settlements is detailed in Table 4.

Table 4: Projected (5 Year) Social Housing Need

Settlement	Housing Need Assessment Area*	Total 5 Year Projection
Newtownabbey Urban	Rathcoole	47
	Rushpark	84
	Rathfern	11
	Whiteabbey(Abbeyville,Glenville,Abbeyglen)	56
	Longlands/Bawnmore/Old Mill	71
	Hightown	19
	Felden	45
	Ballyduff	42
	Central Glengormley (Glenvarna, Queens Park/Avenue)	123

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Settlement	Housing Need Assessment Area*	Total 5 Year Projection
	Mossley	48
	Monkstown	27
	Hydepark/Parkmount	10
Antrim Town	Antrim Central	45
	Antrim West	45
	Parkhall	46
Ballyclare	Ballyclare	13
Crumlin	Crumlin	101
Randalstown	Randalstown	52
Parkgate/Templepatrick	Parkgate/Templepatrick	13
Remaining Settlements (need <10)**	Bleachgreen, Doagh / Kelburn Park and Oakview / Roughfort	14
Total		912

N.B. Please note that need is met for any locations not included on this list.

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

*** Remaining settlement 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 Latent Demand Testing (LDT) or other marketing exercises to identify hidden additional social and mixed tenure demand.

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

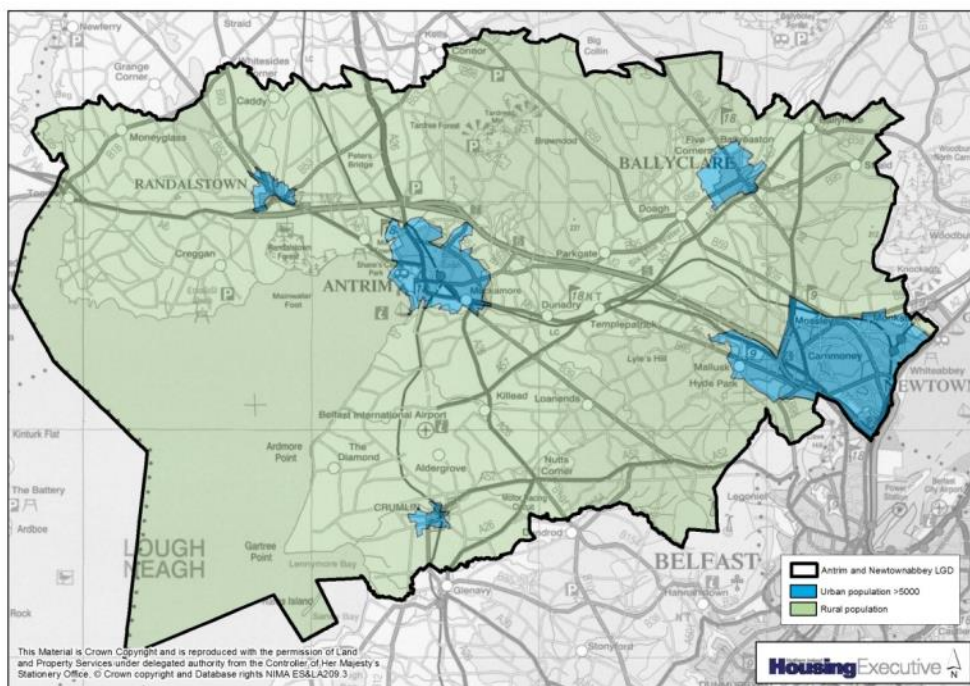
- Housing need in Antrim and Newtownabbey has gradually increased over the past six years. The five-year assessment for 2017-22 shows a projected need for 912 units and is focussed in the main urban settlements;
- Single, small family and older person households comprise 89% of applicants in housing stress. Future housing mix in new social housing developments will be required to cater for these household groups and to consider changes associated with Welfare Reform. Emphasis should also be on accessibility;
- The number of applicants in housing stress remains high and the number of allocations don't currently meet demand;
- In Antrim and Newtownabbey, site identification studies have been carried out by the Housing Executive in Hydepark/Parkmount, Templepatrick, Crumlin and Glengormley. Site identification studies have been carried out in Monkstown and Mossley as part of masterplans for the areas;
- In recent years, social housing need in Antrim and Newtownabbey has been delivered by housing associations on Housing Executive land in Antrim town, Ballyclare and across Metropolitan Newtownabbey. Increasingly, areas of

housing need are emerging in locations where the Housing Executive does not own land;

- Housing associations have reported difficulties in obtaining sites in Crumlin, Randalstown, Templepatrick, Rushpark, Whiteabbey and North Glengormley;
- There were 115 voids at March 2017 in Antrim and Newtownabbey. These are concentrated in Monkscoole House, Rathcoole, which is the subject of an economic appraisal. The remainder are small numbers of operational voids which are generally short term;
- A number of Estate-based Strategies which included selective demolition of unpopular stock were successfully delivered throughout Newtownabbey over the past two decades resulting in increased popularity and stability in these neighbourhoods;
- Housing need varies considerably across Antrim town. Need is currently met in the Springfarm, Newpark/Ballycraigy, Stiles/Rathkyle/Rathglynn and Rathenraw areas. Although these estates have stabilised there is a continuing high turnover of properties particularly to family households.

Rural

Map 4: Antrim and Newtownabbey rural map



The provision of new social housing in rural settlements represents a strategic priority for delivery of the SHDP. Currently the overall rural target share of the SHDP is 11.45% of the overall programme based on average levels of housing stress in rural areas.

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

Indicative housing mix requirements

- At March 2017, there were 1,668 applicants in housing stress on the waiting list for social housing in Antrim and Newtownabbey. The household breakdown shows 759 (46%) single households, 427 (26%) small family households and 291 (17%) older person households;
- In year to March 2017, there were 626 allocations to applicants including 254 (41%) to single households, 191 (31%) to small family households and 92 (15%) to older persons;
- There is a high turnover to family households in some areas within Antrim town;
- Current Housing Executive stock in Antrim and Newtownabbey totals 6,517 dwellings and includes 3,217 (49%) houses, 2,216 (34%) flats, 1,039 (16%) bungalows, 35 (1%) maisonettes and 10 cottages;
- The trend for new dwellings in Antrim and Newtownabbey is for smaller households; for single, older person and small family households. One and two bedroom accommodation is increasingly the norm for singles and small families. Where possible one bedroom properties, while addressing the immediate requirements under welfare reform should be designed flexibly to cater for potential household growth;
- Some three bedroom or larger properties may be required for families and these should be discussed with the Housing Executive;
- Accommodation for older persons should be designed flexibly with long term accessibility taken into consideration. Generic wheelchair units should be included in schemes where possible;
- Alternative mixes can be considered by housing associations in relation to specific sites or scheme types. However, significant changes from the above mix should be discussed with the Housing Executive to avoid nugatory work.

Table 5: Indicative housing mix for Antrim and Newtownabbey

Elderly	Families*	Singles	Wheelchair
17%	37%	46%	6%

* Focus on: Small Adult and Small Family Households

Areas where need is met

Estate Based Strategies in Antrim town and within Metropolitan Newtownabbey, which included selective demolition, have been successfully carried out. These areas have generally stabilised, however there remains a high turnover in some areas; Rathenraw, Springfarm, Newpark/Ballycraigy and Stiles/Rathkyle and Rathglynn. Currently, need is met in these areas.

Rural areas

Based on the waiting list for social housing at March 2017, the current five year (2017-22) projected need for rural areas within Antrim and Newtownabbey is 31 units. Taking account of new build schemes on the current SHDP, residual housing need is focused in Hyde Park/Parkmount and Doagh. A Latent Demand Test is planned for Oakview/Roughfort.

At March 2017 there were 47 applicants, in rural Antrim and Newtownabbey, in housing stress (3% of the total housing stress waiting list). Need is mainly for single and small family households.

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

Wheelchair Housing Need (HNA)

The estimated generic wheelchair housing requirement for Antrim and Newtownabbey is for 26 units. This need is mainly centred in Metropolitan Newtownabbey, Antrim town and Randalstown.

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

Shared Future Demand

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

Travellers' accommodation

Traveller need continues to be monitored in Antrim and Newtownabbey.

Intermediate (Affordable) Demand

- The Housing Executive estimates intermediate/affordable housing demand for Antrim and Newtownabbey at approximately 71 units per annum;
- Co-Ownership approved 96 applications in 2016/17 for Antrim and Newtownabbey;
- Average house prices in Antrim and Newtownabbey have fluctuated over the past six years and at 2016 were 7.2% lower than in 2011.

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Table 6: Average Annual House Prices Antrim and Newtownabbey & NI 2010-2015

Area	2011	2012	2013	2014	2015	2016	% Change 2011- 2016
Antrim and Newtownabbey	£139,684	£126,237	£118,742	£130,706	£129,475	£129,610	-7.2
Northern Ireland	£139,800	£138,147	£131,204	£140,217	£149,499	£154,028	+10.2

Source: Ulster University

Antrim and Newtownabbey Supporting Data

Table 7: Antrim and Newtownabbey Waiting List – March 2017

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	1,185	154	646	66	154	445	2,650
HS Applicants	759	71	427	36	84	291	1,668
Allocations	254	22	191	8	59	92	626

Applicants – Housing applicants at March 2017

HS Applicants – Housing stress applicants at March 2017 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2017

Table 8: Antrim Town Waiting List – March 2017

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	326	36	138	13	26	87	626
HS Applicants	190	13	84	7	12	58	364
Allocations	68	6	45	2	24	11	156

Applicants – Housing applicants at March 2017

HS Applicants – Housing stress applicants at March 2017 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2017

Table 9: Metropolitan Newtownabbey waiting list

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	701	94	392	44	98	297	1,626
HS Applicants	458	44	264	25	52	196	1,039
Allocations	165	13	127	6	28	69	408

Applicants – Housing applicants at March 2017

HS Applicants – Housing stress applicants at March 2017 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2017

Table 10: Housing Stress applicants time on list March 2017

Household	0-6 mths	6-12 mths	1-2 years	2-4 years	4+ years	Total	Average Months
Single	147	115	168	145	184	759	34
Small Adult	10	11	18	14	18	71	36
Small Family	73	62	100	110	82	427	29
Large Adult	2	3	3	8	20	36	61
Large Family	12	10	19	26	17	84	31
Older Person	43	33	47	48	120	291	60
Total	287	234	355	351	441	1,668	38

Ards and North Down

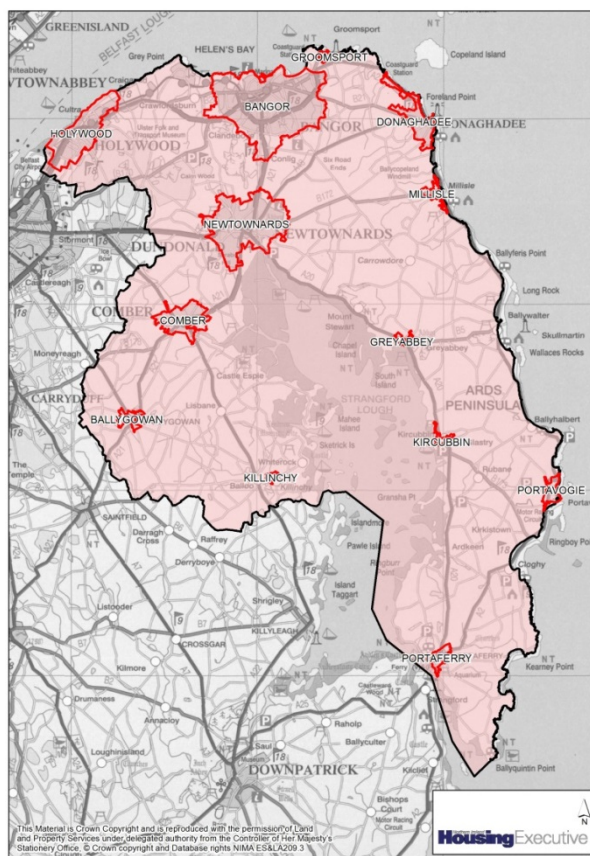
LGD socio-economic context

Ards and North Down council area is known for its rich diversity of scenic countryside and extends from Holywood on the shores of Belfast Lough, to Portaferry on the southern tip of the Ards Peninsula, and Killinchy to the west of Strangford Lough. The Council has 8.6% of NI's population located over an area of 228 square miles and approximately 115 miles of coastline.

Ards and North Down Borough Council has been in operation since the 1 April 2015. The council area offers many beautiful urban and rural locations, ease of access to Belfast, an established tourism infrastructure, a flourishing arts scene and specialist business support services for all sectors.

The area is a significant residential centre, an attractive place to live and work due to its natural scenic landscape, strategic location and connectivity, range of facilities and recreation opportunities. The borough has a growing population of approximately 158,000 and while mostly urban, there is a significant rural populace.

Map 5: Ards and North Down Borough with main settlements



Housing Market Analysis (across tenures)

Housing & Land Supply

- The DOE's Northern Ireland Housing Land Availability Report (Planning NI: 2011-2014) shows potential capacity for 13,347 additional dwellings;
- The annual rate of new house building is less than the requirement (995) as set out in the Regional Development Strategy 2035(RDS);
- Between 2011 and 2016, construction commenced on 3,330 private sector homes, with peak of 848 in 2016.

Owner Occupied Housing Sector

- Census 2011 demonstrates the continued desire of residents to own their own home;
- The private housing market is showing signs of recovery – the number of house sales in Ards and North Down has increased from 1,510 in 2012 to 2,456 in 2016 (LPS);
- The average house price for Ards and North Down has increased between 2013 and 2016. House prices have increased to £185,077 in the past year which is higher than the Northern Ireland average of £154,028;
- Popular locations include Bangor, Newtownards, Holywood and Comber.

Private Rented Housing Sector

- The private rented sector across Ards and North Down has seen an unprecedented increase in its tenure share between 2001 and 2011 (5% - 11.8%);
- Local estate agents report that there is continuing strong demand for private rental accommodation across the district;
- The DfC's Landlord Registration Scheme identified 8,968 tenancies registered for Ards and North Down in March 2017;
- Housing benefit continues to play a vital role in supporting the private rented sector. At March 2016, 4,439 private tenants in Ards and North Down were in receipt of housing benefit;
- There are currently an estimated 5,836 Houses of Multiple Occupation (HMOs) in Northern Ireland, of which 107 are in Ards and North Down. All identified HMOs in Ards and North Down have been registered as complying with regulations.

Social Rented Housing Sector

- Census 2011 showed that the social rented stock in the district (7,370 units) has fallen by 24% compared to the 2001 figure;
- Housing Executive stock at March 2016 was 6,336 with 7,972 properties sold since the commencement of the 'Right to Buy' scheme;
- There were 237 new social housing units completed and a further 636 social housing units on site in the year to March 2017;
- Twenty One Housing Executive properties were sold in the year March 2017;
- There are around 2,890 housing association units in the borough (inclusive of shared stock and bedspaces).

Social Housing Need

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

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

General Housing Need (Urban & Rural)

Urban

Five year projected need for the area as a whole is 706 and the projected need for individual settlements is detailed in Table 11.

Table 11: Projected (5 Year) Social Housing Need 2017-22

Settlement	Housing Need Assessment Area*	Total 5 Year Projection
Newtownards Town	Newtownards Centre	104
	Newtownards Periphery	
Bangor	Bangor Central	270
	Bangor East	
	Bloomfield/Balloo	
	Conlig	
	Kilcooley	
Ballygowan	Ballygowan	10
Comber	Comber	121
Donaghadee	Donaghadee	12
Groomsport	Groomsport	40
Hollywood	Hollywood Central	100
	Hollywood Outer	
Remaining Settlements (need <10)**	Ballyhalbert, Ballywalter, Carrowdore, Crawfordsburn, Helen's Bay, Killinchy, Kircubbin, Lisbane, Millisle and Portavogie	49
Total		706

N.B. Please note that need is met for any locations not included on this list.

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

*** Remaining settlements 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

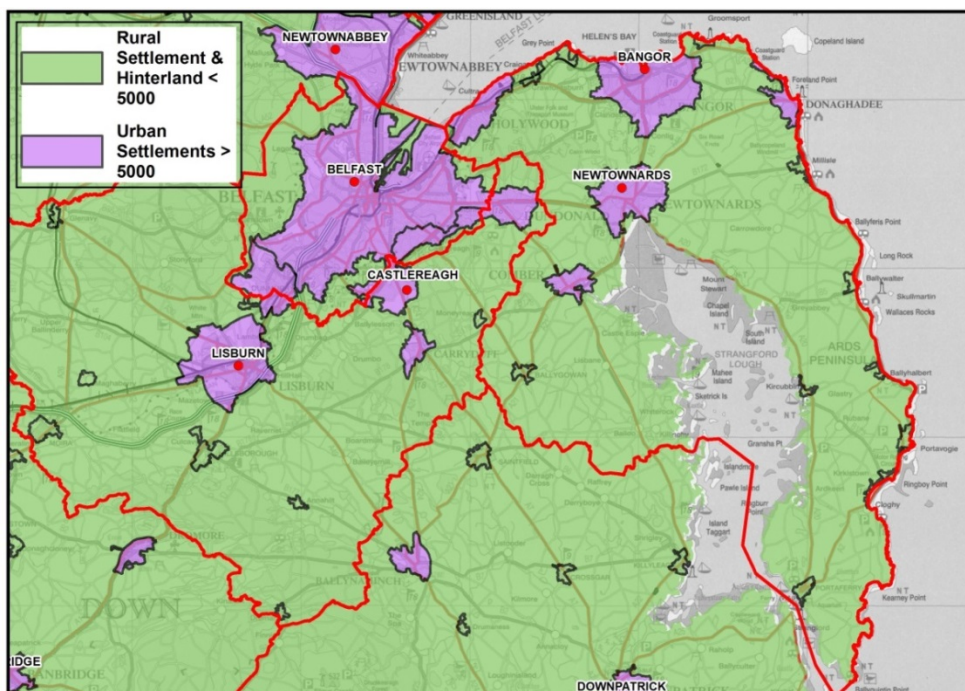
Units may be able to assist in Latent Demand Testing (LDT) or other marketing exercises to identify hidden additional social and mixed tenure demand.

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

- The requirement for new social housing in Ards and North Down has fluctuated since 2012 but remains high. The five-year assessment for 2017-22 shows a need for 706 units with need highest in Bangor, Newtownards, Comber and Holywood;
- Single, older persons and small families comprise the majority of the waiting list in housing stress. Future housing mix in new social housing will need to cater for these household groups;
- In recent years, social housing need in Ards and North Down has been delivered by housing associations on Housing Executive land. Increasingly, areas of housing need are emerging in locations where the Housing Executive does not own land. There has been a strong supply of new build in Bangor and Newtownards in recent years;
- Areas where housing associations have reported difficulties when attempting to acquire sites include Groomsport, Crawfordsburn, Helen's Bay, Holywood and Comber as market prices tend to be high;
- NIHE will carry out site identification studies to examine the potential for new social housing. There are studies scheduled for Comber and Holywood during 2017/18.

Rural

Map 6: Ards and North Down rural map



The provision of new social housing in rural settlements represents a strategic priority for delivery of the SHDP. Currently the overall rural target share of the SHDP is 11.45% of the overall programme based on average levels of housing stress in rural areas. The annual housing need assessment shows 13% of housing need is in rural settlements across the borough.

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 latent demand testing and marketing.

Indicative housing mix requirements

- At March 2017, there were 2,144 applicant households in housing stress on the waiting list for social housing. The household breakdown shows 828 (39%) single person households, 590 (28%) older person households and 429 (20%) small families;
- Analysis of waiting times on the waiting list shows 68% of older person households in housing stress for over two years. Some households apply for social housing as a safety net or wait for specific properties to become available;
- In the year to March 2017, there were 710 allocations including 287 (40%) to singles, 229 (32%) to small families and 113 (16%) to older person households;
- The current Housing Executive stock in Ards and North Down Borough includes 6,336 properties. Property types include 2,948 houses, 1,688 bungalows 1,497 flats, 172 cottages and 31 maisonettes;
- Accommodation for older persons should be designed flexibly with long-term accessibility issues taken into consideration. Generic wheelchair units should be included in schemes where possible;
- Alternative mixes can be considered by housing associations in relation to specific sites or scheme types. However, significant changes from the above mix should be discussed with the Housing Executive to avoid nugatory work.

Table 12: Indicative housing mix for Ards and North Down

Elderly	Families*	Singles	Wheelchair
15%	55%	30%	6%

* Focus on: Small Adult and Small Family Households

Areas where need is met

There are a small number of areas where demand is largely met. Discussion with the Place Shapers will confirm if this is the case on a site-by-site basis.

Rural areas

The number of rural applicants in housing stress on the waiting list for social housing has increased from 168 at March 2014 to 245 at March 2017. Rural areas displaying a significant level of need include Groomsport where there is a need of 40 units and Ballygowan where there is a need of 10 units.

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

Wheelchair Housing Need (HNA)

Included within the waiting list data are applicants who require wheelchair accommodation. There are currently 57 housing stress applicants at March 2017 with 22 allocations last year. The residual generic wheelchair need for Ards and North Down is for 49 units.

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

Shared Future Demand

The Housing Executive actively encourages mixed tenure and shared future housing. Housing Associations bringing forward suitable proposals for shared future designation would be welcomed. There are currently no new build social housing schemes being progressed for potential shared future housing in the area.

Travellers' accommodation

The 2013/18 Traveller Need Assessment identified no accommodation requirement for Traveller families in the Council area. NIHE continues to monitor the need for traveller accommodation throughout the council area.

Intermediate (Affordable) Demand

- Co-Ownership is the most recognised provider of intermediate housing in Northern Ireland. In 2016/17, a total of 82 properties were purchased through Co-Ownership in the Ards and North Down area, reflecting the opportunities this scheme provides;
- The intermediate demand for housing in Ards and North Down is 630 for the ten years to 2026. Affordability is clearly an issue in the Borough with average

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house prices at £185,077, over £30,000 higher than the Northern Ireland average at £154,028.

Table 13: Average Annual House Prices Ards and North Down & NI 2011-2016

Area	2011	2012	2013	2014	2015	2016	% Change 2011- 2016
Ards and North Down LGD	£162,125	£181,424	£163,492	£176,972	£177,296	£185,077	14.2
Northern Ireland	£139,800	£138,147	£131,204	£140,217	£149,499	£154,028	10.2

Source: Ulster University

Ards and North Down Supporting Data

Table 14: Ards and North Down Waiting List – March 2017

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	1,308	224	725	73	217	842	3,389
HS Applicants	828	120	429	53	124	590	2,144
Allocations	287	34	229	10	37	113	710

Applicants – Housing applicants at March 2017

HS Applicants – Housing stress applicants at March 2017 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2017

Table 15: Newtownards Town Waiting List – March 2017

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	357	50	189	14	60	166	836
HS Applicants	237	22	112	11	34	125	541
Allocations	92	10	75	2	7	27	213

Applicants – Housing applicants at March 2017

HS Applicants – Housing stress applicants at March 2017 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2017

Table 16: Bangor Town Waiting List – March 2017

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	508	91	304	33	74	373	1,383
HS Applicants	324	54	188	26	41	260	893
Allocations	101	9	87	7	24	41	269

Applicants – Housing applicants at March 2017

HS Applicants – Housing stress applicants at March 2017 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2017

Table 17: Ards and North Down Borough Housing Stress applicants time on list March 2017

Household	0-6 mths	6-12 mths	1-2 years	2-4 years	4+ years	Total	Average Months
Elderly	55	47	89	113	286	590	67
Large Adult	6	10	9	11	17	53	43
Large Family	18	23	18	31	34	124	33
Single	136	125	169	160	238	828	38
Small Adult	20	11	16	25	48	120	50
Small Family	76	54	74	109	116	429	36
Grand Total	311	270	375	449	739	2,144	46

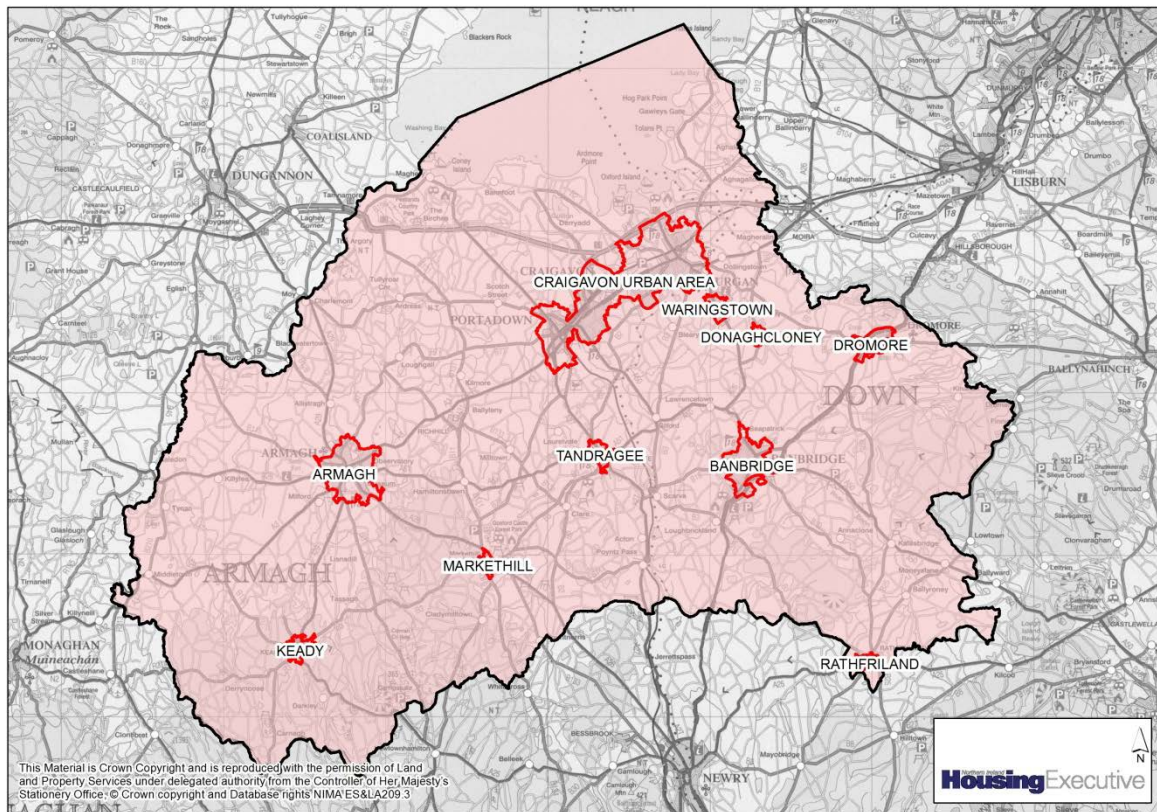
Armagh City, Banbridge and Craigavon

LGD socio-economic context

Armagh City, Banbridge and Craigavon Council (ACBCBC) covers an area of 554 square miles and is the council area with the second largest population after Belfast, accounting for 11% of the overall Northern Ireland population. ACBCBC is strategically positioned on the axis of the main East West and North South economic corridors and is supported by high quality road and rail links both within Northern Ireland and to the Republic of Ireland.

The local economy in ACBCBC continues to grow and the percentage of people claiming unemployment benefits remains below the Northern Ireland total. In 2017, 2% of the working age population in ACBCBC were claiming unemployment benefit compared to 2.7% across Northern Ireland.

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



Housing Market Analysis (across tenures)

Housing & Land Supply

- The DOE's Northern Ireland Housing Land Availability Report (Planning NI: 2011-2013 and ACBCBC 2014) shows potential capacity for 22,578 additional dwellings;
- The rate of new house building is approximately half of the requirement (1,253) as set out in the Regional Development Strategy 2035 (RDS);
- Between 2011 and 2016, construction commenced on 4,558 private sector homes, with a peak of 996 in 2016.

Owner Occupied Housing Sector

- Census 2011 demonstrated the continued desire of residents to own their own home;
- The private housing market is showing signs of recovery – the number of sales in Armagh, Banbridge and Craigavon increased from 1,519 in 2012 to 2,336 in 2016 (LPS);
- The average house price for Armagh, Banbridge and Craigavon has fluctuated over the past number of years, with a low of £102,719 in 2014 and a recent increase to 130,671 in 2016. This is almost £24k below the Northern Ireland average.
- Popular locations in the district include Armagh City, Banbridge Town, Lurgan and Portadown;
- Despite lower house prices and low interest rates, negative equity and rigorous bank lending practises have constrained the housing market. Negative equity affects around 40% of homeowners in NI, with Craigavon (Portadown-Lurgan) among the worst affected areas.

Private Rented Housing Sector

- The private rented sector continues to play a significant role in the local housing market;
- Local estate agents report that there is strong demand for private rental accommodation across the district;
- The DfC's Landlord Registration Scheme identified 11,720 tenancies registered for Armagh, Banbridge and Craigavon in March 2017;
- Housing benefit continues to play a vital role in supporting the private rented sector. In March 2017, 7,570 private tenants in ACBCBC were in receipt of housing benefit;
- There are currently an estimated 5,836 Houses in Multiple Occupation (HMOs) in Northern Ireland, of which 133 are in Armagh, Banbridge and Craigavon. All identified HMOs in Armagh, Banbridge and Craigavon have been registered as complying with regulations.

Social Rented Housing Sector

- Census 2011 showed that the social rented stock in the district (8,547units) has fallen by 28.1% compared to the 2001 figure;

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- Housing Executive stock at March 2017 was 7,613 with 14,061 properties sold since the commencement of the 'Right to Buy' scheme;
- There were 17 new social housing units completed and a further 63 new social housing units on site in the year to March 2017;
- Forty-seven Housing Executive properties were sold in the year to March 2017;
- There are around 2,360 housing association properties in the borough (inclusive of shared stock and bedspaces).

Social Housing Need

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

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

General Housing Need (Urban & Rural)

Urban

Five year projected need for the area as a whole is 327 and the projected need for individual settlements is detailed in Table 18.

Table 18: Projected (5 Year) Social Housing Need 2017-22

Settlement	Housing Need Assessment Area*	Total 5 Year Projection
Armagh	Armagh 1	73
	Armagh 2	26
Banbridge Town	Banbridge Town	56
Lurgan	North Lurgan	86
Portadown	Portadown 1	20
	Portadown 2	10
Derrymacash/ Derrytrasna/ Kinnego	Derrymacash/ Derrytrasna/ Kinnego	22
Remaining Settlements (need <10)**	Aghagallon, Annaghmore/Eglisli, Charlemont/Blackwatertown/ Carrickaness/Donnelly Hill, Dromore, Loughbrickland, Loughgall, Middletown and Poyntzpass	34
Total		327

N.B. Please note that need is met for any locations not included on this list.

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

*** Remaining settlements where need in each settlement is less than 10.*

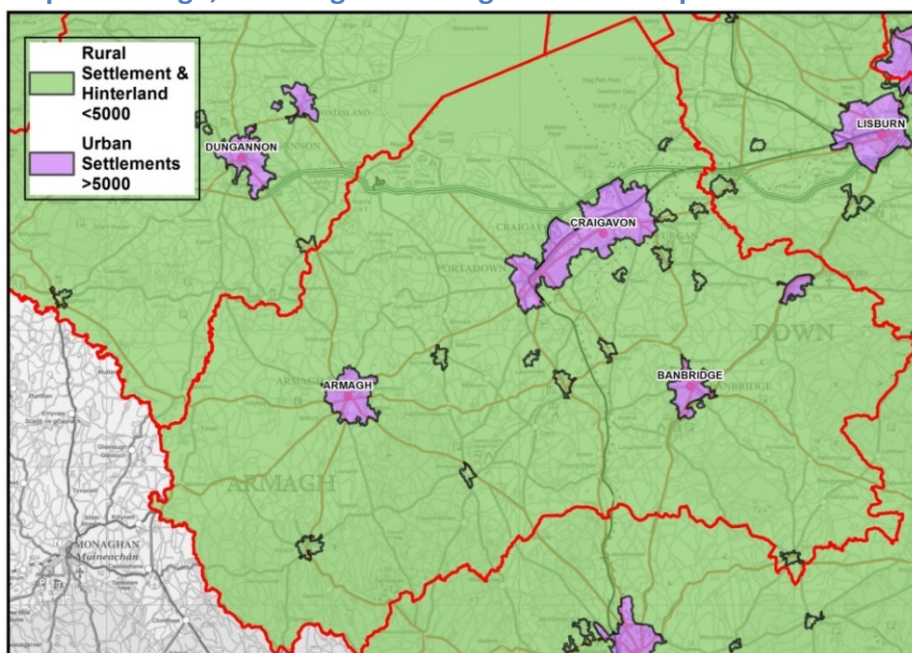
Please note that in relation to those settlements with <10 projected need, the Housing Executive will consider housing association development opportunities or Existing Satisfactory Purchases (ESP). In addition, if land can be identified that may provide for more than current projected social need suggests,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

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

- The requirement for new social housing in the Armagh City, Banbridge and Craigavon borough has remained relatively stable since 2010. The five-year assessment for 2017-22 shows the need for 327 units. Need is highest in Armagh City, North Lurgan and Banbridge town;
- Singles, older persons and small family households comprise the majority of the waiting list for social housing in housing stress. Future housing mix in new social housing will need to cater for these household groups;
- In recent years, social housing need has been delivered by Housing associations on Housing Executive land. Increasingly areas of housing need are emerging in locations where the Housing Executive does not own land. Housing associations may have to acquire sites on the open market which are subject to market price fluctuations;
- NIHE will carry out site identification studies to examine the potential for new social housing. There are three studies scheduled for 2017/18; including Kinnego; Annaghmore/Eglisk and Tullylish/Lenaderg/Lawrencetown;
- Whilst many of the urban areas have housing need, there are a number of scheme proposals that will address this need should they come to fruition.

Rural

Map 8: Armagh, Banbridge and Craigavon rural map



The provision of new social housing in rural settlements represents a strategic priority for delivery of the SHDP. Currently the overall rural target share of the SHDP is 11.45% of the overall programme based on average levels of housing stress in rural areas. The projected housing need for the five years to 2022 shows 17% of the need is located in rural settlements across the borough.

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 latent demand testing and marketing.

Indicative housing mix requirements

- At March 2017, there were 1,268 applicant households in housing stress on the waiting list for social housing. The household breakdown shows 520 (41%) single person households, 256 (20.2%) small family households and 253 (20%) older person households;
- In the year to March 2017, there were 549 allocations including 220 (40%) to singles, 142 (25.9%) to small families and 98 (17.9%) to older person households;
- The current Housing Executive stock in Armagh City, Banbridge and Craigavon Borough includes 7,613 properties. Property types include 3,817 houses, 2,422 bungalows, 1,190 flats, 115 maisonettes and 69 cottages;
- Accommodation for older persons should be designed flexibly with long-term accessibility issues taken into consideration. Generic wheelchair units should be included in schemes where possible;
- Alternative mixes can be considered by housing associations in relation to specific sites or scheme types. However, significant changes from the above mix should be discussed with the Housing Executive to avoid nugatory work.

Table 19: Indicative housing mix for Armagh City, Banbridge and Craigavon

Elderly	Families*	Singles	Wheelchair
20%	50%	30%	6%

* Focus on: Small Adult and Small Family Households

Areas where need is met

- Selective demolition carried out in the past at various locations in Central Craigavon to address the problem of low demand social housing stock has resulted in the area settling and becoming more desirable to live in;
- There are variations of housing need across the district towns of Armagh, Banbridge, Lurgan and Portadown. Discussion with the Place Shapers will confirm if there is need on a site by site basis.

Rural areas

The number of rural applicants in housing stress on the waiting list for social housing has decreased from 259 at March 2013 to 217 at March 2017. It is clear from the Annual Housing Need Assessment, summarised in Table 18, that most need is in the urban areas with rural settlements accounting for 56 units or 17.1% of all need in the Borough.

It is recognised that there may be neighbouring rural settlements where demand has not yet been identified but where land may still be available. The Housing Executive will take account of the potential for 'hidden' or 'latent' demand within such areas if and when housing associations identify potential sites. Should sites come to the attention of housing associations the NIHE will seek to assist in assessing any hidden need by way of latent demand testing if appropriate. We continue to work closely with rural communities to identify housing need. In the Derrymacash/Derrytrasna/Kinnego housing need assessment, area there is a projected need of 22 over the five years to 2022. Need is particularly evident in the Derrymacash area of this HNA area.

Wheelchair Housing Need (HNA)

There are currently 34 housing stress applicants at March 2017 with 14 allocations last year. The residual generic wheelchair need for Armagh City, Banbridge and Craigavon Borough is for 33 units.

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

Shared Future Demand

The Housing Executive actively encourages mixed tenure and shared future housing. Housing Associations bringing forward suitable proposals for shared future designation would be welcomed. There is currently one new build social housing scheme being progressed for potential shared future housing at Dromore Street in Banbridge.

Travellers' accommodation

The 2013/18 Traveller Need Assessment identified the need for a Service site in Craigavon. Site feasibility is currently under investigation. NIHE continues to monitor the need for traveller accommodation throughout the council area.

Intermediate (Affordable) Demand

- Co-Ownership is the most recognised provider of intermediate housing in Northern Ireland. In 2016/17, a total of 129 properties were purchased through Co-Ownership in the Armagh City, Banbridge and Craigavon Borough reflecting the opportunities this scheme provides;

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- The intermediate demand for housing in Armagh City, Banbridge and Craigavon is 1,610 for the ten years to 2026. Although average house prices in the borough are below the Northern Ireland average anecdotal evidence suggests affordability remains an issue especially for first time buyers.

Table 20: Average Annual House Prices Armagh City, Banbridge and Craigavon & NI 2011-2016

Area	2011	2012	2013	2014	2015	2016	% Change 2011-2016
Armagh City, Banbridge and Craigavon	£115,897	£102,435	£113,714	£102,719	£127,347	£130,671	12.7
Northern Ireland	£139,800	£138,147	£131,204	£140,217	£149,499	£154,028	10.2

Source: Ulster University

Armagh City, Banbridge and Craigavon Supporting Data

Table 21: Armagh City, Banbridge and Craigavon Waiting List – March 2017

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	1,301	239	719	104	233	484	3,080
HS Applicants	520	102	256	40	97	253	1,268
Allocations	220	18	142	20	51	98	549

Applicants – Housing applicants at March 2017

HS Applicants – Housing stress applicants at March 2017 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2017

Table 22: Armagh City Waiting List – March 2017

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	235	33	113	11	32	56	480
HS Applicants	116	12	43	4	17	26	218
Allocations	21	3	14	1	6	12	57

Applicants – Housing applicants at March 2017

HS Applicants – Housing stress applicants at March 2017 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2017

Table 23: Banbridge Waiting List – March 2017

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	156	29	71	14	29	67	366
HS Applicants	83	16	31	5	12	46	193
Allocations	34	4	11	5	7	12	73

Applicants – Housing applicants at March 2017

HS Applicants – Housing stress applicants at March 2017 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2017

Table 24: Lurgan Waiting List – March 2017

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	309	61	144	30	28	155	727
HS Applicants	97	28	41	14	12	84	276
Allocations	41	3	36	2	7	24	113

Applicants – Housing applicants at March 2017

HS Applicants – Housing stress applicants at March 2017 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2017

Commissioning Prospectus

Table 25: Portadown Waiting List – March 2017

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	287	62	155	19	61	110	694
HS Applicants	98	21	54	6	21	44	244
Allocations	42	4	26	4	12	24	112

Applicants – Housing applicants at March 2017

HS Applicants – Housing stress applicants at March 2017 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2017

Table 26: Armagh City, Banbridge and Craigavon Borough Housing Stress applicants time on list March 2017

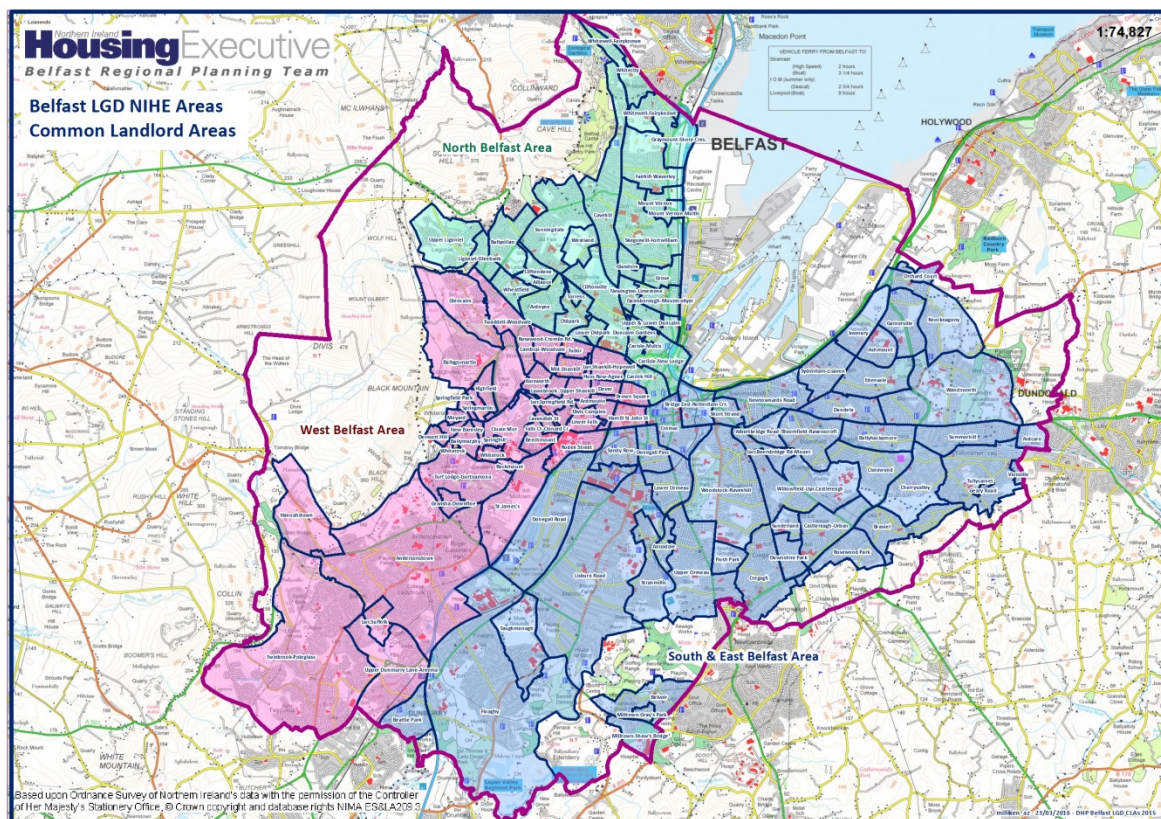
Household	0-6 mths	6-12 mths	1-2 years	2-4 years	4+ years	Total	Average Months
Elderly	41	28	48	38	98	253	59
Large Adult	2	5	6	8	19	40	60
Large Family	18	18	21	19	21	97	29
Single	121	92	113	85	109	520	31
Small Adult	19	17	19	14	33	102	38
Small Family	57	62	57	41	39	256	24
Grand Total	258	222	264	205	319	1,268	37

Belfast

LGD socio-economic context

Belfast is the major industrial, retail, education and residential centre in Northern Ireland. The range of facilities, recreational opportunities and its strategic location make the area an attractive place to live and work. The area has a growing population of approximately 335,000 and in common with other council areas, its older population is growing at a faster rate.

Belfast City Council Area



The economic performance of Belfast as demonstrated through levels of unemployment, economic inactivity and low incomes, continues to lag behind other parts of the U.K. The economic consequences of the Brexit vote may be more acutely felt in Northern Ireland as its industrial and agricultural sectors are closely linked to E.U. markets.

The population continues to grow, with an increasingly ageing populace and smaller households. It is projected that by 2024, older people will represent 16.6% of the population in the area. The increase in the number of older people will have implications in terms of the demand for housing adaptations, specialist housing and personal or nursing care.

Housing Market Analysis (cross-tenure)

Housing & Land Supply

- The DOE's Northern Ireland Housing Land Availability Report for 2013 (Planning NI: 2014) shows potential capacity for almost 19,000 additional dwellings in Belfast; an additional 13,700 new dwellings were allocated to Belfast for the period 2012-2025 under the Regional Development Strategy Housing Growth Indicators;
- The actual rate of new house building is approximately half of the requirement as set out in the Regional Development Strategy 2035;
- New build starts in Belfast have increased from 410 units in 2014/15 to 726 in 2016/17, but are still lower than the Housing Growth Indicator figures.

Owner Occupied Housing Sector

- Census 2011 demonstrated the continued desire of residents to own their own home. Owner occupation accounts for 52% of all properties in Belfast, lower than the Northern Ireland average (67%);
- The private housing market has been showing signs of a slow recovery - the number of house sales in Belfast increased from 2,343 in 2010 to 4,525 in 2016 (LPS);
- The average house price for Belfast stabilised at £150k in 2015 and 2016, slightly above the Northern Ireland average; (Ulster University)
- The most popular locations are in South and East Belfast where prices have traditionally been higher than other areas of the city.

Private Rented Housing Sector

- The private rented sector continues to play a significant role in the local housing market, particularly in parts of South Belfast where it is the dominant tenure.
- Local estate agents report that there is strong demand for private rental accommodation across the city;
- The DfC's Landlord Registration Scheme identified 29,381 tenancies registered in Belfast in March 2017, an increase of almost 3,000 since March 2016;
- Housing benefit continues to play a vital role in supporting the private rented sector. At March 2017, 12,173 private tenants in Belfast were in receipt of housing benefit;
- There are currently an estimated 6,270 Houses of Multiple Occupation (HMOs) in Northern Ireland, 3,700 of which are in Belfast. Recent tax changes for private landlords and significant numbers of Purpose Built Student Accommodation (PBSA) units will impact the traditional private rental market, particularly in the University area. This will be closely monitored as there is anecdotal evidence that the number of HMOs has peaked.

- Census 2011 showed that the social rented stock in the city (30,818 units) accounts for over a quarter of the total. This is higher than the Northern Ireland average of 15% and reflects the high levels of redevelopment carried out in the city since the 1970s;
- Housing Executive stock in Belfast at March 2017 was 25,868 with just over 24,000 properties sold since the commencement of the 'Right to Buy' scheme;
- Housing Association stock in Belfast is around 17,000 (inclusive of shared stock and bedsits). This is a notable increase on the figure reported last year due to boundary changes;
- There were 416 new social housing units completed in the year to March 2017 and a further 335 new social housing units on site at 31st March 2017;
- There were 89 Housing Executive properties sold in the year to March 2017.

Social Housing Need

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

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

General Housing Need

The requirement for new social housing in Belfast has increased consistently since 2010. The five year assessment for 2017-2022 shows a need for over 4,700 units. Need is evident in all sectors of the city (North, South, East and West). Land availability continues to impact on housing need and is vital for the future delivery of social housing in Belfast. There was insufficient land zoned for social housing within BMAP and it is hoped that the new Local Development Plan (LDP) currently being drawn up by Belfast City Council will address this. Approximately 75% of the social housing waiting list comprises single people and small families. The ongoing predominance of these household types means that there is a requirement for one and two bedroom dwellings to be built.

Table 27 shows the Projected 5 year social housing need by settlement.

Table 27: Projected (5 Year) Social Housing Need

Settlement	Housing Need Assessment Area*	Total 3 Year Projection
North Belfast	North Belfast 1	1400
	North Belfast Total	1400
South & East Belfast	Finaghy	25
	Lisburn Road	362
	Lower Ormeau/Markets	220
	Middle East Belfast	231

Commissioning Prospectus

Settlement	Housing Need Assessment Area*	Total 3 Year Projection
	Outer East Belfast	46
	Short Strand	34
	Upper Ormeau	250
	South & East Belfast Total	1,168
West Belfast	Inner West Belfast	551
	Middle West Belfast	1,168
	Outer West Belfast	417
	West Belfast Total	2,136
Belfast City Total		4,704

N.B. Please note that need is met for any locations not included on this list.

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

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

- Social housing need in Belfast has remained at a consistently high level between 2011 and 2017. There were 11,674 total applicants in 2011 and 10,738 in 2017;
- The number of applicants in housing stress over the same period has risen from 6,866 in 2011 to 7,322 in 2017;
- Allocations over the same period have remained consistent at around 2,300 per year;
- Future housing mix in new build developments will need to cater for singles, small families and older persons along with any potential changes associated with Welfare Reform;
- Some locations are more suitable for certain accommodation types than others, for example, flat sites with road frontage are more suited to Category 1 elderly provision and wheelchair units;
- There is an increasing need for wheelchair accommodation across the city. Generic 2 bedroom 3 person units are flexible and meet the needs of a range of applicants;
- The Urban Renewal Area Programme in Belfast is coming to an end, so the number of transfer schemes will be reduced in future. The recently created Belfast Place Shaping Team will work closely with Housing Associations to identify suitable sites for new social housing provision;
- Land availability remains a problem and we are working closely with Belfast City Council in its preparations of the Local Development Plan (LDP) to ensure that there is sufficient land available for social housing during the lifetime of the LDP;
- A number of Estate-Based Strategies which included selective demolition of unpopular stock were successfully delivered throughout Belfast over the past two decades resulting in increased popularity and stability in these neighbourhoods;
- The Housing Executive's emerging Asset Management Strategy will determine and prioritise maintenance/improvement expenditure in its remaining stock

over the next few years. This will have an impact on turnover and the availability of stock for re-letting;

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

Indicative Housing mix requirements

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

Table 28: Indicative housing mix for Belfast

Elderly	Families*	Singles	Wheelchair
14%	58%	28%	6%

* Focus on: Small Adult and Small Family Households

- One and two bedroom accommodation would increasingly be the norm for singles and small families. Where possible one bed properties, while addressing the immediate requirements under Welfare Reform should be designed flexibly to cater for potential household growth;
- Some three bed properties may be required for families and these should be discussed with the Housing Executive, as should bespoke wheelchair dwellings;
- Accommodation for older persons should be designed flexibly with long term accessibility issues taken into consideration, with generic wheelchair units to be included in schemes where possible.

Alternative mixes can be considered by housing associations in relation to specific sites or scheme types. Early contact with Planning/Place Shaping Team is strongly recommended to avoid nugatory work.

Areas where need is met

- Need is considered met in North Belfast 1, Donegall Road, Inner East Belfast and Greater Shankill;

Commissioning Prospectus

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

Wheelchair Housing Need (HNA)

The total potential wheelchair housing requirement for Belfast is assessed at 131 units.

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

Shared Future Demand

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

Supported Housing Need

There is currently no new requirement identified for supported housing capital projects beyond those already in the three Year SHDP for Belfast.

Travellers' accommodation

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

Intermediate (Affordable) Demand

- The Housing Executive estimates intermediate/affordable housing demand for Belfast at approximately 633 units per annum;
- Co-ownership approved 106 applications in 2016/17 for Belfast, reflecting the opportunities this scheme provides in the current housing market environment;
- Average house prices in Northern Ireland decreased by 34% between 2008 and 2017;
- Average house prices in Belfast also decreased over the past 10 years and at 2015 are 37 % lower than in 2008;
- In general house prices in Belfast are higher than Northern Ireland, particularly in the South and East of the city.

Table 29: Average Annual House Prices Belfast & NI 2012-2016

Area	2012	2013	2014	2015	2016	% Change 2012-2016
Belfast	143,372	134,371	149,520	156,991	163,665	+ 14.1%
Northern Ireland	138,147	131,204	140,217	149,499	154,028	+11.5%

Source: Ulster University

Belfast Supporting Data

Table 30: North Belfast Waiting List – March 2017

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	1,296	92	691	27	166	241	2,513
HS Applicants	917	50	500	16	117	164	1,764
Allocations	345	21	202	3	42	57	670

Applicants – Housing applicants at March 2017

HS Applicants – Housing stress applicants at March 2017 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2017

Table 31: South & East Belfast Waiting List – March 2017

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	2,369	227	857	83	252	613	4,394
HS Applicants	1,535	114	474	40	148	363	2,674
Allocations	522	28	250	15	34	113	962

Applicants – Housing applicants at March 2017

HS Applicants – Housing stress applicants at March 2017 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2017

Table 32: West Belfast Waiting List – March 2017

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	1,621	133	1,397	38	260	382	3,831
HS Applicants	1,167	94	1,115	30	193	285	2,884
Allocations	301	20	256	7	67	78	729

Applicants – Housing applicants at March 2017

HS Applicants – Housing stress applicants at March 2017 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2017

Table 33: North Belfast Housing Stress applicants time on list

Household	0-6 mths	6-12 mths	1-2 years	2-4 years	4+ years	Total	Average Months
Single	152	139	194	221	211	917	32
Small Adult	9	5	7	10	19	50	41
Small Family	66	60	104	130	140	500	37
Large Adult	1	2	3	6	4	16	55
Large Family	14	22	20	34	27	117	32
Older Person	21	13	23	41	66	164	68
Total	263	241	351	442	467	1,764	37

Table 34: South and East Belfast Housing Stress applicants time on list

Household	0-6 mths	6-12 mths	1-2 years	2-4 years	4+ years	Total	Average Months
Single	263	235	298	313	426	1,535	37
Small Adult	17	12	31	15	39	114	42
Small Family	60	65	91	113	145	474	39
Large Adult	6	2	10	6	16	40	52
Large Family	16	19	24	38	51	148	42
Older Person	66	26	52	59	160	363	63
Total	428	359	506	544	837	2,674	41

Table 35: West Belfast Housing Stress applicants time on list

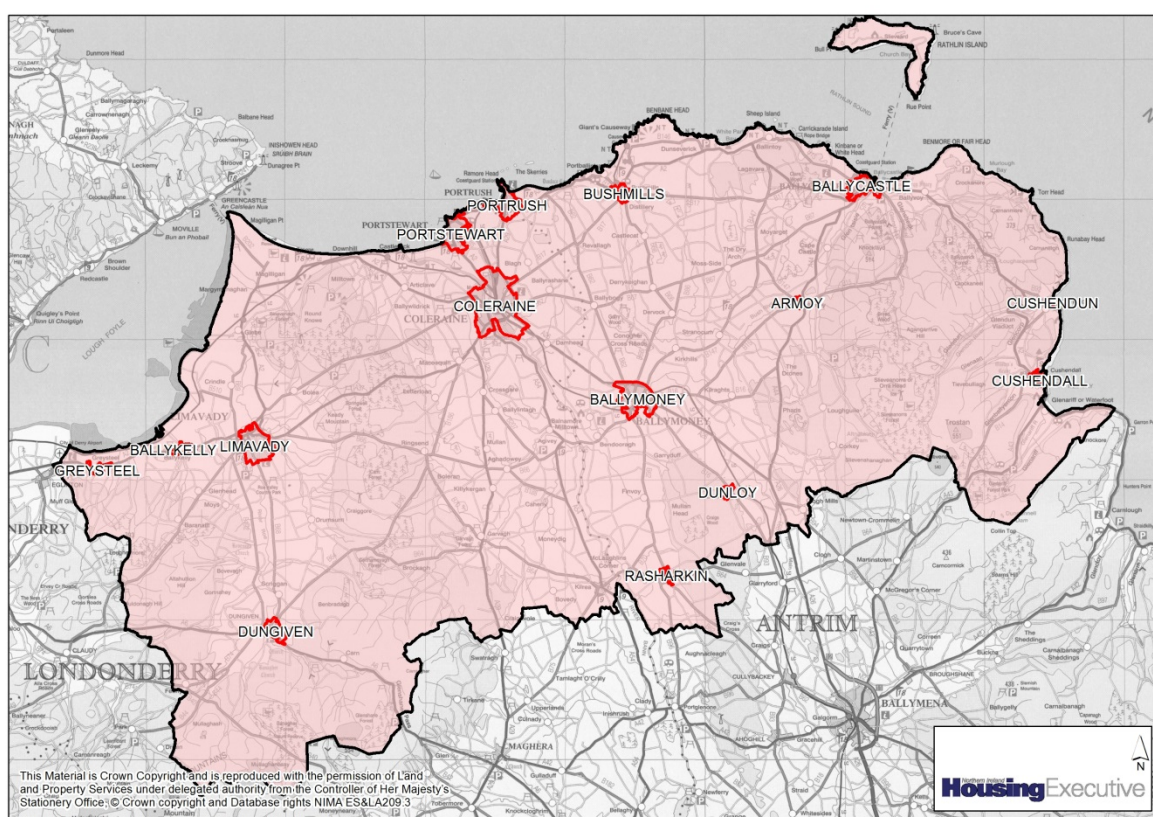
Household	0-6 mths	6-12 mths	1-2 years	2-4 years	4+ years	Total	Average Months
Single	136	143	235	258	395	1,167	43
Small Adult	4	16	14	25	35	94	53
Small Family	90	118	193	292	422	1,115	45
Large Adult	1	2	3	3	21	30	79
Large Family	26	16	41	44	66	193	44
Older Person	29	23	45	53	135	285	67
Total	286	318	531	675	1074	2,884	47

Causeway Coast & Glens

LGD socio-economic context

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

Map 9: Causeway Coast & Glens Borough Council with main settlements



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

It is projected that by 2026 older people will represent 21.9% of the population in the borough, more than the regional average. The increase in the number of older people will have implications in terms of the demand for housing adaptations, specialist housing and personal or nursing care.

Housing Market Analysis (across tenures)

Housing & Land Supply

- The DOE's Northern Ireland Housing Land Availability Report for 2013 (Planning NI: 2014) showed potential capacity for 13,858 additional dwellings in the borough but this has not been updated for 2014 onwards;
- The revised Housing Growth Indicators for the borough indicate that 515 new dwellings will be required each year from 2012 to 2025;
- New build starts have increased from 503 to 706 between 2015 and 2016, which is the highest since the start of the recession.

Owner Occupied Housing Sector

- The sector comprised 68.1% of the total occupied housing stock in the 2011 Census;
- House sales are increasing with 1,866 in 2016 compared to 1,050 in 2010;
- The number of enquiries and sales has increased in the past year, particularly in the lower price ranges up to £150k;
- Average house price was £145k in 2016, similar to the previous year;
- Many first-time buyers are seeking new-build, preferring houses rather than apartments.

Private Rented Housing Sector

- The sector comprised 15.8% of the total occupied housing stock in the 2011 Census;
- Demand for rented properties in the borough is greater than current supply;
- There are 8,654 registered landlords in the borough (2017);
- There are 5,910 private housing benefit claimants in the borough, down 4.6% on last year;
- There were 685 HMOs registered in the borough (2017).

Social Rented Housing Sector

- The sector comprised 13.3% of the total occupied housing stock in the 2011 Census;
- There are 6,648 NIHE owned homes in the borough;
- 9,350 NIHE homes have been purchased by tenants in the borough;
- 214 social housing units are currently under construction, and a further 468 are programmed to start in the next three years;
- There are 2,068 applicants on the waiting list, of which 62% are in housing stress;
- There are around 1,500 housing association units in the borough (inclusive of shared stock and bedspaces).

Social Housing Need

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

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

General Housing Need (Urban & Rural)

Urban

The Strategic Guidelines target share established for Causeway Coast & Glens indicates 134 urban units and 67 rural units of the overall three year programme. Five year projected need for the area as a whole is 592 and the projected need for individual settlements is detailed in Table 36.

Table 36: Projected (5 Year) Social Housing Need

Settlement	Housing Need Assessment Area*	Total 5 Year Projection
Main towns (Hubs)	Ballycastle	39
	Ballymoney	53
	Coleraine	182
	Limavady	13
Other towns	Ballykelly	12
	Cushendall	24
	Dungiven	20
	Portrush	99
	Portstewart	76
	Balnamore	10
Remaining settlements (need <10)**	Armoy, Artikelly, Ballintoy, Ballybogey, Bellarena, Castlerock, Cloughmills, Greysteel, Stranocum, Waterfoot, Cushendun, Ringsend (Craigmore) and Rathlin Island	64
Total		592

N.B. Please note that need is met for any locations not included on this list.

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

*** Remaining settlements where need in each settlement is less than 10.*

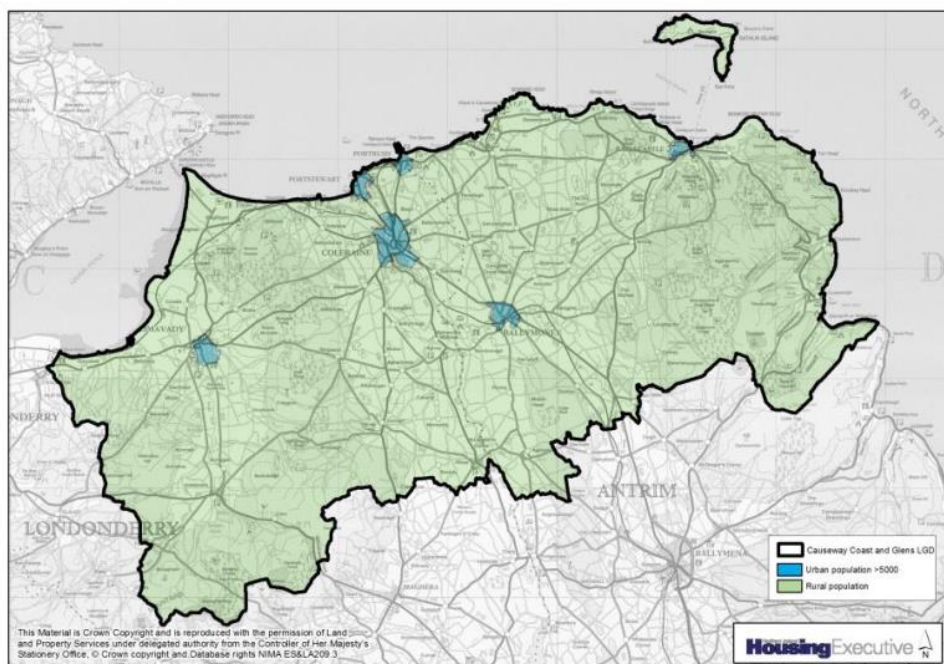
Please note that in relation to those settlements with <10 projected need, the Housing Executive will consider housing association development opportunities or Existing Satisfactory Purchases (ESPs). In addition, if land can be identified that may provide for more than current projected social need suggests,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

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

- Social housing proposals are particularly welcome in locations such as Portrush and Portstewart where there is a persistent unmet need;
- Proposals will be assessed against potential local impacts on existing housing stock, such as turnover in adjacent social housing estates;
- For Coleraine town, the Housing Executive would especially welcome new-build proposals for the town centre and east of centre to balance against current programmed schemes in the west;
- Some settlements have land zoned for social housing, or have sites with Key Site Requirements for social housing. Housing associations are encouraged to investigate these;
- Currently, the Housing Executive is seeking a quota of social housing (normally 20%) on mixed tenure sites in areas of need across the borough, as facilitated by Policy HOU2 of the Northern Area Plan. This will help to deliver more balanced communities and social housing, especially in areas where the social housing sector cannot compete with the private sector;
- Site identification studies will be carried out by the Housing Executive in selected areas across the borough where there is a social housing need and a shortage of sites for development.

Rural

Map 10: Causeway Coast & Glens rural map



The provision of new social housing in rural settlements represents a strategic priority for delivery of the SHDP. Currently the overall rural target share of the SHDP is 13% of the overall programme based on average levels of housing stress in rural areas.

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

Indicative housing mix requirements

- The overall demographic trend is for an ageing population and for small household size (1-3 persons). Future need is predominantly for one and two bedroom design forms and with emphasis on accessibility;
- Accommodation for older persons should be designed flexibly with long term accessibility issues taken into consideration;
- Generic wheelchair units will be required in new-build schemes above a certain size;
- Alternative mixes can be considered by housing associations in relation to specific sites or scheme types. The NIHE North Place Shaping team can advise on local circumstances.

Table 37: Indicative housing mix for Causeway Coast & Glens

Elderly	Families*	Singles	Wheelchair
20%	35%	45%	6%

** Focus on: Small Adult and Small Family Households*

Areas where need is met

- Currently we are not inviting any social housing proposals in the vicinity of the Dhu Varren and Glenmanus areas of Portrush, and Ballysally in Coleraine;
- While there is a need in Dungiven, this will be met by future phased housing development on Housing Executive land. A small number of ESPs, however, could be considered;
- Need is currently met in Dunloy.

Rural areas

The following are additional comments specific to rural areas:

- Social housing proposals are particularly welcome in locations such as Cushendall, Cushendun, Knocknacarry, Balnamore and Waterfoot where there is a persistent unmet need;
- Normally, only sites or dwellings within the statutory development limits can be considered for rural social housing, however some of the smaller settlements and hamlets without development limits may still be acceptable if there is an identified need for housing and where it accords with the prevailing planning policy;
- The Housing Executive will also take into account the potential for 'hidden' (or 'latent') demand in rural areas. Should sites come to the attention of housing associations the Housing Executive will assist in assessing any hidden need by way of latent demand testing if appropriate. There may be neighbouring rural settlements where demand has not yet been identified but where land is still available;
- The Housing Executive will continue to work closely with rural communities to identify housing need.

Wheelchair Housing Need (HNA)

There is a projected need for 32 wheelchair units for the five year period 2017-22 for Causeway Coast and Glens borough.

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

Shared Future Demand

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

Traveller accommodation

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

Intermediate (Affordable) Demand

- The Housing Executive estimates intermediate/affordable housing demand for the borough at approximately 48 units per year, which is down from last year's estimation of 57 per year;
- Co-ownership approved 24 applications in 2016/17 within the borough, down from 29 applications in the previous year;
- Average house prices in the borough in 2016 were the same as the previous year, unlike Northern Ireland which saw a 3% increase;
- Since the property crash of 2008, average prices in the borough have been lower than the Northern Ireland average.

Table 38: Average Annual House Prices Causeway Coast and Glens & NI 2010-2016

Area	2011	2012	2013	2014	2015	2016	% Change 2011-2016
CC&G BC	£130,754	£124,011	£117,935	£136,124	£145,594	£145,453	+11.2
Northern Ireland	£139,800	£138,147	£131,204	£140,217	£149,499	£154,028	+10.2

Source: Ulster University

Causeway Coast & Glens Supporting Data

Table 39: Causeway Coast & Glens waiting list – March 2017

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	938	109	456	66	128	371	2,068
HS Applicants	636	62	247	38	73	236	1,292
Allocations	181	20	127	10	49	81	468

Applicants – Housing applicants at March 2017

HS Applicants – Housing stress applicants at March 2017 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2017

Table 40: Coleraine town waiting list – March 2017

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	252	26	124	14	28	104	548
HS Applicants	182	16	70	10	13	81	372
Allocations	60	7	39	3	9	27	145

Applicants – Housing applicants at March 2017

HS Applicants – Housing stress applicants at March 2017 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2017

Table 41: Limavady town waiting list – March 2017

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	121	14	53	6	10	34	238
HS Applicants	73	7	21	2	6	25	134
Allocations	26	6	19	2	12	13	78

Applicants – Housing applicants at March 2017

HS Applicants – Housing stress applicants at March 2017 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2017

Table 42: Ballymoney town waiting list – March 2017

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	108	15	36	8	13	38	218
HS Applicants	70	9	14	3	6	22	124
Allocations	16	2	12	2	2	6	40

Applicants – Housing applicants at March 2017

HS Applicants – Housing stress applicants at March 2017 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2017

Commissioning Prospectus

Table 43: Ballycastle town waiting list – March 2017

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	72	5	38	2	12	18	147
HS Applicants	47	3	21	1	9	12	93
Allocations	6	1	9	0	1	6	23

Applicants – Housing applicants at March 2017

HS Applicants – Housing stress applicants at March 2017 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2017

Table 44: Causeway Coast & Glens Borough Housing Stress applicants time on list March 2017

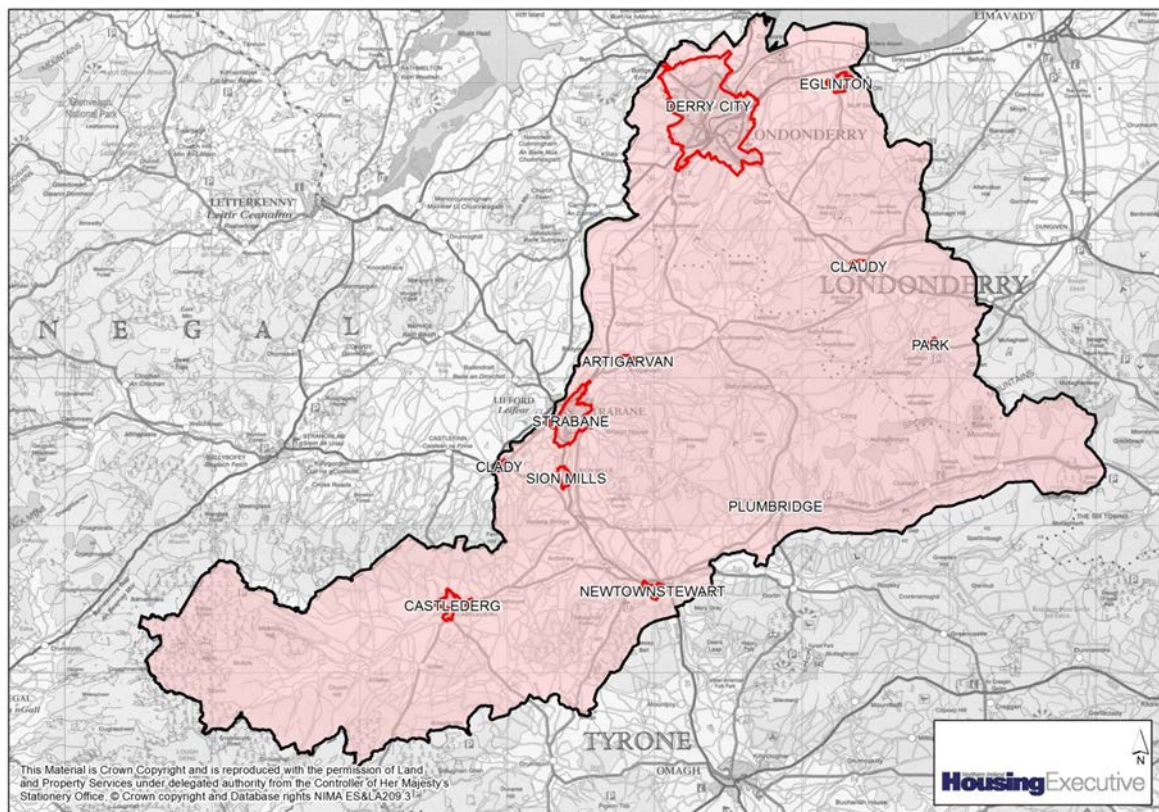
Household	0-6 mths	6-12 mths	1-2 years	2-4 years	4+ years	Total	Average Months
Single	105	78	107	154	192	636	41
Small Adult	7	6	13	9	27	62	55
Small Family	43	36	42	63	63	247	38
Large Adult	5	2	5	8	18	38	53
Large Family	11	6	17	18	21	73	39
Older Person	31	23	38	52	92	236	56
Total	202	151	222	304	413	1,292	44

Derry City and Strabane

LGD socio-economic context

The district has a growing population of approximately 148,630 and while mostly urban, there is a significant rural populace. The local economy has shown scope for improvement in recent years with percentage levels of people claiming unemployment related benefits consistently above the Northern Ireland average.

Map 11: Derry City and Strabane Council with main settlements



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

The population continues to increase and has a high propensity for growth with a relatively young population. Similar to other councils, the older population is growing, albeit at a relatively low rate. While the need for family accommodation remains strong, there is a growing need to construct dwellings to facilitate the increasing older person and smaller households. The increasing proportion of older people will have implications in terms of the demand for housing adaptations, specialist housing and personal or nursing care.

Housing Market Analysis (across tenures)

Housing & Land Supply

- The DOE's Northern Ireland Housing Land Availability Report for 2013 (Planning NI: 2014) shows the potential capacity for 14,904 additional dwellings;
- However, the rate of new house building is approximately half of the requirement as set out in the Regional Development Strategy 2035;
- Between 2011 and 2016, construction commenced on 1,310 private sector homes, with a peak of 297 starts in 2016.

Owner Occupied Housing Sector

- Census 2011 demonstrated the continued desire of residents to own their own home;
- The private housing market had been showing signs of improvement with gradually increasing numbers of transactions. However, this trend has plateaued during 2015;
- House prices have decreased slightly in the past year with an average price of £104,291 recorded for DCSDC in 2016 compared with £105,458 in 2015;
- Economic performance, negative equity, low house prices and lending restrictions may have contributed to DCSDC recording low levels of private new build starts and completions figures. Although relatively high levels of new build starts were recorded, a large proportion has been social housing;
- Feedback from local estate agents indicates that demand is highest in urban and suburban locations with three and four bed houses, with a driveway, being particularly popular. Recent large scale housing developments going on site, particularly in the Waterside area, are welcome and there is hope for continued improvement in the market.

Private Rented Housing Sector

- The private rented sector continues to play a significant role in the local housing market;
- Due mainly to a lack of new build private development, demand continues to outstrip supply across the district. High demand areas include: Westbank, Waterside, Strabane Town and Eglinton;
- The DfC's Landlord Registration Scheme identified 8,117 tenancies registered for the DCSDC area at March 2017;
- Housing benefit continues to play a vital role in supporting the private rented sector. At March 2017, 8,779 private tenants in DCSDC were in receipt of housing benefit;
- There are currently 5,576 Houses of Multiple Occupation (HMO's) in Northern Ireland, of which 476 are in DCSDC.

Social Rented Housing Sector

- Census 2011 showed that the social rented stock in DCSDC (11,609 units) has fallen by 16.9% compared to the 2001 figure;
- Housing Executive stock in March 2017 was 8,903 with 11,379 properties sold since the commencement of the 'Right to Buy' scheme;
- There were 170 new social housing units completed and a further 690 new social housing units on site in the year to March 2017;
- 43 Housing Executive properties were sold in the year to March 2017;
- There are around 5,360 housing association properties in the district (inclusive of shared stock and bed spaces).

Social Housing Need

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

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

General Housing Need (Urban & Rural)

Urban

Five year projected need for the Derry City Urban area as a whole is 2,574 while the projected need for the Strabane Town urban area is 115.

Table 45: Projected (5 Year) Social Housing Need

Settlement	Housing Need Assessment Area*	Total 5 Year Projection
Derry City	Waterloo Place Westbank	1,016
	Collon Terrace Westbank	1,144
	Waterside 1	143
	Waterside 2	458
	Waterside 3	100
	Curryneirin	3
	Drumahoe	9
	Tullyally	1
Strabane Town	Strabane Town	115
Ballymagorry	Ballymagorry	15
Claudy	Claudy	20
Eglinton	Eglinton	33
Sion Mills	Sion Mills/Glebe	16
Strathfoyle	Strathfoyle	24

Commissioning Prospectus

Settlement	Housing Need Assessment Area*	Total 5 Year Projection
Remaining Settlements (need <10)**	Clady, Lettershandoney, Magheramason, Newbuildings, Ardmore and Maydown	21
Total		2,818

N.B. Please note that need is met for any locations not included on this list.

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

*** Remaining settlements where need in each settlement is less than 10.*

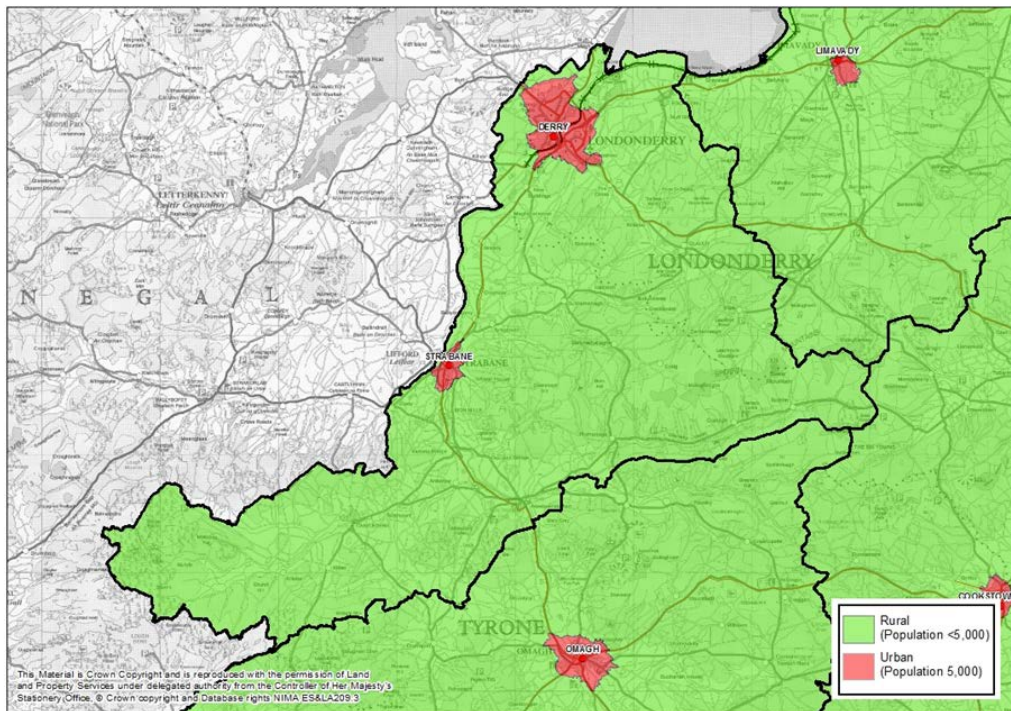
Please note that in relation to those settlements with <10 projected need, the Housing Executive will consider housing association development opportunities or Existing Satisfactory Purchases (ESP). In addition, if land can be identified that may provide for more than current projected social need suggests,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

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

- The Housing Executive has identified Claudy village and Ballymagorry as two locations where we would like to see small sites brought forward within the settlement limits as per the relevant Local Development Plans;
- In Claudy any development should be within the village as opposed to the rural estates 1-2 miles outside the village;
- In Strabane Town the Ballycolman and Lisnafin areas are most popular along with the Town Centre. Therefore, proposals in these areas would be welcome;
- Housing need has continued to increase in Derry City and Strabane Town;
- There is a high demand for single person accommodation throughout the district, particularly in urban areas. We would like to see appropriate sites brought forward to cater for singles in central locations;
- Of all household groups, elderly households continue to wait longest to be rehoused. Therefore, proposals for Category 1 properties at appropriate locations would also be welcome.

Rural

Map 12: Derry City and Strabane Rural Map



The provision of new social housing in rural settlements represents a strategic priority for delivery of the SHDP. Currently the overall rural target share of the SHDP is 13% of the overall programme based on average levels of housing stress in rural areas.

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

Indicative housing mix requirements

- Singles comprised 46% of applicants in housing stress followed by small families (33%) and elderly (11%);
- Accommodation for older persons should be designed flexibly with long term accessibility issues taken into consideration. Generic wheelchair units should be included in schemes where possible;
- Alternative mixes can be considered by housing associations in relation to specific sites or scheme types. However, significant changes from the above mix should be discussed with the Housing Executive to avoid nugatory work.

Table 46: Indicative housing mix for Derry City and Strabane

Elderly	Families*	Singles	Wheelchair
13%	39%	48%	6%

** Focus on: Small Adult and Small Family Households*

Areas where need is met

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

Rural areas

Based on the waiting list at March 2017, the current projected need for rural areas within the DCSDC area is for 129 units. Taking account of new build schemes on the current SHDP, the residual housing need is focused mainly on the villages of Ballymagorry and Claudy.

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

Wheelchair Housing Need (HNA)

There is an identified need for 37 wheelchair units, 2017-22, for the Derry City and Strabane District Council area.

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

Shared Future Demand

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

Travellers' accommodation

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

Intermediate (Affordable) Demand

- The Housing Executive estimates intermediate/affordable housing demand for the Derry City and Strabane District Council area at approximately 44 units per annum;
- Co-ownership approved 17 applications in 2016/17 for the Derry City and Strabane District Council area.

Table 47: Average Annual House Prices Derry City and Strabane & NI 2011-2016

Area	2011	2012	2013	2014	2015	2016	% Change 2011- 2016
Derry City & Strabane	£124,268	£112,653	£101,337	£105,460	£105,458	£104,291	-16.1
Northern Ireland	£139,800	£138,147	£131,204	£140,217	£149,499	£154,028	-4.7

Source: Ulster University

Derry City and Strabane Supporting Data

Table 48: Derry City & Strabane Waiting List – March 2017

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	2,023	138	1,372	48	267	512	4,360
HS Applicants	1,428	91	1,044	34	180	349	3,126
Allocations	297	19	250	7	57	95	725

Applicants – Housing applicants at March 2017

HS Applicants – Housing stress applicants at March 2017 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2017

Table 49: Derry City Waiting List – March 2017

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	1,600	100	1,112	29	195	372	3,408
HS Applicants	1,196	73	907	24	136	267	2,603
Allocations	226	9	205	3	38	76	557

Applicants – Housing applicants at March 2017

HS Applicants – Housing stress applicants at March 2017 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2017

Table 50: Housing Stress applicants time on list March 2017

Household	0-6 mths	6-12 mths	1-2 years	2-4 years	4+ years	Total	Average Months
Single	216	182	309	370	351	1,428	35
Small Adult	13	12	23	24	19	91	31
Small Family	131	107	234	274	298	1,044	36
Large Adult	3	6	2	11	12	34	42
Large Family	30	20	41	44	45	180	35
Older Person	47	50	60	60	132	349	51
Total	440	377	669	783	857	3,126	37

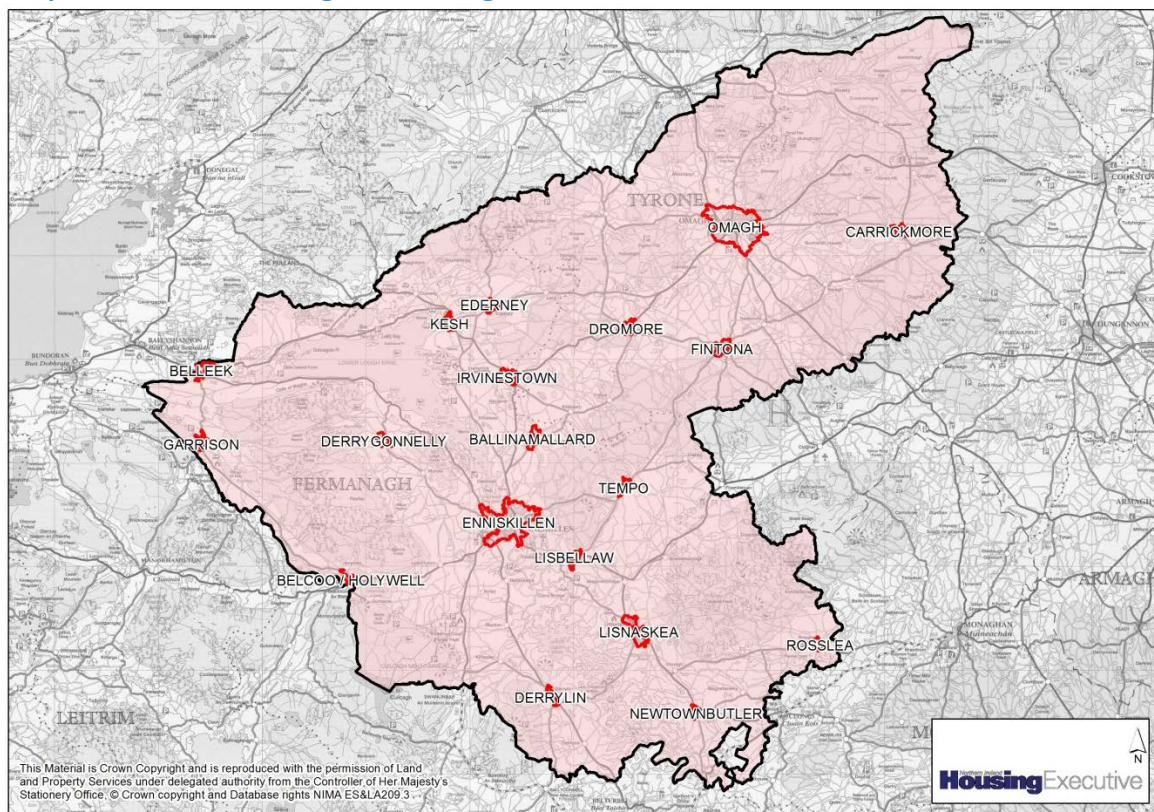
Fermanagh and Omagh District Council

LGD socio-economic context

Fermanagh and Omagh District Council (FODC) has been in operation since 1st April 2016. The council area is one of outstanding natural beauty with lakes, mountains, forest parks, the Marble Arch Caves Global Geopark, historic towns and a rich heritage. It is an area where quality of life is promoted and valued and it is recognised for its talented, skilled and creative people. The district is Northern Ireland's largest region in terms of land mass covering approximately 3,000km² and smallest in terms of population density (38 people per km²).

Fermanagh and Omagh is mainly a rural district with 30% of the population living in Enniskillen or Omagh and 7% living in smaller towns including Carrickmore, Dromore, Fintona, Irvinestown and Lisnaskea. Villages and small settlements account for 17% of the population with the remaining 46% of the population living in open countryside.

Map 13: Fermanagh and Omagh District Council with main settlements



Housing Market Analysis (across tenures)

Housing & Land Supply

- The DOE's Northern Ireland Housing Land Report (Planning NI: 2011-2013 and FODC 2014) shows capacity for 15,305 additional dwellings;
- However the rate of new house building is less than the requirement (759) as set out in the Regional Development Strategy 2035 (RDS). Tighter lending is likely to lead to the continuation of low rates of private housing construction;
- Between 2011 and 2016 construction commenced on 2,440 private sector homes, with a peak of 697 starts in 2011.

Owner Occupied Housing Sector

- Census 2011 demonstrated the continued desire of residents to own their own home;
- The private housing market is showing signs of recovery – the number of house sales in Fermanagh and Omagh increased from 471 in 2012 to 827 in 2016 (LPS);
- The average house price for Fermanagh and Omagh has increased steadily in recent years, increasing from 95,721 in 2012 to 135,181 in 2016. However this figure is still approximately £20k below the Northern Ireland average;
- Popular locations include the main urban centres of Enniskillen and Omagh which offer the greatest services and amenities.

Private Rented Housing Sector

- The private rented sector continues to play a significant role in the local housing market;
- Local estate agents report that there is strong demand for private rental accommodation across the district;
- The DfC's Landlord Registration Scheme identified 5,743 tenancies for Fermanagh and Omagh in March 2017;
- Housing benefit continues to play a vital role in supporting the private rented sector. At March 2017, 4,755 private tenants in Fermanagh and Omagh were in receipt of housing benefit;
- There are currently an estimated 5,836 Houses of Multiple Occupation (HMOs) in Northern Ireland, of which 130 are in Fermanagh and Omagh council. All identified HMOs in Fermanagh and Omagh have been registered as complying with regulations.

Social Rented Housing Sector

- Census 2011 showed that the social rented stock in the district (3,981 units) has fallen by 29% compared to the 2001 figure;
- Housing Executive stock at March 2016 was 3,677 with 6,456 properties sold since the commencement of the 'Right to Buy' scheme;

- There were two new social housing units completed and a further three new social housing units on site in the year March 2017;
- Twenty Housing Executive properties were sold in the year to March 2017;
- There are around 1,300 housing association units in the district (inclusive of shared stock and bedsits).

Social Housing Need

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

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

General Housing Need (Urban & Rural)

Urban

Five year projected need for the area as a whole is 179 and the projected need for individual settlements is detailed in Table 51.

Table 51: Projected (5 Year) Social Housing Need 2017-22

Settlement	Housing Need Assessment Area*	Total 5 Year Projection
Enniskillen Town	Enniskillen Town	130
Omagh Town	Omagh Town	30
Remaining Settlements (need <10)**	Arney / Bellanaleck, Ballinamallard, Derrylin, Kinawley and Maguiresbridge	19
Total		179

N.B. Please note that need is met for any locations not included on this list.

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

*** Remaining settlements 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 Latent Demand Testing (LDT) or other marketing exercises to identify hidden additional social and mixed tenure demand.

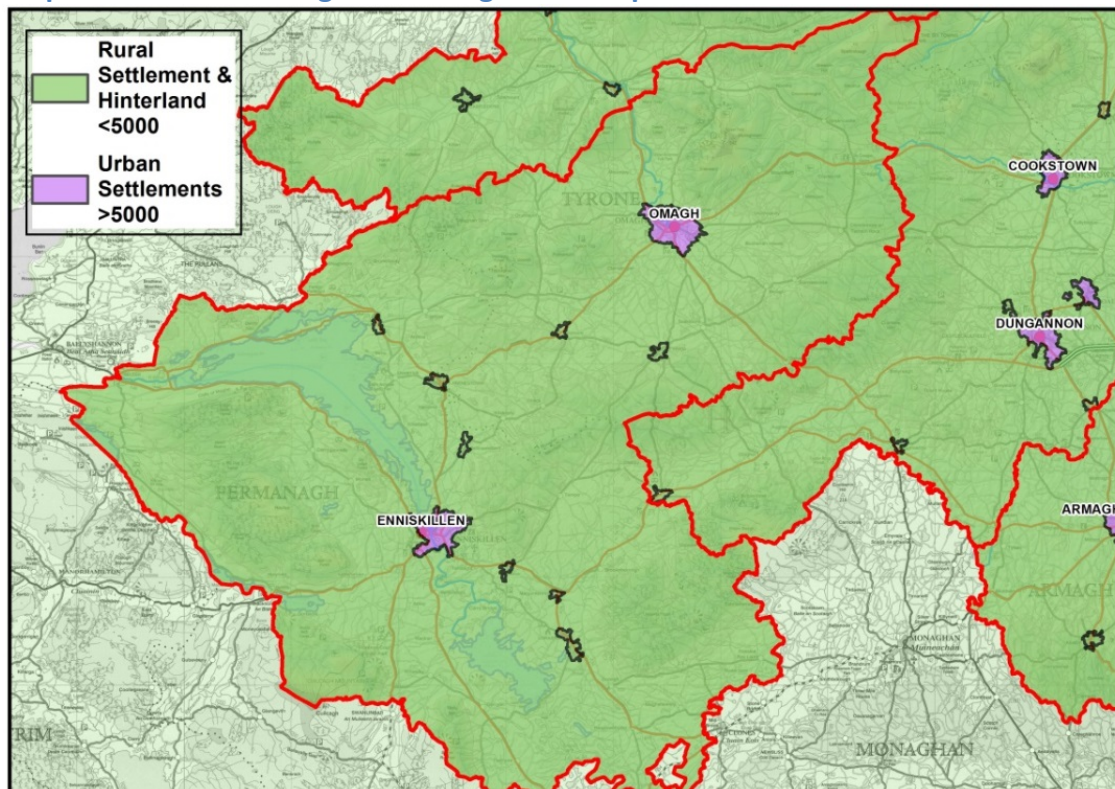
The following comments are relevant to housing need within the council area:

Commissioning Prospectus

- The requirement for new social housing in the FODC has consistently increased since 2010. The five year assessment for 2017-22 shows a need for 179 units. Need is greatest in Enniskillen town (130 units) and Omagh (30 units) with minimal need across other towns and villages. The need in Enniskillen is primarily for accommodation for single and older person households;
- Single, older person and small family households comprise the majority of all applicants on the waiting list in housing stress. Future housing mix in new social housing will need to cater for these household groups;
- In recent years social housing need in FODC has been delivered by housing associations on Housing Executive land. Increasingly areas of housing need are emerging in locations where the Housing Executive does not own land;
- Housing Associations report difficulties in obtaining sites in areas of housing need throughout the FODC area. This results in housing associations having to acquire sites on the open market, which are subject to market price fluctuations;
- NIHE will carry out site identification studies to examine the potential for new social housing. Studies are scheduled to take place in Maguiresbridge and Trillick during 2017/18;
- Whilst need is low across Fermanagh and Omagh, there are signs that need is beginning to increase particularly for small families and older person households.

Rural

Map 14: Fermanagh and Omagh rural map



The provision of new social housing in rural settlements represents a strategic priority for delivery of the SHDP. Currently the overall rural target share of the SHDP is 11.45% of the overall programme based on average levels of housing stress in rural areas.

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

Indicative housing mix requirements

- At March 2017, there were 668 applicant households in housing stress on the waiting list for social housing. The household breakdown shows 345 (51.6%) single person households, 124 (18.6%) older person households and 112 (16.8%) small family households;
- In the year to March 2017, there were 331 allocations including 160 (48.3%) to singles, 72 (21.8%) to small families and 48 (14.5%) to older person households;
- The current Housing Executive stock in Fermanagh and Omagh includes 3,677 properties. Property types include 1,911 houses, 1,366 bungalows, 322 flats, 52 maisonettes and 26 cottages;
- Accommodation for older persons should be designed flexibly with long term accessibility issues taken into consideration. Generic wheelchair units should be included in schemes where possible;
- Alternative mixes can be considered by housing associations in relation to specific sites or scheme types. However, significant changes from the above mix should be discussed with the Housing Executive to avoid nugatory work.

Table 52: Indicative housing mix for Fermanagh and Omagh

Elderly	Families*	Singles	Wheelchair
30%	40%	30%	6%

* Focus on: Small Adult and Small Family Households

Areas where need is met

- Across Fermanagh and Omagh, there are variations in patterns of demand. Please contact a member of the Place Shaping team to discuss any potential proposals.

Rural areas

The number of rural applicants in housing stress on the waiting list for social housing has increased from 127 at March 2013 to 209 at March 2017. It is clear from the Annual Housing Need Assessment, summarised in Table 51, that there is minimal need in many rural areas across the district. The overall projection of need in the district for the five years

to 2022 is 179. The vast majority of need is in the main urban centres of Enniskillen and Omagh with 10.6% of all need in the district falling within rural settlements.

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

Wheelchair Housing Need (HNA)

There are currently 25 housing stress applicants at March 2017 with 9 allocations last year. The residual generic wheelchair need for Fermanagh and Omagh is for 22 units.

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

Shared Future Demand

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

Travellers' accommodation

The 2013/18 Traveller Need Assessment identified no accommodation requirement for Traveller families in the Council area. NIHE continues to monitor the need for traveller accommodation throughout the council area.

Intermediate (Affordable) Demand

- Co-Ownership is the most recognised provider of intermediate housing in Northern Ireland. In 2016/17, a total of four properties were purchased through Co-Ownership in the Fermanagh and Omagh area;
- The intermediate demand for housing in Fermanagh and Omagh district is 590 for the ten years to 2026. Although average house prices in the district are below the Northern Ireland average, anecdotal evidence suggests affordability remains an issue especially for first time buyers.

Table 53: Average Annual House Prices Fermanagh and Omagh District NI 2011-2016

Area	2011	2012	2013	2014	2015	2016	% Change 2011- 2016
Fermanagh and Omagh	£122,613	£95,721	£106,007	£113,779	£129,501	£135,181	10.3
Northern Ireland	£139,800	£138,147	£131,204	£140,217	£149,499	£154,028	10.2

Source: Ulster University

Fermanagh and Omagh District Supporting Data

Table 54: Fermanagh and Omagh District Waiting List – March 2017

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	718	77	289	31	111	241	1,467
HS Applicants	345	22	112	11	54	124	668
Allocations	160	18	72	6	27	48	331

Applicants – Housing applicants at March 2017

HS Applicants – Housing stress applicants at March 2017 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2017

Table 55: Enniskillen Town Waiting List – March 2017

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	250	22	85	7	36	76	476
HS Applicants	160	9	36	5	16	50	276
Allocations	44	2	21	2	9	12	90

Applicants – Housing applicants at March 2017

HS Applicants – Housing stress applicants at March 2017 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2017

Table 56: Omagh Town Waiting List – March 2017

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	228	34	101	16	34	93	506
HS Applicants	89	6	34	2	14	39	184
Allocations	34	4	20	1	4	14	77

Applicants – Housing applicants at March 2017

HS Applicants – Housing stress applicants at March 2017 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2017

Table 57: Housing Stress applicants time on list March 2017

Household	0-6 mths	6-12 mths	1-2 years	2-4 years	4+ years	Total	Average Months
Elderly	25	12	24	27	36	124	42
Large Adult	2	1	1	3	4	11	85
Large Family	9	9	14	13	9	54	28
Single	66	81	76	58	64	345	30
Small Adult	9	2	3	4	4	22	28
Small Family	36	29	18	17	12	112	21

Lisburn and Castlereagh City

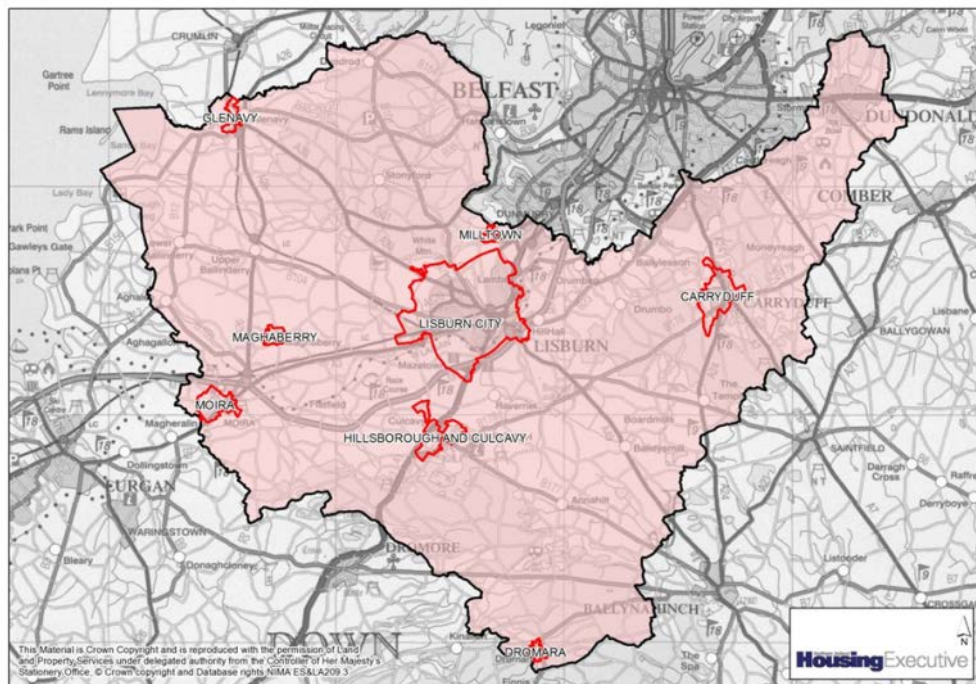
LGD socio-economic context

On the 1st April 2015 Lisburn & Castlereagh City Council (LCCC) assumed responsibility for the new Council area, following the amalgamation of Lisburn City Council and Castlereagh Borough Council.

The Council, made up of 40 Elected Members, represents over 140,000 residents in 58,868 homes and covers an area of nearly 200 square miles.

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

Map 15: Lisburn and Castlereagh City District with settlements



The local housing market is slowly recovering following the economic crash in 2007. Despite a small increase in house prices over the past year a number of imbalances in the housing market remain. The decline in private sector house development, low house prices, a lack of mixed tenure development, an undersupply of private rented accommodation and an increasing number of applicants in housing stress on the social housing waiting list all pose particular challenges.

The LCCC population is projected to grow 10% by 2025. Most of this growth will be concentrated in the 65 plus age group. Whilst the need for small family accommodation remains strong, there will be a requirement to design and construct suitable

accommodation for older persons. However, with the reorganisation of the council boundaries throughout Northern Ireland, the population in LCCC area has increased to over 20% of the 2001 figure.

Housing Market Analysis (across tenures)

Housing & Land Supply

- Between 2011 and 2016, construction commenced on 3,742 private sector homes, with a peak of 803 starts in 2016;
- From 2001 to 2011 the number of households in LCCC area increased by 13%, which is above the Northern Ireland rate of 11.9%;
- The 2011 census shows that 24.9% of Lisburn & Castlereagh City households were one person and 31.2% of households were two person;
- The average household size in LCCC was 2.59;
- Annual HGI requirement for LCCC is 738 from 2012-2025.

Owner Occupied Housing Sector

- Census 2011 demonstrated the continued desire of residents to own their own home with owner occupiers making up 73% of all tenures compared to 67% across all of Northern Ireland;
- House sales for all tenures has increased from 1,226 in 2012 to 2,115 in 2016 although this represents a small decrease from the previous year;
- During 2016/17, 89 properties were purchased through Co-ownership in LCCC;
- The average house price for Lisburn & Castlereagh has increased from £162k in 2012 to £177k in 2016;
- Demand is highest in urban and suburban areas as households leave the countryside to be closer to work and services.

Private Rented Housing Sector

- The private rented sector across LCCC has seen an unprecedented increase in its tenure share between 2001 and 2011. The Census in 2001 recorded 1,802 households (2.7% of all households) renting from private landlords or letting agencies. By Census 2011 the number had increased to 6,758 households (9.2% of all households). Across Northern Ireland the private rented sector accounted for 15.1% of all tenures in 2011;
- Local estate agents also indicated that rents have maintained a consistent level in the past 12 months, the average weekly rent is £139.38 across LCCC
- The DfC's Landlord Registration Scheme identified 5,704 tenancies registered for LCCC in March 2017, up from 5,192 in March 2016;

- Local estate agents have indicated that key drivers affecting the PRS in LCCC include: high demand for private rental; a slowdown of additional supply and low turnover in the social housing sector;
- Housing benefit continues to play a vital role in supporting the private rented sector. At March 2017, 3,518 private tenants in Lisburn & Castlereagh were in receipt of housing benefit.

Social Rented Housing Sector

- Census data shows that the social rented stock in the council area has fallen from 21.3% in 2001 to 15.8% in 2011;
- Housing Executive stock at March 2017 was 5,410 with the majority being two bed units; A total of 7,783 properties have been sold since the commencement of the 'Right to Buy' scheme;
- Housing Association stock in LCCC was around 2,400 in 2016/17 (inclusive of shared stock and bed spaces). This represents a decrease from the figure reported last year due to boundary changes;
- There were 152 new social housing units started in 2016/17;
- Thirty Housing Executive properties were sold in the 2016/17.

Social Housing Need

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

General Housing Need (Urban & Rural)

Shared Future Demand

Supported Housing Need

Wheelchair Housing Need

Travellers' accommodation requirements

General Housing Need (Urban & Rural)

The Strategic Guidelines target share established for LCCC indicates 183 urban units and 8 rural units of the overall three year programme. The five-year projected need for the area as a whole is 800 units. The projected need for individual settlements is detailed in Table 58.

Outside of the urban settlements, the LCCC area encompasses a significant rural landscape, including the popular towns of Glenavy, Moira and Carryduff. Rural communities within the council area benefit from their close proximity to these locations and also from their commutable distance to Belfast and its wider urban settlements.

In 2016, the Housing Executive launched 'Sustainable Rural Communities', the refreshed Rural Strategy & Action Plan 2016-2020. It is aimed at identifying the housing needs of rural communities and working with housing providers, councils, public bodies and rural stakeholders to ensure that where possible, needs are addressed.

Commissioning Prospectus

The Housing Executive is committed to carrying out a review of policy and procedure for identifying hidden rural housing need, and examining the potential to increase housing association involvement in the process. It is hoped that this partnership approach will encourage more people to come forward and may also broaden the scope to include an examination of the demand for affordable/mixed tenure housing.

Table 58: Projected (5 year) Social Housing Need

Settlement	Housing Need Assessment Area*	Total 5 Year Projection
Lisburn/Dunmurry Urban	Lisburn/Dunmurry Urban	582
Castlereagh Urban	Castlereagh Urban	53
Carryduff	Carryduff	20
Glenavy	Glenavy	30
Hillsborough	Hillsborough	29
Lambeg	Lambeg	42
Moirá	Moirá	25
Remaining Settlements (need <10)**	Aghalee, Boardmills, Culcavey, Dromara, Dundrod, Milltown and Ravarnette	19
Total		800

N.B. Please note that need is met for any locations not included on this list.

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

*** Remaining settlements 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 Latent Demand Testing (LDT) or other marketing exercises to identify hidden additional social and mixed tenure demand.

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

- Housing need has remained at a consistently high level in Lisburn and Castlereagh and is focussed in the main urban settlements;
- Future housing mix in new build developments will need to cater for singles, small families and older persons along with any potential changes associated with Welfare Reform;
- Numbers in housing stress have remained high in the area and the number of allocations remains inadequate to meet demand;

- There is an increasing need for two and three bedroom wheelchair units that are flexible to meet the needs of a wide range of applicants;
- Increasingly, areas of housing need are emerging in locations where the Housing Executive does not own land in the council area. Housing associations report difficulties in obtaining sites in areas of housing need throughout the LCCC area. This results in housing associations having to acquire sites on the open market and therefore subject to market price fluctuations;
- Land availability remains a problem and we are working closely with LCCC in its preparations of the Local Development Plan (LDP) to ensure that there is sufficient land available for social housing during the lifetime of the LDP;
- In recent years, social housing need in Lisburn and Castlereagh has been delivered by housing associations on Housing Executive land;
- The areas of greatest housing need are in and around Lisburn City;
- The overall demographic trend is for an ageing population and for small household size (1-3 persons);
- The future need is predominantly for one and two bedroom design forms and with emphasis on accessibility;
- Wheelchair applicants seeking accessible units are increasing in the area.

Indicative Housing mix requirements

- Single and family households comprise 82% of the waiting list in housing stress;
- The table below provides an indicative housing mix based on the profile of housing stress applicants registered on the waiting list;

Table 59: Indicative housing mix for Lisburn and Castlereagh City

Elderly	Families*	Singles	Wheelchair
18%	41%	41%	6%

* Focus on: Small Adult and Small Family Households

- The trend for new dwellings in LCCC is for smaller households. Where possible one bed properties, while addressing the immediate requirements under Welfare Reform should be designed flexibly to cater for potential household growth;
- Some three bed properties may be required for families and these should be discussed with the Housing Executive;
- Accommodation for older persons should be designed flexibly with long term accessibility issues taken into consideration. Generic wheelchair units should be included in schemes where possible;
- Alternative mixes can be considered by housing associations in relation to specific sites or scheme types. However, significant changes from the above mix should be discussed with the Housing Executive to avoid nugatory work.

Areas where Demand is currently met

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

Wheelchair Housing Need (HNA)

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

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

Shared Future Demand

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

Travellers' accommodation

The 2013/18 Traveller Need Assessment identified no accommodation requirements for Traveller families in the council area. Any requirements will be confirmed as this prospectus is reviewed and updated.

Intermediate (Affordable) Demand

- Co-ownership is the most recognised provider of intermediate housing in Northern Ireland. In 2016/17 a total 89 applications were approved in the LCCC area, reflecting the opportunities this scheme provides;
- Average house prices in Lisburn & Castlereagh have fluctuated since 2012, but have consistently remained higher than the Northern Ireland average. In 2016 the average house price increased to £177,298, just over 9% higher than in 2012.

Table 60: Average Annual House Prices Lisburn and Castlereagh City & NI 2012-2016

Area	2012	2013	2014	2015	2016	% Change 2012-2016
Lisburn & Castlereagh	£162,000	£165,264	£161,922	£182,750	177,298	9%
Northern Ireland	£138,147	£131,204	£140,217	£149,499	154,028	11%

Source: Ulster University

Lisburn & Castlereagh City Supporting Data

Table 61: Lisburn/Dunmurry Urban Waiting List – March 2017

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	618	76	333	20	74	204	1,325
HS Applicants	366	41	223	9	40	123	802
Allocations	152	14	99	3	27	48	343

Applicants – Housing applicants at March 2017

HS Applicants – Housing stress applicants at March 2017 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2017

Table 62: Castlereagh Urban Waiting List – March 2017

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	139	31	119	12	20	102	423
HS Applicants	74	10	57	7	13	47	208
Allocations	39	6	21	2	2	30	100

Applicants – Housing applicants at March 2017

HS Applicants – Housing stress applicants at March 2017 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2017

Table 63: Carryduff Waiting List – March 2017

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	29	4	25	4	9	16	87
HS Applicants	21	3	16	1	4	3	48
Allocations	2	2	2	0	1	3	10

Applicants – Housing applicants at March 2017

HS Applicants – Housing stress applicants at March 2017 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2017

Table 64: Hillsborough Waiting List – March 2017

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	17	6	13	0	2	27	65
HS Applicants	10	1	7	0	1	13	32
Allocations	1	0	2	0	0	11	14

Applicants – Housing applicants at March 2017

HS Applicants – Housing stress applicants at March 2017 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2017

Commissioning Prospectus

Table 65: Lisburn & Castlereagh Council Housing Stress applicants time on list

Comp HH HIP	0-6 Mths	6-12 Mths	1-2 years	2-4 years	4+ years	Total	Average Months
Single	110	101	121	82	112	526	36
Small Adult	13	7	11	14	17	62	37
Small Family	58	55	87	90	65	355	37
Large Adult	3	1	6	7	6	23	41
Large Family	16	6	13	20	15	70	37
Older Person	23	29	37	46	97	232	37
Total	223	199	275	259	312	1,268	37

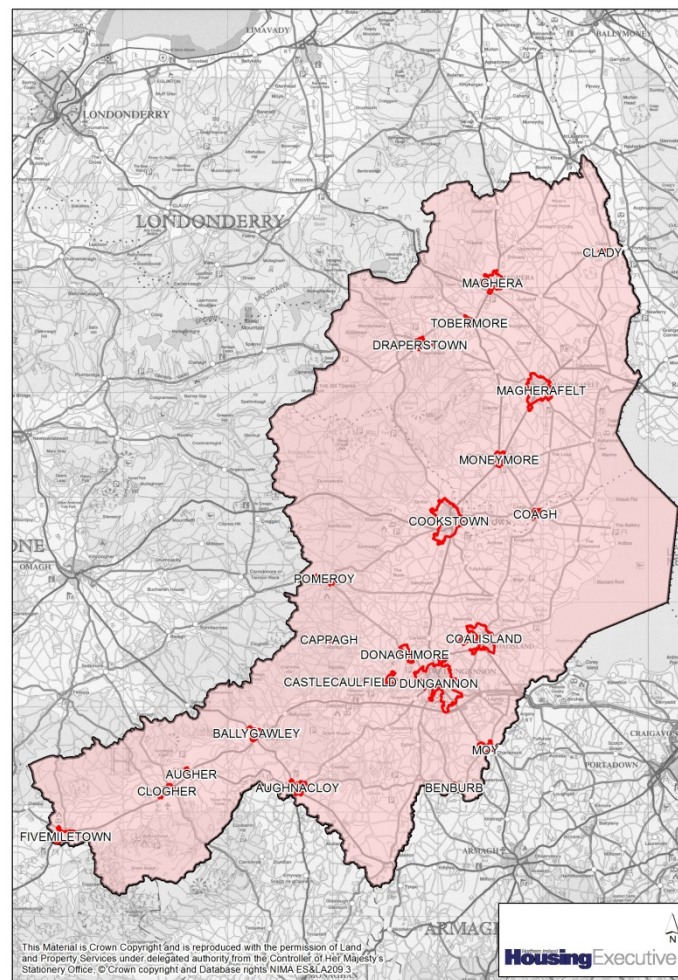
Mid Ulster

LGD socio-economic context

Mid Ulster District Council has been in operation since 1st April 2015. The area extends from Swatragh and Bellaghy in the North to Fivemiletown, Aughnacloy and Moy in the South with Lough Neagh forming a significant part of its eastern border. The Mid Ulster District Covers an area of 1,714 km² and the 144,000 residents live in a mixture of urban and rural areas.

Much of the district is approximately 50 miles from Belfast with many settlements easily accessible to the M1 and M2. The range of facilities, recreational opportunities and its strategic location at the heart of Northern Ireland make the area an attractive place to live and work.

Map 16: Mid Ulster District Council with main settlements



Housing Market Analysis (across tenures)

Housing & Land Supply

- The DOE's Northern Ireland Land Availability Report for 2013 (Planning NI:2011-2013 revised 2014) shows potential capacity for 15,294 additional dwellings;
- However, the rate of new house building falls below the requirement (782) as set out in the Regional Development Strategy 2035. Tighter lending is likely to lead to the continuation of low rates of private housing construction;
- Between 2011 and 2016, construction commenced on 4,144 private sector homes, with a peak of 802 in 2015.

Owner Occupied Housing Sector

- Census 2011 demonstrated the continued desire of residents to own their own home;
- The private housing market is showing signs of recovery – the number of house sales in Mid Ulster increased from 719 in 2012 to 1,123 in 2016 (LPS);
- The average house price for Mid Ulster in 2016 (£140,339) was a significant increase on the 2015 figure (£125,503), however this is still around £14k below the Northern Ireland average;
- Popular locations in the district include the urban centres of Dungannon, Cookstown and Magherafelt;
- Despite lower house prices and low interest rates, negative equity and rigorous bank lending practises have constrained the housing market. Negative equity affects around 40% of homeowners in NI, with Mid Ulster (Portadown-Lurgan) among the worst affected areas where there have been price falls in excess of 50%.

Private Rented Housing Sector

- The private rented sector across Mid Ulster has seen an unprecedented increase in its tenure share between 2001 and 2011;
- Local estate agents report that there is strong demand for private rental accommodation across the district;
- The DfC's Landlord Registration Scheme identified 6,177 registered for Mid Ulster in March 2017;
- Housing benefit continues to play a vital role in supporting the private rented sector. At March 2017, 4,503 private tenants in Mid Ulster were in receipt of housing benefit;
- There are currently an estimated 5,836 Houses of Multiple Occupation (HMOs) in Northern Ireland, of which 90 are in Mid Ulster. All identified HMOs in Mid Ulster have been registered as complying with regulations.

Social Rented Housing Sector

- Census 2011 showed that the social rented stock in the district (4,435 units) has fallen by 26% compared to the 2001 figure;
- Housing Executive stock at March 2017 was 3,978 with 7,651 properties sold since the commencement of the 'Right to Buy' scheme;
- There were 123 new social housing units completed and a further 89 new social housing units on site in the year to March 2017;
- Seventeen Housing Executive properties were sold in the year to March 2017;
- There are around 1,400 housing association units in the area (inclusive of shared stock and bed spaces).

Social Housing Need

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

General Housing Need (Urban & Rural)

Shared Future Demand

Wheelchair Housing Need

Travellers' accommodation requirements

General Housing Need (Urban & Rural)

Urban

Five year projected need for the area as a whole is 577 and the projected need for individual settlements is detailed in Table 66.

Table 66: Projected (5 Year) Social Housing Need 2017-22

Settlement	Housing Need Assessment Area*	Total 5 Year Projection
Cookstown	Cookstown South	17
Dungannon	Dungannon 1	285
Magherafelt	Magherafelt	70
Coalisland	Coalisland	81
Ardboe/Moortown/Ballinderry	Ardboe/Moortown/Ballinderry	10
Donaghmore	Donaghmore	20
Draperstown	Draperstown	14
Moy	Moy	26
Remaining Settlements (need <10)**	Dungannon 2, Moygashel, Maghera, Aughnacloy, Bellaghy, Benburb, Bush, Castlecaulfield, Castledawson and Granville/Brantry	54
Total		577

N.B. Please note that need is met for any locations not included on this list.

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

** Remaining settlements where need in each settlement is less than 10.

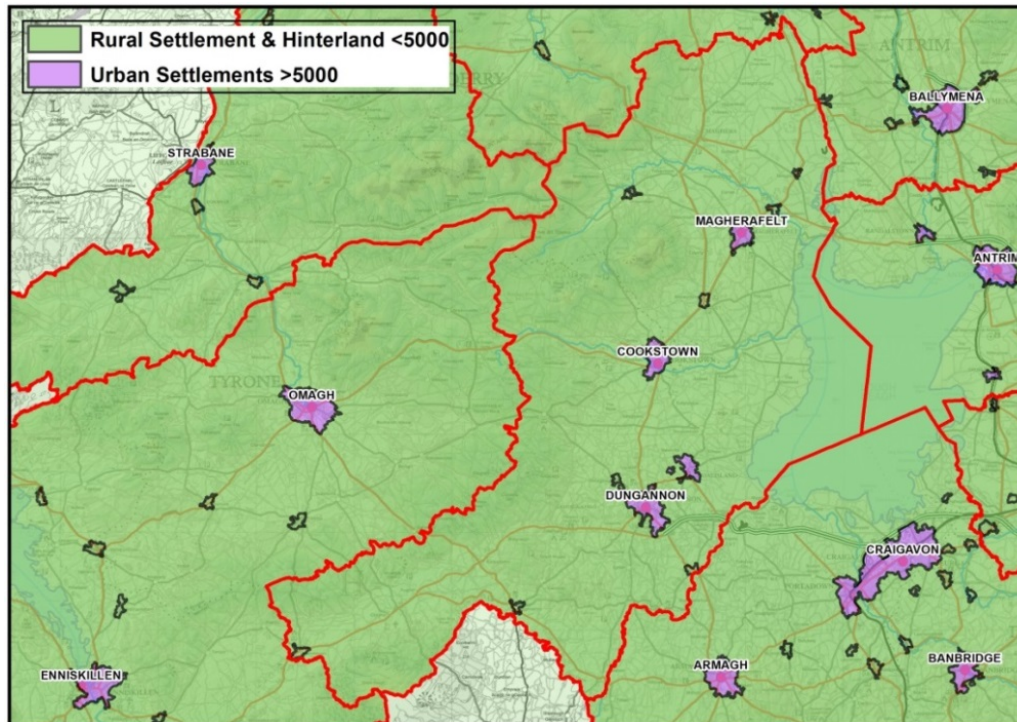
Commissioning Prospectus

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 Latent Demand Testing (LDT) or other marketing exercises to identify hidden additional social and mixed tenure demand.

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

- Housing need in Mid Ulster District has remained at a high level since 2010. The five-year assessment for 2017-22 shows a need for 577 units. Need is highest in Dungannon 1, Coalisland and Magherafelt. Need is largely met in the villages and smaller settlements throughout the council area, with the exception of Moy, Donaghmore and Draperstown;
- Singles, small families and older person households comprise the majority of applicants in housing stress on the waiting list in Mid Ulster. Future housing mix in new social housing will need to cater for these household groups;
- In recent years, social housing need in Mid Ulster has been delivered by housing associations on Housing Executive land. Increasingly, areas of housing need are emerging in locations where the Housing Executive does not own land. Housing Associations have to acquire sites on the open market and are therefore subject to market price fluctuations;
- Housing Associations have reported difficulties in obtaining sites, chiefly to the west of Dungannon. Whilst urban areas have housing need, there are a number of scheme proposals that will address much of this need should they come to fruition;
- NIHE will carry out site identification studies to examine the potential for new social housing. There are currently two site identification studies scheduled for 2017/18 in Benburb and Swatragh.

Map 17: Mid Ulster rural map



The provision of new social housing in rural settlements represents a strategic priority for delivery of the SHDP. Currently the overall rural target share of the SHDP is 11.45% of the overall programme based on average levels of housing stress in rural areas. The projected need in rural settlements within Mid Ulster over the five years to 2022 accounts for 21% of all need.

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

Indicative housing mix requirements

- At March 2017, there were 1,008 applicant households in housing stress on the waiting list for social housing. The household breakdown shows 413 (41%) single person households, 327 (32.4%) small family households and 122 (12.1%) older person households;
- In the year to March 2017, there were 366 allocations including 137 (37.4%) to singles, 128 (35%) to small families, 38 (10.7%) to large families and 37 (10.1%) to older person households;
- The current Housing Executive stock in Mid Ulster includes 3,978 properties. Property types include 2,301 houses, 1,184 bungalows, 416 flats, 61 cottages and 16 maisonettes;

- Accommodation for older persons should be designed flexibly with long term accessibility issues taken into consideration. Generic wheelchair units should be included in schemes where possible;
- Alternative mixes can be considered by housing associations in relation to specific sites or scheme types. However, significant changes from the above mix should be discussed with the Housing Executive to avoid nugatory work.

Table 67: Indicative housing mix for Mid Ulster

Elderly	Families*	Singles	Wheelchair
15%	55%	30%	6%

* Focus on: Small Adult and Small Family Households

Areas where need is met

- Across Mid Ulster, there are variations in patterns of demand. Please contact a member of the Place Shaping team to discuss any potential proposals.

Rural areas

The number of rural applicants in housing stress on the waiting list for social housing has remained relatively static over the last five years. There has been a slight increase from a five-year low of 267 at March 2014 to 298 at March 2017. It is clear from the Annual Housing Need Assessment, summarised in Table 66, that there are significant levels of need in a number of rural settlements across the district including Moy, Donaghmore and Draperstown.

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

Wheelchair Housing Need (HNA)

There are currently 19 housing stress applicants at March 2017 with 11 allocations last year. The residual generic wheelchair need for Mid Ulster is for 19 units.

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

Shared Future Demand

The Housing Executive actively encourages mixed tenure and shared future housing. Housing Associations bringing forward suitable proposals for shared future designation would be welcomed. One shared future scheme completed at Burn Road, Cookstown at the end of 2016.

Travellers' accommodation

The 2013/18 Traveller Need Assessment identified no accommodation requirement for Traveller families in the Council area. NIHE continues to monitor the need for traveller accommodation throughout the council area. A site identification study was carried out in Magherafelt, which reviewed NIHE land holdings within the Magherafelt settlement limit. In total, 14 potential sites were reviewed however none were found to be suitable due to a range of constraints.

Intermediate (Affordable) Demand

- Co-Ownership is the most recognised provider of intermediate housing in Northern Ireland. In 2016/17 a total of 51 properties were purchased through Co-Ownership in the Mid Ulster area, reflecting the opportunities this scheme provides;
- The intermediate demand for housing in Mid Ulster District is 1,210 for the ten years to 2026. Although average house prices in the district are below the Northern Ireland average, affordability remains an issue especially for first time buyers.

Table 68: Average Annual House Prices Mid Ulster & NI 2011-2016

Area	2011	2012	2013	2014	2015	2016	% Change 2011- 2016
Mid Ulster	£135,037	£119,337	£112,922	£113,787	£125,503	£140,339	3.9
Northern Ireland	£139,800	£138,147	£131,204	£140,217	£149,499	£154,028	10.2

Source: Ulster University

Mid Ulster Supporting Data

Table 69: Mid Ulster Waiting List – March 2017

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	686	99	589	45	169	192	1,780
HS Applicants	413	41	327	23	82	122	1,008
Allocations	137	21	128	5	38	37	366

Applicants – Housing applicants at March 2017

HS Applicants – Housing stress applicants at March 2017 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2017

Table 70: Dungannon Waiting List – March 2017

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	229	29	234	11	76	36	615
HS Applicants	152	15	142	6	43	27	385
Allocations	43	5	40	1	12	5	106

Applicants – Housing applicants at March 2017

HS Applicants – Housing stress applicants at March 2017 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2017

Table 71: Magherafelt Waiting List – March 2017

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	109	27	63	9	21	40	269
HS Applicants	63	8	29	3	9	14	126
Allocations	12	2	17	0	1	4	36

Applicants – Housing applicants at March 2017

HS Applicants – Housing stress applicants at March 2017 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2017

Table 72: Coalisland Waiting List – March 2017

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	81	10	76	5	12	18	202
HS Applicants	51	6	51	3	5	12	128
Allocations	11	2	19	2	8	1	43

Applicants – Housing applicants at March 2017

HS Applicants – Housing stress applicants at March 2017 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2017

Table 73: Housing Stress applicants time on list March 2017

Household	0-6 mths	6-12 mths	1-2 years	2-4 years	4+ years	Total	Average Months
Elderly	14	17	25	22	44	122	55
Large Adult	3	5	1	5	9	23	49
Large Family	13	8	17	25	19	82	34
Single	59	69	85	92	108	413	38
Small Adult	5	6	9	10	11	41	42
Small Family	61	43	66	85	72	327	32
Grand Total	155	148	203	239	263	1,008	38

Mid and East Antrim

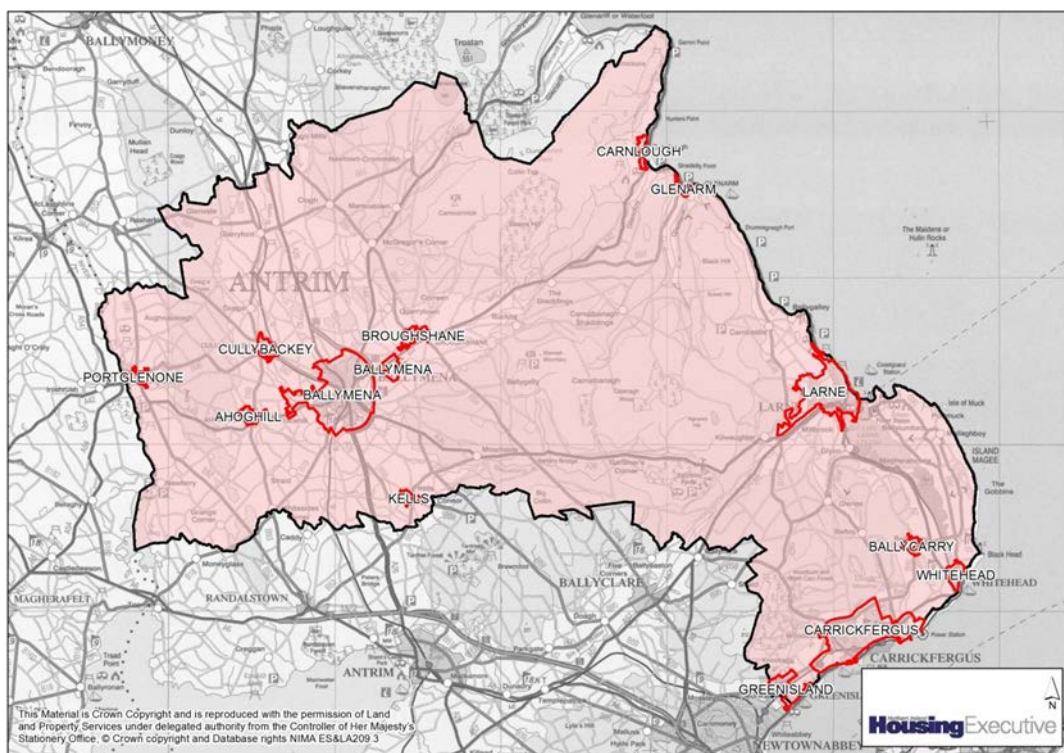
LGD socio-economic context

Mid and East Antrim has a rich historic, cultural and built heritage situated in a high quality natural environment. The Council area extends from the Irish Sea/North Channel in the east to the River Bann in the west; covering 104,954 hectares. It is a major industrial, retail, education and residential centre. The range of facilities, recreational opportunities and its strategic location make the area an attractive place to live and work. The district has a growing population of approximately 137,000 and while mostly urban, has a significant rural populace.

The population of Mid and East Antrim increased by 5% between 2005 and 2015 and is projected to increase by a further 2% by 2025. The number of households is also projected to increase by 4% by 2025. The population is ageing; it is projected that by 2025 older people will represent 22.2% of the population in the borough.

Mid and East Antrim economy has performed well in recent years with percentage levels of people claiming unemployment related benefits consistently below the Northern Ireland average over the past five years.

Map 18: Mid and East Antrim Council with main settlements



Housing Market Analysis (across tenures)

Housing & Land Supply

- The DOE's Northern Ireland Housing Land Availability Report for 2013 (Planning NI: 2014) shows potential capacity for 13,451 additional dwellings in Mid and East Antrim;
- The borough has a HGI projected new dwelling requirement for 2012-2025 of 5,400 units;
- Between 2010 and 2016, construction commenced on 2,926 new homes; 78% of which were private sector dwellings;
- During the same period, 2,539 new homes were completed; 78% private sector dwellings.

Owner Occupied Housing Sector

- Census 2011 demonstrated the continued desire of residents to own their own home; 72.2% of residents were owner occupiers at this date, a decrease of 2.2% from 2001;
- The private housing market continues to recover; the number of house sales in Mid and East Antrim increased from 868 in 2010 to a peak of 1,720 in 2016;
- The average house price for Mid and East Antrim increased to £124k in 2016; £30k below the Northern Ireland average at 2016;
- Local estate agents report that the number of sales and enquiries has increased. Popular locations in the borough include Ballymena, Carrickfergus, Broughshane, Cullybackey and Ahoghill.

Private Rented Housing Sector

- The private rented sector is an increasingly important sector in the borough, with an unprecedented increase in tenure share between 2001 and 2011;
- Local estate agents report that there is continuing strong demand for private rental accommodation across the borough. This is sustained by high demand and low turnover in the social housing sector and a slowdown of supply in the private rental sector;
- The DFC's Landlord Registration Scheme identified 8,363 tenancies for Mid and East Antrim at March 2017;
- Housing benefit continues to play a vital role in supporting the private rented sector. At March 2017, there were 4,704 private tenants in receipt of housing benefit;
- There are currently an estimated 5,836 Houses of Multiple Occupation (HMOs) in Northern Ireland, 106 of which are in Mid and East Antrim. All identified HMOs have been registered as complying with regulations.

Social Rented Housing Sector

- Census 2011 showed that social rented stock in the borough (6,409 units) has fallen by 29% compared to the 2001 figure;
- Housing Executive stock at 2017 was 5,806 with 9,946 properties sold since the commencement of the 'right to Buy' scheme;
- There were 44 social housing units completed and a further 362 social housing units on site in year to March 2017. Three hundred and forty-seven units are planned over the period 2017-2020;
- Thirty-three Housing Executive properties were sold to tenants in year to March 2017;
- There are around 1,655 housing association units in the borough (inclusive of shared stock and bedspaces).

Social Housing Need

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

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

General Housing Need (Urban & Rural)

Urban

Five year projected need for the area as a whole is 800 units and the projected need for individual settlements is detailed in Table 74.

Table 74: Projected (5 Year) Social Housing Need

Settlement	Housing Need Assessment Area*	Total 5 Year Projection
Ballymena town	Ballykeel 1	20
	Central Ballymena	223
	North West Ballymena	93
	Harryville	10
	North East Ballymena	10
Carrickfergus town	Central Carrickfergus	95
	Eden	30
	Sunnylands and Drumhoy	87
	Victoria and Taylors Avenue	40
Larne town	Larne town	10
Whitehead	Whitehead	14
Ahoghill	Ahoghill	38

Settlement	Housing Need Assessment Area*	Total 5 Year Projection
Broughshane	Broughshane	55
Carnlough	Carnlough	14
Cullybackey	Cullybackey	18
Greenisland	Greenisland	15
Remaining Settlements (need <10)**	Kells, Ballycarry, Portglenone, Glenravel, Glynn and Islandmagee	28
Total		800

N.B. Please note that need is met for any locations not included on this list.

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

*** Remaining settlements 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 Latent Demand Testing (LDT) or other marketing exercises to identify hidden additional social and mixed tenure demand.

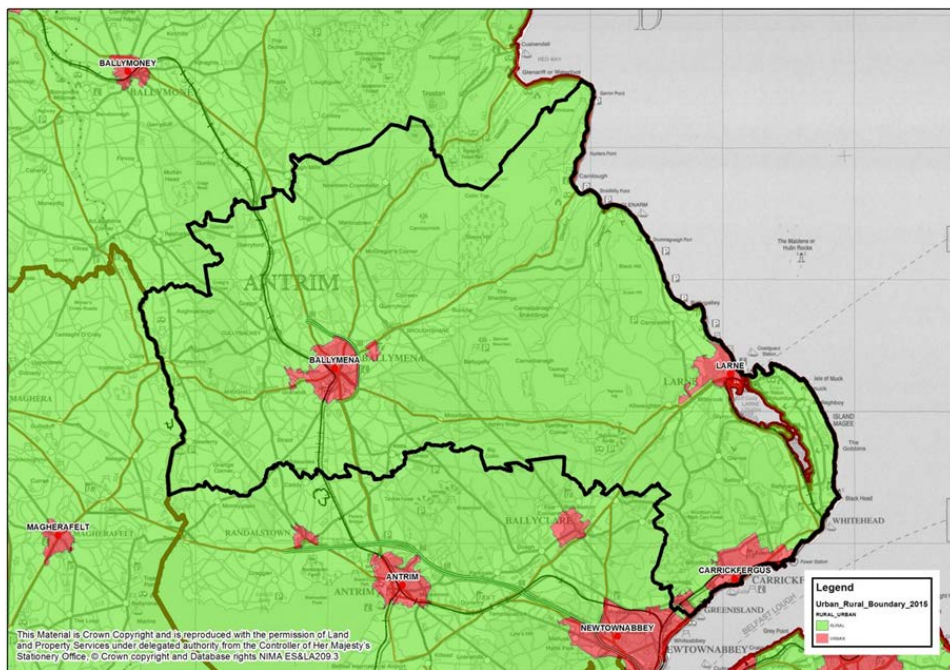
The following comments are relevant to housing need within the council area:

- Housing need in Mid and East Antrim has decreased over the past two years. The five-year assessment for 2017-22 shows a projected need for 800 units and is focussed in the main urban settlements;
- Single, small family and older person households comprise 87% of applicants in housing stress. Future housing mix in new social housing developments will be required to cater for these household groups and to consider changes associated with Welfare Reform. Emphasis should also be on accessibility;
- The number of applicants in housing stress remains high and the number of allocations are inadequate to meet demand;
- In recent years, social housing need in Mid and East Antrim has been delivered by housing associations on Housing Executive land in Ballymena and Carrickfergus towns. Increasingly, areas of housing need are emerging in locations where the Housing Executive does not own land;
- Housing associations have reported difficulties in obtaining sites in Broughshane, Ahoghill, Whitehead and Carnlough;
- There were 61 voids at March 2017 in Mid and East Antrim. These are small numbers of operational voids which are generally let in a short period of time;
- A number of Estate-based Strategies which included selective demolition of unpopular stock were successfully delivered in Ballymena, Carrickfergus and Larne towns over the past two decades resulting in increased popularity and stability in these neighbourhoods;
- Housing need varies considerably across these towns. In Ballymena town, need is met for Ballee and Ballykeel 2. Although these estates have stabilised there is a continuing high turnover of properties. Need is also met for Carniny,

Galgorm/Gracehill and Tullygarley areas; however should a site become available in these areas Housing Executive may be able to assist with a marketing exercise to identify hidden social and mixed tenure demand. In Carrickfergus town, need is met for Lower Woodburn and North Carrick. Turnover of properties in Larne town remains very high. Current projected need for Larne town facilitates small programmed schemes for older persons and families requiring specialised accommodation.

Rural

Map 19: Mid and East Antrim rural map



The provision of new social housing in rural settlements represents a strategic priority for delivery of the SHDP. Currently the overall rural target share of the SHDP is 11.45% of the overall programme based on average levels of housing stress in rural areas.

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

Indicative housing mix requirements

- At March 2017, there were 1,563 applicants in housing stress on the waiting list for social housing in Mid and East Antrim. The household breakdown shows 645 (41%) single households, 344 (22%) small family households and 357 (24%) older person households;

- In year to March 2017, there were 607 allocations to applicants including 296 (49%) to single households, 120 (20%) to small family households and 92 (21%) to older persons;
- There is a high turnover of properties in Larne town;
- Current Housing Executive stock in Mid and East Antrim totals 5,806 dwellings and includes 2,921 (50%) houses, 1,588 (27%) flats, 1,248 (21%) bungalows, 43 (1%) maisonettes and 6 cottages;
- The trend for new dwellings in Mid and East Antrim is for smaller households; for single, older person and small family households. One and two bedroom accommodation is increasingly the norm for singles and small families. Where possible one bedroom properties, while addressing the immediate requirements under welfare reform should be designed flexibly to cater for potential household growth;
- Some three bedroom or larger properties may be required for families and these should be discussed with the Housing Executive;
- Accommodation for older persons should be designed flexibly with long term accessibility taken into consideration, with generic wheelchair units included in schemes where possible;
- Alternative mixes can be considered by housing associations in relation to specific sites or scheme types. However, significant changes from the above mix should be discussed with the Housing Executive to avoid nugatory work.

Table 75: Indicative housing mix for Mid and East Antrim

Elderly	Families*	Singles	Wheelchair
24%	30%	46%	6%

* Focus on: Small Adult and Small Family Households

Areas where need is met

Estate-based Strategies in Ballymena, Carrickfergus and Larne towns, which included selective demolition, have been successfully carried out. These areas have generally stabilised, however there remains a high turnover in some areas: Larne town; Ballee and Ballykeel 1 in Ballymena town; Lower Woodburn and North Carrick. Currently there is no additional new build requirement in these areas.

Rural areas

Based on the waiting list for social housing at March 2017, the current five year (2017-22) projected need for rural areas within Mid and East Antrim is 153 units. Taking account of new build schemes on the current SHDP, residual housing need is focused in Broughshane, Ahoghill and Carnlough. Latent Demand Tests are planned for Glynn and Straid.

At March 2017 there were 360 applicants, in rural Mid and East Antrim, in housing stress (23% of the total housing stress waiting list). Need is mainly for single, small family and older person households.

Commissioning Prospectus

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

Wheelchair Housing Need (HNA)

The projected wheelchair housing requirement for Mid and East Antrim is 39 units. This need is mainly centred in Ballymena, Carrickfergus and Larne towns.

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

Shared Future Demand

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

Travellers' accommodation

The 2013/18 Traveller need assessment did not identify a requirement for Mid and East Antrim.

Intermediate (Affordable) Demand

- The Housing Executive estimates intermediate/affordable housing demand for Mid and East Antrim at approximately 43 units per annum;
- Co-Ownership approved 45 applications in 2016/17 for Mid and East Antrim;
- Average house prices in Mid and East Antrim have increased over the past six years and at 2016 were 4% higher than in 2011.

Table 76: Average Annual House Prices Mid and East Antrim & NI 2010-2015

Area	2011	2012	2013	2014	2015	2016	% Change 2011- 2016
Mid and East Antrim	£118,836	£110,005	£105,224	£115,983	£119,072	£123,538	+4.0
Northern Ireland	£139,800	£138,147	£131,204	£140,217	£149,499	£154,028	+10.2

Source: Ulster University

Mid and East Antrim Supporting Data

Table 77: Mid and East Antrim Waiting List – March 2017

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	1,041	136	587	55	171	553	2,543
HS Applicants	645	67	344	30	102	375	1,563
Allocations	296	24	120	4	34	129	607

Applicants – Housing applicants at March 2017

HS Applicants – Housing stress applicants at March 2017 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2017

Table 78: Ballymena Town Waiting List – March 2017

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	468	52	239	16	68	127	970
HS Applicants	306	29	135	10	43	94	617
Allocations	67	4	32	1	10	29	143

Applicants – Housing applicants at March 2017

HS Applicants – Housing stress applicants at March 2017 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2017

Table 79: Carrickfergus Town Waiting List – March 2017

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	195	33	155	21	36	189	629
HS Applicants	123	16	92	13	20	116	380
Allocations	56	10	30	1	8	44	149

Applicants – Housing applicants at March 2017

HS Applicants – Housing stress applicants at March 2017 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2017

Table 80: Housing Stress applicants time on list March 2017

Household	0-6 mths	6-12 mths	1-2 years	2-4 years	4+ years	Total	Average Months
Single	120	113	124	133	155	645	35
Small Adult	9	12	8	12	26	67	57
Small Family	67	54	70	72	81	344	32
Large Adult	3	4	6	7	10	30	41
Large Family	12	15	19	18	38	102	40
Older Person	60	32	52	79	152	375	58
Total	271	230	279	321	462	1,563	41

Newry, Mourne and Down

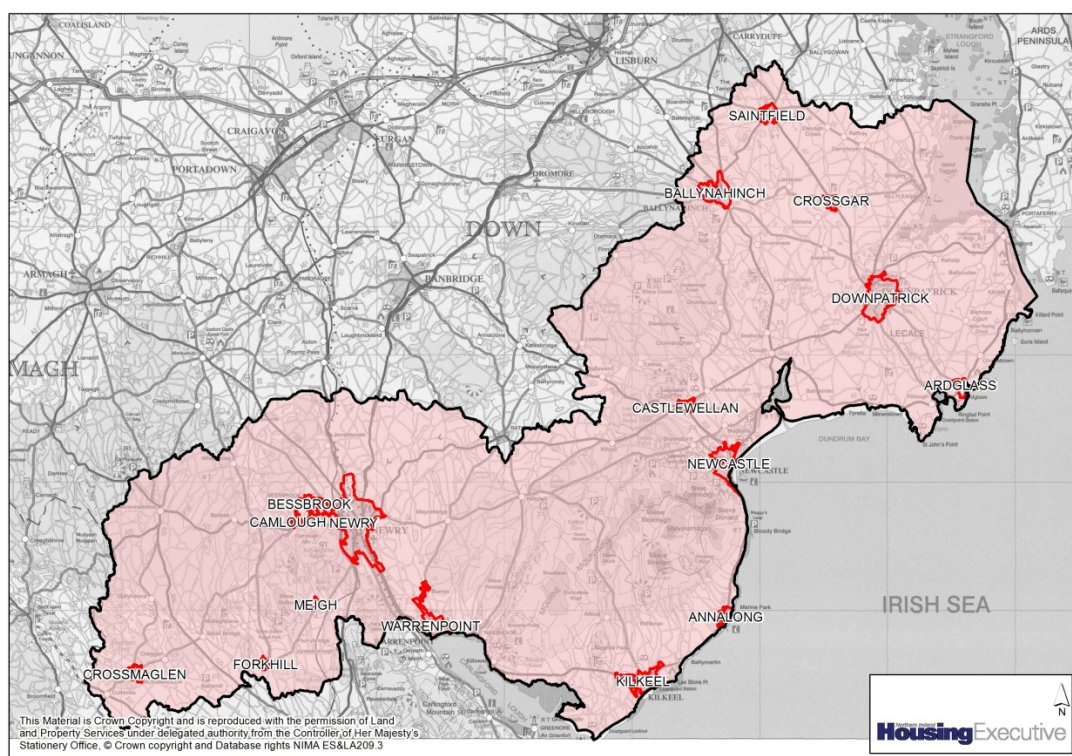
LGD socio-economic context

Newry, Mourne and Down District Council (NMDDC) has been in operation since 1 April 2015. The council area is located in the south east of Northern Ireland, covering parts of Counties Down and Armagh and enjoys a rich historic, cultural and build heritage complemented by outstanding natural assets. Three Areas of Outstanding Natural Beauty are located within the region.

NMDDC is the third largest council area within Northern Ireland, comprising approximately 11% of the total land area, more than 100 miles of coastline and, provides services to over 176,000 residents (9.5% of the NI population). In addition to Newry City, the principal towns within the District are Ballynahinch, Crossmaglen, Downpatrick, Kilkeel, Newcastle and Warrenpoint.

The district consists of an urban and rural mix, and is recognised as an attractive location for business. Newry City is strategically placed on the A1/M1 Belfast to Dublin corridor and several towns fall within the commuter belt of Belfast. There are opportunities to grow and develop the local and regional economy.

Map 20: Newry Mourne and Down Council with main settlements



Housing Market Analysis (across tenures)

Housing & Land Supply

- The DOE's Northern Ireland Housing Land Availability Report (Planning NI: 2011, 2012, 2013 & NMDDC 2014) shows potential capacity for 13,872 additional dwellings;
- The rate of new house building falls below the requirement (1,224) as set out in the Regional Development Strategy 2035. Tighter lending is likely to lead to the continuation of low rates of private housing construction;
- Between 2011 and 2016, construction commenced on 4,017 private sector homes, with a peak of 795 starts in 2016.

Owner Occupied Housing Sector

- Census 2011 demonstrated the continued desire of residents to own their own home;
- The private housing market is now showing signs of recovery as the number of house sales in Newry, Mourne and Down has increased from 919 in 2012 to 1,658 in 2015 before falling slightly to 1,539 in 2016 (LPS);
- The average house price for Newry, Mourne and Down District stabilised at just over £145k in 2016, approximately £9k below the Northern Ireland average.
- Popular locations in the district include Newcastle, Downpatrick, Newry City, Warrenpoint, Bessbrook, Camlough, Ballynahinch, Saintfield and Strangford;
- Despite lower house prices and low interest rates, negative equity and rigorous bank lending practises have constrained the housing market. Negative equity affects around 40% of homeowners here, with some of the worst affected areas being Mid-Ulster (Dungannon-Omagh), Craigavon (Portadown-Lurgan) and Banbridge and Newry where there have been price falls in excess of 50%.

Private Rented Housing Sector

- The private rented sector across Newry, Mourne and Down has seen an unprecedented increase in its tenure share between 2001 and 2011;
- Local estate agents report that there is strong demand for private rental accommodation across the district;
- The DfC's Landlord Registration Scheme identified 7,917 tenancies registered for Newry, Mourne and Down in March 2017;
- Housing benefit continues to play a vital role in the private rental sector. At March 2017, 7,071 private tenants were in receipt of housing benefit;
- There are currently an estimated 5,836 Houses of Multiple Occupation (HMOs) in Northern Ireland, of which 122 are in Newry, Mourne and Down. All identified HMO's in Newry, Mourne and Down have been registered as complying with regulations.

Social Rented Housing Sector

Commissioning Prospectus

- Census 2011 showed that the social rented stock in the district (6,185 units) has fallen by 25% compared to the 2001 figure;
- Housing Executive stock at March 2017 was 5,338 with 12,192 properties sold since the commencement of the 'Right to Buy' scheme;
- There were 42 new social housing units completed and a further 182 new social housing units on site in the year to March 2017;
- Twenty-nine Housing Executive properties were sold in the year to March 2017;
- There are around 2,480 housing association units in the district (inclusive of shared stock and bedsits).

Social Housing Need

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

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

General Housing Need (Urban & Rural)

Urban

Five year projected need for the area as a whole is 1,959 and the projected need for individual settlements is detailed in Table 81.

Table 81: Projected (5 Year) Social Housing Need 2017-22

Settlement	Housing Need Assessment Area*	Total 5 Year Projection
Newry	Newry City	733
Downpatrick	Downpatrick	137
Annalong / Longstone / Glassdrumman	Annalong / Longstone / Glassdrumman	10
Ardglass	Ardglass	28
Bessbrook / Derramore	Bessbrook / Derramore	97
Camlough	Camlough	31
Castlewellan	Castlewellan	110
Crossgar	Crossgar	50
Crossmaglen	Crossmaglen	36
Culloville	Culloville	16
Drumaness	Drumaness	15
Dundrum / Seaforde / Clough	Dundrum / Seaforde / Clough	10
Forkhill	Forkhill	25
Hilltown	Hilltown	25
Kilkeel	Kilkeel	19

Settlement	Housing Need Assessment Area*	Total 5 Year Projection
Killough	Killough	14
Killyleagh	Killyleagh	27
Mayobridge	Mayobridge	13
Meigh	Meigh	21
Mullaghbawn	Mullaghbawn	12
Newcastle	Newcastle	197
Newtowncloghogue	Newtowncloghogue	15
Rostrevor	Rostrevor	39
Saintfield	Saintfield	51
Strangford	Strangford	11
The Commons / Ballyholland	The Commons / Ballyholland	17
Warrenpoint	Warrenpoint	179
Remaining Settlements (need <10)**	Belleek, Burren, Cullyhanna, Granite View, Jonesborough and Whitecross	21
Total		1,959

N.B. Please note that need is met for any locations not included on this list.

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

*** Remaining settlements 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 Latent Demand Testing (LDT) or other marketing exercises to identify hidden additional social and mixed tenure demand.

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

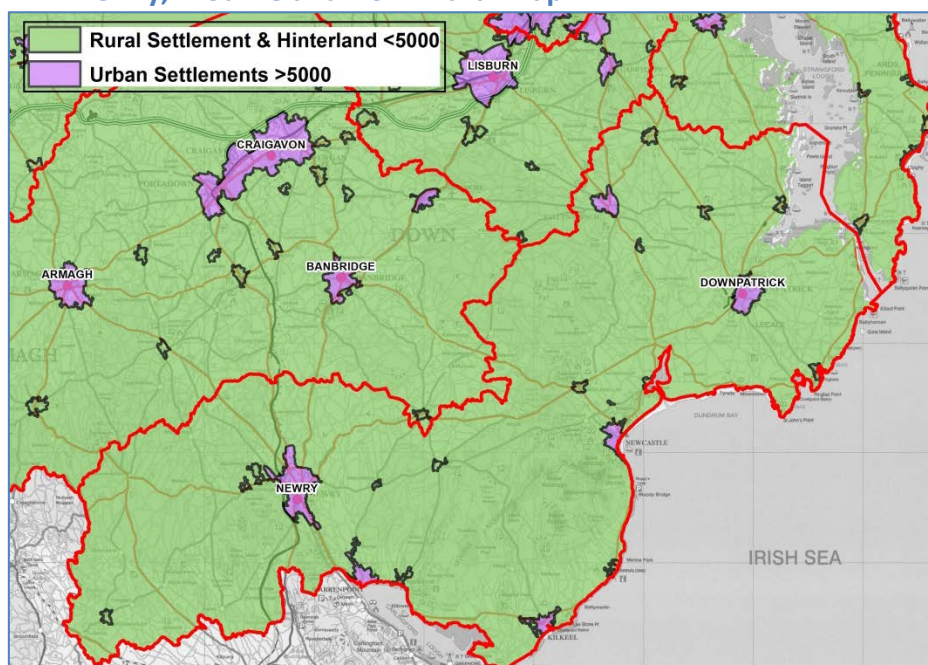
- The requirement for new social housing in Newry, Mourne and Down district council area has remained at a very high level since 2010 and remains with the five-year assessment for 2017-22 showing a need of 1,959 units. Need is highest in Newry City (733 units), Newcastle (197), Warrenpoint (179) and Downpatrick (137);
- Housing need is also evident throughout the large rural hinterland with the villages of Castlewellan, Bessbrook/Derramore, Crossgar, Saintfield and Rostrevor exhibiting the highest requirement;
- Single, older person and small family households comprise the majority of the Council area's waiting list in housing stress. Future housing mix in new social housing will need to cater for these household groups;

Commissioning Prospectus

- In recent years, social housing has been delivered by housing associations on Housing Executive land. Increasingly areas of housing need are emerging in locations where the Housing Executive does not own land;
- Housing Associations report difficulties in obtaining sites in areas of housing need throughout the district and in Newry City in particular. This results in housing associations having to acquire sites on the open market;
- NIHE will carry out site identification studies to examine the potential for new social housing. Work has commenced on a Newry City site identification study. Information is currently being collated to assess the feasibility of potential sites for the development of social housing. This involves the checking of planning history, zoning and ownership, as well as site visits to identify opportunities and constraints. Research has been undertaken for approximately 30 sites across the northern portion of Newry City to date, with further studies to follow across the remainder of the city over the coming months;
- Whilst there is a relatively high level of need in Downpatrick there are already a number of proposed schemes that will help address this need within the three year programme;
- A number of Estate-Based Strategies, which include selective demolition of unpopular stock, were successfully delivered throughout Newry City and Downpatrick over the past two decades. This has resulted in increased popularity and stability in these neighbourhoods.

Rural

Map 21: Newry, Mourne and Down rural map



The provision of new social housing in rural settlements represents a strategic priority for delivery of the SHDP. Currently the overall rural target share of the SHDP is 11.45% of the

overall programme based on average levels of housing stress in rural areas. In Newry, Mourne and Down, 36% of projected need is in rural areas.

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

A number of rural Site Identification Studies are scheduled for 2017/18. These include studies in Rostrevor, Darragh Cross, Saintfield, Bryansford and Raholp / Saul.

Indicative housing mix requirements

- At March 2017, there were 2,367 applicant households in housing stress on the waiting list for social housing. The household breakdown shows 1,045 (44%) single person households, 654 (27.6%) small family households and 322 (13.6%) older person households;
- In the year to March 2017, there were 414 allocations to applicants including 160 (38.6%) to singles, 118 (28.5%) to small families and 67 (16.1%) to older person households;
- The current Housing Executive stock in Newry, Mourne and Down includes 5,338 properties. Property types include 2,692 houses, 1,844 bungalows 717 flats, 55 maisonettes and 30 cottages;
- Accommodation for older persons should be designed flexibly with long-term accessibility issues taken into consideration. Generic wheelchair units should be included in schemes where possible;
- Alternative mixes can be considered by housing associations in relation to specific sites or scheme types. However, significant changes from the above mix should be discussed with the Housing Executive to avoid nugatory work.

Table 82: Indicative housing mix for Newry, Mourne and Down

Elderly	Families*	Singles	Wheelchair
20%	54%	26%	6%

* Focus on: Small Adult and Small Family Households

Areas where need is met

- Across Newry, Mourne and Down there are variations in patterns of demand. Please contact a member of the Place Shaping team to discuss any proposals.

Rural areas

The number of rural applicants in housing stress on the waiting list for social housing has increased from 625 at March 2013 to 863 at March 2017. It is clear from the Annual

Housing Need Assessment, summarised in Table 81, that there are significant levels of need in many rural areas across the district.

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

Wheelchair Housing Need (HNA)

There are currently 38 housing stress applicants at March 2017 with 17 allocations last year. The residual generic wheelchair need for Newry, Mourne and Down is 37 units.

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

Shared Future Demand

The Housing Executive actively encourages mixed tenure and shared future housing. Housing Associations bringing forward suitable proposals for shared future designation would be welcomed. There are currently two new build social housing schemes progressing at Antrim Road, Ballynahinch and Main Street, Dundrum. A scheme was also completed at Crossgar Road, Saintfield in 2016.

Travellers' accommodation

There are no traveller units programmed in 2016/17 of the SHDP. A need for a service site has been identified in Newry. Land for the site has yet to be identified. NIHE continues to monitor the need for traveller accommodation throughout the council area.

Intermediate (Affordable) Demand

- Co-Ownership is the most recognised provider of intermediate housing in Northern Ireland. In 2016/17, a total of 47 properties were purchased through Co-Ownership in the Newry, Mourne and Down area, reflecting the opportunities this scheme provides;
- The intermediate demand for housing in Newry, Mourne and Down is 1,650 for the ten years to 2026. Average house prices in the district are below the Northern Ireland average and anecdotal evidence suggests that affordability remains an issue especially for those trying to get a foothold on the property ladder.

Table 83: Average Annual House Prices Newry, Mourne and Down & NI 2011-2016

Area	2011	2012	2013	2014	2015	2016	% Change 2011- 2016
Newry, Mourne and Down	£145,909	£151,013	£122,547	£132,029	£145,304	£145,228	-0.5
Northern Ireland	£139,800	£138,147	£131,204	£140,217	£149,499	£154,028	10.2

Source: Ulster University

Newry, Mourne and Down Supporting Data

Table 84: Newry, Mourne and Down Waiting List – March 2017

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	1,432	178	933	39	284	456	3,322
HS Applicants	1,045	120	654	23	203	322	2,367
Allocations	160	19	118	4	46	67	414

Applicants – Housing applicants at March 2017

HS Applicants – Housing stress applicants at March 2017 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2017

Table 85: Newry City Waiting List – March 2017

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	324	39	228	8	67	91	757
HS Applicants	260	34	170	4	52	73	593
Allocations	18	2	15	1	10	8	54

Applicants – Housing applicants at March 2017

HS Applicants – Housing stress applicants at March 2017 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2017

Table 86: Newcastle Waiting List – March 2017

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	197	30	78	5	27	64	401
HS Applicants	143	19	54	5	18	47	286
Allocations	17	3	7	0	2	10	39

Applicants – Housing applicants at March 2017

HS Applicants – Housing stress applicants at March 2017 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2017

Table 87: Warrenpoint Waiting List – March 2017

	Single	Small Adult	Small Family	Large Adult	Large Family	Older Persons	Total
Applicants	103	12	74	4	15	37	245
HS Applicants	85	8	56	3	12	28	192
Allocations	11	1	9	0	2	7	30

Applicants – Housing applicants at March 2017

HS Applicants – Housing stress applicants at March 2017 (i.e. 30 points or more)

Allocations – Annual allocations for year ending March 2017

**Table 88: Newry, Mourne and Down District Housing Stress applicants time on list
March 2017**

Household	0-6 mths	6-12 mths	1-2 years	2-4 years	4+ years	Total	Average Months
Elderly	48	32	49	76	117	322	54
Large Adult	2	4	3	6	8	23	55
Large Family	19	14	36	58	76	203	46
Single	134	105	187	271	348	1,045	44
Small Adult	15	10	25	31	39	120	45
Small Family	62	51	100	197	244	654	44
Grand Total	280	216	400	639	832	2,367	45