

**Form for the Submission of a Representation to the Development Plan Document**

**Local Development Plan  
Representation Form  
(Plan Strategy)**

Ref:

Date Received:

(for official use only)

**Name of the Development Plan Document (DPD) to which this representation relates**

Lisburn and Castlereagh City Council Draft Plan Strategy

**Please complete separate form for each representation**

**SECTION A**

**1. Client Details**

**2. Agent Details (if applicable)**

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**SECTION B**

**Your comments should be set out in full. This will help the independent examiner understand the issues you raise. You will only be able to submit further additional information to the Independent Examination if the Independent Examiner invites you to do so.**

3. To which part of the DPD does your representation relate?

- (i) Paragraph \_\_\_\_\_
- (ii) Policy Plan period, SP08 Housing Allocation & Housing Distribution
- (iii) Proposals Map \_\_\_\_\_
- (iv) Site Location \_\_\_\_\_

4(a). Do you consider the development plan document (DPD) is:

Sound  Unsound

4(b). If you consider the DPD to be unsound, please identify which test(s) of soundness your representation relates, having regard to Development Plan Practice Note 6:

Soundness Test No.

5. Please give details of why you consider the DPD to be unsound having regard to the test(s) you have identified above. Please be as precise as possible.

If you consider the DPD to be sound and wish to support the DPD, please set out your comments below:

N/A

*(Continue on a separate sheet if necessary)*

6. If you consider the DPD to be unsound, please provide details of what change(s) you consider necessary to make the DPD sound.

Please note your representation should be submitted in full and cover succinctly all the information, evidence, and any supporting information necessary to support/justify your submission. **There will not be a subsequent opportunity to make a further submission based on your original representation.** After this stage, further submissions will only be at the request of the independent examiner, based on the matters and issues he/she identifies at independent examination.

See enclosed representation

*(Continue on a separate sheet if necessary)*

7. If you are seeking a change to the DPD, please indicate if you would like your representation to be dealt with by:

Written Representation

Oral Hearing

Please note that the Department will expect the independent examiner to give the same careful consideration to written representations as to those representations dealt with by oral hearing.

Signature:

Date:

**Representation to Lisburn & Castlereagh City  
Council's Draft Plan Strategy**  
On behalf of Lagan Homes (Magherahinch)  
Limited

January 2020

**Turley**

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**Client**

Lagan Homes (Magherahinch) Limited

**Our reference**

LAGB2003

January 2020

## Executive Summary

1. This representation is submitted behalf of Lagan Homes (Magherahinch) Limited in response to consultation process on the Lisburn & Castlereagh City Council (LCCC) draft Plan Strategy (dPS).
2. The following table summarises the draft policies which are unsound, for the reasons specified, with a reference in this representation:

### Schedule of key draft Policy Comments

Policy	Comment	Para ref.
Plan Period to 2032	The plan period to 2032 is too short. This is inconsistent with the SPPS requirement for a long term spatial strategy and Departmental Guidance on a 15 year framework which must logically be from adoption.  The plan is unsound as it fails Consistency Test C3.	2.2-2.10
SP08 Housing Allocation & Housing Distribution	We are generally supportive of objective A but insofar as Strategic Policy 08 Housing in Settlements is the policy which refers to the Strategic Housing Allocation (SHA), this draft Policy is unsound because the SHA set out in Table 3 is unsound for the following reasons: <ul style="list-style-type: none"> <li>• The SHA sets out plans for too few new homes over too short a period and under-allocates, with the potential to undermine the Spatial Strategy and Plan Objective A.</li> <li>• It does not take sufficient account of the RDS insofar as it is understood to direct a scale of growth to the main settlements and achieve a complementary urban/rural balance with reference to the Housing Evaluation Framework.</li> <li>• Neither does it sufficiently recognise and plan for cross-boundary connections in the context of the HMA or provide a framework sufficient to address the significant requirement for social/affordable homes within the plan area.</li> <li>• It over-estimates the potential contribution of various sources of housing supply including housing monitor sites and urban capacity sites. In particular, it over-relies upon the delivery of housing at West Lisburn/Blaris at a pace and scale which is unlikely, with limited consideration of alternative options.</li> </ul>	3.3-3.78

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Draft Policy SGS3 is, therefore, unsound as the policy, (and Strategic Housing Allocation) fails soundness tests Consistency Test C1, Consistency Test C4, Coherence & Effectiveness Test CE1, Coherence & Effectiveness Test CE2 and Coherence & Effectiveness Test CE4.

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3. We wish this representation to be dealt with by Oral Hearing.

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# 1. Introduction

- 1.1 This representation is submitted on behalf of Lagan Homes (Magherahinch) Limited, in response to the consultation on the Lisburn & Castlereagh City Council (LCCC) draft Plan Strategy (dPS).
- 1.2 Lagan Homes (Magherahinch) Limited have extensively developed lands towards the southern extent of the settlement limit of Moira, and this representation relates to land adjacent to the existing development which presently sits outside the development limit (Subject Site).
- 1.3 The Subject Site was promoted by way of objection to the draft Belfast Metropolitan Area Plan (dBMAP) by the landowner as part of the wider lands to the north and west. In response to the objection the Department confirmed that zoning a significant part of the land for housing was acceptable in principle and the Planning Appeals Commission (PAC) recommended that the land was zoned as such.
- 1.4 The Department subsequently (unlawfully) adopted BMAP without including the land but given the Council's new plan period to 2032, the landowners have decided to participate in the plan-making process.
- 1.5 This submission is structured to respond to the key sections of the dPS that are of relevance to Lagan Homes (Magherahinch) Limited and seeks to ensure the Plan caters for sufficient growth in the Moira area to contribute to meeting the vision and strategic objectives of the Plan.



## 2. Vision & Plan Objectives

### Vision

- 2.1 Lagan Homes (Magherahinch) Ltd support the LDP Vision.
- Plan Period: Need to get maximum value from process; so extend/plan for longer**
- 2.2 The plan horizon is to 2032, with the plan referring to a 15 year period from 2017 to 2032. On the basis of the Council's latest published timetable, the Local Policies Plan (LPP) part of the plan is not anticipated to be adopted until Q4 2024, well into the stated plan period.
- 2.3 Paragraph 5.1 states that meeting the timetable is dependent upon Member involvement, adequate resourcing and careful risk management, recognising that there are factors that could potentially impact upon the timescale for delivery of the LDP. Adequate resourcing must reasonably be taken to refer to the LDP team, consultees, the Independent Examiner and Dfl.
- 2.4 Whilst it is accepted that the timetable is indicative, subject to review and can be revised, taking into account the potential risks to the process it may be optimistic to suggest that the LPP part of the Plan would be adopted by the end of 2024. Comparisons with the pre-2015 plan making regime may be difficult to make given the changes but as a matter of fact, even if the Council's indicative timetable is achieved, it will have taken nine years to get to the point of adoption of the LPP.
- 2.5 The length of time it takes to prepare applications and secure planning permission on freshly zoned land (should it be required) is also an important consideration – a newly zoned site for housing or employment in 2024 of reasonable scale would not be likely to be able to be commenced and make any significant contribution until 2027, with substantive delivery likely to extend well into the next plan period on the basis of the current stated end date of the plan. This would suggest the importance of a strategic and long term view to ensure continuity of deliverable housing supply into the next plan period.
- 2.6 Whilst it is obviously understood that plans are material beyond their stated end date, given the time and resources being invested in the process by the Council, consultees and stakeholders, getting the most out of the plan making process is critical, particularly given the age of the statutory plans for Lisburn and Castlereagh.
- 2.7 Belfast City Council has taken a slightly longer term view and established a plan period to 2035. A longer plan period, to 2035 would make it more likely that the final plan could clearly and distinctively move the statutory plan for the Borough beyond the 'inherited' strategies, limits and zonings of the legacy plans. It would also bring the plan into line with the SPPS (para 5.7) reference that LDPs should provide a long term spatial strategy and the DPPN 01 reference (para 2.6) to a 15 year framework. Whilst a different jurisdiction, the NPPF (para 22) is clear that the 15 year period is post adoption of strategic policies.

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- 2.8 The risk is that unless a longer term view is taken, when the LPP part of the plan is finally adopted, comparison with the previous plans could raise questions around what has actually changed. Given the relatively limited change from, for example, Lisburn Area Plan 2001 to BMAP, the concern would be that plans adopted nearly 40 years apart would not be that different. With the repatriation of planning to local government the expectation around the new Council's first plan is understandably high. The decision to identify Blaris/West Lisburn as a strategic focus for longer term growth would be consistent with a slightly longer plan period to 2035. There are also other strategic sites in the Plan area, such as Maze Long Kesh, which would benefit from a longer term view.
- 2.9 An alternative to selection of a longer plan period would be to identify additional reserves of land to bridge a gap which might emerge in the form of an over-allocation. This has been the practice in other plan-making exercises such as the Lisburn Area Plan 2001 and BMAP, in the form of flexibility allowances/land reserves.
- 2.10 In summary, the Plan should have a longer plan period in order to be consistent with policy and guidance issued by the Department and is presently unsound with reference to Consistency Test C3.
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### 3. Strategic Policies & Spatial Strategy

#### **Spatial Strategy**

- 3.1 We are generally supportive of the Spatial Strategy but have concerns about how it will be delivered with reference to the Strategic Housing Allocation.

#### **Settlement Hierarchy**

- 3.2 We have no issues with the Settlement Hierarchy.

#### **Plan Objective A: A Quality Place – Strategic Housing Allocation**

- 3.3 We are generally supportive of this objective but insofar as Strategic Policy 08 Housing in Settlements is the policy which refers to the Strategic Housing Allocation (SHA), this draft Policy is unsound because the SHA set out in Table 3 is unsound for the following reasons:

- The SHA sets out plans for too few new homes over too short a period and under-allocates, with the potential to undermine the Spatial Strategy and Plan Objective A.
- It does not take sufficient account of the RDS insofar as it is understood to direct a scale of growth to the main settlements and achieve a complementary urban/rural balance with reference to the Housing Evaluation Framework.
- Neither does it sufficiently recognise and plan for cross-boundary connections in the context of the HMA or provide a framework sufficient to address the significant requirement for social/affordable homes within the plan area.
- It over-estimates the potential contribution of various sources of housing supply including housing monitor sites and urban capacity sites. In particular, it over-relies upon the delivery of housing at West Lisburn/Blaris at a pace and scale which is unlikely, with limited consideration of alternative options.

- 3.4 Draft Policy SGS3 is, therefore, unsound as the policy, (and Strategic Housing Allocation) fails soundness tests Consistency Test C1, Consistency Test C4, Coherence & Effectiveness Test CE1, Coherence & Effectiveness Test CE2 and Coherence & Effectiveness Test CE4. The analysis underpinning these conclusions is set out below.

#### **Issues with HGIs; recessionary trends & suppressed build rates**

- 3.5 DfI published 2016 based Housing Growth Indicators (HGIs) in September 2019 (**Appendix 1**). Whilst the HGI for Lisburn & Castlereagh increased from 9,600 to 10,700. The publication also provided a useful reminder of the purpose and value of HGIs. The following statements in the Chief Planner's covering letter are important:

- *HGIs do not forecast exactly what will happen in the future.*
- *They are policy neutral estimates based on recent trends and best available data on households and housing stock.*

- *They assume that recent trends will continue into the future.*
- *They do not attempt to...predict the impact that....changing economic circumstances or other future events may have on housing requirements.*
- *For these reasons those preparing LDPs should not regard the HGIs as a cap on housing or a target to be met.*
- *Notwithstanding the above, as the HGIs are based on best available data, they are therefore an important starting point to guide the assessment of the overall housing requirement identified in the LDP.*
- *The SPPS identifies a range of other further considerations that, in addition to the HGI, should also inform this housing allocation.*
- *These include the RDS Housing Evaluation Framework; allowance for existing commitments; urban capacity studies; allowance for windfall housing; application of a sequential approach to site identification; Housing Needs Assessment/Housing Market Analysis and transport assessments.*

#### ***HGIs as Policy Neutral***

- 3.6 The HGIs as 'policy neutral' is a particularly important point to consider. If, as the evidence discussed below would suggest, this means that the disaggregation/distribution of HGIs calculated at regional level, to Council level has not had regard to policy such as the RDS' regional spatial strategy and is simply a projection of population and household trends which the RDS direction has yet to properly influence, this must reduce extent to which the Council should take account of it.
- 3.7 The table below compares the 2012 based HGIs to the recently published 2016 based HGIs, with the difference identified in the final column. It is clearly evident that Belfast's HGI has been significantly reduced by the refresh exercise undertaken by DfI (-46%), as has fellow Belfast Metropolitan Area (BMA) Councils Antrim & Newtownabbey (-42%) and Ards & North Down (-23%). The HGI for other Councils such as ABC has been significantly increased (+19%). These changes are at odds with the RDS policy objective of strengthening Belfast as the regional economic driver within a framework of balanced regional growth.

**Table 3.1: HGI Analysis**

Council	2012 HGI	2016 HGI	+/-	% Change
A&N	7200	4200	-3000	-42
A&ND	7100	5500	-1600	-23
ABC	14400	17200	2800	19
Belfast	13700	7400	-6300	-46
CCG	6700	5600	-1100	-16
DCS	5000	4100	-900	-18
FO	4500	4300	-200	-4
LC	9600	10700	1100	11
MEA	5400	5400	0	0
MU	9500	10300	800	8
NMD	10900	10000	-900	-8
	94000	84700	-9300	-10

Sources: 2012 & 2016 Based HGIs

- 3.8 The RDS itself confirms that the HGIs are not policy neutral nor are they based on past trends:

*The figures in Appendix B, Table B2 are not to be seen as a rigid framework but as guidelines for local planning. The distribution across council areas reflects what might be required to achieve the policy objectives of strengthening Belfast as the regional economic driver and Londonderry as the principal city of the North West. They are not based purely on past trends of population movement. (RDS p43)*

- 3.9 The extent to which the refreshed HGIs conflict with the policy objective of regional balance expressed as a 52%/48% split between the North, South and West of the region and the BMUA districts and hinterland is difficult to be precise about given the change in Council boundaries in 2015 but a crude comparison<sup>1</sup> would suggest that the split may be of the order of 61/39, so significantly shifting against the BMUA districts.
- 3.10 The fact that this change to HGIs has been made without consultation must make them difficult for local Councils to handle in the context of Plan-making. When the lineage of HGIs is reviewed it can be seen that they were subject to public consultation and independent examination in 1999 and 2005/6 (five year review) and consultation in 2011 (ten year review), however, there has been no public consultation or associated independent examination since then. If, as is suggested by the simple analysis set out here, the refreshed HGIs mark a shift away from RDS policy objectives they should be subject to consultation and independent examination. Such consultation and

<sup>1</sup> Antrim & Newtownabbey, Ards & North Down, Belfast, Lisburn & Castlereagh and Mid & East Antrim have a 39% share of the 2016 total HGI

examination could usefully reflect on the assumptions and evidence base which underpins the figures, including vacancy rates, second home ownership and stock replacement. The extent to which the household formation figures are influenced by the forward projection of recessionary household characteristics such as involuntary sharing arising from challenges securing mortgages could also have been considered. As it stands, these figures have been produced with no public or stakeholder scrutiny whatsoever.

3.11 As noted above, we welcome the fact that, unlike other Councils, LCCC has commissioned independent analysis of the HGI to test the asserted position of HGIs as 'best available evidence'. We can see that the Lichfield's Growth Study has been used to establish an updated 2016-based number which has not been used as a ceiling, target or cap. Whilst this will be a consideration in determining the final strategic housing allocation and the Report itself refers to other considerations, we have concerns about the approach taken by the dPS to arrive at a final distributed housing allocation and there are other important considerations to be taken into account in arriving at a final position.

3.12 As noted by the Council in the dPS and Technical Supplements, paragraph 6.139 of the SPPS states that housing allocations should be informed by not only the RDS HGIs but also:

- the RDS housing evaluation framework (Table 3.2 on p42 of RDS 2035);
- existing commitments;
- urban capacity;
- windfall;
- a sequential approach;
- housing needs assessment/housing market analysis; and
- transport assessments.

***RDS Housing Evaluation Framework (HEF)***

3.13 The SPPS says that the RDS HEF should take account of the varying capacities of settlements and will assist councils in making judgements on the allocation of housing growth. This suggests that the capacity or potential for a settlement to grow will influence how much housing it is allocated, which must in turn influence the overall or aggregate Strategic Housing Allocation.

3.14 This approach is consistent with the comments of Commissioners T A Rue, G Scott and J B Martin at paragraph 2.12.75 of their 14 March 2008 report into Public Local Inquiry Into Objections to the Draft Ards And Down Area Plan 2015, which remain pertinent:

*It seems to us that housing land allocation is an iterative process, requiring examination of both strategic and site-specific factors and seeking the best fit between them. The strategic conclusions set out above have a bearing on our assessment of the housing-*

*related site-specific objections and the converse is also true. We return to this subject in the final chapter of our report.*

- 3.15 Appendix D of Part 1 of the dPS sets out an Evaluation of Settlement Characteristics, with each of the settlements classified in the Settlement Hierarchy, information on population, role and function, existing infrastructure provision and future potential. This analysis appears to have been informed by the information and analysis in Technical Supplement 6: Countryside Assessment, which at Part 4 sets out Settlement Appraisals for Lisburn, the three towns, 13 villages and 33 small settlements. The Settlement Appraisals provide an assessment of each settlement using RDS resource, environmental capacity, transport, economic development, urban & rural character, community services, social equity and development constraints tests.
- 3.16 The allocation of growth to different levels in the settlement hierarchy and to particular settlements is important to achieving Plan Objective A: a Quality Place – enabling sustainable communities and delivery of new homes; particularly sub-objectives A1, A2, A4. However, the dPS Housing Allocation does not appear to use draft Plan’s Settlement Appraisal evaluation to set a housing allocation for any tier of the settlement hierarchy or any individual settlement. Table 6 in Technical Supplement 1: Housing Growth Study sets out the Housing Allocation over the 2017-2032 Plan Period. This table reports the total potential housing units remaining from various sources of supply to arrive at a total housing allocation. By only reporting on supply and by aggregating the villages/small settlements tier, it suggests that the dPS housing strategy has been dictated by commitments rather than an evaluation of the growth potential of settlements as assessed in Settlement Appraisals using the HEF methodology.
- 3.17 The approach in the dPS appears to have been to identify the level of future housing required over the plan period (Lichfields Housing Growth Study), estimate available supply (from Housing Monitor, Urban Capacity Study and windfall analysis) and add in the strategic requirement for housing in West Lisburn (West Lisburn Development Framework). Whilst the resulting inherent focus on Lisburn is welcome, it has resulted in a dislocation with the Settlement Analysis/HEF to the extent that settlements with acknowledged capacity for growth beyond existing plans do not provided with a housing allocation which allows for such growth. The difficulty is that it will be too late at LPP stage to influence a settlement’s allocation within the Strategic Housing Allocation, which risks the plan-making process not facilitating this growth.
- 3.18 A comparison with other emerging dPS’ illustrates the point that the capacity for a settlement to grow, with reference to the RDS HEF, influences a final SHA. Antrim & Newtownabbey dPS sets out an overall housing allocation which is based on its assessment of the growth capacity of the settlements which is used to generate a share of the overall allocation (see Table 10 of Evidence Paper 6). Similarly, Mid & East Antrim’s housing allocation (see TS3 Tables 7.1 and 7.2) is established following a determination that the share of housing in the main towns should increase by 3.5% to enhance the critical mass of the main hubs and address the risk of a disproportionate share of growth in lower tier settlements.



3.19 Nowhere in the dPS or its Technical Supplements is the SHA compared to the population within settlements but the analysis set out below clearly shows the extent to which the critical mass and growth capacity of some settlements is under provided for in the housing allocation:

**Table 3.2: Analysis of SHA/Population Share**

	Total Potential Units	%	Population	%
Lisburn City (including WLB)	6553	47.5	45410	31.8
Lisburn Greater Urban Area	406	2.9	4948	3.5
Castlereagh Greater Urban Area	2022	14.7	30717	21.5
<b>Metropolitan</b>	<b>8981</b>	<b>65.2</b>	<b>81075</b>	<b>56.8</b>
Carryduff	1612	11.7	6947	4.9
Hillsborough & Culcavy	512	3.7	3953	2.8
Moira	717	5.2	4584	3.2
<b>Towns</b>	<b>2841</b>	<b>20.6</b>	<b>15484</b>	<b>10.9</b>
Villages & Small Settlements	1231	8.9	17496	12.3
Countryside	729	5.3	28585	20.0
<b>Rural</b>	<b>1960</b>	<b>14.2</b>	<b>46081</b>	<b>32.3</b>
<b>TOTAL</b>	<b>13782</b>	<b>100.0</b>	<b>142640</b>	<b>100.0</b>

3.20 Again, to reiterate, the focus of growth in Lisburn City is welcome and reflects the direction of the RDS. It should not be reduced, indeed the focus in Lisburn (and elsewhere) should be on ensuring a deliverable supply of housing land, particularly towards the end of the Plan period (see paras 3.36 to 3.59 below). However, when the connection between the SHA and the HEF is restored, additional housing is required elsewhere in the City Council area – particularly in Castlereagh and the rural area – to achieve a better balance of planned development across the Council area.

#### ***Rural Settlements***

3.21 Alongside its important metropolitan centres of population, Lisburn & Castlereagh has a relatively large number of rural settlements which provide important service centres for its geographically and demographically significant rural area.

3.22 Plan Objective A4 seeks to support towns, villages and small settlements as vibrant and attractive centres providing homes and services appropriate to their role in the settlement hierarchy whilst protecting their identity from excessive development. This objective is consistent with the RDS' SFG13 which seeks to sustain rural communities.



- 3.23 It is acknowledged that it is important to guard against unsustainable development where settlements might be allowed to grow beyond their capacity, particularly where this would result in increased car-based travel to access services and physical sprawl beyond logical and defensible environmental limits that would impact upon urban form and compactness. The balance to be struck in a largely attractive and growing Council area is planning for a level of growth which is consistent with the role and function of a settlement with reference to the settlement hierarchy which will support and sustain services without resulting in these negative outcomes of excessive development.
- 3.24 Within this overall framework, to allow the Plan objectives to be met and, as the RDS (RG8, para 3.21) requires, achieve a complementary urban/rural balance, it is judged appropriate to effect a modest increase in the housing allocation to the towns of Moira and Hillsborough. Whilst not capable of the larger scale of growth judged to be permissible at Carryduff<sup>2</sup>, they are attractive long-established settlements of scale and character at the top of the rural settlement hierarchy that provide important concentrations of services for local communities, including valued town centres. There is a need to reflect their standing and ensure their services are sustained and protected by allocating additional housing to increase their share of the overall housing allocation.
- 3.25 Whilst Moira has generally had a higher level of acknowledged growth potential in strategic planning exercises than Hillsborough<sup>3</sup>, road traffic congestion in the town centre at peak hours would suggest that there should be an additional supplementary allocation in the order of around 100-150 units to each town. A change of this order would help improve urban/rural balance without undermining the settlement hierarchy and having regard to the acknowledged environmental constraints to lateral growth in some parts of each settlement.

#### **Existing Commitments, Urban Capacity Sites & Housing Trajectory**

- 3.26 The overall analysis of the dPS is that when the housing allocation is compared to the various different sources of housing land supply, aside from West Lisburn, there is no requirement for any additional zonings.
- 3.27 Whilst elsewhere the plan recognises that not all permissions may be built and the Council's assessment of housing potential is reduced by 10% due to the possibility of non-deliverability of sites over the plan-period (dPS p59) but this level of discounting is likely to be too low. There is no evidence to suggest that the Council has interrogated its Housing Monitor information and there are policy and other issues with some of the sites identified through the Urban Capacity Study. There is also a major reliance upon Blaris/West Lisburn to deliver homes in significant numbers, particularly towards the end of the stated plan period.

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<sup>2</sup> The commentary at paragraphs 5.14 to 5.16 of Technical Supplement 6 would tend to support the view that from a landscape perspective, Carryduff can accommodate a greater scale of growth than Moira or Hillsborough.

<sup>3</sup> As already noted, Moira was one of the seven small towns around the BMA identified for expansion in the prior version of the RDS. Hillsborough was not.

### ***Housing Monitor***

- 3.28 When reviewed on a site by site basis, the data shows that a significant number of the Housing Monitor sites are longstanding and have either not delivered any houses or stood still for a long period. Our comparison of Housing Monitor information from 2006-9 and 2016/17 for the main settlements is at **Appendix 5**. Whilst it is necessarily a snapshot in time and some movement should be expected, the number of housing monitor sites which have been static over this period of time is evidence which suggests that a 10% discounting of Housing Monitor sites for non-delivery is too low. The extent to which these sites are currently affected by NIW infrastructure issues is unknown.

### ***Urban Capacity Sites***

- 3.29 The policy objectives of delivering more housing within existing urban areas, achieving compact urban forms and regenerating City/town centres is not disputed. However, the extent to which the Plan is able to confidently rely upon the scale of urban capacity identified is unknown. Our commentary on the 41 Urban Capacity sites identified by ARUP is set out in **Appendix 3**. Again, it supports the proposition that the 10% discounting applied to UCS sites is too low.
- 3.30 We have undertaken a desktop assessment of each site and have considered, from a development management perspective, whether the sites can be delivered with limited planning risk (shaded green); the principle of development or proposed yield is may be challenging (shaded amber); or the site's delivery may be subject to significant planning risk (shaded red).
- 3.31 We support the principle of apartment and higher density development within Lisburn City Centre. However, in aggregate the proposed unit numbers are ambitious and should not be relied upon in full for development before 2032. This concern is based on the lack of recent apartment development within Lisburn City Centre and the relatively slow rate of comparable development within Belfast City Centre. A number of the sites were identified for development in the Lisburn City Centre Masterplan (Department for Social Development, August 2010) and remain undeveloped almost 10 years later. Several would appear to be in public ownership and the timing of their disposal is uncertain. Collectively they would also require a comprehensive review of the City Centre car parking strategy given the potential impact of their loss to urban development.
- 3.32 A number of informal green spaces are also identified as UCS sites despite their protection under current (SPPS and PPS 8 Open Space, Sport & Outdoor Recreation) as well as draft LDP planning policies. The Local Development Plan 2032 Supplementary Planning Guidance (SPG) document defines open space as *"For the purposes of Operational Policies OS1 to OS6, open space is taken to mean all open space of public value, including not just land, but also inland bodies of water such as rivers, canals, lakes and reservoirs which offer important opportunities for sport and outdoor recreation and can also act as a visual amenity."* The definition includes *"amenity green space (most commonly, but not exclusively in housing areas) – including informal recreation spaces, communal green spaces in and around housing, and village greens.....natural and semi-natural urban green spaces – including woodlands, urban forestry....."* (emphasis added). In this context, we question why the following

sites have been identified for residential development and the likelihood of planning permission for residential development being granted on them –

- Mountview Drive, Lisburn (13 units)
- Manor Drive, Lisburn (21 units)
- Ballinderry Road, Lisburn (30 units)
- Richmond Court, Lisburn (12 units)
- Causeway End Road, Lisburn (25 units)
- Lough Brin Park, Carryduff (11 units)
- Beechill Road, Newtownbreda (13 units)

3.33 We have a long standing interest in the zoned residential development lands adjacent to Mealough Road, Carryduff. The adjacent lands identified for residential development by Council in the UCS are outwith the zoning and we would query how they can be safely accessed given their proximity to the Saintfield Road (designated Protected Route). Given that the lands are also within a mix of private and public ownerships we also question the deliverability of the units proposed for these sites within the Plan period.

3.34 Finally, we note that Council has identified the lands adjacent to the existing Cairnshill Park & Ride for the development of 36 no. units. This site is subject to a current planning application for an extension to the existing car park and as such there is significant doubt as to whether the identified potential for semi-detached houses will be realised.

#### ***Housing Trajectory & West Lisburn***

3.35 The potential for growth of the City of Lisburn by way of a strategic urban expansion in the West Lisburn area has been well established for some time through successive planning exercises.

3.36 The principle of a major mixed use development delivering both a significant number of homes and a range of employment opportunities on a key transport corridor is sound, indeed it represents one of the largest scale development opportunities in the region.

3.37 Equally well established and sound is the requirement to deliver the associated infrastructure of the M1-Knockmore Link Road, its attendant junctions with the existing road network and the associated bridge over the River Lagan. This infrastructure is necessary to service the development itself and also complete an important part of the City's road system, allowing traffic to flow from the M1 into North Lisburn.

3.38 The Council's decision to purposefully plan for this development comes through strongly in the draft Plan Strategy and it is appropriate to specifically include it within Plan Objective A: A Quality Place; Enabling Sustainable Communities and Delivery of New Homes.

- 3.39 Its importance to housing land supply, particularly towards the end of the Plan-period is underlined in Technical Supplement 1: Housing Growth Study. Paragraph 9.14 states that *'whilst the supply in Lisburn does appear to be healthy, it is lower than in other areas and is not sufficient to cover the full plan period without the West Lisburn Strategic site (12.5 years supply without West Lisburn).'* The point is confirmed in paragraph 9.17 bullet point 1.
- 3.40 Technical Supplement 2: Urban Capacity Study confirms the point. It sets out an indicative trajectory to help consider whether enough deliverable and developable sites have been identified to meet need in the district (para 5.6.1.1). Table 15 'Indicative Trajectory' identifies a very significant reduction in the number of sites in development in the last five years of the plan period (5, dropped from 41 in the middle part of the plan period). An indicative housing yield of 936 is set against these sites. The footnote (30 at the bottom of p38) confirms that one of the five sites is West Lisburn/Blaris. It also sets out the assumption that the consultants have *'estimated an 8 year lead in time for this site due to this not being available until the LDP is complete and the requirements for major infrastructure works and planning permission is obtained.'*
- 3.41 There are two issues to consider here. The first is the assumption around when West Lisburn might be expected to start to make a reasonable housing contribution – the lead in time. The second is about the scale of the annual output that might be achieved – housing trajectory. Given the history of allocation of large areas of land for housing development in Lisburn and Castlereagh over the last 20-25 years there is an extensive evidence base to assist with these considerations.
- 3.42 The Lisburn Area Plan 2001 allocated some 250 ha of land for housing development in Lisburn when it was adopted after an 8 year plan-making process in July 2001. The principal zonings were as follows:

**Table 3.3: Lisburn Area Plan**

Zoning <sup>4</sup>	Housing Monitor Ref/Name <sup>5</sup>	Construction <sup>6</sup>	Units Complete <sup>7</sup>	Units Remaining <sup>8</sup>	Average Build Rate <sup>9</sup>	Builders
LD1	16547 & 20925 B'derry Rd/B'town Rd/Glenavy Rd	2007 to date	440	1360	44	ACC, Dingles, Carvill (Lagan)
LD2	16550 Plantation/ Saintfield Rd	2007 (est) to 2014	119	0	17	WJK Construction
LD3	16551 Plantation/ Hillhall Rd	2008 (est) to date	172	281	19	WJ Law
LD4	16555 Aghnahough	2006 (est) to date	814	389	74	Farrans, Lagan, Porter, Hagan
LD5	16549 & 20927 Ballinderry Rd	2005 (est) to date	259	19	22	WJK Construction
LD6 (a)	16552 Sth NLF	2005 (est) to date	188	112	16	Porter
LD6 (b)	16553 Sth NLF	2005 (est) to date	87	353	8	Blue Horizon Vaughan
LD7	16548 Pond Pk Rd	2005 (est) to date	73	5	6	Farrans

3.43 LD4, LD6 and LD7 are of particular interest given their collective scale of development (over 2,000 units) and the requirement to deliver the North Lisburn Feeder Road (NLF). A number of different housebuilders/developers came together to form the North Lisburn Development Consortium (NLDC) to develop the various lands for housing and

<sup>4</sup> Lisburn Area Plan Reference – see Map 2 Lisburn Urban Area

<sup>5</sup> [https://www.lisburncastlereagh.gov.uk/uploads/general/Annual\\_Housing\\_Monitor\\_Report\\_2016-17.pdf](https://www.lisburncastlereagh.gov.uk/uploads/general/Annual_Housing_Monitor_Report_2016-17.pdf)

<sup>6</sup> Established by reviewing historic housing monitor information

<sup>7</sup> Ibid 10

<sup>8</sup> Ibid 10

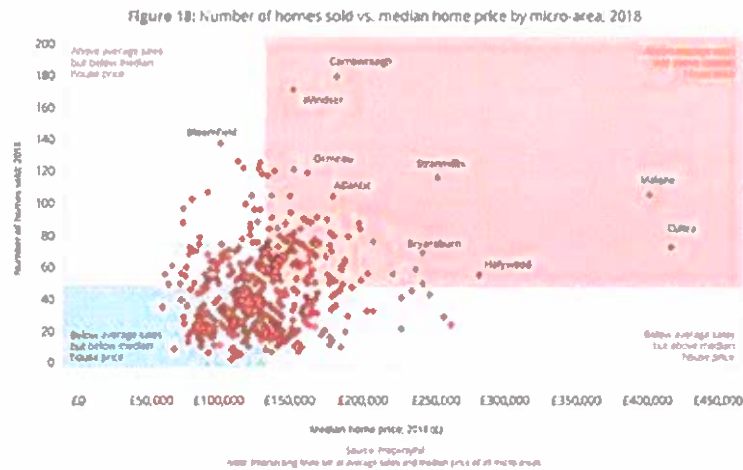
<sup>9</sup> Calculated from start date

deliver the NLF. The £6 million developer funded 2.6 km NLF was opened in March 2006. House building has continued by multiple builders in the form of developments by Farrans Homes, Lagan Homes, Porter & Co. The overall build rate across all sites by all builders averages around 120 units per year.

- 3.44 LD1 is also of interest insofar as its scale is broadly comparable to that of West Lisburn (1800 units). Outline planning permissions were granted in 2006 and 2007, with the first detailed planning permissions granted in 2007 and houses constructed and handed over thereafter by Antrim Construction Company, Dingles and Carvill Developments all involved in the early stages. Other developers have taken over parts of the development in recent years which continues to be developed alongside the delivery of off-site junction improvements. The overall build rate across all builders averages around 50 units per year.
- 3.45 Compared with the assumptions for West Lisburn, the evidence would suggest that the 8 year lead-in period for the delivery of meaningful numbers of new homes, whilst dependent upon timescales associated with this and the LPP stage of the plan, is reasonable. However, based on the evidence of North Lisburn, the draft Plan Strategy would appear to have over-estimated the scale of the housing contribution that West Lisburn will be able to make at the end of the plan period.
- 3.46 The Design & Access Statement submitted with the outline planning application for West Lisburn/Blaris (LA05/2018/1154/O) contains an Indicative Phasing Plan at Section 26. The M1-Knockmore Link Road is indicatively identified for completion 2020-2021. The first residential phase of development (R1) of 200 units is indicatively identified for construction between 2020 and 2023. Residential phases R5 and R6 (400 of the 1300 houses proposed) are indicated for delivery beyond the end of the Plan Period in 2028-2034 and 2031-2035 respectively. Based on progress with the planning application there seems to be little prospect that this indicative phasing programme will be achieved but it is of interest that the project itself clearly anticipates delivery beyond the end of the Plan period. The indicative timings of separate phases overlaps but projects a 15 year residential construction period from 2020 to 2035, suggesting an assumed average of around 90 units per year. The Planning Statement accompanying the planning application indicates that the construction period may be between 15 and 20 years (para 1.30), with a residential build rate of some 70-80 per year (para 1.31). Paragraph 1.32 acknowledges that there will be a slower rate of development in the initial phase which is predicated on the delivery of the link road and *'an upper level of housing delivery on the wider site by 2030 would be around 700 dwellings.'* Paragraph 1.33 states that the *'number of dwellings that are proposed will straddle not one but two local development plan cycles'* through to 2037/38. This analysis by the project proponents would suggest that there needs to be a realistic view of the rate at which West Lisburn/Blaris will contribute to meeting the City's housing needs.
- 3.47 Even if multiple builders are involved in different parts of the site in an effort to boost output beyond the levels set out by the West Lisburn/Blaris team, the evidence would suggest that the maximum output that may be expected could be in the order of 50 to 125 units depending on the number of individual developments. The Property Pal Local Property Review for Lisburn & Castlereagh (Appendix 4) provides an insight into hotspots for house sales at 'micro-area' level. It reports (p25) that the Carrowreagh



micro-area in Lisburn & Castlereagh is the second most popular location to buy a home in Northern Ireland since 2014, with approximately 160 homes sold each year. It was, in fact, the highest selling micro-area in 2018, as confirmed in the chart below.



3.48 Whilst this figure includes re-sales it is indicative of the success of the Millmount Village area within Carrowreagh where various developments of new-build houses by Antrim Construction Company, Dingles, McGinnis Developments and Lagan Homes have recorded strong levels of sales. White Mountain (115 sales per year) and Magheralave (80) are the next highest micro-areas for sales. This evidence supports the Housing Monitor analysis for North Lisburn insofar as it confirms that even in demonstrably strong markets, such as Lisburn, with multiple builders selling well, there is a limit to the output that is achieved from a single site (even a large one).

3.49 The potential over reliance on what is essentially a single site at West Lisburn/Blaris to meet the housing needs of the City of Lisburn towards the end of the plan period, at a time when ongoing sites currently making a housing contribution are likely to be exhausted, would strongly suggest that other sites are required. In the circumstances it would be prudent to have a more detailed version of the Indicative Trajectory provided in Table 15 of Technical Supplement 2: Urban Capacity Study. The identification of additional sites would provide increased resilience in the housing supply, improve choice, allow for diversity and improve the prospects of addressing the issue of affordable housing. Sites around Lisburn that have previously been assessed as suitable for development, such as the wider Plantation area are well placed for consideration in this context. The fact that the Plan is looking beyond its plan period when allocating larger sites which bring infrastructure improvements is an important positive consideration when further consideration is given to additional lands.

**Housing Needs Assessment - Affordability**

3.50 Allocating more land for housing will help address the requirement for affordable/social housing within the Plan area.

3.51 Part 1 of the draft Plan Strategy sets out the draft Strategic Policies proposed by the Council. Housing is considered under the title 'A quality Place' at Chapter 4 of Part 1. At the outset the Council has established a list of actions that it will seek to adopt in order to achieve the objective of creating sustainable communities. Action five is to:

*“provide appropriate opportunities for housing in settlements with a range of types and tenures, including affordable housing.”*

3.52 This action is welcomed as the delivery of sustainable communities is a key objective of the SPPS.

3.53 Draft Strategic Policy 08 goes on to state:

*“The plan will support development proposals that:*

- a) Are in accordance with the Strategic Housing Allocation provided in Table 3;*
- b) Facilitate new residential development which respects the surrounding context and promotes high quality design within settlements;*
- c) Promote balanced local communities with a mixture of house types of different size and tenure including affordable and specialised housing;*
- d) Encourage compact urban forms and appropriate densities while protecting the quality of the urban environment.”*

3.54 It is recognised within the ‘justification and amplification’ text that affordable and specialist accommodation provision should be met where need is identified. This approach is welcomed, however the Council has not published any evidence to indicate how need is identified. Reference is made in Technical Supplement 1 to a need for 2,490 affordable units which has been derived from the Northern Ireland Housing Executive Housing Market Analysis Update (HMA) dated April 2018, however this is not provided within the supporting papers. If the Council is to rely upon this evidence as justification for a policy-led approach to affordable housing then the relevant information should be provided in support in order to allow for a robust assessment to be undertaken by the Planning Appeals Commission (PAC).

3.55 In the absence of the original data set from NIHE the approach could be unsound under soundness test CE2.

3.56 The SPPS also sets out at Paragraph 6.139 that:

*“Housing Needs Assessment/Housing Market Analysis – provides an evidence base that must be taken in to consideration in the allocation, through the development plan, of land required to facilitate the right mix of housing tenures including open market and special housing needs such as affordable housing, social housing, supported housing and travellers accommodation. The HNA will influence how the LDPs facilitate a reasonable mix and balance of housing tenures and types. The Northern Ireland Housing Executive, or the relevant housing authority, will carry out the HNA/HMA.”*

3.57 The SPPS is therefore clear that the HMA should inform the LDP. Whilst the Council has referenced the HMA, it is not specifically included within the supporting evidence base for the draft Plan Strategy and therefore it could not be demonstrated that the plan would comply with soundness test C3.



3.58 We also note that Housing Need Assessment/Housing Market Analysis is considered at Page 61 of dPS Part 1. Here it is stated:

*“The Northern Ireland Housing Executive (NIHE) are responsible for carrying out a Housing Needs Assessment (HNA) to assist the Council in the preparation of the Local Development Plan. The HNA seeks to provide a reasonable mix and balance of house types to cater for a range of housing needs. The total affordable housing requirement for the plan period is 6,240 units, of which 2,400 are social housing units. The deliverability of affordable housing and in particular the social housing element will largely depend on the zoned sites remaining to be developed and other sites lying outside these zonings (urban capacity and windfall).”*

3.59 We wish to highlight that the Council’s Technical Supplement 1 sets an affordable housing requirement for the plan period of 2,490 dwellings which would appear to conflict with the dPS figure of 6,240 units. Furthermore the Housing Growth Strategy, which forms Chapter 6 of Technical Supplement 1, identifies a social housing need of 2,490 new homes. This is only one element of affordable housing as currently defined in NI, however the study fails to consider the need for other forms. On this basis the plan would be unsound as it conflicts with the evidence and would therefore fail against soundness test CE2. There is also a lack of clarity within the papers and the dPS on the actual affordable housing need for the plan period.

3.60 Technical Supplement 1, Table 6 shows that remaining zoned land without planning permission could accommodate c1,099 units. Add to this the potential yield for the proposed Strategic Mixed Use site at West Lisburn identified in Table 6 and the potential yield could be c2,599 units. Given that the Council’s proposed policy for the provision of affordable housing could only be applied to future planning applications it is difficult to understand how an affordable need of 6,240 units could be met within zoned land which could only yield 2,599 units. We acknowledge that urban capacity sites and windfall sites could also contribute to the provision of affordable housing, however the Council’s own evidence provided in Technical Supplement 1 indicates that such sites could yield c.1,318 units. Even with a provision of 100% affordable housing the need identified at page 61 of dPS Part 1 could not be adequately met. As such the dPS would fail soundness tests CE1 and CE2.

3.61 In order to ensure that a that the dPS can meet the soundness tests, we recommend that the Council:

- Makes all relevant evidence/data available for consultation and for the PAC to inform their assessment of the Plan;
- Provides clarification on why evidence provided in Technical Supplement 1 shows a different affordable housing need than that presented in Part 1 of the dPS; and
- Ensures that there is sufficient land available for development within the plan period which would be able to support the delivery of the relevant affordable housing requirement and if necessary identify additional lands through the expansion of settlement limits at the Plan Strategy stage.

### **Housing Market Assessment – Relationship with Belfast**

- 3.62 The dPS recognises how housing markets work across administrative boundaries, that Lisburn & Castlereagh is located within the Belfast Housing Market Area (HMA) and that housing policy needs to be developed in discussion with neighbouring Councils.<sup>10</sup> Section 3 of the Lichfields Housing Growth Study sets out a review of the Housing Market. It references (para 3.6) research which identifies Lisburn & Castlereagh as part of the Core Belfast Local HMA and remarks on the strength of the relationship between the two LGDs (paras 3.12, 3.13, 3.18, 3.21) taking into account commuting flow data (Figure 3.4) which shows how the majority (two thirds) of worker outflow is to Belfast.
- 3.63 An outcome sought by the dPS is to provide jobs within Lisburn & Castlereagh to enable future residents to live and work in the local area. This is obviously important from a sustainable development perspective. If, as the evidence would suggest, many Lisburn & Castlereagh residents commute to work in Belfast (and this trend is likely to continue) and it is intended to grow further the availability of local jobs, this will drive the Council's housing requirement even before any consideration of the implications of any unmet need from Belfast – a consideration beyond Lichfields' scope (para 3.15). As noted at paragraph 9.8 of the Lichfields Growth Study *'the level of growth proposed in Belfast could have a significant impact on the housing market dynamics across the Belfast Metropolitan HMA and this will need to be explored further.'*
- 3.64 Lisburn and Castlereagh is within the Belfast Metropolitan Urban Area (BMUA), the area defined in the RDS as the continuous built up area centred on Belfast with an arc from Jordanstown to Knocknagoney, including the city of Lisburn and towns of Bangor, Carrickfergus and Holywood. The RDS (para 3.36) recognises the BMUA as the major conurbation in Northern Ireland with a thriving retail, service, administration, cultural and educational centre in the City of Belfast. It is the Region's largest employment centre and is at the centre of the regional transport network and the major gateway for national and international trade. Whilst Lisburn & Castlereagh has a scale and critical mass of its own, it also has a physical and functional relationship within the BMUA. It makes an important contribution to meeting the housing needs of the wider conurbation. The Council recognises its part within the wider City-Region and is now one of the six partner Councils included in the Belfast Region City Deal (BRCD).
- 3.65 Strategic planning for this relationship is important because if Belfast City Council's ambitious plans to grow its economy, consistent with RDS SFG1, are to be realised, there will be a significant need for additional housing. In Regional Guidance 8 (RG8), the RDS (para 3.15) states that *'strategic planning places emphasis on the importance of the relationship between the location of housing, jobs, facilities, services and infrastructure'*. The evidential basis of the dPS is strong insofar as it recognises the well-established transboundary housing market. This is important, not least because Belfast City Council flag the possibility of neighbouring districts within the wider metropolitan area – specifically Lisburn & Castlereagh and Antrim & Newtownabbey – potentially identifying land to be used for housing to accommodate some of Belfast's population growth.

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<sup>10</sup> Technical Supplement 1: Housing Growth Study para 4.41.

- 3.66 If the City's ambitious plans, founded on economic growth, are adopted but it cannot meet its own housing requirement, other options could be explored such as neighbouring authorities in the wider metropolitan area, such as Lisburn & Castlereagh, zoning land to accommodate some of Belfast's population growth.
- 3.67 Belfast City Council Draft Plan Strategy Technical Supplement 2: Housing para 4.18 states that any such areas agreed would need to have excellent connectivity to Belfast, including public transport links such as BRT and rail, along key transport corridors. Lisburn and Castlereagh in its capacity as part of the BMUA would clearly satisfy the sustainable transport related criteria given its excellent public transport links to Belfast.
- 3.68 The functional relationship with Belfast is an important planning consideration which bears upon its housing allocation through the HEF process. There are, however, issues with how the dPS handles transportation planning.

**Transport Assessment – disconnect between land use & transportation planning**

- 3.69 As noted in the DfI's covering letter in relation to the HGI's, Transportation Assessments are a factor in arriving at a housing allocation. This is reflected in the integration between land use and transport planning sought by the RDS, New Approach to Regional Transportation and SPPS. The inclusion of the Transport Test in the HEF must be in support of the SPPS' pursuit of the successful integration of transport and land use as fundamental to the objective of furthering sustainable development (SPPS 6.293). Taking this forward in the context of plan-making, paragraph 6.299 of the SPPS is as follows:

*The preparation of a LDP provides the opportunity to assess the transport needs, problems and opportunities within the plan area and to ensure that appropriate consideration is given to transportation issues in the allocation of land for future development, including appropriate integration between transport modes and land use. Preparation of a local transport study will assist in this process. Councils should seek early engagement with DRD, or the relevant transport authority, and take account of their 'The New Approach to Regional Transportation' document and any subsequent transport plans.*

- 3.70 So to achieve the integration sought, there is a clear emphasis on the LDP as an opportunity to assess transport needs, problems and opportunities. In this dPS, however, the indication is that a full analysis of the problems and opportunities at main hub level has been deferred to LPP stage. This postponement unfortunately fetters the ability of the plan to build in the fundamental integration between land use and transportation planning since it is clearly a factor which must bear upon arriving at a housing allocation for main hubs following application of the HEF.
- 3.71 Paragraph 2.39 of Technical Supplement 8: Local Transport Study states that *the Department for Infrastructure (DfI) have confirmed through consultation with the Council that the Belfast Metropolitan Transport Plan (BMTP) will be reviewed as part of the next stage of the Local Development Plan process.*
- 3.72 The Introduction to the Local Transport Study for Lisburn & Castlereagh (DfI) at Section 5 contains the following note:

*Note: This Study is part of the Belfast Metropolitan Transport Plan Local Transport Study (BMTS). The BMTS has yet to be completed and therefore this study is provided in draft form. It will remain as a draft until the BMTS is finalised and until then it is subject to change. The Department has agreed that the Lisburn and Castlereagh City Council (LCCC) may use the Draft LCCC LTS as a technical supplement to the LCCC LDP Plan Strategy.*

- 3.73 Notwithstanding the attempt to inform the dPS through the Local Transport Study in advance of the BMTP, the difficulty is that the potential for developer-led road improvements which may provide local or potentially more strategic benefits, a factor in assessing a settlement's capacity for growth via the HEF, is deferred to a later stage in the plan-making process.
- 3.74 They must reasonably be regarded as an opportunity to address the transport needs, problems and opportunities within the town but the potential to achieve integration between transportation and land use planning is being frustrated by the deferral of the assessment of this opportunity until LPP stage by which time the obvious risk is that the housing allocation for the settlement will be too low to justify the scale of expansion necessary for a developer-led transport scheme like this.

### **Management of Housing Supply**

- 3.75 The LDP does not propose to introduce a managed release of housing land in settlements.
- 3.76 Given the preceding comments, it may be appropriate to consider identifying Phase 2 land to be held in reserve until Phase 1 land (live permissions/likely permissions/urban capacity sites/existing zonings) are developed.
- 3.77 The intent of this approach is summarised below:
- Create compact towns, through a sequential approach to the phasing of land, in order to avoid urban sprawl by, in the first instance, focusing the growth of the residential population within the existing urban footprint;
  - Holding Phase 2 lands, located within revised settlement development limits, as a land bank to meet future need (providing a vision for the long term expansion of the main settlements);
  - Phase 2 lands will not be released for housing development until its designation changes to phase 1 as a consequence of an LDP amendment following a Plan review;
  - When releasing phase 2 land, account will be taken of the latest Housing Growth Indicators, the strategic housing allocation, current land availability, housing building rates and infrastructure capacity;
  - To ensure a sequential approach to development, when determining which land should be released to phase 1, account will be taken of its accessibility to the town centre and core services and also the availability of infrastructure;

- During reviews of the LDP, consideration will be given to the level of commitment and investment made by landowners to release and progress delivery of phase 1 housing land. Where no demonstrable progress has been made, consideration will be given to re-designating the land at review stage;
- The release of phase 2 housing land may also be considered where it has been demonstrated that there is insufficient uncommitted phase 1 housing land to meet affordable housing needs. Such a need should be supported by NIHE and should be selected taking into account the sequential approach above.

3.78 The overall intent of this policy suggestion would provide a mechanism for review of the housing land supply which seeks to address over-reliance on sites which are not being brought forward for housing. It could support the Spatial Strategy commitments to:

- support the growth and regeneration of our city, towns and villages, sustaining a living and working countryside and protecting environmentally sensitive areas;
- provide a settlement hierarchy, defining development limits and allocating land for housing growth in accordance with the sequential approach of the RDS, as well as,
- all of the Plan Objective A actions.

## 4. The Strategic Case for the Subject Site

- 4.1 The strategic case for additional housing land in Moira is grounded in the context set out above. However, there are good planning reasons to challenge the dPS's assertions that sufficient land is available to facilitate the housing growth aspiration for Moira within the existing urban area.
- 4.2 Moira has grown in size over in recent years with much of the growth focused towards the southern extent of the settlement, where the Subject Site is located.
- 4.3 The Subject Site lies adjacent to the settlement boundary of Moira and is bound to the north and west by existing residential development. The lands are also enclosed to the east by Magherahinch House and its associated farm buildings.
- 4.4 As the site is bound by development on three sides, it is our contention that the site can be deemed a natural rounding off opportunity of the settlement limit of Moira when considered in relation to the proximity of the listed Magherahinch House. The Subject Site visually links with the existing buildings within the settlement limit and will not appear visually prominent or incongruous from critical views towards the settlement from the open countryside.
- 4.5 The prevalent site specific characteristics and the location of adjoining development which mean that this parcel of land does not exhibit the normal characteristics of land in the open countryside. Whilst we acknowledge the site currently lies within the Local Land contain any of the key features of the LLPA and the development of the land would not detract from the wider LLPA setting.
- 4.6 The site is subject to a live planning application (ref: LA05/2019/0164/F) Importantly, the scheme currently being considered by the Council Planning Department has been designed to mitigate against any potential impact on the operations of the active farm holding of Magherahinch House through the siting of the dwellings within the site and the provision of a dense landscape buffer between the dwellings and farm buildings. This landscape buffer will also serve as a visual break between the residential development and farm buildings, acting as a natural definition of the settlement limit which is sensitive to the transition into the open countryside. The Proposed Site Layout Plan is attached at **Appendix 5**.

### **Scale of Development**

- 4.7 In the context of the strategic consideration of this area it is important to ensure that sufficient land is zoned to support the continued growth of the settlement at a modest rate, relative to the size of the settlement and its position in the hierarchy of settlements in the Council area. In accordance with the live planning application for the subject site, we consider the site has capacity to accommodate up to 14 dwellings which represents a modest extension to the urban area.
- 4.8 The scheme as proposed is of a lower density than much of the existing residential development within Moira and the density is appropriate to the site's location on the edge of the settlement.

**Availability of Infrastructure**

- 4.9 The Subject Site is bound to the north and west by residential development which has been constructed in recent years. The infrastructure installed to serve the existing development has been designed to retain capacity for the development of the Subject Site and the site can be directly connected to the infrastructure at Magherahinch Avenue.

**Archaeology and Built Heritage**

- 4.10 The Subject Site was previously considered to be unsuitable to be zoned for housing during the Public Inquiry of BMAP due to the potential impact any development might have on the setting of the adjacent Listed Building (Magherahinch House) and the Scheduled Rath (Pretty Mary's Fort).
- 4.11 It is however our consideration that given the proximity of the residential development constructed in the period since the Public Inquiry into BMAP, the setting of the Listed Building has already been altered and the critical view of the building from the south are now framed by the residential development to the north and the Listed Building is read in the context of this development.
- 4.12 It is also our contention that the erection of the dwellings at Glebe Gardens has created a physical and visual buffer between the Subject Site and the Scheduled Rath to the southwest. It is therefore our consideration that the development of the Subject Site would not have any significant adverse impact on the setting of this monument.

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## **Appendix 1: September 2019 HGIs 2016-2030**

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# Housing Growth Indicators

**2016-based**

# Housing Growth Indicators (HGIs)

2016 - 2030

## WHAT INFORMS THE HGIs?

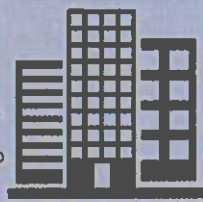


### Background to the HGIs

Housing Growth Indicators (HGIs) provide an indication of future housing need in Northern Ireland.

The indicators have been updated at the request of Regional and Strategic Planning within the Department for Infrastructure and are produced to provide guidance for those preparing development plans.

Household projections produced by NISRA form the basis of the estimate. The estimates are based on current population & household formation trends with the assumption that these trends will continue into the future.



### Using the HGIs

These estimates are purely for guidance & should not be considered as a cap or a target on development, they present a robust starting point which can subsequently be adjusted taking account of the full range of factors that may influence housing requirements over the plan period. Various other factors will also have an influence on housing requirements over longer time periods.

They are intended to support the development process by giving an indication of where development is most likely to be needed given the current trends.



## NI STOCK REQUIREMENT ESTIMATE FOR 2030



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## **1. Background to the HGIs**

- 1.1. Housing Growth Indicators (HGIs) provide an indication of future housing need in Northern Ireland. Household projections produced by NISRA form the basis of the estimate. The estimates are based on current population/household formation trends with the assumption that these trends will continue into the future.
- 1.2. As population and household formation projections are regularly updated and housing stock data presents the most up to date position annually, the HGIs should be used for guidance. The estimate does not take account of any future policy development or social factors and, as such, should not be considered a target or seen as a cap on housing development in the area.
- 1.3. Following a public consultation, an agreed methodology was established in 2005. This methodology has been replicated as closely as possible for all HGI updates since, including this latest 2016 based update. The variables that make up the HGI calculations have been updated using the most recently available information from robust sources. The 2012 based update of the HGIs contains more detailed information on the earlier applications of the methodology and can be found at <https://www.infrastructure-ni.gov.uk/publications/2012-based-housing-growth-indicators-hgis-and-methodology-paper>.
- 1.4. In addition to the household projections which are considered the main component of the HGIs, data on vacant housing stock, second homes and net conversions/closures/demolitions (net stock loss) are also used to produce the final estimates. As new, updated data was available for household projections, housing stock, vacant stock and second homes, updating the HGIs at this time is in line with the commitment to refresh estimates when updated household projections are published. This update ensures that any decision making or planning taken forward can be supported by the most robust, up-to-date information as evidence.
- 1.5. A number of updates of the HGIs have been produced, including being part of the first Regional Development Strategy which was published in 2001. Housing Growth Indicators were last published in May 2016 for the time period 2012-2025. The household projections used for these HGIs were based on 2012 data. The latest HGIs use 2016 based household projections and have been calculated for the time period 2016-2030 to align with the timeframe for the majority of Local Development Plans.
- 1.6. The HGIs have been calculated for Northern Ireland and also for each of the 11 Local Government Districts (LGDs). Further detail on how the HGIs are calculated, user information and methodology is presented throughout this document.

## **2. Uses of the HGIs**

- 2.1. The indicators have been updated at the request of the Department for Infrastructure Planning Group and in line with the commitment to refresh estimates when updated household projections are published. They are produced primarily to provide guidance for those preparing development plans. They are intended to support the development process by giving an indication of where development is

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most likely to be needed given the current understanding of population, current data on the housing infrastructure and expected population growth. As mentioned above, these estimates are purely for guidance and should not be considered as a cap or a target on development and, as such, represent a robust starting point which can be considered while also taking account of the full range of factors that may influence housing requirements over the plan period in terms of how many houses are needed in any area.

### 3. Northern Ireland Housing Growth Indicators 2016-2030

- 3.1. Following a period of gathering the required data from a variety of sources (detailed on paragraph 3.7 and also section 4); examining the previous methodology; confirming with Planning representatives on a way forward for the 2016-based update; and engaging in various meetings and conversations with subject experts, Analysis, Statistics and Research Branch within the Department for Infrastructure took forward HGI calculations using the most recent available data.
- 3.2. Once the data analysis was complete, the updated HGI figures calculated for the period 2016-2030 show that the estimated new dwelling requirement in Northern Ireland for the period is:

**84,800**

- 3.3. As well as calculating an updated estimate for Northern Ireland, estimated dwelling requirements for the 11 Councils were also produced.

**Table 1: Estimate of total housing need in Northern Ireland by Council 2016-2030<sup>1</sup>**

<b>Council</b>	<b>2030 estimated dwelling requirement</b>
Antrim and Newtownabbey	4,200
Ards and North Down	5,500
Armagh City, Banbridge and Craigavon	17,200
Belfast	7,400
Causeway Coast and Glens	5,600
Derry City and Strabane	4,100
Fermanagh and Omagh	4,300
Lisburn and Castlereagh	10,700
Mid and East Antrim	5,400
Mid Ulster	10,300
Newry, Mourne and Down	10,000
<b>Northern Ireland</b>	<b>84,800</b>

<sup>1</sup> Estimates are rounded to the nearest hundred. Totals may not add due to rounding.

- 3.4. This report and its appendices provide further detail on the methodologies, data used and further insight into how these estimates have been produced. As mentioned previously, these estimates are an indication of likely need and should not be considered as a definitive target. The social and policy environment is likely to be subject to much change over the next decade and these estimates are modelled from currently available data. There has been no attempt to model future events into these estimates, so the data presented should be considered 'policy neutral'.
- 3.5. However, these should be considered as 'a best estimate' given the data available at this point in time. Data used has been obtained from professional, reliable sources and the updated HGIs have been developed by NISRA statisticians based on an agreed methodology, in consultation with subject experts. A number of



potential sources were considered and a sound, consistent rationale was employed to make the decisions that formed the final estimate calculations.

3.6. The variables informing the calculation of the Northern Ireland estimate are shown in Table 2 and this largely reflects the methodology that was used in the 2012 based HGIs.

**Table 2: Variables that comprise 2016-2030 HGIs<sup>1</sup>**

Variable		Year of data	Value	Notes
(A)	Number of households	2030	784,600	2016 based NISRA household projections (occupied stock)
(B)	Second homes	2030	8,700	1.11% of occupied housing stock. NISRA Central Survey Unit combined survey sample
(C)	Vacant stock	2030	57,000	6.70% of total housing stock. NISRA Central Survey Unit combined survey sample
(D)	Net conversions/ closures/ demolitions	2016 to 2030	11,100	Net stock loss estimated using LPS housing stock and new dwelling completions data. Based on 9 year average.
(E)	New stock requirement estimate at end of period	2030	861,400	Sum of (A), (B), (C), & (D)
(F)	Total stock at start of period	2016	776,500	LPS Northern Ireland Housing Stock data <a href="http://www.finance-ni.gov.uk/publications/annual-housing-stock-statistics">www.finance-ni.gov.uk/publications/annual-housing-stock-statistics</a> - stock at beginning of 2016/17
(G)	Projected new dwelling requirement	2016 to 2030	84,800	(E) minus (F)
(H)	Projected new annual dwelling requirement		5,700	

<sup>1</sup> Estimates are rounded to the nearest hundred. Totals may not add due to rounding.

3.7. Further information on the data sources used and changes compared to the previous 2012 based HGIs is available in 'User Information – data sources' (page 9) and 'Changes to data since 2012 HGIs' (page 11). However, at a basic level, the detail of each variable listed above is as follows.

Number of households 2030 (A)

The estimate of the number of households in 2030 of 784,600 comes from the 2016 based household projections produced by NISRA, available at [this link](#).

Second homes 2030 (B)

The term 'second home' used in this calculation relates to a dwelling, not permanently occupied, whose owner resides principally in another dwelling. This includes holiday homes and residences used for easy access to business, but excludes dwellings privately rented to other tenants. Following review of the previous potential sources for this update only one robust data source for second homes data was identified: the NISRA Central Survey Unit (CSU) combined survey sample 2016-17, which provides a factor of 1.11% (see 'Changes to data since

2012 HGIs' section (page 11)). Applying the CSU second homes factor (1.11%) to the data gives an estimated second homes figure of 8,700 in 2030.

Vacant stock 2030 (C)

Two possible data sources were identified for these data: the NI House Condition Survey 2016 (NIHCS) and the CSU combined survey sample 2016-17 (see 'User Information – data sources' (page 9)). In the NIHCS 2016, the proportion of vacant properties was 3.65%. In the CSU combined survey sample 2016-17, this proportion was 6.70%.

To maintain consistency with the data used for second homes, the NISRA CSU data was also used as the source for this variable and this results in an estimated vacant stock figure of 57,000 in 2030.

Net conversions/closures/demolitions 2016 to 2030 (D)

Estimates were produced, using housing stock numbers and new dwelling completions data from Land and Property Service (LPS) (see 'Calculation of estimates' section on page 12). These estimates suggest a figure of 741 stock loss per annum.

New stock requirement estimate 2030 (E)

This is calculated by adding the estimated number of second homes (B), vacant stock (C) and stock loss adjustment (D) to the estimated number of households (A). This results in a stock requirement estimate of 861,400 in 2030.

Total stock 2016 (F)

The LPS publication 'Northern Ireland Housing Stock' reports on data from the NI Valuation List (see 'User Information – data sources' on page 9). At April 2016, total NI housing stock was 776,500.

Projected new dwelling requirement 2016 to 2030 (G)

This is calculated by subtracting the 2016 total stock figure (F) from the 2030 total stock estimate (E).

- 3.8. Development of the updated HGIs based on the variables as outlined above results in a projected new dwelling requirement of 84,800 between 2016 and 2030 (approximately 5,700 per annum). While past trends are not necessarily an indicator of future trends and house building is not a linear, constant development, it is worth considering the projected annual requirement against recent numbers of new dwelling completions in Northern Ireland. In the past 9 years these are as follows <https://www.finance-ni.gov.uk/publications/new-dwelling-statistics-report>:

2010-11	6,213
2011-12	5,719
2012-13	5,526
2013-14	5,315
2014-15	5,501
2015-16	5,771
2016-17	6,463
2017-18	7,096
2018-19	7,809



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So a figure of around 5,700 per annum is a broadly central point amongst these nine annual figures and as such the updated HGI figure sits within the recent trend of completions over the past decade.

## **4. User Information – data sources**

4.1. This section describes the data sources that were used or considered as part of the development process for the latest 2016 based HGIs. The decision was made early on in this refresh process to replicate the agreed methodology that was used for the 2012 based HGIs and, as far as possible, this is the process that has been employed. However, due to data quality or data availability at the time of this refresh, it is important to note that some data sources may have changed since the previous 2012 based HGIs were derived. This is fully discussed in the section 'Changes to data sources since 2012 based HGIs' on page 11. Generally any changes are due to lack of availability of the original data source or considerations related to consistency of data use across HGI variables.

### ***4.1.1. NISRA household projections***

Household projections are formed using population projections and household formation trends. The projected population is assigned into household groups using the trends in household formation from one Census to the next. The 2016 based household projections are based on the most up-to-date trend data on household formation between the 2001 and 2011 Census. 2016 based household projections data have been calculated for the 11 new LGDs.

The 2016 based data were used as the starting point for the HGI calculations.

### ***4.1.2. NI Housing Executive House Condition Survey***

The NIHCS is conducted by the NI Housing Executive (NIHE). A detailed technical survey is carried out on the interior and exterior of properties and, in addition, a short interview is conducted with the householder or their partner. The data are weighted and grossed to ensure final figures reflect the actual housing stock. The achieved sample size in 2016 was 2,023.

Data from the NIHCS 2016 were considered as a potential source to estimate the proportion of second homes and proportion of vacant houses. Advice was also sought from the research team in NIHE in support of the development of these updated HGIs and the producers of this report are grateful for that support and expert advice. During the conversations with NIHE, the advice provided was that due to small sample sizes, NIHCS data on second homes was not robust enough to be used to inform the HGIs. Therefore NISRA CSU data was used for second homes estimates. In the interests of consistency across the calculations, this provided a rationale for also using the NISRA CSU data for vacant stock estimates.

### ***4.1.3. Land and Property Services (LPS) publications***

#### ***Building Control new dwelling completions data***

Figures are collected quarterly by LPS from Building Control offices in each council on the number of new dwellings that have been completed during that quarter. The date of a new dwelling completion is the date on which the building control completion inspection takes place. New dwellings include both houses and apartments.

New dwelling completions data were used in the calculations to estimate net stock loss.

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#### *Housing stock data - NI Domestic Valuation List*

LPS publish housing stock figures based on their domestic valuation list. The data represents housing stock at a point in time usually in April. The download is taken on the first working day of the month. Housing stock data are available from 2008 to 2019 for the 11 LGDs.

Total housing stock data is one of the elements of the HGIs model. The data were also used in the calculations to estimate net stock loss.

#### **4.1.4. NISRA Central Survey Unit combined survey sample**

Central Survey Unit (CSU) has amalgamated samples from their main surveys which took place over each financial year from 2013-14. These are the complete samples that were selected from the LPS address database and so the data include properties that were found to be vacant or second homes when the interviewer went to visit. The combined sample for the year used in the HGI calculations (2016-17) includes 25,400 properties.

A sample size of 25,400 allows for data analysis at LGD level. Data on second homes and vacant properties have been used in the HGI calculations at LGD level and to confirm data used at Northern Ireland level. The data source is not an official estimate of data on second homes or vacant properties. It is a by-product of survey research and it is considered to be a representative sample of houses at Northern Ireland level and LGD level.

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## 5. Changes to data sources since 2012 based HGIs

5.1. The changes outlined in this section include where a new data source has been used to calculate the HGIs and also if there have been any significant changes to a data source since the last HGIs were calculated. Looking at each of the 5 key elements in the Northern Ireland level HGI calculations:

### **5.1.1. Number of households**

*Data source:* NISRA household projections (2016 based).

#### *Changes to data*

The latest household projections (2016 based) replaced the previous household projections (2012 based).

The 2016 based figures are lower than the 2012 based figures. As stated in NISRA's methodological paper, the main driving force behind the 2016-based projections being lower than the 2012 based projections is due to a lower population base. Similar findings are also found in household projections for countries in the rest of the UK and indeed for areas within Northern Ireland.

For further details of differences between the 2012 based household projections and 2016 based household projections, see [the methodology report](#) on the NISRA website ('Useful links' section on page 19).

### **5.1.2. Second homes/Vacant stock**

*Data source:* NISRA CSU Combined Survey Sample 2016/17.

#### *Changes to data*

2016/17 figures from the NISRA CSU Combined Survey Sample replace the figures from the 2011 NIHCS. 2016/17 was considered the most relevant year for the 2016 based HGI update.

NIHE advice was that the NIHCS sample was considered too small to provide robust data for the second homes variable. Given that issue with regards to second homes and NIHCS data, it was considered that the preferred approach was to ensure consistency of data source across the calculations/relevant variables and as NISRA CSU data informed the second homes variable, the NISRA CSU data was also chosen to inform the vacant stock variable. Additionally, using vacant stock estimates provided by NIHCS and LPS lead to an overall gain in some LGDs, which would lead to an indicator suggesting no additional requirement of homes within these areas over the HGI estimate period. This issue also occurred in aspects of the 2012 based update and was a driver for variable decision making at that time. As this is a refresh of that 2012 method, the issue has been handled similarly.

### **5.1.3. Net conversions/closures/demolitions**

*Data source:* Estimates produced using published LPS data on new dwelling completions and housing stock.

#### *Changes to data*

NIHE advice obtained on net demolitions, conversions and closures across NIHE stock suggested a figure of 200 per annum. Advice was also sought from LPS on available data. The LPS figures that were available represent all Northern Ireland housing stock so the decision was taken to give precedence to these estimates. The latest net stock loss estimate based on the average of the time series available (9 years (2010-11 to 2018-19) is 741 per annum. This results in an estimated stock loss of 11,100 dwellings over the period to 2030. The previous 2012 based HGIs used a 2 year average and an annual estimated stock loss of 1,000 but this update has used the full time series available to provide a more robust average to smooth out any volatility across the period.

#### *Calculation of estimates*

Housing stock numbers and new dwelling completions data from LPS were used to give some guidance on approximating net stock loss data. Estimates were produced as follows:

- Take housing stock at the beginning of the year (LPS NI Housing Stock publication) and add in new dwellings completed during the year (LPS NI Building Control Starts and Completions publication). If no net stock loss, this figure would be the total housing stock at the end of the year.
- Compare this estimated 'housing stock if no loss' figure with the actual housing stock at the beginning of the next year (LPS NI Housing Stock publication). If the actual housing stock is less than the estimated 'housing stock if no loss', this would suggest that some stock has been lost during the year.
- Subtract actual housing stock at the beginning of the next year from estimated 'housing stock if no loss' to get an estimate for net stock loss during the year.

Due to the nature of the data and considering these figures are estimates, there can be wide variation from year to year. Therefore, averages have been taken over nine years to smooth the variations in the data and look at longer term trends.

### **5.1.4. Total stock**

*Data source:* LPS Northern Ireland Housing Stock publication

#### *Changes to data*

The LPS NI Housing Stock publication remains the source of housing stock statistics with the most recent statistics available up to 2019. This HGI update has used the relevant data available at the time of update.

## 6. Local Government District (LGD) level figures – 2016 based Housing Growth Indicators

### 6.1. Background to LGD level estimates

Each time the HGIs have been calculated, estimates at LGD level have been produced. These are produced by using existing data or estimating LGD level data for each of the key components of the HGIs detailed in Table 2: number of households, second homes, vacant stock, net conversions/closures/demolitions (net stock loss) and total housing stock for start year. The individual components are then combined to produce the HGIs at LGD level.

6.2. Data sources for each of the 5 key components are the same as those listed for the NI HGI figure (see 'User Information – data sources' on page 9) and more detail on the LGD calculations can be found in Appendix 1, page 15.

**Table 3: Estimate of total housing need in Northern Ireland by Council 2016-2030<sup>1</sup>**

<b>Council / Region</b>	<b>2030 estimated dwelling requirement</b>
Antrim and Newtownabbey	4,200
Ards and North Down	5,500
Armagh City, Banbridge and Craigavon	17,200
Belfast	7,400
Causeway Coast and Glens	5,600
Derry City and Strabane	4,100
Fermanagh and Omagh	4,300
Lisburn and Castlereagh	10,700
Mid and East Antrim	5,400
Mid Ulster	10,300
Newry, Mourne and Down	10,000

<sup>1</sup> Estimates are rounded to the nearest hundred.

6.3. These figures have been used as a starting point for allocating housing land as part of the Local Development Plan process. The figures presented here at LGD level are solely based on the data, are 'policy neutral' and use similar methodology to that used to produce the NI HGI estimate.

#### 6.3.1. Issues when producing LGD level data

There are fewer data sources available to calculate the HGIs at LGD level. Some data that are robust for Northern Ireland are not robust when broken down to LGD level. In addition, some data that were used in the past may no longer be available or not available at suitable quality levels (see 'User Information – data sources' on page 9).

## Appendix 1

LGD level Northern Ireland Housing Growth Indicators 2016-2030 - estimating each of the 5 key components

Table A1: Estimate of housing need by Local Government District 2016-2030

District Council	Household projection 2030	Second Homes 2030	Vacant Stock 2030	Net Conversions Closures and Demolitions 2016-2030	New Stock Estimate 2030	Housing Stock at April 2016	Projected New Dwelling Requirement 2016-2030
Antrim and Newtownabbey	59,200	400	3,200	-400	62,400	58,300	4,200
Ards and North Down	70,100	900	4,500	200	75,800	70,300	5,500
Armagh City, Banbridge and Craigavon	90,500	900	6,300	2,000	99,700	82,500	17,200
Belfast	148,200	1,500	13,000	900	163,500	156,100	7,400
Causeway Coast and Glens	58,300	2,700	5,200	2,400	68,600	62,900	5,600
Derry City and Strabane	60,000	200	4,300	100	64,600	60,500	4,100
Fermanagh and Omagh	46,200	500	4,300	1,300	52,400	48,000	4,300
Lisburn and Castlereagh	63,500	400	3,700	1,100	68,700	58,000	10,700
Mid and East Antrim	59,200	200	3,600	1,000	64,100	58,700	5,400
Mid Ulster	57,000	200	3,500	2,300	63,000	52,600	10,300
Newry, Mourne and Down	72,300	800	5,300	300	78,700	68,600	10,000
<b>Northern Ireland</b>	<b>784,600</b>	<b>8,700</b>	<b>57,000</b>	<b>11,100</b>	<b>861,300</b>	<b>776,500</b>	<b>84,800</b>

Cells are rounded to the nearest 100. Calculations have been worked out using unrounded data. Therefore summing individual figures in the table above may not add to total.

### ***Household projection 2030***

*Data source:* 2016 based household projections

*To produce LGD level data:* Household projections data have been calculated for the new 11 LGDs.

#### *Changes to data*

The latest household projections (2016 based) replaced the 2012 based household projections. The 2016 based figures are lower than the 2012 based figures (see 'Number of households' section on page 11 for some of the reasons why the figures are lower).

### ***Second homes 2030***

*Data source:* Central Survey Unit combined survey sample 2016-17

*To produce LGD level data:* As with the NI HGI calculation, the term 'second home' relates to a dwelling, not permanently occupied, whose owner resides principally in another dwelling. This includes holiday homes and residences used for easy access to business, but excludes dwellings privately rented to other tenants. Following review of the previous sources for this update only one robust data source for second homes data was identified: the NISRA CSU combined survey sample 2016-17. The overall NI second homes figure was apportioned across each of the 11 Councils to reflect the distribution present in the NISRA CSU combined survey sample data.

#### *Changes to data source*

No change

### ***Vacant stock 2030***

*Data source:* Central Survey Unit combined survey sample 2016-17

#### *To produce LGD level data:*

As with the NI HGI calculation, to maintain consistency with the data used for second homes, the NISRA CSU data was also used as the source for this variable. Again, similar to the second homes calculations, the overall NI vacant stock figure was apportioned across each of the 11 Councils to reflect the distribution present in the NISRA CSU combined survey sample data.

#### *Changes to data source*

For the 2012 based HGIs, NIHCS data was used. However, as detailed previously, for this 2016-based HGI update it was decided to maintain consistency across data used to ensure a more robust estimate using figures obtained from one source where possible and so, given only one suitable source was available for estimating second homes, that same source was used for vacant stock estimation. Therefore the source for vacant stock estimation has changed from NIHCS to NISRA CSU Combined Survey Sample.

### ***Net conversions/closures/demolitions 2016 to 2030***

*Data source:* Estimates produced using published LPS data on new dwelling completions and housing stock.



*To produce LGD level data:* Approximations were produced for each LGD as per the estimation of the NI level figure (see 'Calculation of estimates' section on page 12). These LGD level data have been used to apportion the NI level net conversions/closures/demolitions figure of 11,100.

*Change to data source*

No change

*Issues to note*

- *Using average over 9 years*

As per the NI level figure, due to the nature of the data there can be wide variation from year to year. Therefore averages have been taken over a number of years to smooth the variations in the data and look at longer term trends.

Previously a 4 year average was used to calculate LGD level estimates. For this refresh, to produce a more robust estimate, the full data available covering the period 2010-11 to 2018-19 was used.

### ***New stock estimate 2030***

The new stock estimate for 2030 is calculated by adding the estimated number of second homes, vacant stock and stock loss adjustment to the estimated number of households for each Local Government District area.

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### ***Total stock 2016***

*Data source:* LPS NI Housing Stock publication

*To produce LGD level data:* Data are available for the new 11 LGDs from this publication

### ***Projected new dwelling requirement by LGD for 2016 to 2030***

This is calculated by subtracting total stock estimate for 2016 from total stock estimate for 2030 for each LGD.

## Appendix 2

**Table A2: Comparison of LGD level Housing Growth Indicators 2016-2030 with recent new dwelling completion rates**

Local Government District	Projected new dwelling requirement 2016-2030 <sup>1</sup>	Comparison 15 year figure using recent completion rates <sup>2</sup>
<b>Antrim and Newtownabbey</b>	4,200 dwellings	8,160 (544 x 15)
<b>Ards and North Down</b>	5,500 dwellings	10,275 (685 x 15)
<b>Armagh, Banbridge and Craigavon</b>	17,200 dwellings	13,755 (917 x 15)
<b>Belfast</b>	7,400 dwellings	10,065 (671 x 15)
<b>Causeway Coast and Glens</b>	5,600 dwellings	8,565 (571 x 15)
<b>Derry City and Strabane</b>	4,100 dwellings	7,680 (512 x 15)
<b>Fermanagh and Omagh</b>	4,300 dwellings	4,935 (329 x 15)
<b>Lisburn and Castlereagh</b>	10,700 dwellings	11,580 (772 x 15)
<b>Mid and East Antrim</b>	5,400 dwellings	6,405 (427 x 15)
<b>Mid Ulster</b>	10,300 dwellings	10,680 (712 x 15)
<b>Newry, Mourne and Down</b>	10,000 dwellings	9,690 (646 x 15)

<sup>1</sup> Estimate of housing need by Local Government District 2016-2030 (see Table 1 and Table 3 on pages 6 and 13 respectively) - derived by estimating each of the key components at LGD level and combining to form the HGI for each LGD.

<sup>2</sup> An approximate figure of new dwelling completions per annum (given in brackets) has been worked out using LPS new dwelling completions data over the time period 2015-16 to 2018-19 (the full time series available at 11 LGD level). 2016 to 2030 is a 15 year period so the calculated average figure has been multiplied by 15 to give a figure that can be compared with the projected new dwelling requirement 2016-2030.

## Appendix 3

### Useful links

2012 based Housing Growth Indicators and methodology paper are available on the DfI website at:

<https://www.infrastructure-ni.gov.uk/publications/2012-based-housing-growth-indicators-hgis-and-methodology-paper>

Details of the household projections data and methodology are available on the NISRA website at:

<https://www.nisra.gov.uk/sites/nisra.gov.uk/files/publications/HP16-bulletin.pdf>

RDS 2035 available on the DfI website at:

<https://www.infrastructure-ni.gov.uk/publications/regional-development-strategy-2035>

Details on the NI Housing Executive Northern Ireland House Condition Survey (including results from the survey) are available on the NIHE website:

<https://www.nihe.gov.uk/Working-With-Us/Research/House-Condition-Survey>

Land and Property Services NI Building Control Starts and Completions publication is available on the DoF website:

<https://www.finance-ni.gov.uk/publications/new-dwelling-statistics-report>

Land and Property Services NI Housing Stock publication is available on the DoF website:

<https://www.finance-ni.gov.uk/publications/annual-housing-stock-statistics>

## **Appendix 2: Housing Monitor Analysis**

# Housing Monitor Review

**Table1: Review of Lisburn City Housing Sites**

Site Ref	Site Name/Location	Units Complete	Remaining Potential	Development Status
15249	69 & 71 Hillsborough Road	0	7	Not started (same as 2009 Monitor)
16442	Adj to 91 Causeway End Rd	0	1	Not started (same as 2009 Monitor)
16443	Adj to 51 Moira Rd	0	1	Not started (same as 2009 Monitor)
16524	Opposite Glenmore Terrace, Mill St	0	14	Not started (same as 2009 Monitor)
16528	132 Causeway End Rd	0	5	Not started (same as 2009 Monitor)
16541	Rear of 146 Hillsborough Rd	0	3	Not started (same as 2009 Monitor)
16542	Adj to 24 Beechdene Pk	0	2	Not started (same as 2009 Monitor)
16554	Sth North Lisburn Feeder	0	83	Not started
16548	Pond Pk Rd/Derriaghy Rd	70	4	'Ongoing' but same figures as 2009 Monitor
16623	Adj to 1 Prince William Rd	0	24	Not started (same as 2009 Monitor)
16626	Adj 64 Causeway End Rd	0	1	Not started (same as 2009 Monitor)
16627	Adj 81 Causeway End Rd	122	10	'Ongoing' but same figures as 2009 Monitor
16817	21-25 Seymour St	0	12	Not started (same as 2009 Monitor)
16819	115/117 Hillsborough Rd	0	10	Not started (same as 2009 Monitor)
16825	27 Pond Pk Rd	0	3	Not started (same as 2009 Monitor)
16826	2A Leamington Place/Grand Street	0	4	Not started (same as 2009 Monitor)
16833	Site 4 Esker Ridge, Antrim Rd	0	1	Not started (same as 2009 Monitor)
16904	Adj 196 Belsize Rd	0	3	Not started (same as 2009 Monitor)

16919	Opp 7-11 Ruskin Heights	0	4	Not started (same as 2009 Monitor)
17182	Adj 15 Harmony Hill	0	1	Not started (same as 2009 Monitor)
17186	Rear of 70C Causeway End Rd	0	1	Not started (same as 2009 Monitor)
17187	Adj 104 Pond Pk Rd	0	9	Not started (same as 2009 Monitor)
17188	63 Gregg St	0	1	Not started (same as 2009 Monitor)
17190	68 Woodland Pk	0	13	Not started (same as 2009 Monitor)
17198	Adj 56 Harmony Hill	0	1	Not started (same as 2009 Monitor)
17209	99 Ballynahinch Rd	1	26	1 house built since 2009
17210	43 Antrim Rd	0	2	Not started (same as 2009 Monitor)
18096	Adj 51 Moira Rd	0	20	Not started (same as 2009 Monitor)
18306	Ardfoyle Forthill	0	1	Not started (same as 2009 Monitor)
18310	Adj 14 Glenavy Gdns	0	1	Not started (same as 2009 Monitor)
18312	23 Benson St	0	2	Not started (same as 2009 Monitor)
18316	Side Garden 27 Laurehill Pk	0	1	Not started (same as 2009 Monitor)
18319	38 Pond Pk Rd	0	1	Not started (same as 2009 Monitor)
18323	3 & 5 Smithfield Sq	0	24	Not started (same as 2009 Monitor)
18328	149 Hillsborough Rd	0	14	Not started (same as 2009 Monitor)
18642	Garden of 2 Hillview Ave	0	1	Not started (same as 2009 Monitor)
18644	Side Garden of 1 Ferndell	0	1	Not started (same as 2009 Monitor)
18648	34-44 Grand St	0	5	Not started (same as 2009 Monitor)

18659	Rear of 22 Derryvolgie Pk, Lambeg	0	1	Not started (same as 2009 Monitor)
18679	169-171 Moira Rd	0	12	Not started (same as 2009 Monitor)
18680	Knockmore Business Centre Moira Rd	0	36	Not started (same as 2009 Monitor)
18692	99 Antrim Rd	0	3	Not started (same as 2009 Monitor)
18693	Adj 65 Antrim Rd	0	1	Not started (same as 2009 Monitor)
18696	17 Magheralave Rd	0	1	Not started (same as 2009 Monitor)
18698	Adj 23 Wyncroft Crescent	0	1	Not started (same as 2009 Monitor)
18712	46C Castle St	0	52	Not started (same as 2009 Monitor)
19465	96 Pond Pk Rd	0	7	Not started (same as 2009 Monitor)
19469	6 Rathvarna Close	0	1	Not started (same as 2009 Monitor)
19470	52 Mill St	0	14	Not started (same as 2009 Monitor)
19486	13 Plantation Drive	0	1	Not started (same as 2009 Monitor)
19494	99 Ballynahinch Rd	0	8	Not started (same as 2009 Monitor)
19508	Rear 76 Causeway End Rd	0	1	Not started (same as 2009 Monitor)
19509	Adj 24 Wyncroft Gdns	0	1	Not started (same as 2009 Monitor)
19515	19A Ballymacash Rd	0	4	Not started (same as 2009 Monitor)
19551	Adj 21 Greenburn Way	0	1	Not started (same as 2009 Monitor)
19552	74 Greenburn Way	0	1	Not started (same as 2009 Monitor)
19577	121-123 Old Hillsborough Rd	0	7	Not started (same as 2009 Monitor)
19928	Rear 61 Moss Rd	0	2	Not started (same as 2009 Monitor)

				Monitor)
19931	21 East Down View	0	6	Not started (same as 2009 Monitor)
19933	34A Belfast Rd	0	3	Not started (same as 2009 Monitor)
19934	Rear 34-38 Dalboyne Pk	0	1	Not started (same as 2009 Monitor)
19935	24 Magheralave Rd	0	8	Not started (same as 2009 Monitor)
19947	20 The Green	0	2	Not started (same as 2009 Monitor)
19948	Side 31 Innisfayle Rd	0	1	Not started (same as 2009 Monitor)
19949	18 Pond Pk Rd	0	5	Not started (same as 2009 Monitor)
20004	14 Warren Gdns	0	3	Not started (same as 2009 Monitor)
20033	108-110 Ballymacash Rd	0	6	Not started (same as 2009 Monitor)
20035	114-116 Ballymacash Rd	1	5	1 house built since 2009 Monitor
20037	Ballymacross Phase 5	0	8	Not started (same as 2009 Monitor)
20925	Glenavy Rd/Brokerstown Rd (LD1 North)	0	650	Not started (same as 2009 Monitor) Planning application under consideration
20471	Barbour Threads, Hilden	0	603	Not started Planning permission lapsed
<b>Total</b>			<b>1773</b>	



**Table 2: Review of Lisburn Greater Urban Area Housing Sites**

Site Ref	Site Name/Location	Units Complete	Remaining Potential	Development Status
18351	Rear of No. 4 5-7 Kilmakee Cottages, Willow Gardens	0	29	Not started (same as 2009 Monitor)
18661	65 Mosside Road, Derriaghy	0	5	Not started (not referenced in 2009 data)
18663	Rear of Kilmakee Cottages, Willow Gardens, Dunmurry	0	25	Not started (not referenced in 2009 data)
18664	283 & 285 Kingsway, Dunmurry	0	3	Not started (not referenced in 2009 data)
19456	64 Mosside Road, Derriaghy, Dunmurry	0	2	Not started (not referenced in 2009 data)
19458	Adjacent to 6 Larch Grove	0	1	Not started (not referenced in 2009 data)
<b>Total</b>			<b>65</b>	

**Table 3: Review of Greater Castlereagh Urban Area Housing Sites**

Site Ref	Site Name/Location	Units Complete	Remaining Potential	Development Status
553	77 Beechill Road	0	2	Not started (same as 2009 Monitor)
558	Beechill Road	0	37	Not started (same as 2009 Monitor)
12196	350 Saintfield Road	0	20	Not started (same as 2009 Monitor)
12302	Hanwood House 125 Old Dundonald Road	0	44	Not started (same as 2009 Monitor)
12680	86 Beechill Road	0	1	Not started (same as 2009 Monitor)
12929	Land adjacent to 2 Carrowreagh Gardens	0	1	Not started (same as 2009 Monitor)
12983	164 Newtownbreda Road	0	2	Not started (same as 2009 Monitor)
13284	Land adjacent to 16 Knockbracken Road	0	38	Not started (same as 2009 Monitor)
17284	To the rear of 310 Comber Road	0	1	Not started (same as 2009 Monitor)
18090	Forster Green Hospital Upper Knockbreda Road MCH 12 Mixed Use	0	30	Not started (same as 2009 Monitor)
18225	804 Upper Newtownards Road	0	4	Not started (same as 2009 Monitor)
18230	Rear of 17-23 Ferndene Park	0	6	Not started (same as 2009 Monitor)
18232	Quarry Corner, Upper Newtownards Road	0	41	Not started (same as 2009 Monitor)
18234	104-118 Comber Road	0	8	Not started (same as 2009 Monitor)
18235	274 Comber Road	0	1	Not started (same as 2009 Monitor)

18236	292 Comber Road	0	2	Not started (same as 2009 Monitor)
18813	1027 to 1035 Upper Newtownards Road	0	32	Not started (same as 2009 Monitor)
18848	14 Mount Michael Drive	0	1	Not started (same as 2009 Monitor)
18860	103 to 107 Saintfield Road	0	6	Not started (same as 2009 Monitor)
19622	133A Comber Road	0	3	Not started (same as 2009 Monitor)
19628	Rear of 180 Saintfield Road	0	1	Not started (same as 2009 Monitor)
19630	Side garden of 1 Brooklands Park	0	0	Not started (same as 2009 Monitor)
19631	28 Beechill Park South	0	1	Not started (same as 2009 Monitor)
19635	Land at Islay Gardens	0	8	Not started (same as 2009 Monitor)
19640	190 Newtownbreda Road	0	2	Not started (same as 2009 Monitor)
20045	70 Beechill Park West	0	1	Not started (same as 2009 Monitor)
20061	Rear garden 65 Old Dundonald Road	0	1	Not started (same as 2009 Monitor)
20064	66 Church Road	0	11	Not started (same as 2009 Monitor)
20065	33-37 Gransha Road	0	12	Not started (same as 2009 Monitor)
20066	42-52 Gransha Road	0	15	Not started (same as 2009 Monitor)
20068	99-107 Comber Road	0	45	Not started (same as 2009 Monitor)
20069	155 & 157 Comber Road	0	2	Not started (same as 2009 Monitor)

				Monitor)
20074	58 Old Dundonald Road	0	5	Not started (same as 2009 Monitor)
20847	Lands at and to the north of 360 Saintfield Road	0	80	Not started (not referenced in 2009 data but long standing site)
21526	East of Ballymaconaghy Road, Manse Road & Garland Hill	0	313	Not started (not referenced in 2009 data as identified through BMAP process)  Planning applications submitted & under consideration
<b>Total</b>			<b>717</b>	

**Table 4: Review of Carryduff Housing Sites**

Site Ref	Site Name/Location	Units Complete	Remaining Potential	Development Status
591	Adjacent to 22 Lough Moss Park	0	14	Not started (same as 2009 Monitor)
11437	Land to the southeast of Meadowvale Road CF 04/04	0	174	Not started (same as 2009 Monitor)
11981	Rear of 21 Holly gate Avenue	0	1	Not started (same as 2009 Monitor)
11988	26 Ballynahinch Road	0	2	Not started (same as 2009 Monitor)
12152	32-34 Ballynahinch Road	0	2	Not started (same as 2009 Monitor)
12262	Sunnyholme 11 Queensfort Road	0	3	Not started (same as 2009 Monitor)
12323	Between 7 & 9 Thorndale Road South	0	1	Not started (same as 2009 Monitor)
12591	20 Church Road	0	1	Not started (same as 2009 Monitor)
12976	Lands to east & south of Baronscourt & north of Edgar Road & Comber Road CF 4/06	2	378	Development on-going
12977	Lands to north of Marlborough Crescent, Blenheim Park & Queensfort Court, west of Saintfield Road and south of Mealough Road CF 03/05	0	349	Not started Planning permissions granted
13233	101 Ballynahinch Road CF 04/03	0	110	Not started (same as 2009 Monitor)
13274	6 Thorndale Road North	0	1	Not started (same as 2009 Monitor)
13279	30 Ballynahinch Road	0	2	Not started (same as 2009 Monitor)
18239	Rear of 1 Ballynahinch Road	0	1	Not started (same as 2009 Monitor)
18243	37 Church Road	0	6	Not started (same as 2009 Monitor)
18244	Adjacent to 694 Saintfield Road	0	30	Not started (same as 2009 Monitor)
18531	North of Thorndale Park	0	24	Not started (same as 2009 Monitor)

18827	31 Church Road	0	3	Not started (same as 2009 Monitor)
19657	16 Hillsborough Road	0	3	Not started (same as 2009 Monitor)
20077	70-72 Ballynahinch Road	0	33	Not started (same as 2009 Monitor)
20079	83 Ballynahinch Road	0	5	Not started  Potential yield identified as 1 unit in 2009 data
20080	Adjacent to 10 & 15 Baronscourt Lane	0	2	Not started (same as 2009 Monitor)
20081	Rear of 2 Thompsons Grange	0	1	Not started (same as 2009 Monitor)
20087	644 Saintfield Road	0	7	Not started (same as 2009 Monitor)
21292	Carryduff Shopping Centre, Church Road	0	150	Not started  Application received (LA05/2019/1270/F) for 2 no. retail units, 1 no. bar/restaurant unit, 1 no. off licence unit and 21 no. apartments with associated car parking and landscaping (amendment to planning approval under LA05/2018/0459/F)
21522	Lands at Comber Road CF 04/05	0	94	Not started  Application under consideration (LA05/2018/1221/RM) for 79 houses
<b>Total</b>			<b>1397</b>	

**Table 5: Review of Hillsborough Housing Sites**

Site Ref	Site Name/Location	Units Complete	Remaining Potential	Development Status
15325	Lisburn Road HH 03/02 & HH 03/03	0	119	Not started  Remaining potential identified as 150 units in 2009 data
16666	25 Lisburn Road	0	10	Not started (same as 2009 Monitor)
18336	Adjacent to the Old Mill Development Culcavy Road	0	1	Not started (same as 2009 Monitor)
18349	17 Dromore Road	0	1	Not started (same as 2009 Monitor)
18718	7 Abercorn Park	0	1	Not started (same as 2009 Monitor)
18739	45 Carnreagh	0	1	Not started (same as 2009 Monitor)
19242	16 Dromore Road	0	1	Not started (same as 2009 Monitor)
19245	10 Main Street	0	1	Not started (same as 2009 Monitor)
20184	1 Park Street	0	1	Not started (same as 2009 Monitor)
20186	Opposite 19-23 Dromore Road	0	7	Not started  Potential yield identified as 29 units in 2009 data
20195	1 Hillcourt	0	2	Not started (same as 2009 Monitor)
20201	Vacant site to rear 45-53 Old Mill Heights Culcavy Road	0	8	Not started (same as 2009 Monitor)
20205	30-32 Culcavy Road	0	16	Not started (same as 2009 Monitor)
20206	Maisemore 41 Lisburn Road	0	2	Not started (same as 2009 Monitor)
<b>Total</b>			<b>171</b>	



**Table 6: Review of Moira Housing Sites**

Site Ref	Site Name/Location	Units Complete	Remaining Potential	Development Status
<b>15331</b>	Old Kilmore Road, Fortwilliam MA 04/06	0	50	Not started (same as 2009 Monitor)
<b>16505</b>	Rear of 100 Main Street	0	1	Not started (same as 2009 Monitor)
<b>16609</b>	South of 23-25 St Johns Park	0	2	Not started (same as 2009 Monitor)
<b>16940</b>	Land to the rear of 35-37 Main Street	0	7	Not started (same as 2009 Monitor)
<b>17173</b>	8 Lurgan Road	0	14	Not started (same as 2009 Monitor)
<b>17176</b>	Adjacent to 33 Lurgan Road	0	5	Not started (same as 2009 Monitor)
<b>18102</b>	Land at 89-101 Main Street	0	10	Not started (same as 2009 Monitor)
<b>18103</b>	Land adjacent to 1A Hillsborough	0	20	Not started (same as 2009 Monitor)
<b>18104</b>	Land adjacent to 45 Lurgan Road MA 03/02 & MA 04/09	0	69	Not started (same as 2009 Monitor)
18756	4A Lurgan Road, Moira	0	50	Not started  Application under consideration (LA05/2019/0012/F) for proposed change of house types from extant planning permission (S/2008/0177) comprising the erection of 82 units
<b>19117</b>	Lands to the south-east of 45 Main Street	0	6	Not started (same as 2009 Monitor)
<b>19119</b>	Adjacent to 31 Lurgan Road	0	1	Not started (same as 2009 Monitor)
<b>19121</b>	Lands adjacent to and including Lurgan Road	0	24	Not started (same as 2009 Monitor)
<b>20216</b>	Lands north 10 Waringfield	0	1	Not started (same as 2009 Monitor)

	Park			Monitor)
20217	Rear 4 Waringmore	0	1	Not started (same as 2009 Monitor)
20219	Rear 18-20 Woodhall	0	1	Not started (same as 2009 Monitor)
20942	Land adjacent to 41 Old Kilmore Road MA 04/08	0	60	Not started No planning history
20944	Land west of Claremont Crescent MA 04/07	0	53	Not started Planning approval (LA05/2017/0428/F) for 53 no. dwellings
<b>Total</b>			<b>375</b>	

## **Appendix 3: Urban Capacity Study Analysis**

Lisburn & Castlereagh City Council LDP Technical Supplement 2: Urban Capacity Study - Assessment of Identified Sites by Turley (January 2020)

Lisburn City Centre						
Unique ID	Source ID	Address	Yield	Comment by Turley	Status in Lisburn City Centre Masterplan 2019-2023	Status in Lisburn City Centre Masterplan 2010
1	75	Level car park fronting Lisburn Health Centre	102 Apartments	The limited amount of recent apartment development in Lisburn city centre may point to a potential lack of demand. There is uncertainty around the timing of any potential disposal. Turley question whether the proposed 102 units will be delivered during the Plan period.	Site D14. Identified for residential or mixed use development.	Site 6A Identified for Commercial, Residential and Parking. Approximate number of dwellings - 65.
2	76	Site and associated surface level car park of Lisburn Health Centre	60 Apartments	The limited amount of recent apartment development in Lisburn city centre may point to a potential lack of demand. There is uncertainty around the timing of any potential disposal. Turley question whether the proposed 60 units will be delivered during the Plan period.	Site D16. Identified for reuse of all or part of building as flexible workspace for small businesses and co-working with associated supporting facilities. Potential longer term redevelopment of site for mixed-use development.	Sites 6E & 6F. 6E identified for Retail and Commercial use. Approximate Number of Dwellings - 55; 6F identified for Retail and Commercial use.
3	77	Royal Mail Depot, Linenhall Street.	72 Apartments	The limited amount of recent apartment development in Lisburn city centre may point to a potential lack of demand. There is uncertainty around the timing of any potential disposal. Turley question whether the proposed 72 units will be delivered during the Plan period.	Site D15. Identified for large scale residential or mixed use development replacing existing building.	Site 3B. Identified for commercial development.
4	80	Surface level car park bounding Smithfield Street.	26 Apartments	The limited amount of recent apartment development in Lisburn city centre may point to a potential lack of demand. There is uncertainty around the timing of any potential disposal. Turley question whether the proposed 26 units will be delivered during the Plan period.	Car Park is not identified as a Development Opportunity Site. The 'Projects Framework: Public Realm Enhancement' states that the car park use should be retained most of the time.	Site 2B & 2C. 2B identified for Retail and Residential development. Approximate Number of Dwellings - 4; 2C identified for Retail and Residential development. Approximate Number of Dwellings - 12.
5	82	Surface level car park at Barrack Street.	8 Townhouses	The scale of the development suggests it may be deliverable within the Plan period.	Site E19. Identified for residential development.	Site not identified.
6	84	Units fronting Bachelors walk with rear car park bounding McKeown St.	21 Apartments	Given the lack of recent apartment development in Lisburn city centre, the potential lack of demand and the site's private ownership, Turley question whether the proposed 21 units will be delivered during the Plan period.	Site B5. Identified for mixed use development including retail.	Identified as an extension to the existing car park.
7	85	Graham Gardens	45 Apartments	Given the lack of recent apartment development in Lisburn city centre, the potential lack of demand and the site's private ownership, Turley question whether the proposed 45 units will be delivered during the Plan period.	Site B6. Identified for refurbishment of vacant sites and poor quality buildings, potential for residential or mixed use development.	Identified as part of Sites 8B and 8C. The sites are identified for retail development.

8	87	115	Antrim Rd surface level car park	45 Apartments	Given the lack of recent apartment development in Lisburn city centre, the potential lack of demand and the site's private ownership, Turley question whether the proposed 45 units will be delivered during the Plan period.	Site A2. Identified as having potential to form part of Bow Street Mall site or stand alone mixed-use development / extension of existing mall.	Identified as Sites 1A & 1B. Site 1A identified for Retail & Car parking, Site 1B identified for retail
9	88	116	Site north of 42 Castle Street	24 Apartments	Given the lack of recent apartment development in Lisburn city centre, the potential lack of demand and the site's private ownership, Turley question whether the proposed 24 units will be delivered during the Plan period.	Site 13. Identified as a small infill site needed to repair dereliction and townscape. No use identified.	Identified within the wider 7C area. Approximate Number of Dwellings - 21
10	109	0	Sloan Street	21 Apartments	Planning application LA05/2017/0537/F for the demolition of existing buildings and erection of 21 new affordable apartments and associated car parking is currently PENDING. DFI Roads are currently objecting to the planning application due to the lack of car parking spaces proposed and this may impact on the ability to deliver the suggested 21 no. units	Site D18. Identified for residential development	Within the wider Site 4C. Identified as Commercial, Residential and Multi-Storey Car Park development. Approximate number of dwellings - 55
11	110	0	Vacant units fronting Market Square and rear at Wardsborough Road	28 Apartments	Planning Application LA05/2017/0907/F GRANTED planning permission for Demolition of The Fire Place showrooms & associated workshops Demolition of the corrugated iron hall, the rear return of 23 Railway Street & partial demolition of the rear return of 25-27 Railway St. Partial demolition of the existing Smyth Patterson Department Store. Construction of 28 two-bed apartments for social housing. Alterations to existing three storey elevation to create new frontage & internal alterations to the first floor of the Smyth Patterson Department Store & two new storage buildings. Amalgamation of 23-27 Railway St into one retail unit, changes to elevation & alterations to shop front. Associated access, parking & servicing arrangements (Amended Proposal).	Within Area B but not identified as a Development Opportunity Site.	Not identified
12	111	0	Site at Graham Gardens adjacent to new housing scheme.	6 apartments	The scale of the development may be deliverable within the Plan period.	Within Area B but not identified as a Development Opportunity Site.	Not identified
13	112	0	Small infill site on Antrim Street opposite Jordan's Mill	3 apartments	The scale of the development may be deliverable within the Plan period.	Site A2. Identified as having potential to form part of Bow Street Mall site or stand alone mixed use development/extension of existing mall.	Not identified

14	116	0	Bow Lane, car park to the rear of bank	8 apartments	The scale of the development may be deliverable within the Plan period.	Site A2. Identified as having potential to form part of Bow Street Mall site or stand alone mixed use development / extension of existing mall.	Not identified
15	118	0	Site on Bridge Street adjacent to Health Centre Car Park	6 apartments	Planning application 5/2014/0797/F GRANTED permission for Demolition of existing buildings and construction of a new mixed-use development incorporating 3 No Retail Units and 6 No Apartments	Site D16. Identified for reuse of all or part of building as flexible workspace for small businesses and co-working with associated supporting facilities. Potential longer term redevelopment of site for mixed-use development.	Within Sites 6E. Site identified for Retail and Commercial use. Approximate Number of Dwellings - 55 (counted previously above)

**Lisburn**

Unique ID	Source ID	Address	Yield	Comment by Turley	
16	29	54	111 Mountview Dr, Lisburn BT27 4JL	13 Semi-detached	Site is undesignated public open space but is afforded protection under PPS 8 Policy OS 1 Protection of Open Space and draft LDP Policy OS1 Protection of Open Space. Turley question whether this site should have been identified as a potential residential development site.
17	36	64	146 Hillsborough Old Rd, Lisburn BT27	7 detached	The location and scale of the development should be deliverable within the Plan period.
18	47	75	10 Manor Dr, Lisburn BT28 1JH	21 apartments	Site is designated as a Local Landscape Policy Area (LC47) and a future planning application would currently be assessed against Policy ENV 1 Local Landscape Policy Areas. The site is undesignated public open space but is afforded protection under PPS 8 Policy OS 1 Protection of Open Space and draft LDP Policy OS1 Protection of Open Space. Given the existing planting on the site and the proximity to a designated archaeological site Turley question whether this site should have been identified as a potential residential development site.
19	48	76	20 Ballinderry Rd, Lisburn BT28 1UF	30 Townhouses	Site is designated as a Site of Local Nature Conservation Importance (LC20/06) and a future planning application would be assessed against PPS 2 Natural Heritage Policy NH 4 - Sites of Nature Conservation Importance and draft LDP Policy NH4 Sites of Nature Conservation Importance - Local. The site is undesignated public open space but is afforded protection under PPS 8 Policy OS 1 Protection of Open Space and draft LDP Policy OS1 Protection of Open Space. Given the existing planting on the site Turley question whether this site should have been identified as a potential residential development site.

20	49	77	Land at Moira Road	13 Townhouses	The location and scale of the development should be deliverable within the Plan period
21	91	57	69 Richmond Ct, Lisburn BT27 4QX	12 Semi-detached	Site is undesignated wooded open space but is afforded protection under PPS 8 Policy OS 1 Protection of Open Space and draft LDP Policy OS1 Protection of Open Space. Turley question whether this site should have been identified as a potential residential development site.
22	138	105	56 Saintfield Rd, Lisburn BT27 5BE	13 Detached	Planning application LA05/2015/0559/F GRANTED permission for the Erection of 3 No. detached and 4 No. pairs of semi-detached dwellings with single storey garages, car parking, landscaping, associated site works and access arrangements from Ballynahinch Road, Lisburn ( 11 No. residential units in total ) (omended address). Turley note that planning permission has been granted for 11 no. units rather than the 13 no. units identified by the Urban Capacity Study
23	204	NA	Between Belmont Drive & Haddingtonhill Derrigahy Rd	7 Semi-detached	Planning application LA05/2018/1102/F for Proposed construction of 8 no dwellings 6no garages with associated parking and landscaping (Additional information received) is currently PENDING. The location and scale of the development should be deliverable within the Plan period.
24	205	NA	Former Filling Station adj 151 Moira Road	10 Townhouses	The site's historic use as a petrol filling station may have caused localised ground contamination that may have implications for the redevelopment of site. The southern part of the site is within the floodplain and this may reduce the size of the developable area and the aspiration to deliver 10 no. townhouses.
25	206	NA	134 Causeway End Road	25 Semi-Detached	Site is undesignated wooded open space but is afforded protection under PPS 8 Policy OS 1 Protection of Open Space and draft LDP Policy OS1 Protection of Open Space. Turley question whether this site should have been identified as a potential residential development site.



26	208	NA	Adj to Dobbies Garden Centre Saintfield Road	29 Apartments	Planning application LA05/2015/0466/F for the Demolition of residential premises and the erection of 26 nr semi-detached dwellings and 1 nr detached dwelling (27 nr dwellings in total) site access works, development roads, associated site works and landscaping was REFUSED. The decision has been appealed to the Planning Appeals Commission. Turley note that permission is sought for 27 no. houses across the wider site rather than the 20 no. houses and 29 no. apartments identified by LCCC.
27	226	NA	Adj to Dobbies Garden Centre Saintfield Road	20 Semi-detached	Planning application LA05/2015/0466/F for the Demolition of residential premises and the erection of 26 nr semi-detached dwellings and 1 nr detached dwelling (27 nr dwellings in total) site access works, development roads, associated site works and landscaping was REFUSED. The decision has been appealed to the Planning Appeals Commission. Turley note that permission is sought for 27 no. houses across the wider site rather than the 20 no. houses and 29 no. apartments identified by LCCC.

Moira					
Unique ID	Source ID	Address	Yield	Comment by Turley	
28	1	20 Meeting Street, Moira, Craigavon, BT67	24 Semi-detached	The location and scale of the development should be deliverable within the Plan period.	
Hillsborough					
Unique ID	Source ID	Address	Yield	Comment by Turley	
29	7	Blundell Hill, Hillsborough, BT26 6LD	15 detached	The location and scale of the development should be deliverable within the Plan period. However, the proposed yield may be high given character of surrounding area.	
30	120	62 Lisburn St, Hillsborough, BT26 6LL	13 Townhouses	Planning application LA05/2017/0218/O GRANTED planning permission for Proposed demolition of existing two storey detached dwelling and erection of thirteen dwellings and associated site works	
Corryduff					
Unique ID	Source ID	Address	Yield	Comment by Turley	
31	11	6 Lough Brin Park, Corryduff, BT8 8PL	11 Semi-detached	Site is undesignated public open space but is afforded protection under PPS 8 Policy OS 1 Protection of Open Space and draft LDP Policy OS1 Protection of Open Space. Turley question whether this site should have been identified as a potential residential development site.	

32	123	19	610 Saintfield Road, Carryduff, BT8 8BL	16 Townhouses	Site is designated as a Local Landscape Policy Area (CF14) and a future planning application would currently be assessed against Policy ENV 1 Local Landscape Policy Areas. Turley question whether this site should have been identified as a potential residential development site. The site is in joint public and private ownership and this may impact on its deliverability. It is also unclear how the site could be safely accessed. Saintfield Road is a 'Protected Route' and a future planning application would be assessed against PPS 3 Access Movement & Parking Policy AMP 3: Access to Protected Routes and draft LDP Policy TRA3 Access.
33	124	20	634 Saintfield Road, Carryduff, BT8 8BT	13 Townhouses	Site is designated as a Local Landscape Policy Area (CF14) and a future planning application would currently be assessed against Policy ENV 1 Local Landscape Policy Areas. Turley question whether this site should have been identified as a potential residential development site. The site is in joint public and private ownership and this may impact on its deliverability. It is also unclear how the site could be safely accessed. Saintfield Road is a 'Protected Route' and a future planning application would be assessed against PPS 3 Access Movement & Parking Policy AMP 3: Access to Protected Routes and draft LDP Policy TRA3 Access.
34	126	24	646-644 Saintfield Road, Carryduff, BT8	11 Semi-detached	Site is designated as a Local Landscape Policy Area (CF14) and a future planning application would currently be assessed against Policy ENV 1 Local Landscape Policy Areas. Turley question whether this site should have been identified as a potential residential development site. The Carryduff River runs through the site and this may have implications for the site's development. It is also unclear how the site could be safely accessed. Saintfield Road is a 'Protected Route' and a future planning application would be assessed against PPS 3 Access Movement & Parking Policy AMP 3: Access to Protected Routes and draft LDP Policy TRA3 Access.
35	128	34	53 Alveston Park, Carryduff, BT8 8RP	9 Semi-detached	It is unclear how the site can be accessed. Saintfield Road is a 'Protected Route' and a future planning application would be assessed against PPS 3 Access Movement & Parking Policy AMP 3: Access to Protected Routes and draft LDP Policy TRA3 Access to Protected Routes.

36	209	NA	Adj junction of Mealough and Saintfield	38 Detached	It is unclear how the site can be accessed. Saintfield Road is a 'Protected Route' and a future planning application would be assessed against PPS 3 Access Movement & Parking Policy AMP 3: Access to Protected Routes and draft LDP Policy TRA3 Access. It is also unclear how the site could be safely accessed. Saintfield Road is a 'Protected Route' and a future planning application would be assessed against PPS 3 Access Movement & Parking Policy AMP 3: Access to Protected Routes and draft LDP Policy TRA3 Access.
37	210	NA	Adj to 615 Saintfield Road	22 Detached	It is unclear how the site can be accessed. Saintfield Road is a 'Protected Route' and a future planning application would be assessed against PPS 3 Access Movement & Parking Policy AMP 3: Access to Protected Routes and draft LDP Policy TRA3 Access to Protected Routes. Turley note that DFI Roads currently considers planning application LA05/2018/1069/F for Proposed residential development of 18 No. dwellings comprised of 16 No. semi-detached dwellings and 2 No. detached dwellings access via the approved development to the west and north from Mealough Road together with all ancillary development to be unacceptable. The southern & western sections of the site are within the floodplain. The application will be assessed against PPS 15 Planning & Flood Risk Policy FLD 1 Development in Fluvial (River) and Coastal Flood Plains and draft LDP Policy FLD1 Development in Fluvial (River) Flood Plains. The lands are under multiple private ownership and this may impact on the deliverability of the site.
38	211	NA	Land to the rear of 25 Baronscourt Road	13 Detached	Planning application LA05/2016/0504/F GRANTED planning permission for D1 community and cultural use and associated offices (Amended site address) in the southern portion of the subject lands. If implemented this permission would preclude residential development on this part of the site.
<b>Purlysburn</b>					
	<b>Unique ID</b>	<b>Source ID</b>	<b>Address</b>	<b>Yield</b>	<b>Comment by Turley</b>
39	212	NA	Rear of 279 Saintfield Road adjacent	36 Semi-detached	The lands are zoned in draft BMAP for a 'Park & Ride' car park; Planning application for the development is for a asphalt surfaced car park, which shall be an extension to the existing DFI Park and Ride site. The extension shall provide 359 additional parking spaces. The scheme shall include new concrete kerbs and boundary fencing. Additional street lighting shall be provided for the extension (additional info - Environmental Assessment Report, Transport Assessment, Drainage info, amended plan 06A and additional plan 09 is currently PENDING. If approved and implemented this application would preclude residential development at the site.

Newtownbreda					
Unique ID	Source ID	Address	Yield	Comment by Turley	
40	216	NA	Lands opposite Beechill Business Park	13 Semi-detached	The identified lands may be required for a road proposal identified in draft BMAP. A future application would be assessed against PPS 3 Policy AMP 4: Protection for New Transport Schemes and draft LDP Policy TRA4 Protection of New Transport Schemes. The lands may also be considered as 'open space' and would therefore be afforded protection by PPS 8 and draft LDP Policy OS1.
Millmount / Dundonald					
Unique ID	Source ID	Address	Yield	Comment by Turley	
41	223	NA	Rear of 25 Millar's Forge	66 Semi-detached	The extent of the Enler River's floodplain and the need to maintain a buffer for a link relief road through the site will reduce the developable area and may preclude the development of all of the 66 semi-detached houses.

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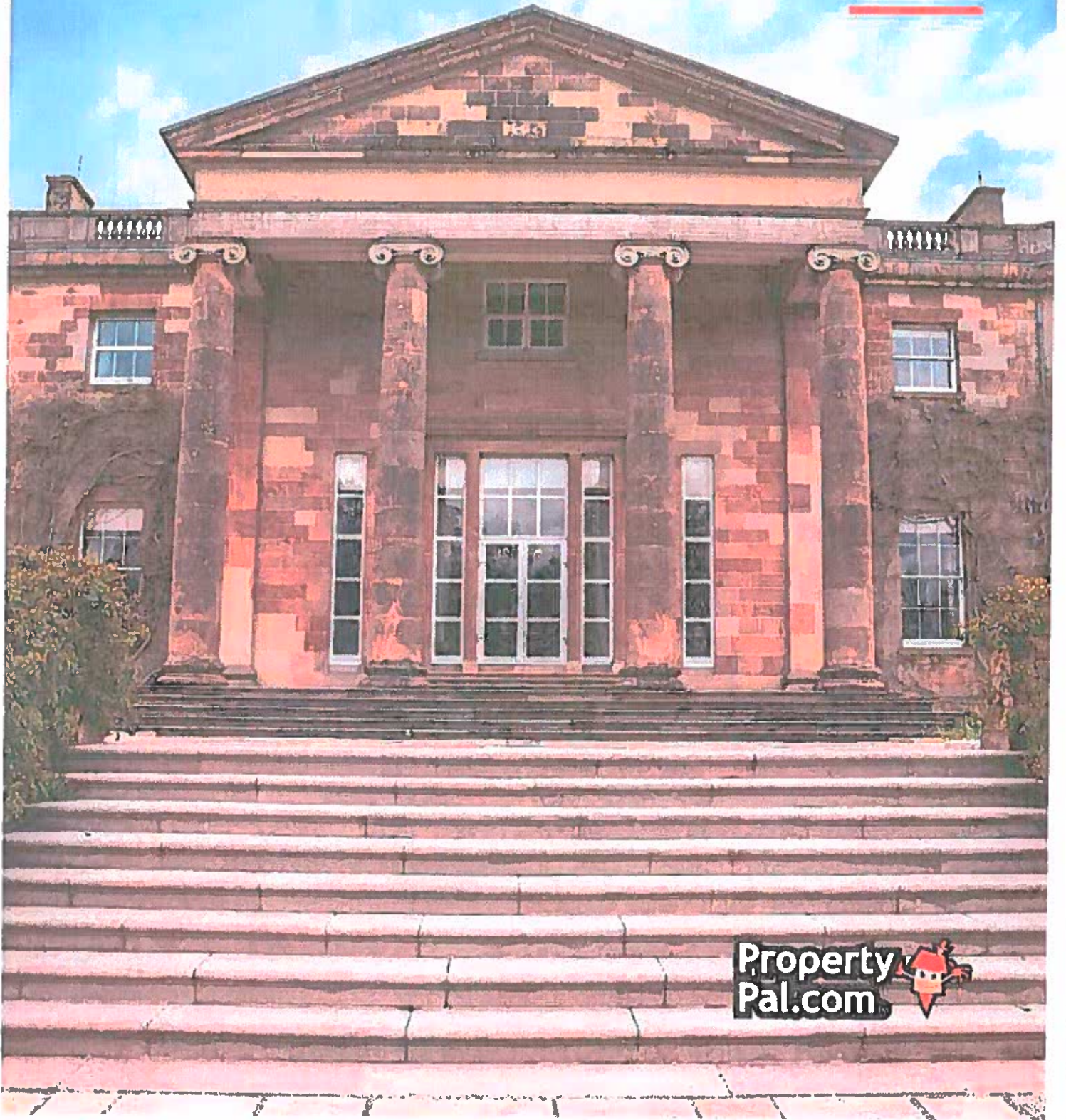
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## Appendix 4: Property Pal Analysis

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LOCAL PROPERTY REVIEW:  
Lisburn & Castlereagh

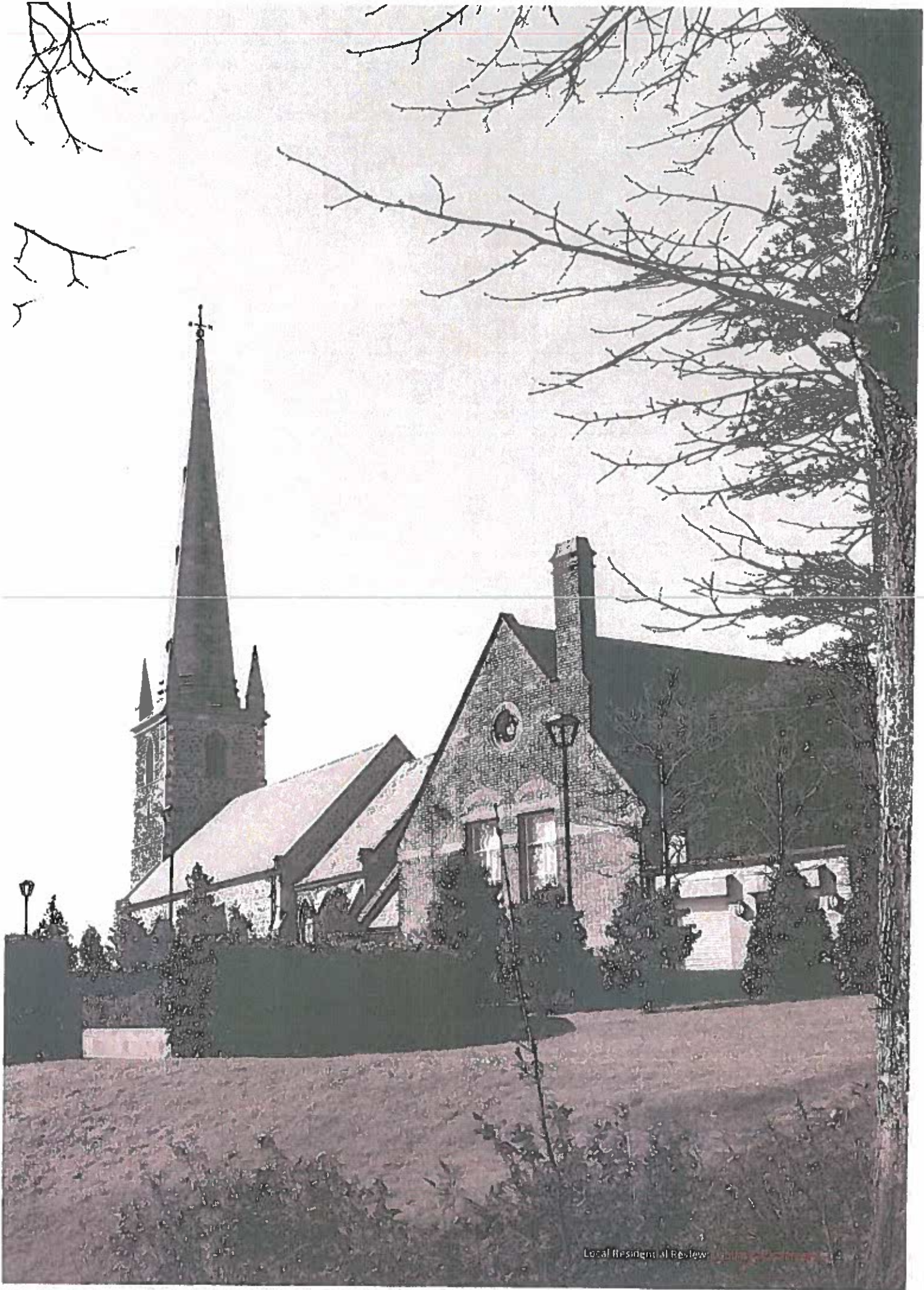


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## Introduction to PropertyPal's Local Residential Review

*PropertyPal's Local Residential Review series offers data driven economic analysis on the residential property market in Northern Ireland. At PropertyPal we recognise that buying, selling, moving or renting a home is one of the biggest decisions of a lifetime. We aim to provide informative insights on current market trends as well as providing forecasts and outlooks on the future performance of the N.Ireland residential property market.*

The official sales and house price information is a fascinating insight into local economic performance. However, one of the challenges with the N.Ireland data is the inability to understand market performance at more disaggregated geography levels, particularly as headline statistics can disguise significant underlying variations.

At PropertyPal we have been researching the housing market activity at a truly granular level. In conjunction with the N.Ireland Statistics and Research Agency, we have subdivided N.Ireland's 11 council areas into almost 500 smaller 'micro-areas', equivalent to an average of 1,700 homes per micro-area. This is then further split to include analysis by property type within each micro-area.

PropertyPal is delighted to provide a comprehensive overview of the residential property market with a truly local dimension. The report can help inform all stakeholders with an interest in the local property market including; estate agents, developers, government policy makers, property professionals, the media and the general public.

At PropertyPal we aim to give our users the best experience in their home searching journey and we hope this addition of market analysis is a useful gauge of developments in the property market.

## Number of homes sold and house prices by property type in Lisburn & Castlereagh

Number of homes sold and house prices by property type in Lisburn & Castlereagh areas 2014								
Electoral area	Q=4 (H) area	Q4, 2014 Homes sold	All houses	Flats/apts	Detached	Semi-detached	Apartment	Other
CASTLEREAGH EAST	Ballytanwood	40	£162,500	£181,200	£200,000	£149,000	£110,300	£104,400
	Carrowreagh	179	£180,000	£181,600	£200,300	£170,000	£115,000	£156,800
	Dundonald	52	£124,800	£139,200	£167,600	£130,300	£97,200	£90,200
	Enfer	30	£82,800	£92,900	£111,200	£80,800	£52,900	£83,500
	Graham's Bridge	50	£126,800	£141,400	£237,500	£125,000	£81,000	£115,000
	Moneyreagh	41	£225,000	£222,500	£248,300	£225,000	£143,800	£177,600
CASTLEREAGH SOUTH	Beechill	45	£182,000	£203,000	£305,000	£176,500	£116,300	£17,000
	Carristall	47	£190,000	£211,300	£260,000	£179,800	£121,400	£122,100
	Carryduff East	55	£174,000	£191,100	£216,500	£132,500	£111,200	£111,300
	Carryduff West	72	£159,000	£296,800	£213,000	£146,000	£101,800	£120,000
	Galwally	52	£179,000	£198,600	£238,200	£177,300	£121,800	£114,400
	Knockbrackan	45	£183,000	£200,800	£225,000	£163,300	£115,000	£115,700
	Newtownbreda	65	£115,000	£161,800	£230,000	£149,000	£115,000	£93,200
DOWNSHIRE EAST	Ballymacrosshalla	18	£109,500	£168,500	£168,000	£165,000	£108,000	£108,600
	Dromara	33	£139,000	£155,100	£192,000	£134,300	£88,800	£89,400
	Orunbo	45	£232,000	£258,800	£280,200	£226,500	£148,300	£149,100
	Hillhall	56	£201,500	£260,000	£257,500	£192,900	£128,800	£85,300
	Ravenat	29	£255,000	£284,500	£274,000	£249,000	£163,000	£168,900
DOWNSHIRE WEST	Blans	76	£135,000	£162,500	£276,600	£162,500	£79,900	£92,500
	Hillborough	43	£245,000	£316,000	£285,000	£287,900	£136,600	£177,500
	Lagan	40	£166,000	£170,000	£258,300	£161,000	£106,100	£106,700
	Meze	44	£167,000	£186,800	£213,500	£146,800	£106,700	£107,400
	Mura	67	£172,500	£176,000	£226,000	£170,000	£110,300	£134,000
HILLTUGH	Ballinderry	47	£150,000	£146,500	£190,000	£128,000	£95,900	£96,400
	Glenavy	52	£157,800	£166,300	£175,000	£134,800	£100,800	£101,400
	Maghaberry	63	£161,100	£166,000	£178,000	£140,000	£102,900	£135,900
	Stonyford	17	£147,000	£141,100	£176,900	£88,300	£94,000	£94,500
	White Mountain	105	£148,000	£170,900	£231,000	£145,000	£106,700	£147,300
LISBURN NORTH	Derrybegh	81	£150,000	£175,000	£181,000	£170,800	£92,000	£92,000
	Larnsey Hill	42	£177,000	£197,000	£125,000	£139,800	£113,100	£113,800
	Hilton	46	£81,000	£90,400	£108,000	£79,100	£65,000	£85,000
	Lambeg	70	£110,000	£130,000	£117,300	£127,000	£70,300	£95,800
	Magheravea	75	£167,600	£172,000	£185,900	£167,500	£107,100	£152,500
	Wallace Park	33	£205,000	£228,700	£270,000	£179,600	£131,000	£191,800
LISBURN SOUTH	Ballymacash	31	£182,500	£181,300	£178,500	£125,000	£109,900	£104,500
	Ballymacross	96	£127,300	£142,000	£171,100	£124,300	£81,400	£81,800
	Knockmore	54	£120,000	£134,000	£175,000	£137,000	£75,000	£98,000
	Lagan Valley	30	£91,500	£102,100	£122,900	£124,500	£58,500	£65,500
	Lisnagarvey	30	£138,300	£145,300	£230,700	£125,000	£83,200	£83,700
	Old Warren	33	£85,000	£94,800	£114,100	£113,300	£54,900	£78,200
<b>LISBURN &amp; CASTLEREAGH</b>			<b>£164,800</b>	<b>£192,700</b>	<b>£211,000</b>	<b>£134,000</b>	<b>£100,800</b>	<b>£105,000</b>

Source: Property4.ie





# Overview of Lisburn & Castlereagh's housing market performance

The property market continues to recover in both prices and the number of homes being sold. House prices have grown for 6 consecutive years with typical homes in Lisburn & Castlereagh (LCC) experiencing similar rates of growth in prices compared to the wider N.Ireland economy.

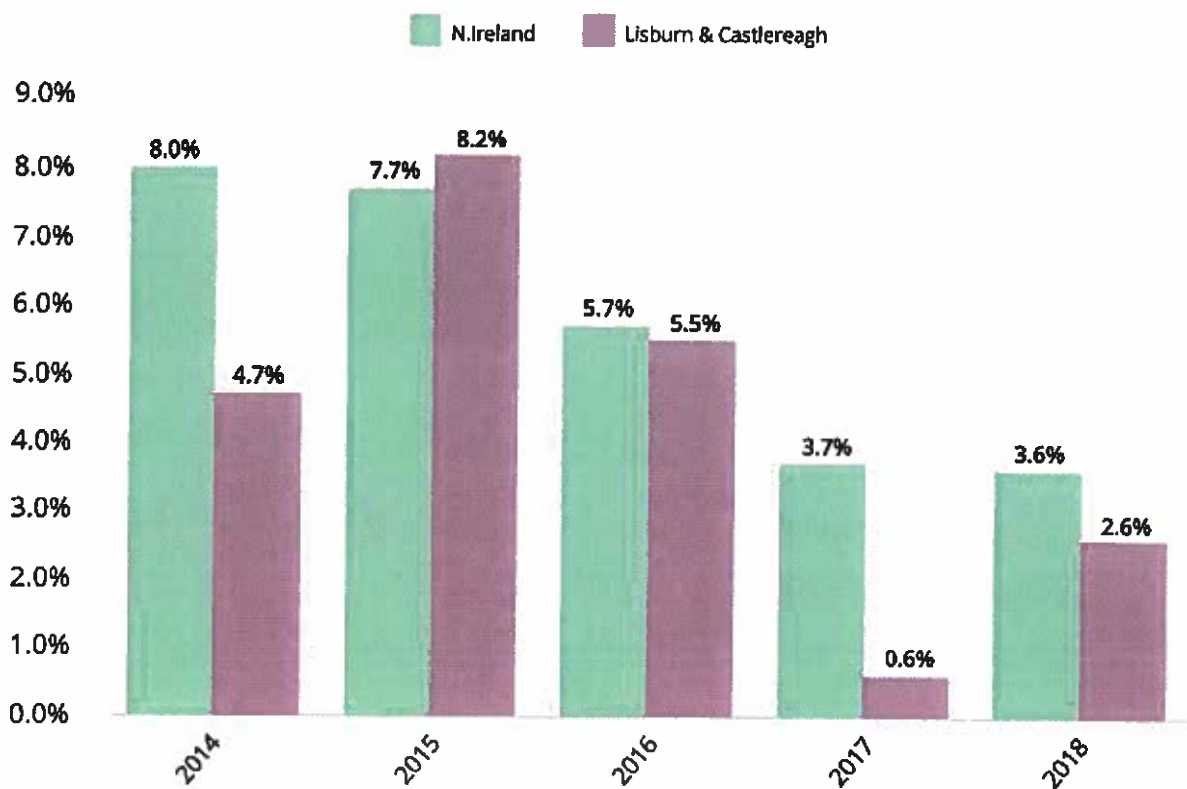
During the period 2013-2016 house prices in LCC appreciated by over 6% each year on average, reflecting the return of confidence in the housing market following a long period of price contraction in the aftermath of the credit crisis in 2007-08. Over the last few years house prices have

moderated to a more sustainable 1.8% annual growth and closer aligned to wages which has helped support affordability pressures in the area.

To date, the median house price in LCC stands at approximately £158,000, the most expensive council area across all of N.Ireland. Despite recent appreciation, house prices remain 31% below peak levels in 2007 when typical prices were £230,000.

In total, house prices in LCC have increased in value by over £30,000 since low points in 2013, equivalent to 23% cumulative growth.

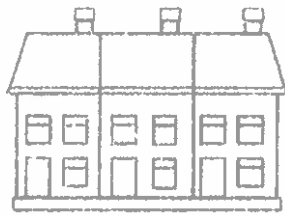
Figure 1: House price growth in Lisburn & Castlereagh vs. N. Ireland; 2014-2018



Source: PropertyPal, NISRA  
Note: Using median property prices

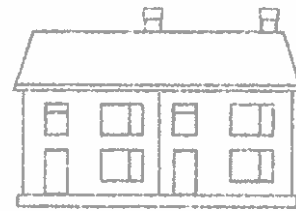
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**House prices have increased/remained stable across all home types compared to last year with the exception of detached properties**



**TERRACE HOMES**

increased by  
**5.0%** to **£105,000**,  
an increase in value of  
**£5,000**



**SEMI-DETACHED HOMES**

increased by  
**2.7%** to **£154,000**,  
an increase in value of  
**£4,000**



**APARTMENTS**

**remained stable**  
with growth of **0.0%**  
and typical prices of **£100,000**



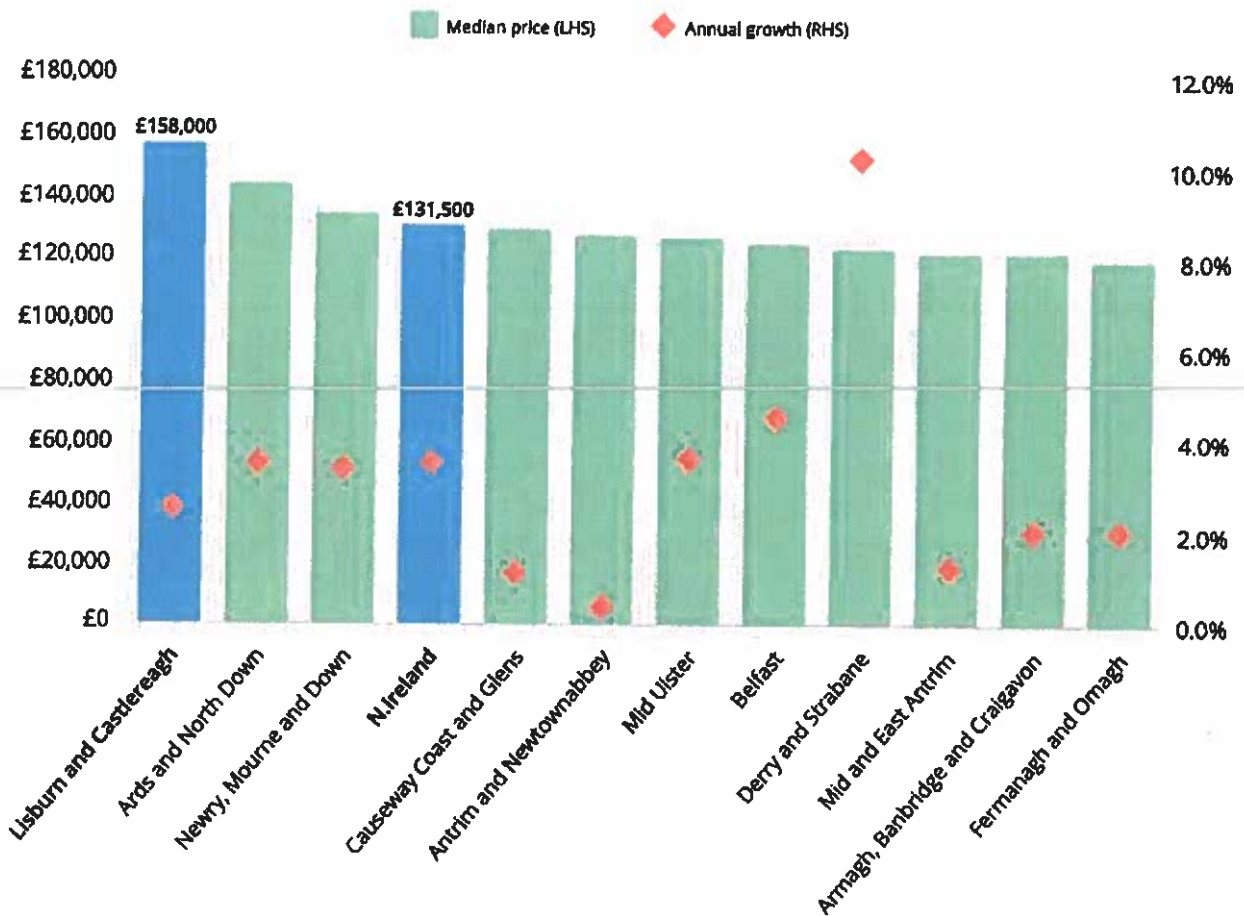
**DETACHED HOMES**

increased by  
**-0.6%** to **£211,200**,  
an increase in value of  
**£1,300**



Source: PropertyPal, NISRA

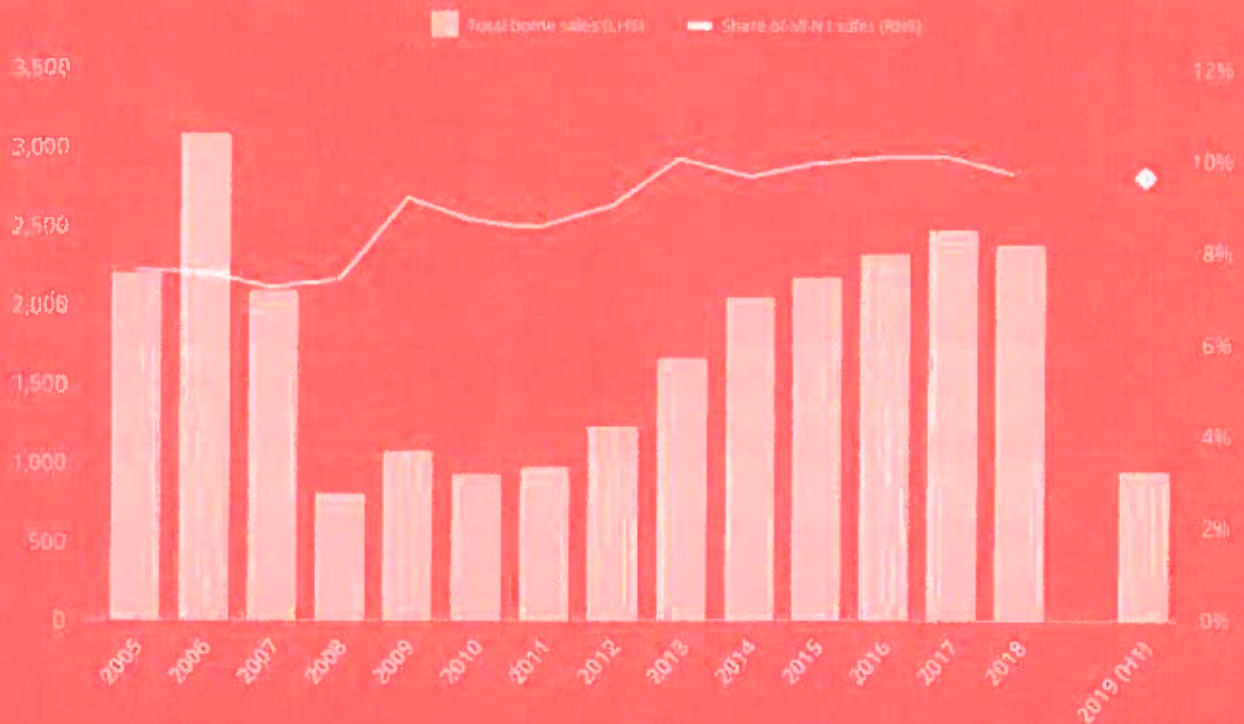
**Figure 2: House prices across N. Ireland council areas; 2018**



Source: PropertyPal, NISRA, LPS  
 Note: Based on median property prices.



Figure 3: Home sales in Lisburn & Castlereagh: 2005-2019



Source: NIA, LCC, HousingMarket.ie

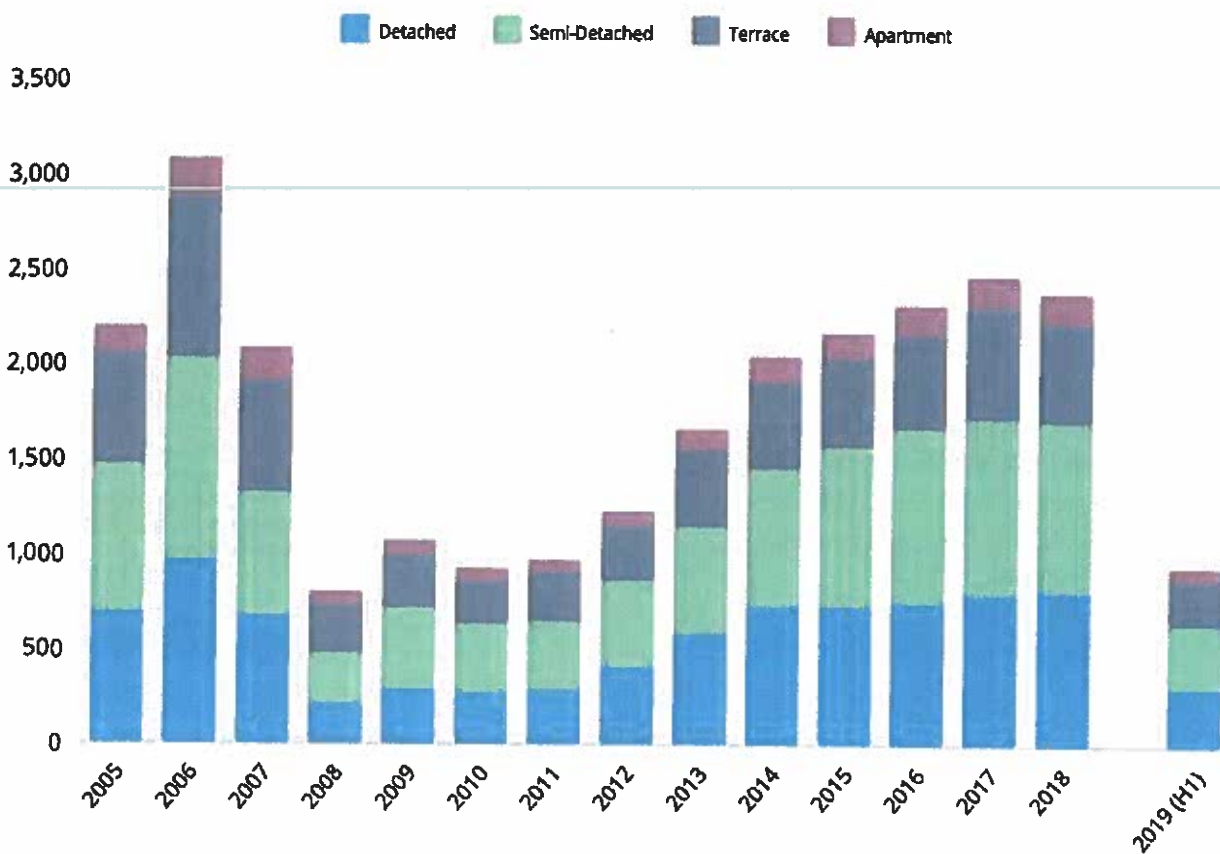
Home sales in LCC have accounted for 7-10% of all homes sales in N.Ireland over the last 15 years. During the boom era in the mid 2000's there were almost 3,100 recorded home sales in LCC in a single year. This was followed by 4-year period of depressed activity with an average of fewer than 1,000 recorded sales each year.

Since 2014, the property market has been in recovery mode with approximately 2,300 homes sold each year in LCC, equivalent to a sustainable halfway point between pre recessionary highs and post recessionary lows.

In first half of 2019 there have been approximately 950 homes sold in Lisburn & Castlereagh, equivalent to 10% of all sales across N.Ireland and broadly matching the upper end of recent trends over the previous 5 years.

Semi-detached properties are the most popular style of home, accounting for 38% of all homes sold whilst detached properties are slightly lower (34%). Terrace properties share of total sales has fallen from 27% in 2005 to 22% in 2018 and apartments are consistently the least popular choice making up fewer than 1 in every 10 homes sold.

**Figure 4: Home sales in Lisburn & Castlereagh by type of home; 2005-2019**



Source: NISRA, LPS, PropertyPal analysis



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## Analysis by micro-area in Lisburn & Castlereagh

Council level trends are useful to give a barometer of local housing market activity. However, there are approximately 60,000 homes across the whole LCC boundary. As such, there can be significant variation in home prices within more specific areas. Furthermore, in absence of more granular information there is a gap in understanding which areas within councils are most popular for home purchase and underlying trends in price movements by different property types.

At PropertyPal we have analysed the underlying performance at the more disaggregated geographical range. In total, LCC has been split into 40 micro-areas, each with an average of approximately 1,500 homes. Each micro-area is then subdivided into property types to

enable further understanding of the most in demand areas for both home purchase and price movements of different property styles. All analysis of house price data used within this report is based on **median prices**.

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*In 2018 typical property prices in LCC were £158,000. However, house prices ranged from £81,000 in the most affordable area to £255,000 in the most expensive.*

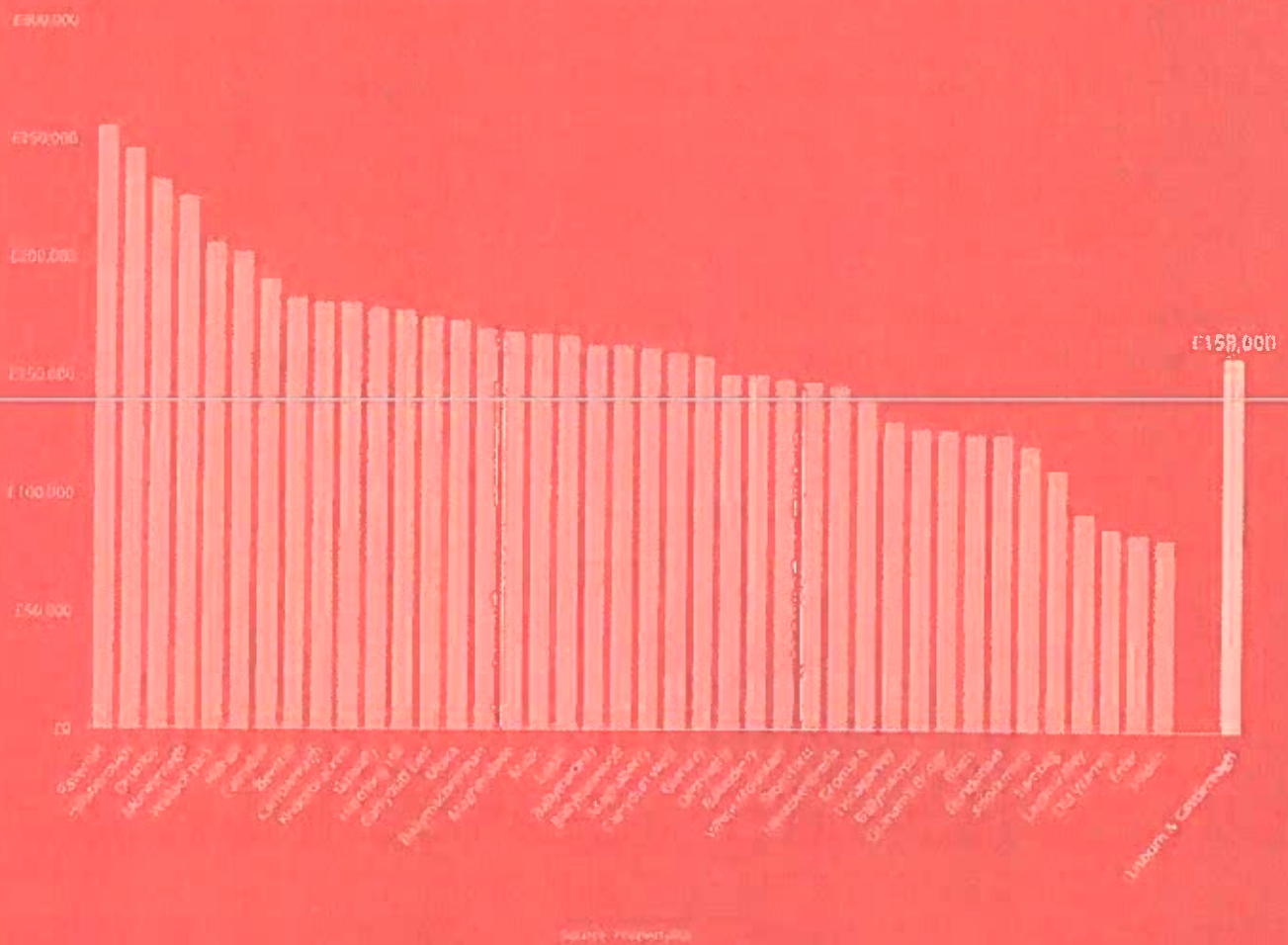
In 2018 typical property prices in LCC were £158,000. However, house prices ranged from £81,000 in the most affordable area to £255,000 in the most expensive, reflecting the underlying differences within the wider council boundary.

[Methodology: The micro-areas are not mix adjusted but use annual transactional data from Land Registry to better reflect the actual mix of properties sold. This is particularly useful when identifying the change in prices for properties sold in a given period and area but is not designed to represent the overall dwelling stock. The micro-areas report median price paid and the methodology is in line with that used for the Office for National Statistics for reporting on small area house prices. Full methodology is available on [propertypal.com/insights](http://propertypal.com/insights)]

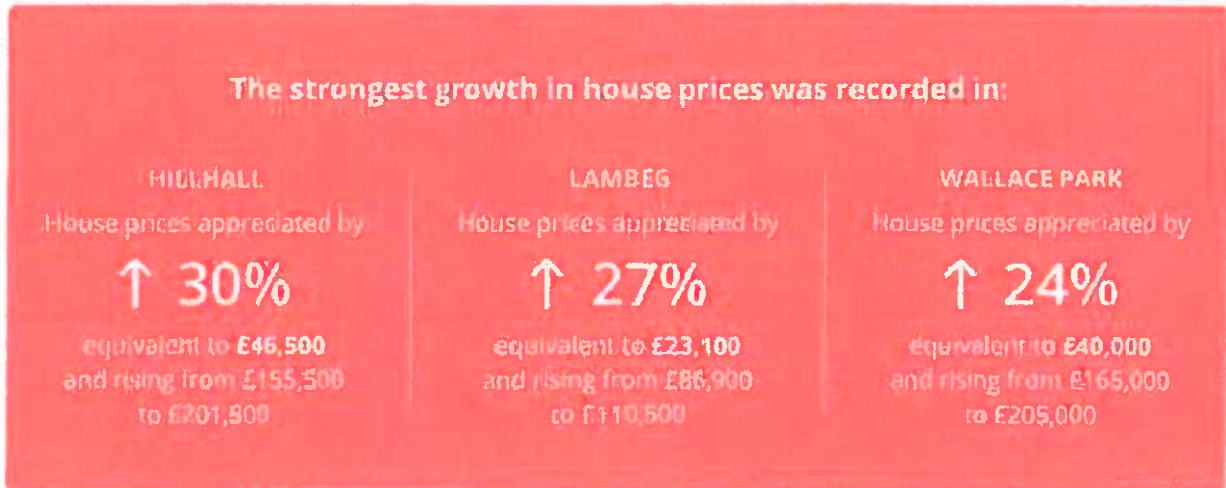
The three most expensive micro-areas were:



Figure 5: House prices by micro-area in Lishburn & Castlereagh

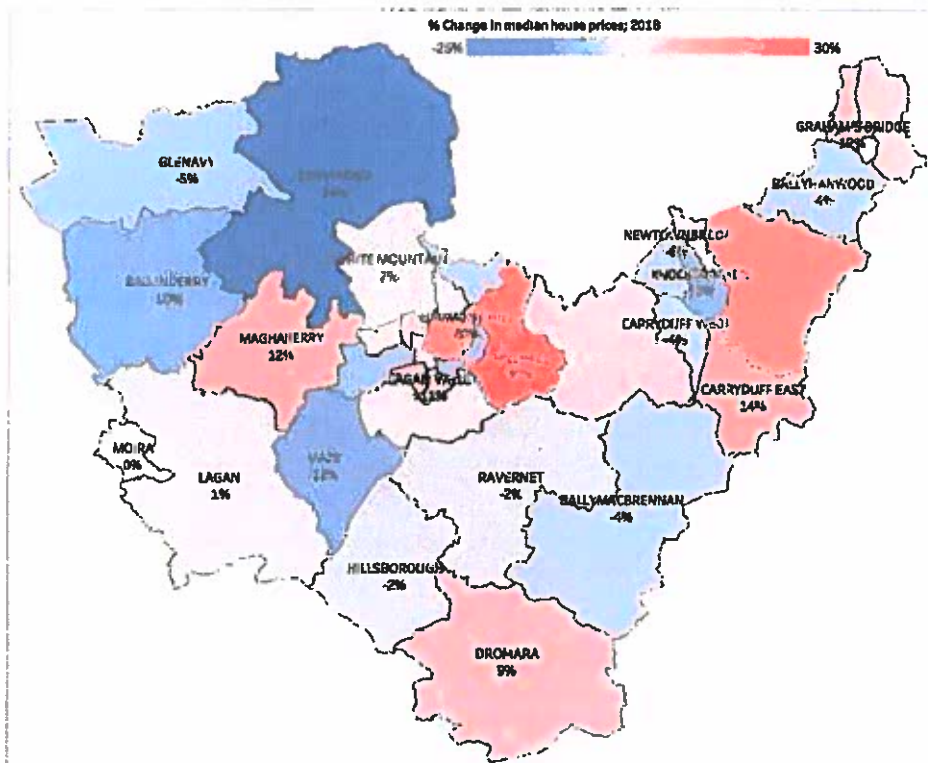


Of the 40 recorded micro-areas in LCC, 23 experienced growth in house prices over the last year, with 10 areas showing double digit levels of growth.



The 7 other micro-areas experiencing double digit levels of house price growth included; Moneyreagh, Harmony Hill, East Carryduff, Old Warren, Maghaberry, Graham's Bridge and Lagan Valley. In contrast, house prices fell at the fastest rate in Stonyford (-24%), Maze (-12%) and Ballinderry (-10%).

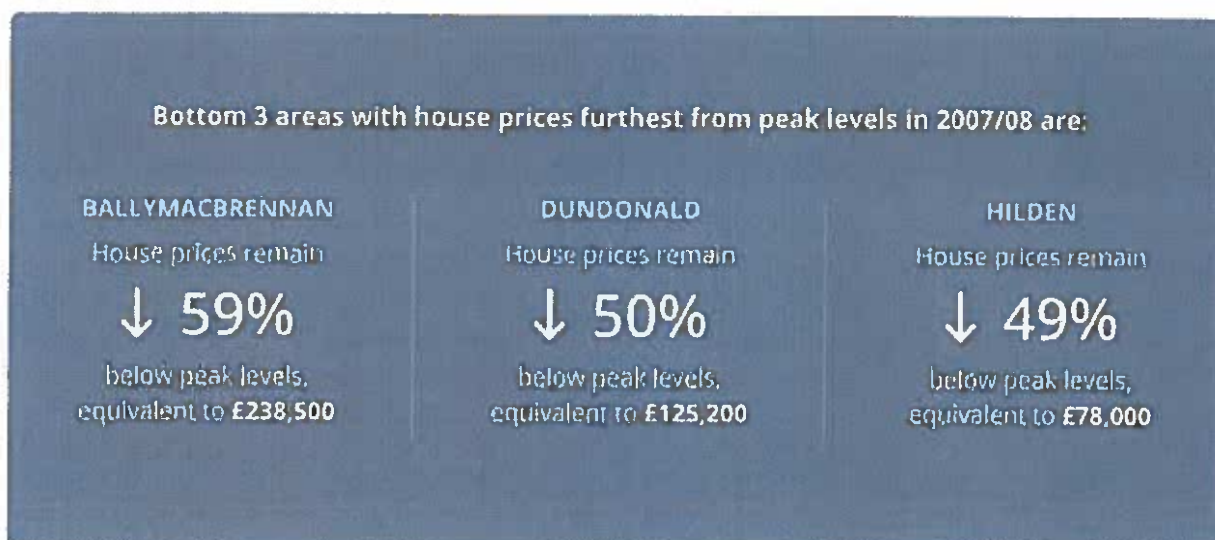
**Figure 6: House price growth by micro-area in Lisburn & Castlereagh; 2018**



Source: PropertyPal

Compared to peak levels in 2007, median house prices across all of N.Ireland remain approximately 29% below peak and equivalent levels in LCC.

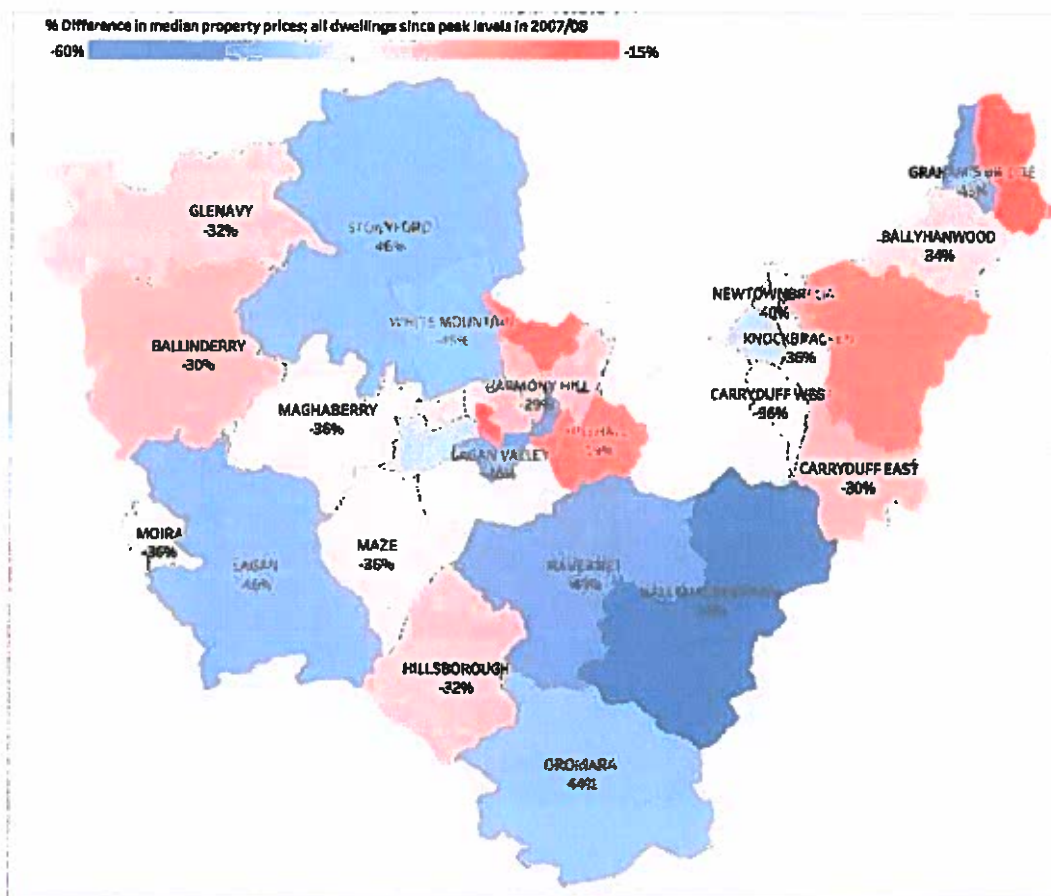
Given the nature of the property crash in 2007/08, all micro-areas with the exception of one in Mid & East Antrim has property prices lower than peak levels. As such, it is most likely that any homebuyer in mid-2007 period is likely to be in negative equity. Across all of LCC, house prices have recovered the most value in Carrowreagh whereas they remain most negatively impacted in the Ballymacbrennan area.



Source: PropertyPal



Figure 7: % change in house prices since peak levels before financial crash; 2007/08-2018



Source: PropertyPal

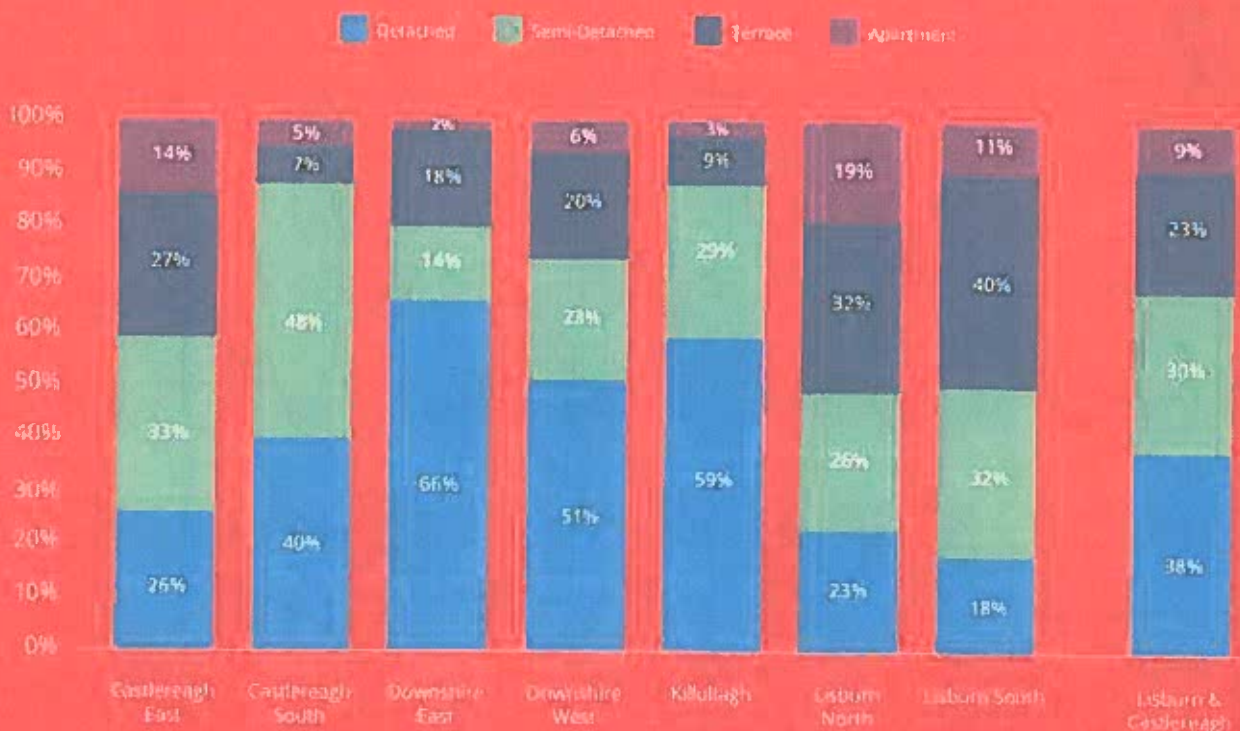
## House prices by property type

The micro-areas can be aggregated to match the wider Electoral Area (EA) boundaries to enable comparisons by type of home within the overall council boundary. Each EA is comprised of approximately 5 micro-areas with an average total of 8,500 homes.

Areas which are comprised of a higher proportion of detached homes tend to have higher property prices compared to areas with a larger makeup of terrace/properties or apartments.

From a household structural perspective, the Downshire East EA is comprised of 66% detached homes, whilst semi-detached are most common in the South Castlereagh EA (48%). South Lisburn EA has the highest proportion of terrace homes (40%) and the largest share of apartments are in the North Lisburn (19%).

Figure 8: Breakdown of electoral areas in Lisburn & Castlereagh by property type: 2018



Source: Lisburn & Castlereagh Council, 2018, Property Statistics

### DETACHED HOMES

Detached homes range in price from £255,500 in the South Castlereagh EA, to £165,000 in South Lisburn EA. However, of all micro-areas, detached properties are the most expensive in Knockbracken (£325,000) and most affordable in Hilden (£108,800).

### SEMI-DETACHED HOMES

Semi-detached homes range from £194,000 in the East Downshire EA to £125,000 in South Lisburn EA. However, of all micro-areas, semi-detached properties are the most expensive in Hillsborough (£287,900) and most affordable in Hilden (£79,100).

### TERRACE PROPERTIES

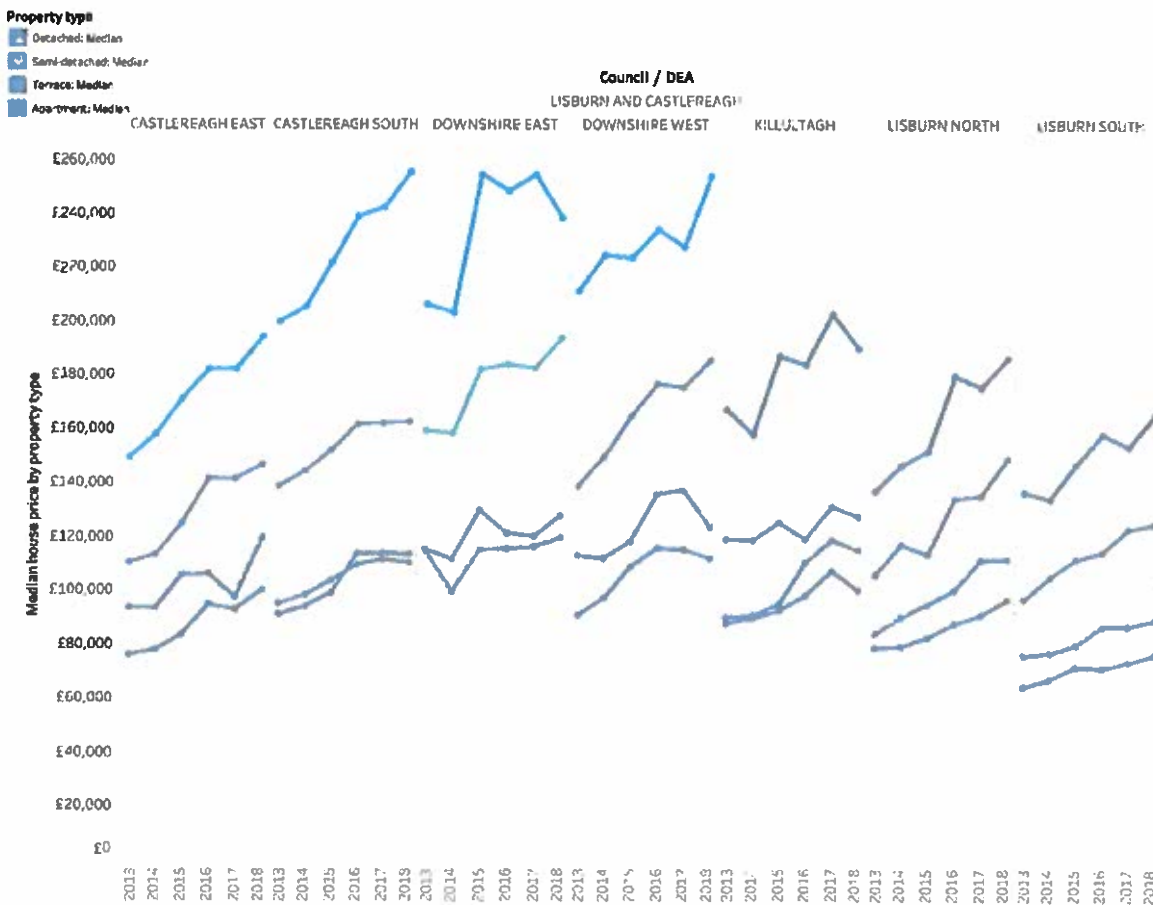
Terrace properties range from £123,000 in the West Downshire EA to £89,000 in South Lisburn EA. However, of all micro-areas, terrace properties are the most expensive in Moneyreagh (£177,600) and most affordable in Old Warren (£78,200).

### APARTMENTS

Apartments range from £127,000 in the East Downshire EA to £76,000 in South Lisburn EA. However, of all micro-areas, apartments are the most expensive in Raveret (£163,000) and most affordable in Enier (£52,900).

(note: the full breakdown of house prices by type of home, across all micro-areas is provided in the table overview at the beginning of the report).

**Figure 9: House prices by property type in Lisburn & Castlereagh electoral areas; 2013-2018**



Source: PropertyPal

## New build properties

There were approximately 4,000 new build properties sold in N.Ireland last year with an estimated median price of approximately £160,000.

New build sales as a proportion of all home sales has remained fairly stable over the last decade, typically accounting for 15-20% of all homes sold.

*Prices for a new build property ranged from £316,400 in Hillsborough, to £90,400 in Hilden.*

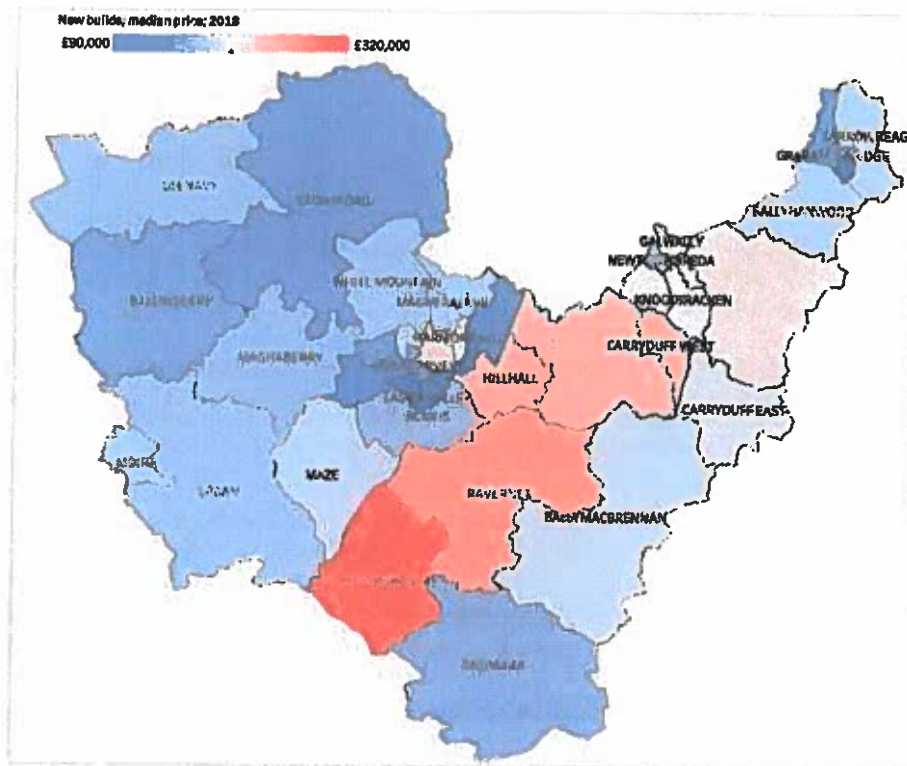
property ranged from £316,400 in Hillsborough, to £90,400 in Hilden.

The most expensive new build properties tend to have been developed in Central LCC areas including Hillsborough, Ravernet, West Carryduff and Hillhall.

In 2018 the median price of a new build property in LCC was approximately £172,700, almost 8% more expensive than the national selling point. However, the headline estimate disguises significant underlying variation in pricing points in neighbouring areas. Prices for a new build

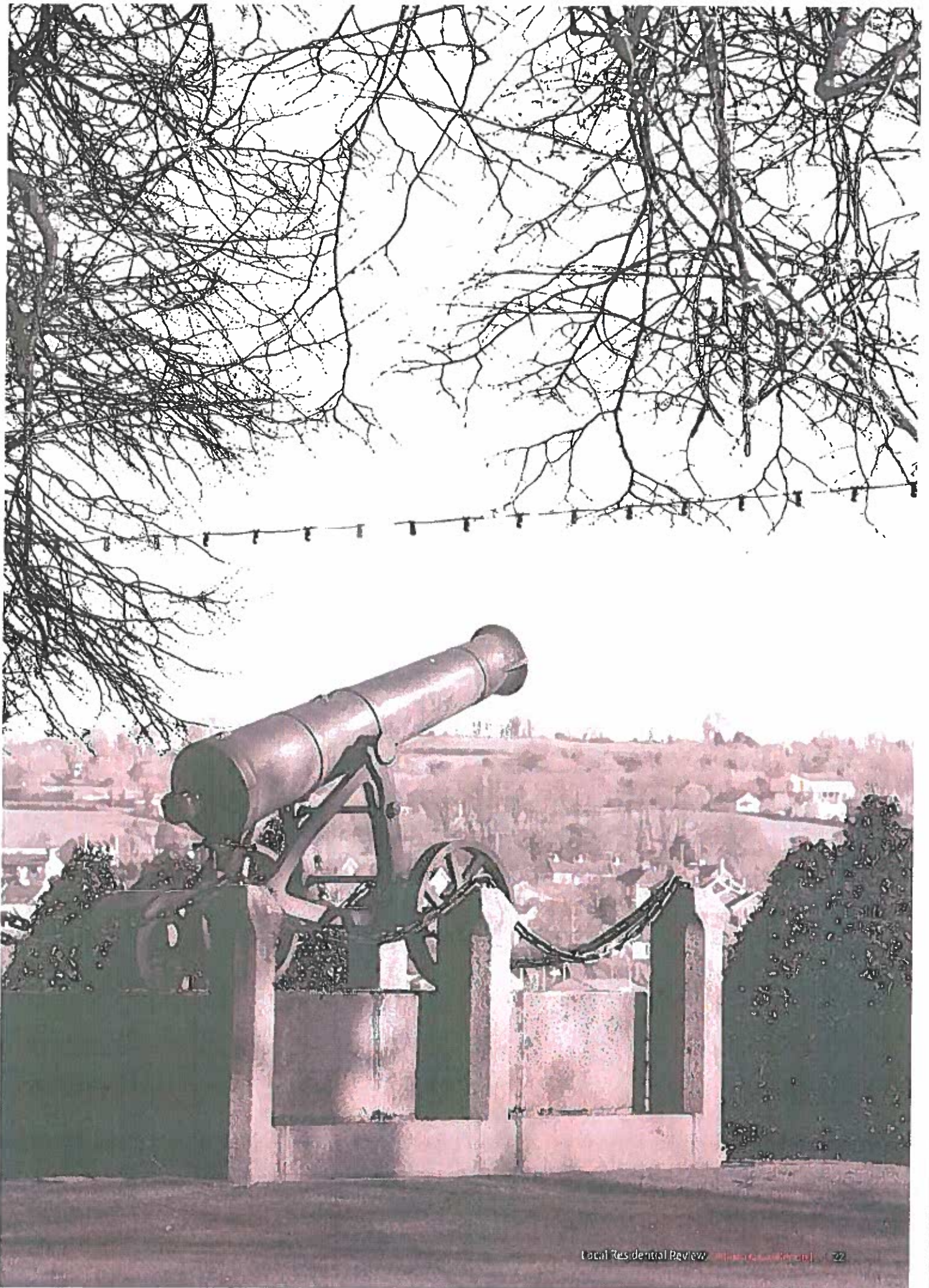
In contrast, more western micro-areas such as Ballinderry, Stonyford and Glenavy tended to experience prices for new homes significantly below the median, typically in the £140,000-£160,000 range.

**Figure 10: New build property prices in Lisburn & Castlereagh; 2018**



Source: PropertyPal







## Home sales activity in Lisburn & Castlereagh

Lisburn & Castlereagh was the 4th most popular council for home purchase in N.Ireland with approximately 2,400 properties sold last year.

### The most popular locations for home purchase:



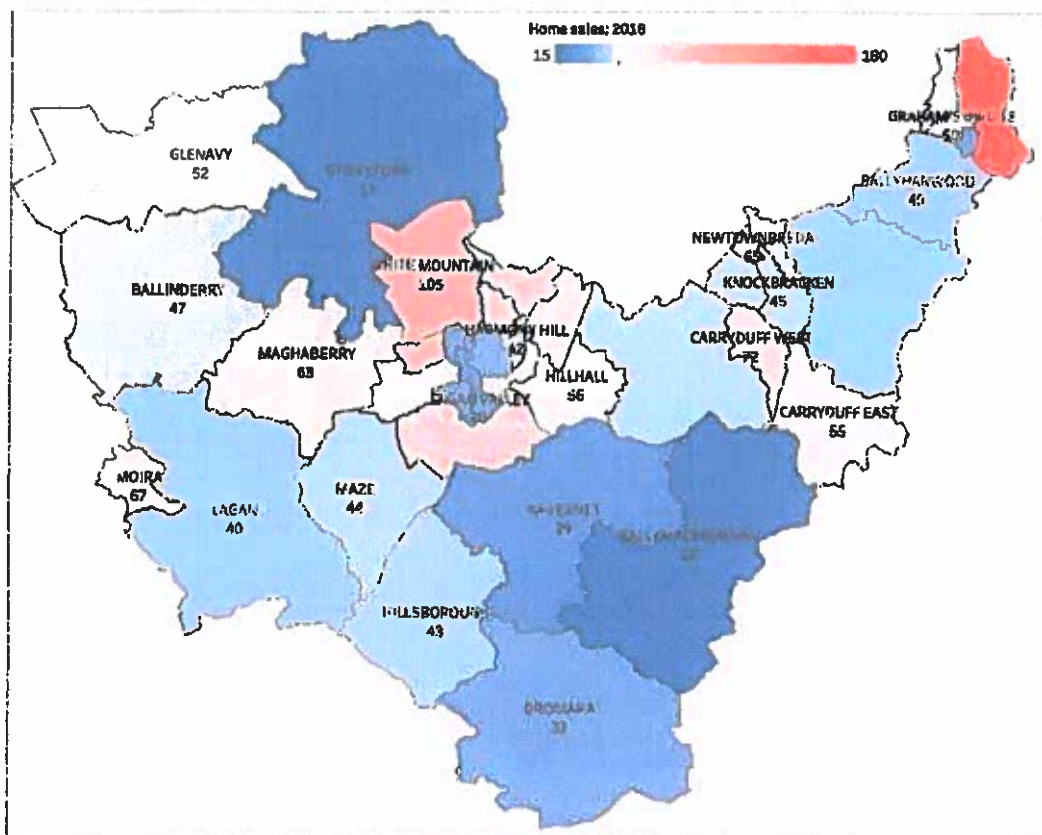
### The least popular locations for home purchase:



Source: PropertyPal, NISRA

(note; the full breakdown of sales activity, across all 40 micro-areas is provided in the overview at the beginning of the report).

**Figure 11: Home sales by micro-area in Lisburn & Castlereagh; 2018**



Source: NISRA, PropertyPal

## Hotspot analysis

Carrowreagh was the most popular area to buy a home in Lisburn & Castlereagh and across all of N.Ireland last year. Taking a longer-term view, it is the second most popular location to buy a home since 2014. Indeed, there has been approximately 160 homes sold each year, almost three times the typical micro-area sales volumes in the LCC council area.

Interestingly Carrowreagh has only emerged as a hotspot for new buyers during the housing market recovery period. A decade ago it ranked in a mid range 200th position of all micro-areas.

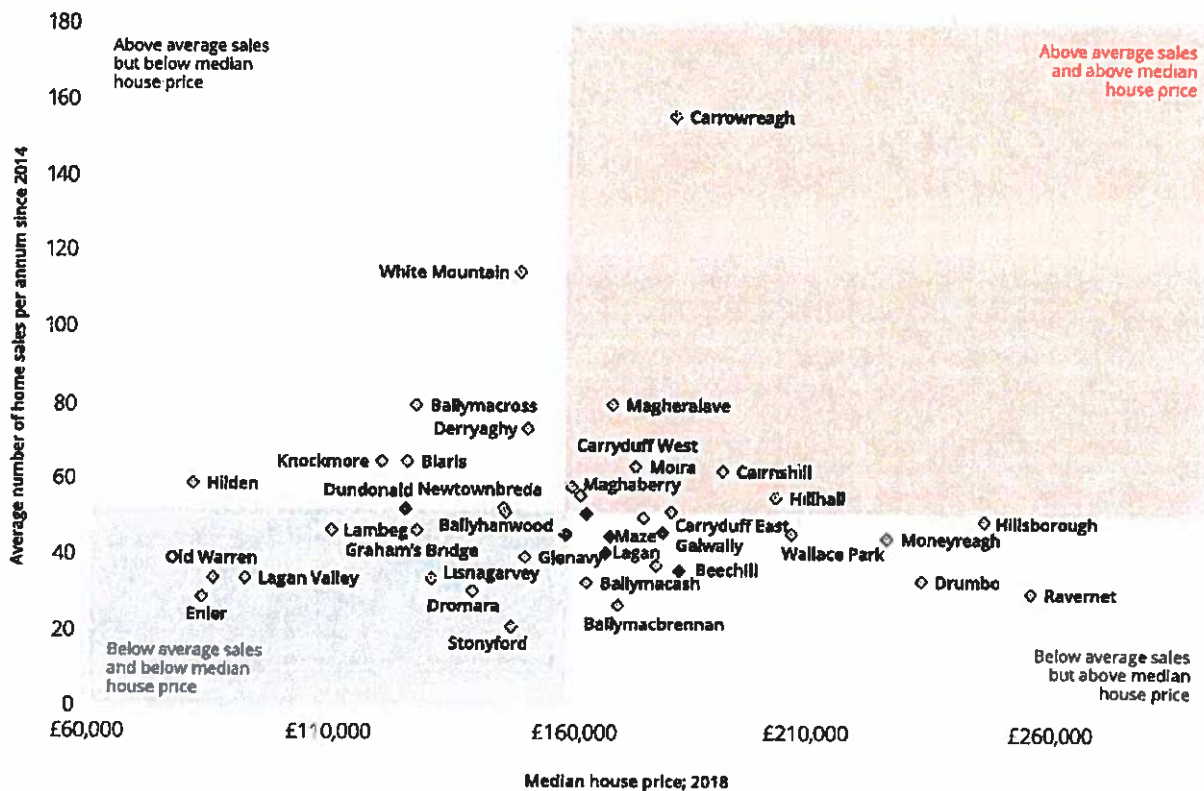
White Mountain was the next most popular area with approximately 115 sales per year, more than double the typical sales levels compared to neighbouring micro-areas. Similarly this

represented a jump in the country wide rank by 110 places compared to pre-crash activity. Magheralave was the third most popular area, driven by the emergence of a significant volume of new build activity, largely comprised of a range of 3-4 bedroom semi-detached /detached homes. Magheralave is particularly noteworthy as it has experienced the biggest improvement in ranked position of anywhere in the country, improving by 339 places.

In contrast, the lowest volume of sales were recorded in Stonyford and Ballymacbrennan micro-areas, typically selling between 15-20 homes per year.

The majority of the 'mid range' priced areas have typically sold between 40-60 properties each year.

Figure 12: Home sales (avg since 2014) vs. house prices; Lisburn & Castlereagh



Source: PropertyPal  
Note: Intersecting lines set at average sales and median price of all micro-areas

During the 2005-2007 period the property market was experiencing strong growth in prices driven by high demand for homes. However, whilst the market is in a significantly more sustainable position compared to pre-crash levels, there has been a noticeable shift in the most popular places to buy a home. By ranking all 40 micro-areas in LCC by their volume of sales during the two periods, 2005-2007 and 2014-2018, the emerging 'hotspots' can be identified relative to the previous point in time. For example, if area X,

was the top ranked micro-area for number of homes sold in the 2005-2007 period, but fell to the 10th ranked micro-area for sales in the 2014-2018 period, then it will have decreased by 10 ranked positions and reduced its popularity as a lower demand area to buy a home. In contrast, if area Y, was 10th ranked in 2005-2007 but 1st ranked in the period 2014-2018 it will have improved by 10 ranked positions and increased its popularity as a high demand area to buy a home.

The top 3 most improved micro-areas in LCC are:

MAGHERALAVE

Improved by

↑ 34

ranked positions.

BLARIS

Improved by

↑ 16

ranked positions.

MAGHABERRY

Improved by

↑ 15

ranked positions.

The top 3 worst performing micro-areas in LCC are:

OLD WARREN

Decreased by

↓ 20

ranked positions.

BALLINDERRY

Decreased by

↓ 18

ranked positions.

GRAHAM'S BRIDGE

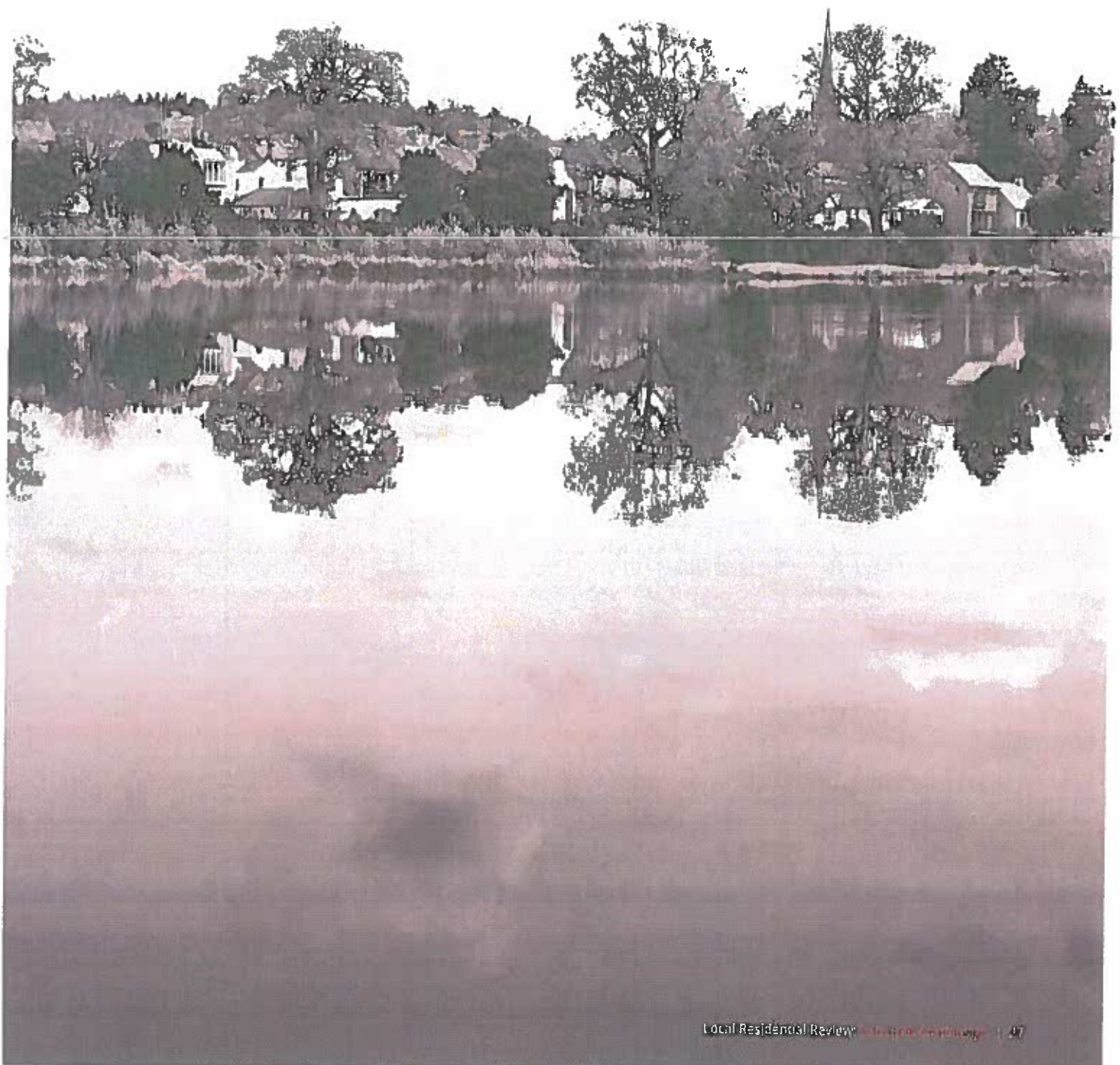
Decreased by

↓ 15

ranked positions.

Source: PropertyPal





# Affordability and incomes for homes in Lisburn & Castlereagh

There are two key elements when considering buying a property; the deposit contribution and how much you're eligible to borrow relative to your income.

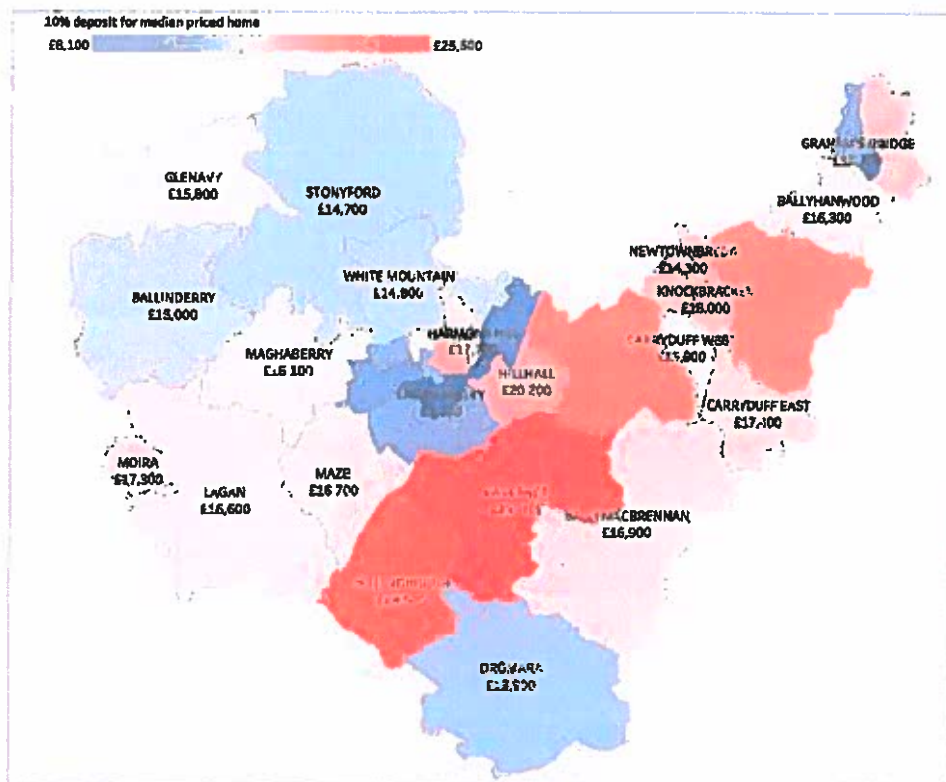
## The deposit contribution

The deposit contribution towards a home purchase is worked out as a percentage of the total value of the house. The recommended deposit is typically between 10% and 20% but some lenders offer mortgages with only a 5% deposit. It is beneficial to put down a larger deposit because the mortgage borrowings would be lower and subsequent monthly repayments. A larger deposit also lowers the loan to value

ratio of the property which can mean a lower rate of interest on the mortgage balance and lower monthly repayments.

In Lisburn & Castlereagh a 10% deposit for a median priced home is approximately **£15,800**. However, given the variation in home prices at the micro-area level this can vary from £25,500 in Ravernet compared to £8,100 in Hilden.

Figure 13: 10% deposit contribution for a median priced home in Lisburn & Castlereagh micro-areas



Source: PropertyPal

## The required salary/household income for home purchase

Following the financial crash in 2008, banks have adopted tighter lending practices aimed at protecting the financial system. These lending rules typically permit mortgages of around 3.5-4.0x applicants' income. For example; an individual earning £30,000 could borrow between £105,000-£120,000. Equally if two applicants each had a salary of £15,000, the combined household income would be £30,000 and meet the eligibility criteria for the same respective mortgage offer.

(Note: each lender conducts a detailed affordability assessment based on outgoings and total income. Some lenders offer mortgages using a higher income; loan ratio but using the most common 4x ratio is useful to give a gauge of affordability of properties in different areas.)

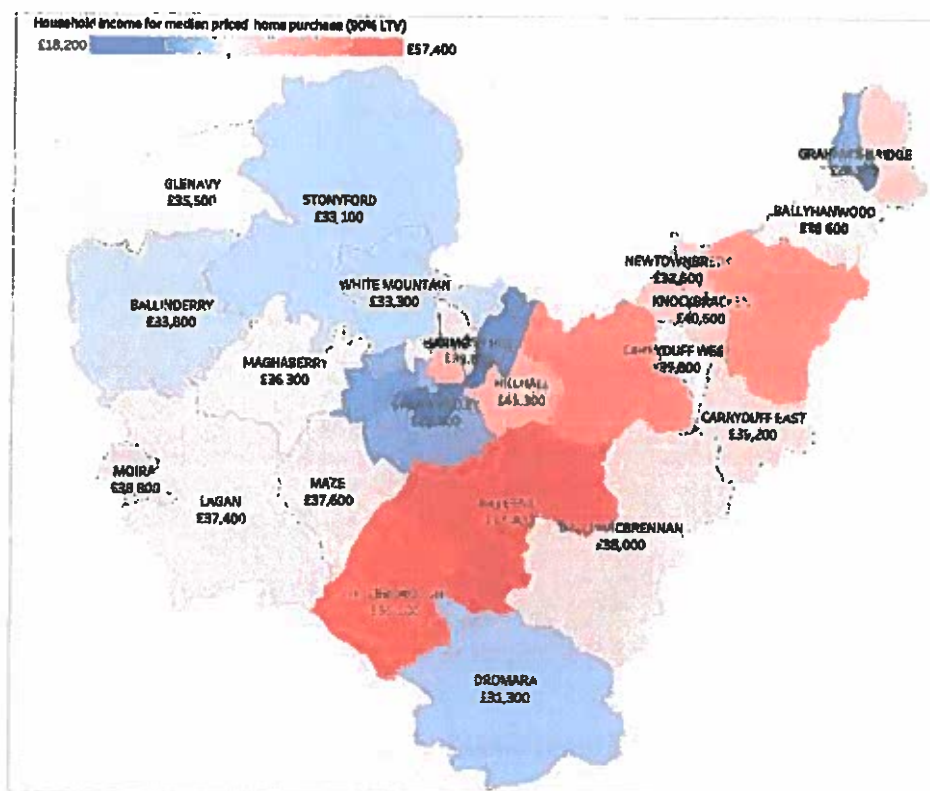
Using these lending rules and by deducting the deposit contribution from the property price,

the required salary (or combined joint salary if multiple applicants) to meet the eligibility criteria can be derived. Across all of Lisburn & Castlereagh a prospective homeowner would require a household income of approximately **£35,600** (based on a 4x lending multiple and a 10% deposit contribution).

In the most expensive areas; Ravernet, Hillsborough and Drumbo, the typical household income required would reach £57,400, £55,100 and £52,200 respectively.

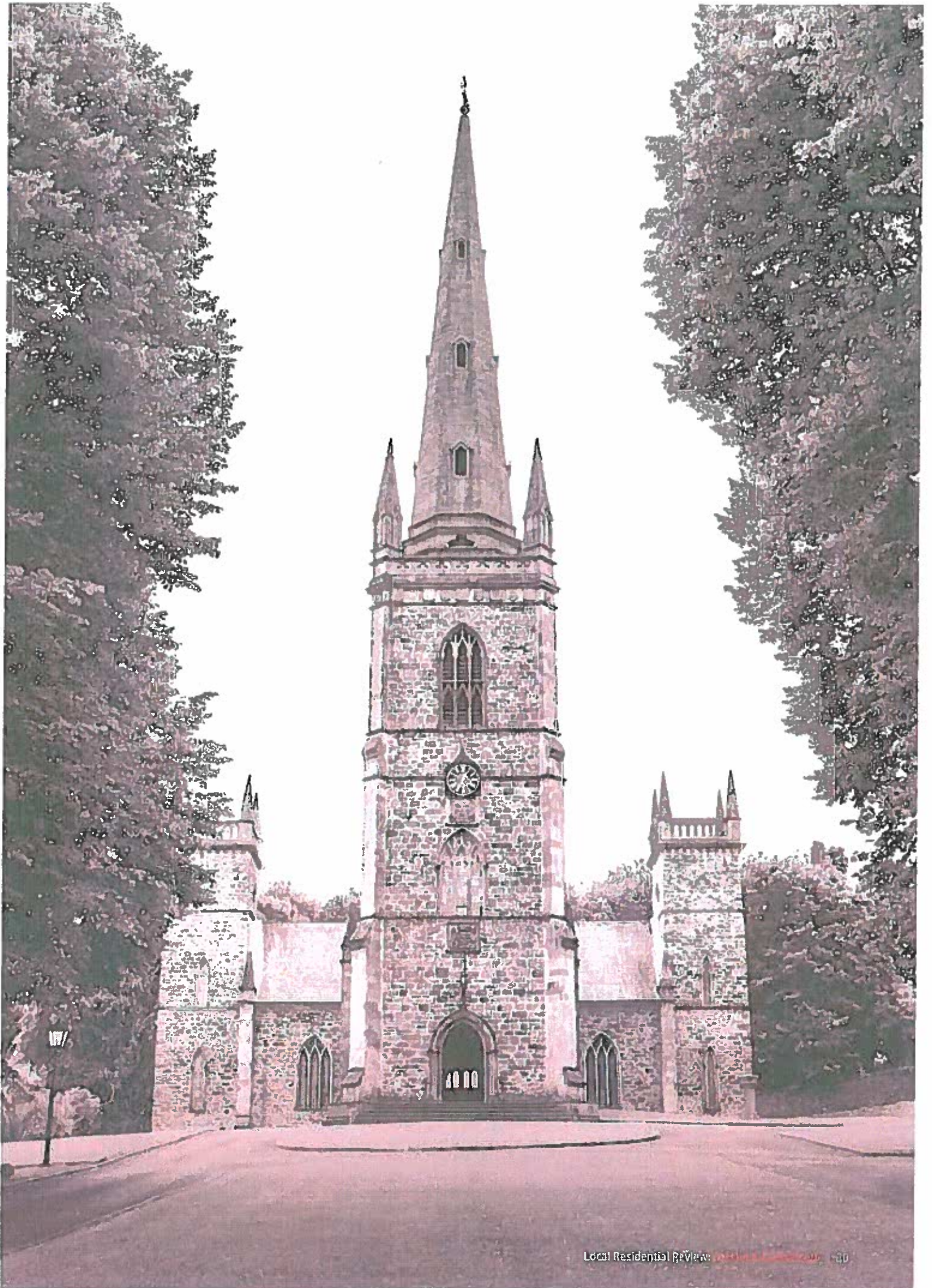
In contrast, the most affordable including; Hilden, Enler and Old Warren, would require a more modest household income ranging from £18,200-£19,100.

Figure 14: Household income required for mortgage; Lisburn & Castlereagh micro-areas



Source: PropertyPal  
Note: Based on mortgage balance of 90% of median home value by micro-area







## The outlook for house prices

House price and sales information are an important barometer of consumer confidence and wider economic performance. House prices and market activity should continue to be determined by the economics, but sentiment cannot be overlooked.

The latest Royal Institute of Chartered Surveyors (RICS) UK Residential Survey suggest a largely downbeat picture of the wider UK housing market amid heightened economic uncertainty due to Brexit. The survey stated there is *“little departure from the subdued picture evident across the sales market for several months now. Forward-looking indicators suggest this lack of momentum is likely to continue for a while longer, although perceptions on the 12-month outlook are a little more sanguine.”*

Until a Brexit deal is secured, economic and political uncertainty will restrain buyer sentiment. The UK wide housing market will remain price sensitive and beyond that, depending on what deal is agreed, will have an impact on the path of interest rates and wage growth. Once interest rates begin to rise they will act as a drag on house price growth and increased mortgage regulation in the aftermath of the financial crash has restrained peoples ability to take on more debt relative to their household income.

Fortunately, from a N.Ireland perspective, there is a case for much higher levels of optimism. At face value the data shows that people in N.Ireland benefit from a more competitive market than

most other parts of the UK. The problem is the journey it took to get this point with thousands of homeowners forced to endure financial distress. Nonetheless, housing costs represent a large proportion of people's outgoings and cheaper local housing is a genuine selling factor to appeal to retain graduates or returning workers who want to get on the housing ladder.

Looking forward, despite an increasingly uncertain economic environment, it is likely N.Ireland will continue to experience growth in house prices. Indeed, the RICS survey highlighted

N.Ireland as being one of the only UK regions with the majority of respondents expecting continued growth.

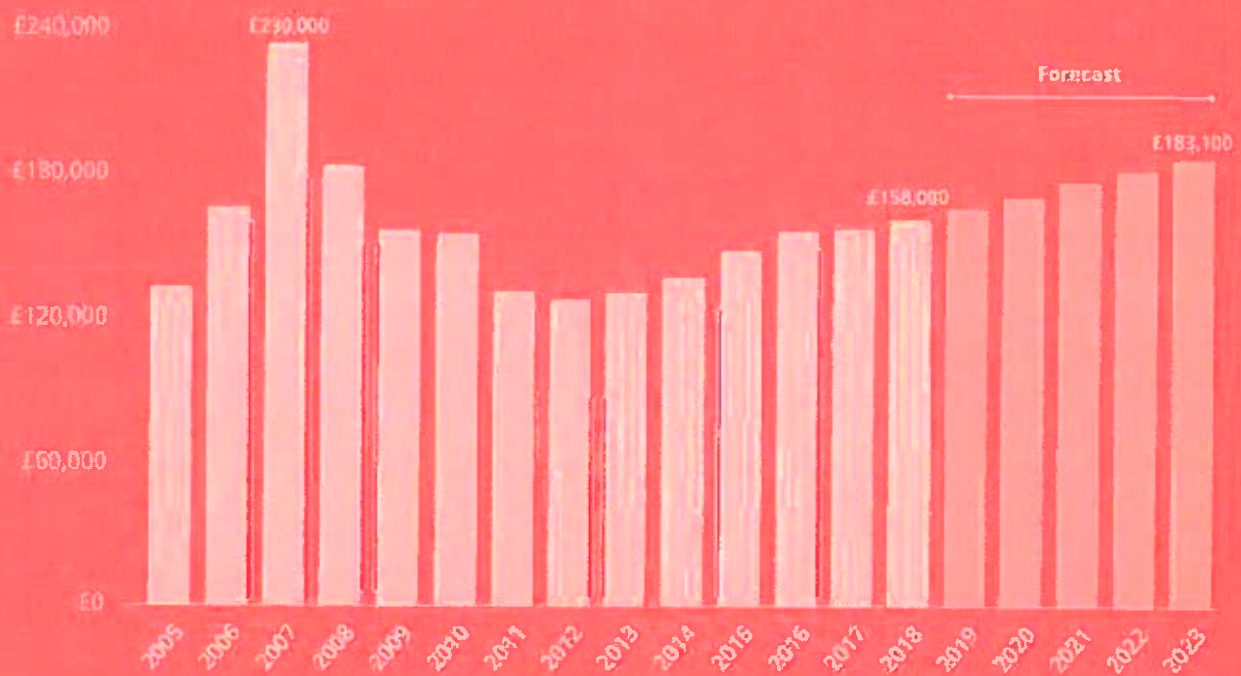
The fundamental drivers remain encouraging. Ongoing affordability, pent up demand, a low

interest rate environment and an increasingly tight labour market with real wage growth should support house price growth in the coming years. Assuming a No Deal Brexit is avoided, the local housing market should continue in the upwards stage of the recovery.

At PropertyPal we forecast house price growth in Lisburn & Castlereagh of 2.7% this year, and prices to appreciate on average by 3.1% per annum until 2023. Under this forecast, property prices will increase by £25,100 with typical properties valued at over £183,000 by the end of the forecast period.

*At PropertyPal we forecast house price growth in Lisburn & Castlereagh of 2.7% this year, and prices to appreciate on average by 3.1% per annum until 2023.*

Figure 15. PropertyPal's house price forecast for Ljlsburn & Castlereagh 2005-2023



Source: PropertyPal Housing and Economic Outlook, August 2019  
 (Data based on median property prices)

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## Contact details



### Jordan Buchanan Chief Economist

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Jordan Buchanan is the Chief Economist at PropertyPal, acting as the spokesperson for the company and a trusted subject matter expert on all UK and Northern Ireland economic and housing matters.

Jordan is an experienced economist and research professional and has published extensive analytical research on key issues affecting the UK and NI economies. His recent work includes research on Brexit and other macro-economic risks, the labour market and the housing sector. Jordan is skilled in economic modelling and alongside colleagues in the University of Cambridge, has developed a macro-economic forecasting model of the UK economy and a gravity trade model to estimate the economic impact of Brexit. Jordan has also developed economic forecasting models to understand future growth patterns in Northern Ireland. Jordan lectured in Economics in the Ulster Business School and is a regular commentator across a range of media outlets.

#### Contact Jordan

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## PropertyPal

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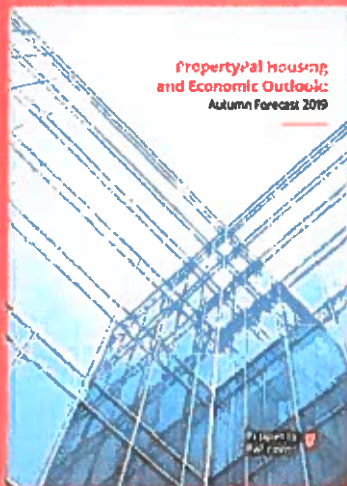
#### Acknowledgements

The statistics are based on property sales recorded by HMRC. Under statute all property transactions must be notified to HMRC for Stamp Duty purposes, excepting a small number of transfers which are exempt from duty (e.g. property transfer due to probate, divorce etc). All micro-area local data is compiled using median property price information in conjunction with NISRA and PropertyPal analysis and research. PropertyPal wish to extend their gratitude to staff in NISRA for their support.



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## Other publications in this series



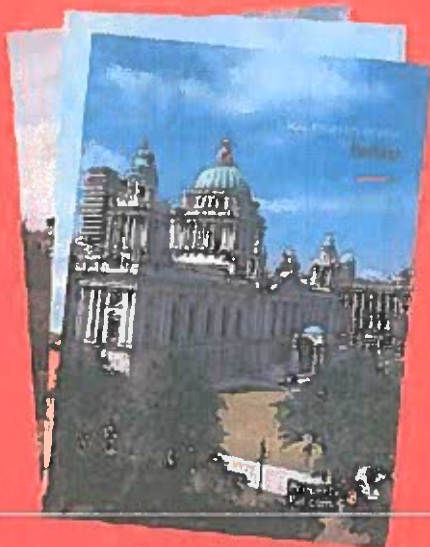
### **PropertyPal Housing and Economic Outlook: Autumn Forecast 2019**

PropertyPal's Housing and Economic Outlook offers economic analysis and informative guidance to some of the biggest issues facing the global, national and local economies. Our suite of economic models for both the United Kingdom and N.Ireland provide forecasts of key economic indicators including GDP, sectoral employment, wages and house prices. The macro-model of the UK economy is regularly updated and equipped to operate scenario analysis based on different macro-economic arrangements.



### **PropertyPal Residential Review: Autumn 2019**


PropertyPal's Residential Review offers data-driven economic analysis on the current performance of N.Ireland's residential property market, as well as detailed forecasts and outlooks on its future from our suite of economic forecasting models. This is the first report of its kind in Northern Ireland and, by having a comprehensive, local dimension, this not only adds significant value to the general public, but will help inform all stakeholders with an interest in the local property market including; estate agents, developers, property professionals, lenders, insurers, policy makers/researchers and the media.



## Local Property Reviews

Following on from the Residential Review, PropertyPal have developed bespoke overviews of the residential property market for each of the 11 council boundaries in N.Ireland. These include detailed, localised analysis of house prices by property styles, transactions activity, affordability and the outlook for prices in the area.

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Ards & North Down  
Armagh, Banbridge & Craigavon  
Belfast  
Causeway Coast & Glens  
Derry & Strabane  
Fermanagh & Omagh  
Lisburn & Castlereagh  
Mid & East Antrim  
Mid Ulster  
Newry, Mourne & Down

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**Appendix 5: Proposed Site Layout Plan  
(LA05/2019/0164/F)**

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Item	Material	Quantity	Unit	Specification	Remarks
1	Concrete	100	m <sup>3</sup>	Standard	For foundation
2	Rebar	100	m	12mm	For foundation
3	Brick	1000	m <sup>2</sup>	Standard	For wall
4	Plaster	100	m <sup>2</sup>	Standard	For wall
5	Roofing	100	m <sup>2</sup>	Standard	For roof
6	Paint	100	liters	Standard	For wall
7	Window	100	units	Standard	For window
8	Door	100	units	Standard	For door
9	Lighting	100	units	Standard	For lighting
10	Sanitary	100	units	Standard	For sanitary

Item	Material	Quantity	Unit	Specification	Remarks
11	Concrete	100	m <sup>3</sup>	Standard	For foundation
12	Rebar	100	m	12mm	For foundation
13	Brick	1000	m <sup>2</sup>	Standard	For wall
14	Plaster	100	m <sup>2</sup>	Standard	For wall
15	Roofing	100	m <sup>2</sup>	Standard	For roof
16	Paint	100	liters	Standard	For wall
17	Window	100	units	Standard	For window
18	Door	100	units	Standard	For door
19	Lighting	100	units	Standard	For lighting
20	Sanitary	100	units	Standard	For sanitary

Item	Material	Quantity	Unit	Specification	Remarks
21	Concrete	100	m <sup>3</sup>	Standard	For foundation
22	Rebar	100	m	12mm	For foundation
23	Brick	1000	m <sup>2</sup>	Standard	For wall
24	Plaster	100	m <sup>2</sup>	Standard	For wall
25	Roofing	100	m <sup>2</sup>	Standard	For roof
26	Paint	100	liters	Standard	For wall
27	Window	100	units	Standard	For window
28	Door	100	units	Standard	For door
29	Lighting	100	units	Standard	For lighting
30	Sanitary	100	units	Standard	For sanitary

1. General Information  
 2. Site Location  
 3. Project Description  
 4. Design Objectives  
 5. Design Basis  
 6. Design Assumptions  
 7. Design Standards  
 8. Design Methodology  
 9. Design Results  
 10. Conclusion



**Legend**

- Green circle: 100mm diameter tree (100mm dia tree)
- Green square: 100mm x 100mm tree (100mm x 100mm tree)
- Green rectangle: 100mm x 200mm tree (100mm x 200mm tree)
- Green oval: 100mm x 100mm tree (100mm x 100mm tree)
- Green diamond: 100mm x 100mm tree (100mm x 100mm tree)
- Green triangle: 100mm x 100mm tree (100mm x 100mm tree)
- Green hexagon: 100mm x 100mm tree (100mm x 100mm tree)
- Green octagon: 100mm x 100mm tree (100mm x 100mm tree)
- Green star: 100mm x 100mm tree (100mm x 100mm tree)
- Green circle with cross: 100mm diameter tree (100mm dia tree)
- Green square with cross: 100mm x 100mm tree (100mm x 100mm tree)
- Green rectangle with cross: 100mm x 200mm tree (100mm x 200mm tree)
- Green oval with cross: 100mm x 100mm tree (100mm x 100mm tree)
- Green diamond with cross: 100mm x 100mm tree (100mm x 100mm tree)
- Green triangle with cross: 100mm x 100mm tree (100mm x 100mm tree)
- Green hexagon with cross: 100mm x 100mm tree (100mm x 100mm tree)
- Green star with cross: 100mm x 100mm tree (100mm x 100mm tree)

**Scale**  
 1:1000

**North Arrow**

**Project Information**

Project Name: [Name]  
 Client: [Name]  
 Date: [Date]  
 Location: [Location]

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