



**Lisburn &
Castlereagh
City Council**

Local Development Plan

Technical Supplement 1: Housing Growth Study

October 2019



Contents

1.0 Introduction

- 1.1 Purpose and Background
- 1.5 Facilitating Future Housing Growth

2.0 Policy Context

- 2.1 Regional Policy Context
- 2.24 Local Policy Context

3.0 Key Findings – Position Paper 2 Housing & Settlements

4.0 Overview of Strategic Housing Assessment and Allocation

4.1 Housing Assessment:

1. RDS Housing Growth Indicators (HGIs)
2. Use of the RDS housing evaluation framework & Settlement Hierarchy
3. Allowance for existing housing commitments (Annual Housing Monitor & Housing Land Assessment) and assessment of density
4. Urban Capacity Study
5. Allowance for windfall housing
6. Application of a sequential approach and identification of suitable sites for settlements over 5,000 population
7. NIHE Housing Needs Assessment/Housing Market Analysis (HNA/HMA)
Study of Planning Approvals and Potential for Affordable Housing Delivery
Housing Market Areas (HMAs)
8. Transport Assessments

5.0 Executive Summary of Housing Growth Study

6.0 Housing Growth Study

Appendices

- A Maps showing Housing Land Availability of Urban Areas
-

1.0 INTRODUCTION

Purpose and Background

- 1.1 This Technical Supplement provides details of the evidence base used to inform the preparation of the Lisburn & Castlereagh City Council's Local Development Plan (LDP) 2032, draft Plan Strategy. It is one of a suite of topic-based Technical Supplements that should be read alongside the draft Plan Strategy and sets out the rationale and justification for the strategic policies, allocations and proposals within the draft Plan Strategy.
- 1.2 It builds upon the suite of 14 thematic Topic Papers prepared and published alongside the Preferred Options Paper (POP), which established the baseline position and identified the key issues that need to be addressed by the LDP.
- 1.3 The evidence base has been informed through a professional evidence-based study on Housing Growth undertaken by professional consultants. The details of these reports were presented to Members during preparation of the policy for the draft Plan Strategy.
- 1.4 The main purpose of the research was to inform the emerging Local Development Plan (LDP), by identifying the potential future supply for housing growth within the Council area and provide a sound policy base for future planning decisions. The key requirements of the study were to provide:-
- An overview of Housing Requirements based on Housing Growth Indicators (HGIs)
 - An audit of undeveloped zoned land and existing committed zoned land & land with planning approvals in Lisburn City, the Greater Urban Areas and the 3 Towns using the Annual Housing Monitor evidence base.
 - An assessment of Windfall Housing Potential within the Urban Capacity Study.
 - An indication of the number of rural approvals projected over the plan period.
 - An assessment of the Housing requirements for each settlement for the plan period.
 - An indication of Affordable Housing requirements.

Facilitating Future Housing Growth

- 1.5 Lisburn & Castlereagh City Council's population is projected to grow from 142,600 in 2017 to 159,800 in 2032¹ which is an estimated increase in population of around 12%. Households are projected to grow from 55,786 in 2017 to an estimated 64,508 in 2032, based on NISRA projections². The structure of households is also expected to change with an increase in smaller household size and an aging population.
- 1.6 The provision and allocation of housing across the Council area is a key issue for the Local Development Plan, as is its integration with transport and other infrastructure, including the need to provide good facilities for walking, cycling and public transport. Housing should be sustainable and provide for quality places best integrates with transport and essential infrastructure. Housing

¹ NISRA – Mid 2016 based population projections for areas within NI – published 26 April 2018

² NISRA Household projections (2016 based) published 06 December 2018

also needs to be accessible to a wider range of people with the delivery of sufficient amounts of affordable homes and other specialist housing where a need is identified.

- 1.7 Lisburn & Castlereagh City Council commissioned a Housing Growth Study for the purposes of examining future housing growth and its allocation across the Plan period. It identified a projected housing need of 10,500 new dwellings between 2017 and 2032, based on carrying out a revision of the Department's Housing Growth Indicators (HGIs), using 2016-based household projections. This also takes account of the different types of housing needed, for example, affordable housing in accordance with the Housing Needs Assessment (HNA) provided by the Northern Ireland Housing Executive.
- 1.8 The draft Plan Strategy seeks to fulfil the spatial aspirations of the local Community Plan, particularly in seeking to provide a range of good quality housing options. Planning policies relating to new housing are also required to be in keeping with regional policy, which advise that Councils should adopt a policy approach to meet the requirements of the RDS and SPPS whilst meeting its objectives for the provision of housing in the settlements of the plan area³. The Plan Strategy must contain robust and credible housing policies, within which a central element is to establish the level of housing growth to be accommodated in Lisburn & Castlereagh over the plan period.
- 1.9 The draft Plan Strategy has been written based on the most accurate information available incorporating detailed analysis of that information. Monitoring of housing data is a vital element of any plan process and monitoring of this data will indicate if the policies are helping to deliver the required housing allocation.

³ DPPN 07 The Plan Strategy, paragraph 13.2

2.0 POLICY CONTEXT

Regional Policy Context

- 2.1 The regional policy context is provided by the Regional Development Strategy 2035 (RDS), the Strategic Planning Policy Statement (SPPS) and regional Planning Policy Statements (PPSs). The latter are subject to the transitional arrangements set out in paragraphs 1.10-1.16 of the SPPS, which states that existing policy retained under the transitional arrangements will cease to have effect where a Council adopts its Plan Strategy. A summary of these documents and how they relate to plan making and housing allocation is provided in the following sections.

Regional Development Strategy (RDS) 2035

- 2.2 The Regional Development Strategy 2035 (RDS) prepared under the Strategic Planning (Northern Ireland) Order 1999 by the Department for Regional Development (published 15th March 2012) is the spatial strategy for the Executive and provides an overarching strategic planning framework to facilitate and guide the public and private sectors and is material to decisions on individual planning applications. The RDS acknowledges that housing is a key driver of physical, economic and social change and emphasises the importance of the relationship between the location of housing, jobs, facilities, services and infrastructure and must be taken into account when preparing a local development plan.
- 2.3 The RDS provides strategic guidance through Regional Guidance (RG) and Spatial Framework Guidance (SFG) under the 3 sustainable development themes of the Economy, Society and Environment. It advises (paragraph 3.9) that *'Sustainable communities are places where people want to live, work and play, now and in the future. They meet the diverse needs of existing and future residents are sensitive to their environment, and contribute to a high quality of life. They are safe and inclusive, well planned, built and offer equality of opportunity and good services for all.'*
- 2.4 The guidance set out below supports the aims of 'A Shared Future' published by the office of the First Minister and Deputy First Minister in March 2005 and recognises the need to:-
- **RG6 Strengthen community cohesion** by developing integrated services and facilities, fostering a stronger community spirit and sense of place and encouraging mixed housing development;
 - **RG7 Support urban and rural renaissance** by developing innovative ways to bring forward under-utilised land and buildings, particularly for mixed use development, promoting regeneration in areas of social need, ensuring that environmental quality in urban areas of social need, is improved and maintained with adequate provisions of green infrastructure, and reducing noise pollution.
 - **RG8 Manage housing growth** to achieve sustainable patterns of residential development by promoting more sustainable development within existing urban areas and ensuring an adequate and available supply of quality housing to meet the needs of everyone and using a broad evaluation framework to assist judgements on the allocation of housing growth.
- 2.5 The RDS sets a regional target of 60% of new housing to be located on appropriate 'brownfield' sites within the urban footprints of settlements greater than 5,000 population.
- 2.6 In addition, the RDS seeks to:
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- **promote more sustainable housing development within existing urban areas** - by encouraging compact urban forms and promoting more housing within existing urban areas
- **ensure an adequate and available supply of quality housing to meet the needs of everyone** - housing land will be identified in Development Plans to ensure an adequate and available supply of quality housing to meet the needs of everyone taking account of existing vacant housing and need identified in the Housing Needs Assessment/ Housing Market Analysis (this includes land for social and intermediate housing such as shared ownership and affordable housing).
- **use a broad evaluation framework to assist judgements on the allocation of housing growth** - further details are provided below and addressed in Chapter 4.0 of this report.

Strategic Planning Policy Statement (SPPS) 'Planning for Sustainable Development'

- 2.7 The Department of the Environment's 'Strategic Planning Policy Statement for Northern Ireland' - Planning for Sustainable Development (SPPS), was published September 2015. The provisions of the SPPS must be taken into account in the preparation of Local Development Plans, and are also material to all decisions on individual planning applications and appeals.
- 2.8 The SPPS recognises that good quality housing is a fundamental human need that plays a significant role in shaping our lives and our communities. The SPPS states that the planning system can play a positive and supporting role in the delivery of homes to meet the full range of housing needs of society, within the wider framework of sustainable development. The policy approach must be:
- to facilitate an adequate and available supply of quality housing to meet the needs of everyone;
 - to promote more sustainable housing development within existing urban areas; and
 - to provide mixed housing development with homes in a range of sizes and tenures.
- 2.9 This approach to housing will support the need to maximise the use of existing infrastructure and services, and the creation of more balanced sustainable communities.
- 2.10 The SPPS states that in preparing Local Development Plans (LDPs) councils should bring forward a strategy for housing, together with appropriate policies and proposals that must reflect the policy approach of the SPPS, tailored to the specific circumstances of the plan area. Planning authorities must deliver increased housing density without town cramming, sustainable forms of development, good design and balanced communities.
- 2.11 The SPPS advises that planning has a role to play in helping to improve the health and well-being of people by avoiding development that will result in a deterioration in air or water quality; safeguarding and facilitating open space, sport and outdoor recreation, managing the adverse impacts of noise and nuisance by influencing the location, layout and design of new development.
- 2.12 The SPPS requires that housing allocations in Local Development Plans should be informed by:
- **RDS Housing Growth Indicators (HGIs)**
 - **Use of the RDS housing evaluation framework**
 - **Allowance for existing housing commitments**
 - **Urban Capacity Studies**
 - **Allowance for windfall housing**
 - **Application of a sequential approach and identification of suitable sites for settlements over 5,000 population**
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- **Housing Needs Assessment/Housing Market Analysis (HNA/HMA)**
- **Transport Assessments**

2.13 These 8 areas have been assessed in the development of the draft Plan Strategy's strategic housing allocation and are discussed later in this Technical Supplement.

Planning Policy Statement 7: 'Quality Residential Environments' (PPS 7)

2.14 PPS7 sets out regional planning policies for achieving quality in new residential development and advises on the treatment of this issue in development plans. The Statement, together with the advice contained in associated Supplementary Planning Guidance documents, including Creating Places and Living Places, complements existing Government policy and initiatives aimed at achieving attractive and sustainable places through better design.

2.15 The main objectives are:

- To promote an integrated approach to achieving sustainable and quality residential environments.
- To promote quality residential development that:
 - creates places for people which are attractive, locally distinctive and appropriate to their surroundings, safe, convenient, adaptable and easy to maintain;
 - respects and enhances features of value and local character and promotes biodiversity; and
 - reduces reliance on the private car, supports movement by pedestrians and cyclists, provides adequate and convenient access to public transport and connects well with the wider locality
- To promote the comprehensive planning and development of residential areas and ensure that adequate information accompanies planning applications which will enable the delivery of an improved design quality
- To ensure that adequate provision is made for infrastructure and appropriate local neighbourhood facilities as an integral part of residential development

Planning Policy Statement 7 (Addendum): Residential Extensions and Alterations

2.16 This addendum to PPS7 provides an additional planning policy for the extension and/or alteration of a dwelling house or flat, including those in multiple occupancy. The key objectives of this Addendum are:

- to promote high quality design of residential extensions and alterations; and
- to ensure that such works are sympathetic to the original property; respect the character of the local area; and protect neighbouring residential amenity

Planning Policy Statement 7 (Addendum): Safeguarding the Character of established Residential Areas

2.17 The primary purpose of this addendum is to reinforce existing planning policy on housing within urban areas and introducing additional provisions to protect areas of established residential character, environmental quality and residential amenity. It also sets out regional policy on the conversion of existing buildings to flats or apartments. In addition, the addendum contains policy to

promote greater use of permeable paving within new residential developments to reduce the risk of flooding from surface water run-off. The key consideration is to continue to ensure that new residential schemes are sensitive in design terms to people living in existing neighbourhoods and are in harmony with the local character of established residential areas, villages and smaller settlements.

Planning Policy Statement 12: Housing in Settlements

- 2.18 PPS 12 Housing in Settlements has been prepared to assist in the implementation of the RDS to guide the future pattern on housing by managing future housing growth and distribution, support urban renaissance and achieve balanced communities. The policy objectives of PPS12 are:
- To manage housing growth in response to changing housing need;
 - To direct and manage future housing growth to achieve more sustainable patterns of residential development;
 - To promote a drive to provide more housing within existing urban areas;
 - To encourage an increase in the density of urban housing appropriate to the scale and design of the cities and towns of Northern Ireland; and
 - To encourage the development of balanced local communities.
- 2.19 PPS 12 states that the development plan process is the main vehicle for assessing future housing land requirements and that housing allocation in development plans will be determined by:
- (a) Application of the HGIs;
 - (b) Allowance for existing commitments (including dwellings already built);
 - (c) Use of urban capacity studies;
 - (d) Application of a sequential approach and identification of suitable sites for housing;
 - (e) Housing needs assessment;
 - (f) Allowance for windfall housing sites; and
 - (g) Residual housing need.

Planning Policy Statement 21: 'Sustainable Development in the Countryside'

- 2.20 PPS21 sets out the following policy objectives:
- to manage growth in the countryside to achieve appropriate and sustainable patterns of development that meet the essential needs of a vibrant rural community;
 - to conserve the landscape and natural resources of the rural area and to protect it from excessive, inappropriate or obtrusive development and from the actual or potential effects of pollution;
 - to facilitate development necessary to achieve a sustainable rural economy; including appropriate farm diversification and other economic activity; and
 - to promote high standards in the design, siting and landscaping of development in the countryside.
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- 2.21 The development plan process plays a key role in identifying the countryside assets and balancing the needs of rural areas and communities with protection of the environment. This is facilitated by the preparation of Countryside Assessments. (Further detail is set out in Technical Supplement 6 which contains an Environmental Assets Appraisal; a Landscape Assessment; a Development Pressure Analysis and a Settlement Appraisal.)

Creating Places: Achieving Quality in Residential Environments

- 2.22 This guide describes the contributions to quality and sustainability that developers in Northern Ireland will be expected to make through the design of new residential developments. It seeks to ensure that what is designed and built today will be cherished by both present and future generations. The guide is for use by all those involved in the design of new residential developments and the rejuvenation of existing housing areas.

Living Places - An Urban Stewardship and Design Guide for Northern Ireland

- 2.23 This Urban Stewardship and Design Guide aims to clearly establish the key principles behind good place making. It seeks to inform and inspire all those involved in the process of managing (stewardship) and making (design) urban places, with a view to raising standards across Northern Ireland. The focus of the guide is urban areas, by which is meant all of our cities, towns, villages and neighbourhoods. It recognises the wider economic, cultural and community benefits of achieving excellence in the stewardship and design of these important places, be they existing or newly proposed.

Local Policy Context

- 2.24 The current planning policy context at a local level is complex as a result of a successful legal challenge to the adoption of the Belfast Metropolitan Area Plan (BMAP) 2015. There are therefore pre-existing development plans that relate to parts of the Lisburn & Castlereagh Council district, alongside draft BMAP (published in 2004) and post-inquiry BMAP (published in 2014). All of these documents will be superseded at the adoption of the new Local Development Plan 2032. The SPPS's transitional arrangements provide for continuity until such times as a new LDP for the whole of the council area is adopted to ensure continuity in planning policy for taking planning decisions.

Belfast Metropolitan Area Plan 2015

- 2.25 Although formally adopted in 2014, this process of final BMAP adoption was declared unlawful as a result of a judgement in the court of appeal delivered on 18 May 2017. This means the Belfast Urban Area Plan (BUAP) 2001, Lisburn Area Plan 2001 and the other Development Plans provides the statutory plan context for the area.
- 2.26 BMAP, in its most recent, post-examination form remains a significant material consideration in future planning decisions. It was at the most advanced stage possible prior to formal adoption. BMAP referred to throughout this document therefore refers to that version. However, in
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preparing this document the council has also had regard to the provisions of the draft BMAP which was published in 2004, the objections which were raised as part of the plan process and the Planning Appeals Commission Inquiry report.

Belfast Urban Area Plan (BUAP) 2001

- 2.27 The current development plan for the majority of the Belfast district is the Belfast Urban Area Plan (BUAP) 2001, which was adopted in December 1989. The area covered by the plan included the whole of the administrative area of the former Belfast City Council area, together with the urban parts of the former district council areas of Castlereagh, Lisburn and Newtownabbey as well as Greenisland and Holywood.
- 2.28 The purpose of the BUAP was to establish physical development policies for this broad urban area up to 2001, clarifying the extent and location of development and providing a framework for public and private agencies in their investment decisions relating to land use. Although alterations were made in 1996, the BUAP is now largely out-of-date and was formally superseded by the BMAP in September 2014. However, as BMAP was subsequently quashed as a result of a judgement in the court of appeal delivered on 18 May 2017, the BUAP 2001 remains a statutory development plan covering a portion of the Council area.

Lisburn Area Plan 2001

- 2.29 Adopted on 4 July 2001, the Lisburn Area Plan sought to establish physical development policies for Lisburn and its surroundings up to 2001. An element of provision was incorporated so that the area's reasonable housing development needs could be continued to be met with some certainty until such time as the successor Belfast Metropolitan Area Plan was in place.

Lagan Valley Regional Park Local Plan 2005

- 2.30 The quashing of BMAP also means that the Lagan Valley Regional Park Local Plan (adopted in 1993) was re-instated as the statutory development plan for the Lagan Valley Regional Park (LVRP). It sets out the strategy and policies associated with the protection and enhancement of the natural and man-made heritage of the LVRP. Its main objectives are to conserve the landscape quality and features of the Lagan Valley and to enhance recreational use for the public.

Carryduff Local Plan 1988-1993

- 2.31 The adopted Plan comprises the provisions of the Draft Plan as approved and amended by the Adoption Statement. A composite Proposals Map and schedule for Carryduff was subsequently produced.

Lisburn & Castlereagh Community Plan

- 2.32 The Council took on responsibility for community planning in 2015 as a result of local government reform. Community Planning is enshrined in the Local Government Act (Northern Ireland) 2014 and places a duty on the Council along with a number of named partners to identify long-term
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objectives for improving the social, economic and environmental well-being of the district and the achievement of sustainable development while promoting equality of opportunity and good relations and tackling poverty, social exclusion and patterns of deprivation. The plan sets out a joint vision and long-term ambitions for the future, as well as outlining priorities for action.

- 2.33 The Community Plan vision for Lisburn & Castlereagh is 'An empowered, prosperous, healthy, safe and inclusive community'.
- 2.34 Delivery of this vision is based on a number of strategic outcomes. Councils must take account of their current Community Plan when preparing a Local Development Plan (LDP). The Community Plan include the supporting outcomes including that neighbourhoods are designed and regenerated to promote well-being, everyone lives in an affordable home that meets their needs, we have access to essential services, shops, leisure and workplaces and there is a modal shift to sustainable and healthy transport options.
- 2.35 The LDP will provide a spatial expression to the community plan, thereby linking public and private sector investment through the land use planning system.
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3.0 KEY FINDINGS – POSITION PAPER ON HOUSING

3.1 A summary of the key findings of Position Paper 2 Housing & Settlements is provided below:

- The Local Development Plan has an important role to fulfil in terms of the allocation of new housing across the Council area in accordance with the direction set out in regional policy;
 - The issue of social housing need is currently much greater in Lisburn and will need carefully assessed using the information provided by the Northern Ireland Housing Executive in its Housing Needs Assessment and address issues such as affordability, vacancy and unfitness of housing stock;
 - To address future housing needs, the Local Development Plan should facilitate a reasonable mix and balance of housing tenures and types including smaller house types for a growing elderly population and 1-2 person households;
 - The Settlement Strategy for the Lisburn & Castlereagh City Council area must take into account the existing settlement hierarchy and determine whether re-classification of existing settlements or classification of new settlements is required (this includes identifying the role, function, size and constraints of such settlements).
 - The needs of those living in rural areas outside settlements must also be considered in terms of accessibility and creating sustainable communities.
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4.0 OVERVIEW OF STRATEGIC HOUSING ASSESSMENT AND ALLOCATION

4.1 To inform the preparation of the LDP, a number of studies were completed and workshops held with Council Members, to carry out a housing assessment which focused on the 8 key areas identified in the SPPS with emphasis on Housing Growth for the Council Area as follows:

1. RDS Housing Growth Indicators (HGIs)

4.2 The HGIs were updated in April 2016 to reflect the new District boundaries following local government reform and published in the RDS 2035. These are calculated on the basis of 2012-based population projections and provided an indicator for each district 2012-2025. It is important to note that these HGIs published by NISRA are based on the 2012-based population projection. The Department formally adopted the revised HGI figures on 29 April 2016.

4.3 The HGIs are formed using 5 key pieces of data:

- number of households (household projections). The basis for the household projections is the population projections;
- second homes;
- vacant stock;
- net conversions/closures/demolitions (net stock loss); and
- total housing stock

4.4 The figures have been calculated from various data sources:

- Northern Ireland Statistics and Research Agency (NISRA) Household Projections;
- Northern Ireland Housing Executive House Condition Survey;
- Data from Land and Property Services Publications; Building Control new dwelling completions data, Housing Stock Data – NI Domestic Valuation List; and
- NISRA Central Survey Unit Combined Survey Sample.

4.5 HGIs have been calculated for Northern Ireland. The projected new dwelling requirement between 2012 and 2025 (i.e. over a 13 year period) is 94,000 (approximately 7,200 per annum).

Table 1: Northern Ireland Housing Growth Indicators 2012-2025- Northern Ireland level

	Variable	Year of data	Value¹	Source
(A)	Number of households	2025	768,300	2012 based NISRA household projections
(B)	Second homes	2025	10,800	1.4% of occupied housing stock. Derived from 2011 NIHCS and expert consultation.
(C)	Vacant stock	2025	60,400	7.2% of total housing stock. Derived from 2011 NIHCS and expert consultation.
(D)	Net conversions/ closures/ demolitions	2012 to 2025	13,000	1,000 loss per annum. Net stock loss estimated using LPS housing stock and new dwelling completions data.
(E)	New stock estimate	2025	852,500	Sum of (A), (B), (C), & (D)
(F)	Total stock	2012	758,500	LPS Northern Ireland Housing Stock publication
(G)	Projected new dwelling requirement	2012 to 2025	94,000	(E) minus (F)

Source: DRD review of existing Housing Growth Indicators January 2016

Housing Growth Allocation for Lisburn & Castlereagh Local Government District 2012-2025

- 4.6 The projected HGIs are also worked out for each of the 11 new Local Government Districts (LGDs). The projected new dwelling requirement between 2012 and 2025 is 9,600 dwellings for Lisburn & Castlereagh Government District.

Table 2: LGD level Northern Ireland Housing Growth Indicators 2012-2025 - Estimating each of the 5 key components

Local Government District	A	B	C	D	E	F	G
	Number of Households 2025	Second Homes 2025	Vacant Stock 2025	Net Conversions, Closures and Demolitions 2012 to 2025	New Stock Estimate 2025	Housing Stock 2012	Projected New Dwelling Requirement 2012 to 2025
Antrim & Newtownabbey	58,400	400	4,600	200	63,600	56,400	7,200
Armagh, Banbridge & Craigavon	86,600	800	5,400	2,200	95,000	80,600	14,400
Belfast	147,900	2,200	15,300	2,300	167,700	154,000	13,700
Causeway Coast & Glens	57,300	3,700	5,600	2,100	68,700	62,000	6,700
Derry & Strabane	59,400	300	3,800	900	64,300	59,300	5,000
Fermanagh & Omagh	45,700	900	4,500	600	51,700	47,200	4,500
Lisburn & Castlereagh	60,400	500	3,500	700	65,000	55,400	9,600
Md & East Antrim	57,800	100	4,100	800	62,800	57,400	5,400
Md Ulster	55,200	100	3,800	1,500	60,600	51,100	9,500
Newry, Mourne & Down	70,900	900	5,100	500	77,400	66,500	10,900
North Down & Ards	68,800	1,000	4,900	1,100	75,800	68,700	7,100
Northern Ireland	768,300	10,800	60,400	13,000	852,500	758,500	94,000

Source: DRD review of existing Housing Growth Indicators January 2016

Housing Growth Allocation for Lisburn & Castlereagh Local Government District to 2032

- 4.7 The new Lisburn & Castlereagh City Council's Local Development Plan will run from 2017-2032, over a 15 year period. Using the 2012 HGI baseline, this equates to 738 dwellings per annum or 11,070 dwellings over the life time of the new Local Development Plan.
- 4.8 Given the critical importance of the HGI, the Council commissioned a Housing Growth Study (see Chapter 5.0) which examined the robustness of the RDS Housing Growth Indicators (HGI). The study looked at updating the 2012 based HGI through the use of 2016-based household projections and adjustments set out within the 2012 HGI methodology. It identified a new baseline future growth of 10,380 households over the Plan period (692 dwellings per annum). This was rounded up to 700 dwellings per annum equating to **10,500 dwellings** for the plan period.
- 4.9 There is a requirement for the council to ensure that the identified HGI figure can be met. A buffer of 10% over-supply has been applied to the HGI baseline figure which takes into consideration the possibility that an element of the identified potential might not come forward during the plan period. This gives a resultant figure of 11,550 units and provides the overall strategic housing allocation (SHA).
- 4.10 On 25 September 2019, the Department for Infrastructure released revised HGI figures for each of the eleven Council area, following an update of data for three components which previously made

up the HGI, namely updated NISRA Household Projections, new Household Condition Survey data published by NIHE and more recent data from NISRA Central Survey Unit combined survey sample.

4.11 The following table provides these updated figures as shown below.

Table 3: Estimate of total housing need in Northern Ireland by Council 2016-2030

<u>Council / Region</u>	<u>2030 estimated dwelling requirement</u>
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

4.12 The Department advises that 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.

4.13 The updated figures very closely align with the figures produced by the Lisburn & Castlereagh City Council’s Consultants who undertook the Housing Growth Study (See Chapter 5.0).

2. Use of RDS Evaluation Framework & Settlement Hierarchy

4.14 Settlements have been assessed against the RDS Housing Evaluation Framework. This framework sets out six tests to include a Resource Test, Environmental Capacity Test, Transport Test, Economic Development Test, Urban and Rural Character Test and Community Services Test. Settlement Appraisals have been carried out and are a useful guide and are available in the Countryside Assessment Technical Supplement 6.

Table 4: Housing Evaluation Framework

Housing Evaluation Framework	
Resource Test	Studies should be carried out to assess and detail the existence of community assets and physical infrastructure such as water, waste and sewage, including spare capacity.
Environmental Capacity Test	An assessment of the environmental assets of the settlement, the potential of flooding from rivers, the sea or surface water run-off and its potential to accommodate future outward growth without significant environmental degradation should be made.
Transport Test	Studies should be carried out to assess the potential for integrating land use and public transport and walking and cycling routes to help reduce reliance on the car.
Economic Development Test	The potential to facilitate an appropriate housing and jobs balance and to unlock any major strategic development opportunities should be assessed and detailed.
Urban and Rural Character Test	Assessment should be made of the potential to maintain a sense of place, and to integrate new development in a way that does not detract from the character and identity of the settlement.
Community Services Test	The potential to underpin and, where necessary, reinforce the community service role and function of the settlement should be assessed and detailed.

- 4.15 This framework was used to develop a hierarchy of settlements based on the Infrastructure wheel in the RDS. Details of the strategic Settlement Appraisal are provided in Appendix D of the draft Plan Strategy 'Evaluation of Settlement Characteristics' and the Countryside Assessment, Technical Supplement 6 which accompanies the draft Plan Strategy. The population of each of the settlements within the Council area is provided in Table 5 below.

Table 5: Settlement Hierarchy and Population Lisburn & Castlereagh City Council, 2015

Settlement Hierarchy	Lisburn & Castlereagh City Council Area	Total / % of District Total
City	Lisburn (45,410)	45,410 (40%)
Lisburn Greater Urban Area	Lisburn Greater Urban Area (4,948)	4,948 (4%)
Castlereagh Greater Urban Area	Castlereagh Greater Urban Area including Dundonald (30,717)	30,717 (27%)
Towns	Carryduff (6,947) Hillsborough & Culcavy (3,953) Moira (4,584)	15,484 (14%)
Villages	Aghalee (863); Annahilt (1045); Dromara (1,006); Drumbeg (813); Drumbo (375); Glenavy (1,791); Lower Ballinderry (912); Maghaberry (2,468); Milltown (1,499); Moneyreagh (1,379) Ravernet (564); Stoneyford (605); Upper Ballinderry (226)	13,546 (12%)
Small Settlements	Ballyaughlis (99); Ballycarn (105); Ballyknockan; Ballylesson (111); Ballynadolly (79); Ballyskeagh (194); Boardmills; Carr; Crossnacreevy (317); Drumlough (74); Drumlough Road; Dundrod (193); Duneight (88); Feumore; Halfpenny Gate (80); Halftown (197); Hillhall (81); Kesh Bridge (122); Lambeg; Legacurry (82); Long Kesh (358); Lower Broomhedge (239); Lurganure (467); Lurganville (87); Lurgill; Magheraconluce (459); Morningside (55); Purdysburn; Ryan Park (141); St James (115); The Temple; Tullynacross (129); Upper Broomhedge (78)	3,950 (3%)
Total Population in Settlements (114,055)		

(Source NISRA Headcount and Household Estimates for Settlements - March 2015) Please note: These settlements are based on settlement development limits provided for draft BMAP. The total population for the small settlements does not include any settlement with under 50 resident population. The settlements under 50 resident population are Boardmills, Carr, Drumlough Road, Feumore, Lambeg, Lurgill, Purdysburn, The Temple and Ballyknockan.

3. Allowance for Existing Housing Commitments (Annual Housing Monitor & Undeveloped & Ongoing Housing Land Assessment)

- 4.16 The Housing Monitor Maps within the Annual Housing Monitor Reports provide a breakdown of the sites monitored and accompanying statistical tables. These maps show land zoned for housing and also committed land with planning permission for housing outside the housing zonings and its current status i.e. 'development not started, development on-going or complete'.
<https://www.lisburncastlereagh.gov.uk/resident/planning/planning-publications>

4.17 Table 6 identifies that approximately 11,367 housing units are currently achievable over the Plan Period 2017-2032. When the housing element of proposed Strategic Mixed Use Site at West Lisburn/Blaris is included the figure rises to 12,867 units. This is marginally above the revised estimated Strategic Housing Allocation (SHA) requirement of 11,550 housing units.

4.18 The maps showing undeveloped and ongoing housing sites (including urban capacity sites) are identified in Appendix A.

Table 6: Housing Allocation 2017-2032 Plan Period

Settlement	Potential Units Remaining (Undeveloped Zoned Sites)	Potential Units Remaining (Ongoing Zoned Sites)	Potential Units Remaining (Ongoing Committed Sites with Planning Permission - Not Zoned)	Total Potential Units Remaining (Undeveloped & Ongoing Sites)
Lisburn City	69	3,378	1,086	4,533
Lisburn Greater Urban Area	0	29	180	209
Castlereagh Greater Urban Area-Newtownbreda/ Cairnshill Area	360	386	57	803
Castlereagh Greater Urban Area- Dundonald	0	628	378	1,006
Carryduff	410	888	266	1,564
Hillsborough/Culcavy	0	397	71	468
Moira	269	165	172	606
Villages & Small Settlements				1,368
Countryside				810
Total Units				11,367
Strategic Mixed Use Site West Lisburn/Blaris				1,500
Total				12,867
Total Units in Urban Footprint				3,801

- Potential Units for Lisburn City, the Greater Urban Areas and 3 Towns based on undeveloped sites and ongoing Sites
- Villages & Small Settlements based on Housing Policy Areas and Committed sites with Planning Permission
- Countryside based on (Building Control Completion Notices over 5 years) at an average of 54 dwellings per year projected (excluding Replacement Dwellings).
- Undeveloped sites - Zoned Land with No Planning Permission as of 31st March 2017
- Ongoing Zoned Sites - Zoned Land with Planning Permission as of 31st March 2017
- Ongoing Committed Sites - Sites Not Zoned but Committed with Planning Permission

4.19 The existing density in the settlements was assessed using the Housing Monitor, which assessed the density of completed housing monitor sites based on area in hectares and numbers of units complete. The study also looked at sites with planning approval that are still under construction and housing sites that had not started. A recommended density was then applied, indicated in Table 7 below.

Table 7: Existing Density

Location	Density on Completed Housing Monitor Sites (units per hectare)	Density on all Monitor Sites (units per hectare)	Recommended Density
Lisburn City	25	26	30
Lisburn City Centre	78	118	120
Lisburn Greater Urban Area	38	36	30
Castlereagh Greater Urban Area	20	19	30
Moira	19	20	25
Carryduff	24	24	25
Hillsborough	20	21	25

4. Urban Capacity Study

4.20 The Council commissioned an Urban Capacity Study (see Technical Supplement 2) which was completed in October 2018 for settlements over 5,000 population. In Lisburn and Castlereagh City Council Area this is relevant to Lisburn City, Lisburn Greater Urban Area, Castlereagh Greater Urban Area and Carryduff. Moira and Hillsborough & Culcavy are also assessed as they are designated towns in the proposed settlement hierarchy. They have smaller populations than the stipulated 5,000 but are allocated an urban footprint as it is considered appropriate due to their growth rate in housing over recent years.

4.21 The study provides a comprehensive analysis of the potential for future housing growth with the urban footprint. The Urban Capacity Study identified that the estimated potential on identified Urban Capacity Sites is 975 housing units, as shown in Table 7. When broken down to the number of housing units that can be located within the urban footprint, this equates to 705 housing units with 270 units located outside the urban footprint.

Table 8: Potential Urban Capacity Sites Identified

Settlement	Potential Units on Urban Capacity Sites	Potential Units on Urban Capacity Sites (Within Urban Footprint)
Lisburn City	675	642
Lisburn Greater Urban Area	0	0
Castlereagh Greater Urban Area	115	13
Carryduff	133	11
Hillsborough/Culcavy	28	15
Moira	24	24
Villages & Small Settlements	N/A	N/A
Countryside	N/A	N/A
Total Units	975	705

5. Allowance for Windfall Housing

- 4.22 A number of planning approvals or applications have historically and are currently approved on windfall sites. These are sites that were neither zoned nor anticipated during the formulation of the development plan but which have become available during the lifetime of the plan. Windfall potential is central to the assessment of future housing land requirement and is a key element of the urban capacity study (see Urban Capacity Study, Technical Supplement 2 for more detail).
- 4.23 An analysis of windfall sites has been carried out (see Table 9) based on past trends using information from the Annual Housing Monitor. Further analysis of windfall is included in the Urban Capacity Study Report. The projected Windfall for the Plan Period for 15 years based on historical trends amounts to 240 housing units on small sites that could accommodate up to 4 units and 1,605 housing units on sites that accommodate 5 units and over.

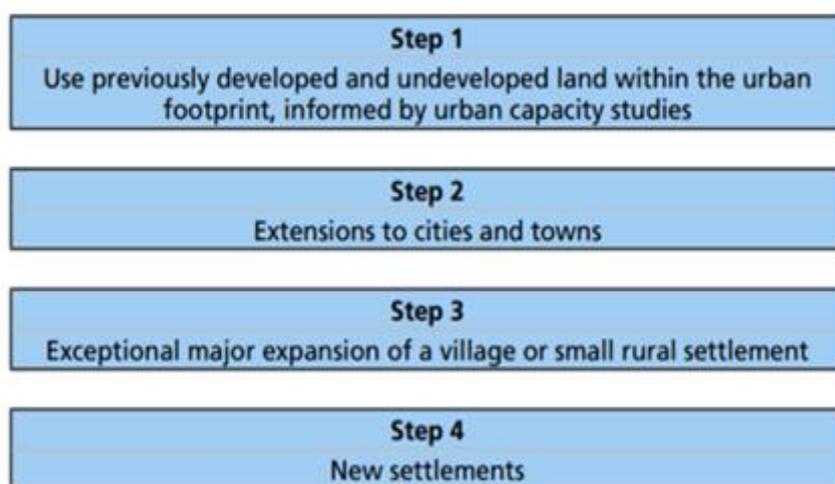
Table 9: Windfall Potential Projected over 15 Year Period

Settlement	Windfall Potential 1-4 Units Projected over 15 year period (Within Urban Footprint)	Windfall Potential 5+ Units Projected over 15 year period (Within Urban Footprint)
Lisburn City	135	585
Lisburn Greater Urban Area	3	300
Castlereagh Greater Urban Area	60	345

Carryduff	15	105
Hillsborough/Culcavy	30	60
Moira	0	210
Total Units Projected over 15 Year Period	243	1,605

6. Application of a sequential approach and identification of suitable sites for settlements over 5,000 population

- 4.24 The Regional Development Strategy (RDS 2035, page 40) sets a regional target of 60% of new housing to be located in appropriate ‘brownfield’ sites within the urban footprints of settlements greater than 5,000 population. PPS 12 (page 13) identifies a sequential approach and that the focus should be on using previously developed land and buildings, underdeveloped and undeveloped land first.



- 4.25 In Lisburn and Castlereagh City Council Area the Sequential Approach is relevant to Lisburn City, Lisburn Greater Urban Area, Castlereagh Greater Urban Area and Carryduff having populations over 5,000. Moira and Hillsborough & Culcavy are also assessed as they are designated towns in the current settlement hierarchy with smaller populations than the stipulated 5,000 but are allocated an urban footprint as it is considered appropriate to assess capacity due to their growth rate in housing over recent years.
- 4.26 According to the RDS 2035 (page 106) brownfield land is sometimes referred to as previously developed land being land that is, or was occupied by a permanent structure within a defined settlement limit. The term may encompass vacant or derelict lands, infill sites, land occupied by redundant or underused buildings, a piece of industrial or commercial property that is abandoned or underused and often environmentally contaminated.
- 4.27 The RDS 2035 defines the Urban Footprint for towns and cities throughout Northern Ireland as the continuous built-up area of the settlement. The boundary is represented by an uninterrupted line,
-

often lying inside the planned settlement limit. The urban footprint contains land which has a formal urban use including land on the edge of the settlement where it forms part of the curtilage of a building. Undeveloped zoned land at the edge of the settlement is excluded. Urban footprints have been identified and set as a baseline as of January 2001 (page 109 RDS, 2035).

- 4.28 The Council has updated the Urban Footprint to 2012 to make it more relevant to the study and to align with the formally adopted Housing Growth Indicators (HGIs) 2012-2025.
- 4.29 The Urban Capacity Study (Technical Supplement 2) assessed the potential within the **urban footprint**. It is concluded that out of Lisburn City, the Greater Urban Areas of Lisburn and Castlereagh and the three towns, Carryduff, Hillsborough and Moira 41% of new housing could be located within the urban footprint based on potential undeveloped and ongoing sites. This is short of the 60% target.
- 4.30 However, it should be noted that the majority of the urban capacity sites identified are located within the urban footprint and windfall projections will also allow a substantial number of dwellings within the urban footprint. A number of sites are currently zoned for housing in the existing Area Plan that are located outside the urban footprint but within the settlement limit. The Lisburn & Castlereagh Area Plan Strategy will not de-zone such sites as these are mostly committed through planning permission. The Maps in Appendix A show the individual sites detailing the undeveloped, ongoing and urban capacity sites.

Table 10: Potential Housing in Urban Footprints

Settlement	Potential Units Remaining Undeveloped & Ongoing Sites (Within Settlement Limits)	Potential Units Remaining Undeveloped & Ongoing Sites (Within Urban Footprint)
Lisburn City	4,533	2,270
Lisburn Greater Urban Area	209	209
Castlereagh Greater Urban Area	1,809	503
Carryduff	1,564	373
Hillsborough/Culcavy	468	279
Moira	606	167
Total Potential Units	9,189	3,801
Total Deliverable Within Urban Footprint		41.0%

7. Housing Needs Assessment/Housing Market Analysis (HNA/HMA)

- 4.31 The SPPS states that 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 development plan.
-

The findings of the HNA will influence how development plans will seek to facilitate a reasonable mix and balance of housing tenures and types to cater for a range of housing needs. Further details is provided in the Northern Ireland Housing Executive (NIHE) Housing Market Analysis Update Paper- April 2018. This provides information on the Housing Market Drivers, Tenures, and Affordable/ Social Housing Need. The NIHE will carry out regular monitoring and reviews of the data and trends for the various categories within the HNA.

4.32 The SPPS defines affordable housing as social rented housing and intermediate housing. These are defined as follows:

- **Social Rented Housing** is housing provided at an affordable rent by a Registered Housing Association; that is, one which is registered and regulated by the Department for Social Development as a social housing provider. Social rented accommodation should be available to households in housing need and is offered in accordance with the Common Selection Scheme, administered by the Northern Ireland Housing Executive, which prioritises households who are living in unsuitable or insecure accommodation.
- **Intermediate Housing** consists of shared ownership housing provided through a Registered Housing Association (e.g. the Co Ownership Housing Association) and helps households who can afford a small mortgage, but that are not able to afford to buy a property outright. The property is split between part ownership by the householder and part social renting from the Registered Housing Association. The proportion of property ownership and renting can vary depending on householder circumstances and preferences.
This definition of intermediate housing used for the purpose of this policy may change over time to incorporate other forms of housing tenure below open market rates

4.33 The total affordable new build requirements over the plan period is 2,490 units which forms part of the HGI figure. Where a local housing needs assessment identifies that there is a need for specialised or travellers specific accommodation this will also be met through policy.

Table 11: Social/Affordable Housing Requirements

Settlement	Potential Housing Units Remaining	Social Housing Need 2017-2032
*STRATEGIC HOUSING ALLOCATION (SHA) 11,550		
Lisburn City	4,533	1,770
Lisburn Greater Urban Area	209	200
Castlereagh Greater Urban Area - Newtownbreda/Cairnshill Area	803	50
Castlereagh Greater Urban Area - Dundonald	1,006	100
Total	6,551	2,120
Towns		
Carryduff	1,564	60
Hillsborough/Culcavy	468	110
Moirá	606	75
Total Towns	2,638	245
Villages		

Aghalee	44	10
Annahilt	136	0
Dromara	99	5
Drumbeg	21	0
Drumbo	8	0
Glenavy	269	90
Lower Ballinderry	72	0
Maghaberry	70	0
Milltown	89	5
Moneyreagh	115	0
Ravernet	19	5
Stoneyford	80	0
Upper Ballinderry	22	0
Total Villages	1,044	115
Small Settlements		
Boardmills	7	10
All other Small Settlements	317	0
Total Small Settlements	324	10
Countryside	810	0
Total Units	11,367	2,490
Total % of Strategic Housing Allocation	98.0%	22 %
Strategic Mixed Use Site West Lisburn/Blaris	1,500	
Total	12,867	

Developing a Policy-led Approach to enable the delivery of Affordable Housing

- 4.34 As the SPPS identifies the development plan process as being the primary vehicle to facilitate any identified need, the proportion of land or units to be set aside for affordable housing is determined through a policy-led approach, which is set out in the draft Plan Strategy.
- 4.35 In order to determine what such a policy-led approach should consist of, taking account of the particular characteristics and circumstances of the Council area, a study was carried out to determine the level of Affordable Housing that could be delivered if a planning policy was introduced for a percentage of housing to be given over to affordable housing in any approved planning application.
- 4.36 The study looked at all planning applications for housing during a 5 year period using planning approvals of 5 units or more and applying a 10% and 20% figure. It concluded that 915 affordable/social housing units could be delivered at 10%, and 2,040 units at 20% over a 15 year period. A Workshop was held with Members along with the Northern Ireland Housing Executive, Department for Communities and Northern Ireland Federation of Housing Associations to debate

such an approach. However, it should be noted that delivery of the required affordable housing can only be applied to new planning applications and not planning applications that are already approved or committed.

4.37 Further detail on the Council's approach is found in Policy HOU10 of Part 2, draft Plan Strategy.

Table 12: Social/Affordable Housing Delivery

Years from March to March	Total number of residential units approved (5 units and over)	Number of units delivered if 20% affordable is applied	Number of units delivered if 10% affordable is applied
2014-2015	514	97	42
2015-2016	433	81	34
2016-2017	1,012	193	88
2017-2018	815	153	69
2018-2019	801	154	73
Total	3,575	678	306
Average	715	136	61

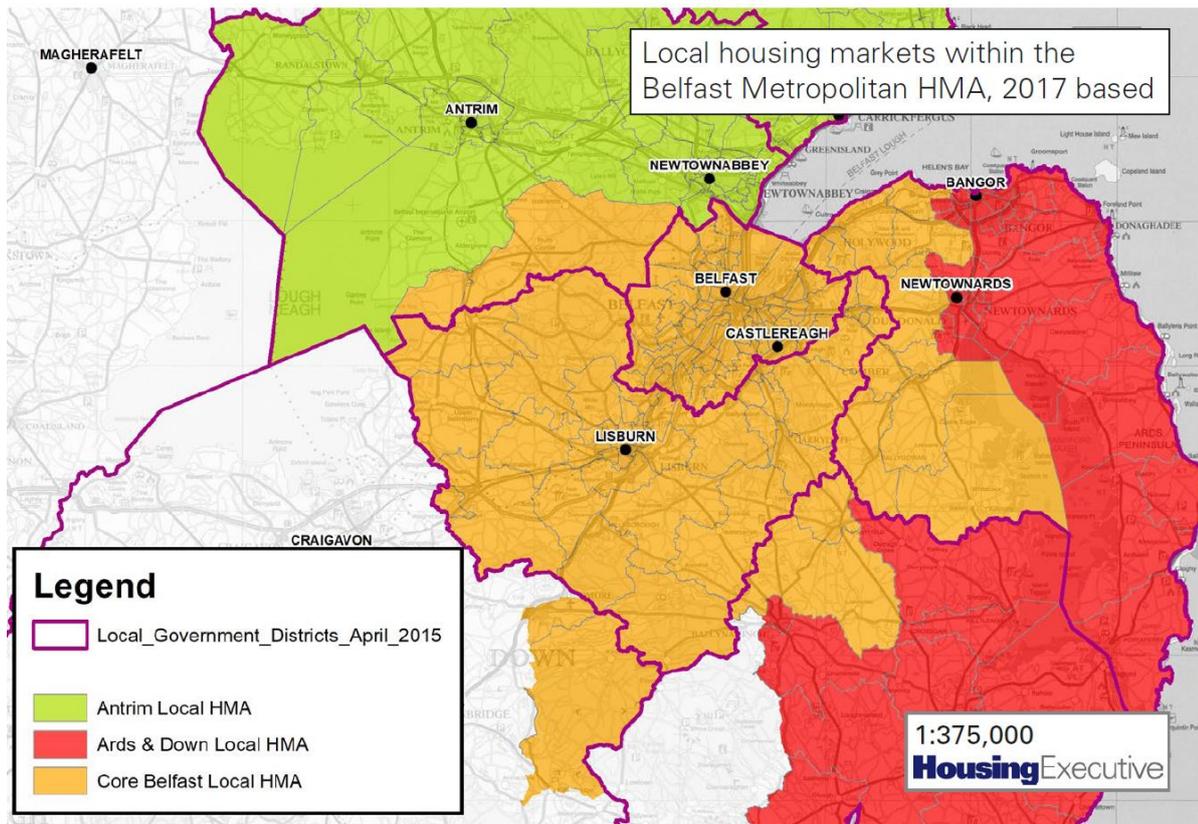
If taken over the plan period this would work out as follows

10% affordable would provide 61 (average) X 15 (plan period) = **915 Units**

20% affordable would provide 136 (average) X 15 (plan period) = **2,040 units**

Housing Market Areas

- 4.38 The Northern Ireland Housing Executive has produced Housing Market Areas (HMAs). These are primarily intended to provide the Housing Executive with a spatial framework to support their analysis of local housing systems and their internal strategy development processes. However, the HMAs should also assist local authorities to more clearly understand the broad HMA of which their local area is part. This in turn should help to clarify which local authorities should look to collaborate in planning for housing development across the broad HMA.
- 4.39 The geography of functional HMAs are shaped by where people live and work and the spatial area over which people search for and choose a new home without changing their place of work.
- 4.40 In the last 20 years, the need to understand housing markets and the spatial area over which they operate has become widely accepted as an important part of the housing planning and policy making process across the UK.
- 4.41 There is no single or widely accepted method for defining and mapping the spatial extent of broad HMAs but there is broad agreement that the delineation of the 'outer shell' of an HMA should draw on evidence of internal migration and commuting flows. The map shows that Lisburn & Castlereagh is located in the Belfast Metropolitan HMA and therefore housing policy needs to be developed in discussion with the neighbouring councils as people can live and work in these adjacent HMAs.



Source: Housing Executive Housing Market Areas Review Paper 2018

8. Transport Assessments

- 4.42 The Department for Infrastructure (DfI) has developed a suite of Local Transport Studies (LTS) which will set out the evidence baseline position for transportation infrastructure over the next 15 years. The Council will take account of integration of land use proposals and transportation through operational policy provided in Part 2 of the draft Plan Strategy. A number of new policies have been introduced, including a requirement for the promotion of active travel in all housing developments.
- 4.43 The need for the submission of travel plans and assessments in new planning applications for housing will be an important requirement. (See Local Transport Study Technical Supplement 8 for further detail).

5.0 EXECUTIVE SUMMARY OF HOUSING GROWTH STUDY

5.1 The Housing Growth Report was undertaken by Lichfields Planning Consultants between June and August 2019. The Report is summarised as follows:

Introduction

5.2 The introduction establishes the context for the Council requirements for the need for carrying out the Housing Growth Study to support the emerging Local Development Plan 2017-2032 and the Consultant's appointed. The report includes an update of the Housing Growth Indicators (HGI) approach (2012) and an assessment of a range of scenarios which are likely to drive future housing need over the Plan period.

Policy Context

5.3 This section details the hierarchy of current Policy including the Regional Development Strategy (RDS), the Strategic Planning Policy Statement (SPPS), Planning Policy Statements (PPSs) and the current Area Plans and other Council Strategies. The section also identifies the Preferred Options Paper put forward for housing growth.

Review of the Housing Market

5.4 This section details the Belfast Housing Market Area (HMA) and considers the position of Lisburn & Castlereagh within this and looks at travel to work areas and migration patterns and relationships between areas.

Housing Market Dynamics

5.5 This section provides an overview of key facts and figures (house prices, house sales, affordability, the private rented sector and housing completions) relating to the housing market in Lisburn & Castlereagh and comparisons with other local government districts in Northern Ireland.

Demographic baseline

5.6 This section provides an overview of the current demographic position in Lisburn & Castlereagh and considers the key drivers of anticipated future change in the population and number of households including projections and household size and concludes that the population projections suggest continued growth going forward over the Plan period. However it highlights that growth is expected in the older age groups with a decline in the proportion of younger working age people. Household size is projected to decline. The past and future demographic trends in Lisburn & Castlereagh highlight the need to continue to ensure that future housing can meet the needs of families and young working age population, together with an increasing proportion of smaller households and the elderly.

Future Housing Growth

5.7 This section considers the level of future housing required over the Plan period and looks at a range of future scenarios for growth and, in particular, whether the level of future housing growth should be uplifted beyond the baseline growth associated with the 2016-based household projections. It does this by considering the Housing Growth Indicators and testing a number of demographic and economic-led housing growth scenarios through a suite of software. The report states that following publication of the 2016-based household projections, the official HGIs are now out of date and an update of these figures is not available at the time of writing the report. The

Consultants have undertaken an update of the HGI taking into account the 2016-based household projections, and applying the adjustments identified in the HGI 2012 methodology.

- 5.8 The Consultants conclude that updating the HGI results in a projected new dwelling requirement between 2017 and 2032 of 692 dpa which is rounded up to 700 dpa, equating to 10,500 dwelling units over the Plan period. Using a number of jobs-led and economic growth scenarios, it is considered that this figure would support economic growth and is achievable over the Plan period.

Estimating the Future Housing Mix

- 5.9 This section details an understanding of the mix of housing that is required in Lisburn & Castlereagh to meet the identified housing need recognising that a failure to deliver the right mix of housing may result in the creation of imbalanced communities and a deterioration in the affordability of particular types of property.
- 5.10 The Consultants have applied an approach to housing mix based on an analysis of future household change, set against an appreciation of existing occupancy rates. They have estimated that the housing mix should be 32.7% for small (1 and 2 bedroom) and 67.3% for Family (3 and 4+ bedroom) housing.

Affordable Housing Needs

- 5.11 This section details information provided by the Northern Ireland Housing Executive (NIHE) on the projected social housing need for 2,490 new build units over the Local Development Plan period. This is built in to the HGI figure and represents 24% of the total housing requirement identified by the HGI.

Meeting Future Housing Need

- 5.12 This section summaries that the study seeks to update the HGI using the 2016-based household projections. This results in a future need of 692 dwellings per annum rounded up to 700 dpa for the Plan period in Lisburn & Castlereagh. It recognises that the 692 figure is higher than the minimum figure identified by the 2016 household projections but that in order to identify the appropriate level of future growth the Council should give consideration to whether an upward adjustment is required to address the housing market conditions; meet a particular identified strategic economic ambition, such as supporting the strategic proposals at West Lisburn; help address the impact of an aging population and support net in-migration, particularly of younger, economically-active population.
- 5.13 The report also identifies that the relationship between Lisburn & Castlereagh and Belfast should continue to be acknowledged as the level of growth proposed in their current draft Plan Strategy could have a significant impact on the housing market dynamics across the Belfast Metropolitan Housing Market Area (HMA).
- 5.14 The report also makes reference to housing monitor data on housing supply and patterns of past delivery and concludes that there appears to be a healthy supply of housing land across Lisburn & Castlereagh which would cover the Plan period 2017 to 2032. Table 9.1 of their report identifies the housing potential as of 31 March 2017 for 12,867 units on undeveloped and ongoing sites. This includes the lands at West Lisburn which is a key area of future regeneration and growth which is a priority for the Council for the next 20 years.
-

- 5.15 Overall the identified future supply of over 12,800 is sufficient to meet the identified HGI figure of 700 dwellings per annum over the 15-year period (10,500). This level of supply is dependent on the West Lisburn strategic site coming forward (supported by the West Lisburn Development Framework) to ensure the long term supply and the need for investment in the transport infrastructure to secure its future potential.
- 5.16 The report recommends that the future housing growth is identified as 700 dpa (10,500) within the emerging plan.

6.0 HOUSING GROWTH STUDY

Lisburn & Castlereagh Housing Growth Study

Lisburn & Castlereagh City Council

24 September 2019

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Contents

1.0	Introduction	1
2.0	Policy Context	3
	Regional Development Strategy (2010)	3
	Strategic Planning Policy Statement for Northern Ireland (September 2015)	4
	Planning Policy Statement 12: Housing in Settlements (2005)	4
	Belfast Metropolitan Area Plan (draft, 2015)	5
	Lisburn Area Plan (2001)	5
	Investment Plan	6
	West Lisburn Development Framework (2018 review)	6
	Preferred Options Paper (2017)	6
	Summary	6
3.0	Review of the Housing Market	8
	Housing Market Area	8
	Travel to Work Areas	12
	Migration Patterns	13
4.0	Housing Market Dynamics	14
	Summary	19
5.0	Demographic baseline	20
	Current Population	20
	Population Projections	21
	Household Projections	27
	Summary	30
6.0	Future Housing Growth	31
	Review of Housing Growth Indicators	31
	Scenario Modelling	32
	Jobs-led scenarios	34
	Summary and implications	36
7.0	Estimating the Future Housing Mix	37
8.0	Affordable Housing Needs	41

9.0 Meeting Future Housing Need	43
Housing land supply	44
West Lisburn	46
Housing Mix	46
Policy Recommendations	47

Figures

Figure 3.1 Housing Market Areas 2017	9
Figure 3.2 Belfast Metropolitan HMA	10
Figure 3.3 Belfast Local HMAs broken down by sub-area	11
Figure 3.4 Travel to Work Commuting Flow	12
Figure 4.1 Standardised house prices 2005 to 2019	15
Figure 4.2 Number of Sales Lisburn & Castlereagh	16
Figure 4.3 Net housing completions Lisburn & Castlereagh	18
Figure 5.1 Demographic profile of Lisburn & Castlereagh compared to NI (2017)	20
Figure 5.2 Historic population growth compared to projected growth Lisburn and Castlereagh	22
Figure 5.3 Relative population projections by Local Government District	23
Figure 5.4 Projected population broken down by age	24
Figure 5.5 Historic components of change in Lisburn and Castlereagh	25
Figure 5.6 Average net internal migration to Lisburn and Castlereagh	26
Figure 5.7 Projected future drivers of population change for Lisburn and Castlereagh	26
Figure 5.8 Comparison of projected household growth 2017 to 2032 for Lisburn and Castlereagh - 2012 and 206-based household projections	27
Figure 5.9 Relative population projections by local government district	28
Figure 5.10 Projected average household size in Lisburn and Castlereagh	29
Figure 5.11 Projected growth in household type in Lisburn and Castlereagh	29
Figure 6.1 Summary of scenarios	36
Figure 7.1 Housing ladder outcomes: Scenario A – building a 2-bed home	39
Figure 7.2 Housing ladder outcomes: Scenario B – building a 4-bed home	39
Figure 7.3 Current house type and number of bedrooms Lisburn and Castlereagh	40

Tables

Table 2.1 Housing Evaluation Framework	3
Table 4.1 Average House Price and Number of Sales by local government district (Q1 2019)	14
Table 4.2 House price change Q1 2015 to Q1 2019	15
Table 4.3 Change in Affordability Index - % unaffordable	17
Table 4.4 Ulster University's Multiplier Weighting Ratio	17
Table 4.5 Average rent by property type (pcm)	18
Table 5.1 Population change between 2001 and 2017 by local government district	21

Table 5.2 Age Structure Comparison	21
Table 5.3 Projected average household size by local government district	28
Table 6.1 Estimate of housing need for Lisburn & Castlereagh	31
Table 6.2 Estimate of housing need of Lisburn and Castlereagh	32
Table 6.3 Summary of demographic outcomes - Scenario C	34
Table 6.4 Summary of demographic outcomes - Scenario D	35
Table 6.5 Summary of demographic outcomes - Scenario E	35
Table 7.1 Household composition by occupancy rating	37
Table 7.2 Estimated housing mix requirements for Lisburn and Castlereagh	38
Table 8.1 Lisburn & Castlereagh household composition of housing applicants as of March 2017	41
Table 9.1 Housing land supply as of 31 March 2017	45

1.0 Introduction

1.1 Lisburn & Castlereagh City Council ('LCCC') commissioned Lichfields to undertake this Housing Growth Study to inform its emerging Local Development Plan (2017 to 2032).

1.2 The purpose of this study is to identify future housing needs for Lisburn & Castlereagh for the period 2017 to 2032, and to provide a robust and up-to-date evidence upon which the new Local Development Plan will be developed. In so doing, it will form the basis by which LCCC will be able to develop its Local Development Plan policies relating to the provision of housing. However, it should be noted that this report does not in itself provide a policy position in respect of future levels of housing provision which is a matter for future determination by LCCC.

1.3 The report includes an update of the Housing Growth Indicators ('HGI') approach (2012) and an assessment of a range of scenarios which are likely to drive future housing need over the period 2017 and 2032.

1.4 The HGIs are published by the Northern Ireland Statistics and Research Agency ('NISRA') and provide an estimate of future housing need at a Local Government District level. These are important in the development of planning policies but there is no expectation that the HGIs would be automatically translated into Local Development Plan policy. Critically, the latest HGIs are based on 2012-based population and household projections and only consider housing growth to 2025.

1.5 With that in mind, the starting point for this report has been the latest 2016-based NISRA population and household projections which identify an additional 8,720 households in Lisburn & Castlereagh between 2017 and 2032. Alternative scenarios have been tested using the PopGroup⁴ suite of demographic software to consider the implications of achieving alignment between housing and employment growth.

1.6 The household projections identify the level of housing growth that would occur if historic population and household formation trends continue into the future. The population projections are based on demographic information from the most recent five years of data, whilst the household projections take account of (and project forwards) household membership probabilities from the 2001 and 2011 censuses. The application of a trend-based approach will determine the scale of future household growth that is anticipated by the projections, irrespective of the direction of future policies and strategic aspirations.

1.7 In addition to assessing the scale of housing growth over the Local Development Plan period to 2032, this report also considers the appropriate mix of the housing supply and affordable housing needs. This will help LCCC to frame its housing delivery policies, albeit that these should also take account of other evidence, such as that relating to development viability.

1.8 This report draws on a wide range of data, including that provided by:

- 1 NISRA, including:
 - a 2011 Census
 - b 2017-based Mid-Year Population Estimates

⁴ Demographic Modelling Software which was developed to generate population, household and labour force projections for specified geographical areas. Forecasts can be made using a variety of data inputs and assumptions. It is used by analysts and planners in both the public and private sectors and provides the UK standard for local area demographic analysis and forecasting, complementing the approaches used by the UK statistical agencies, including the Northern Ireland Statistics and Research Agency (NISRA).

- c 2016-based population and household projections
- 2 Northern Ireland Housing Executive (NIHE); and,
- 3 LCCC monitoring data.

1.9 This report is structured as follows:

- Section 2 summarises the relevant planning and housing policy context;
- Section 3 considers how Lisburn & Castlereagh fits within the wider Housing Market Areas;
- Section 4 contains an overview of the housing market in Lisburn & Castlereagh;
- Section 5 provides an overview of existing demographic trends in Lisburn & Castlereagh;
- Section 6 considers future housing growth scenarios in Lisburn & Castlereagh between 2019 and 2032;
- Section 7 estimates the future housing mix that is required in Lisburn & Castlereagh;
- Section 8 details the affordable housing needs for Lisburn & Castlereagh; and,
- Section 9 sets out our conclusions and recommendations for meeting the future housing need.

2.0

Policy Context

2.1 This section sets out the planning and housing framework which form the policy basis for this housing growth study. It provides a summary of the relevant housing and planning documents and provides the context for future housing allocations and housing policies.

Regional Development Strategy (2010)

2.2 The Regional Development Strategy 2035 (RDS)⁵ is the spatial strategy of the Executive, which provides the long-term policy direction and strategic spatial perspective for planning in Northern Ireland. The RDS has a statutory basis under the Strategic Planning (Northern Ireland) Order 1999.

2.3 Section 3 of the RDS provide Strategic Guidance in the form of:

- 1 Regional Guidance (RG) which applies to everywhere in the region and is presented under the three sustainable development themes of Economy, Society and Environment;
- 2 Spatial Framework Guidance (SFG) which is additional to the region-wide guidance and is tailored to each of the five geographical components of the Spatial Framework.

2.4 Regional Guidance point RG8 refers to “*Manag(ing) housing growth to achieve sustainable patterns of residential development*”. It requires a varied mix of housing to be delivered, including the availability of affordable and special needs housing.

2.5 Paragraph 3.19 provides an overview of the policy in relation to appropriate housing in settlements, which should:

- 1 Promote more sustainable housing development within existing urban areas;
- 2 Ensure an adequate and available supply of quality housing to meet the needs of everyone; and,
- 3 Use a broad evaluation framework to assist judgements on the allocation of housing growth.

2.6 The Housing Evaluation Framework set out below outlines the process which should be followed to assist judgements on the allocation of housing growth.

Table 2.1 Housing Evaluation Framework

Housing Evaluation Framework	Justification
Resource Test	Studies should be carried out to assess and detail the existence of community assets and physical infrastructure such as water, waste and sewage including spare capacity.
Environmental Capacity Test	An assessment of the environmental assets of the settlement, the potential of flooding from rivers, the sea or surface water run-off and its potential to accommodate future outward growth without significant environmental degradation should be made.
Transport Test	Studies should be carried out to assess the potential for integrating land use and public transport and walking and cycling routes to help reduce reliance on the car.

⁵ Department for Regional Development, Regional Development Strategy 2035, (2010)

Housing Evaluation Framework	Justification
Economic Development Test	The potential to facilitate an appropriate housing and jobs balance and to unlock any major strategic development opportunities should be assessed and detailed.
Urban and Rural Character Test	Assessment should be made of the potential to maintain a sense of place, and to integrate new development in a way that does not detract from the character and identity of the settlement.
Community Services Test	The potential to underpin and, where necessary, reinforce the community service role and function of the settlement should be assessed and detailed.

Source: Regional Development Framework Table 3.2 (page 42)

2.7 Another important step in the allocation process is identified in paragraph 3.21 as making judgments to achieve a complementary urban/rural balance to meet the need for housing in the towns of the district and to meet the needs of the rural community living in smaller settlements and the countryside.

Strategic Planning Policy Statement for Northern Ireland (September 2015)

2.8 The Strategic Planning Policy Statement for Northern Ireland (SPPS)⁶ sets out the framework for planning across Northern Ireland, including in relation to the preparation of LDPs. It has a statutory basis under Part 1 of the Planning Act (Northern Ireland) 2011.

2.9 Paragraph 3.3 of the SPPS requires planning authorities to deliver on all three pillars of sustainable development when formulating policies. It also states that the planning system should focus on the needs and aspirations of our society such as *“facilitating sustainable housing growth in response to changing housing need (including delivery of social and affordable homes)”*.

2.10 Paragraph 6.135 identifies the three key purposes of housing in settlements as being to:

- 1 Manage housing growth to achieve sustainable patterns of residential development;
- 2 Support urban and rural renaissance; and,
- 3 Strengthen community cohesion.

2.11 Paragraph 6.143 states that the NIHE or relevant housing authority will undertake a Housing Needs Assessment (HNA)/Housing Market Assessment (HMA), the purpose of which will be to identify the range of specific housing needs including affordable housing need requirements.

Planning Policy Statement 12: Housing in Settlements (2005)

2.12 This Planning Policy Statement provides strategic direction and guidance in the form of regional planning policy to assist the implementation of the RDS. The policy guidance in this statement applies to all residential development proposals within cities, towns, villages and small settlements in Northern Ireland. It does not apply to dwellings in the countryside except in respect to travellers’ accommodation.

2.13 PPS12 identifies a range of planning control principles including:

⁶ Department of the Environment, Strategic Planning Policy Statement for Northern Ireland (SPPS): Planning for Sustainable Development, (2015)

- 1 Principle 1: *Increased Housing Density without Town Cramming* states that when considering an increase in housing density in established residential areas, care should be taken to ensure that local character and the environmental quality are not eroded;
- 2 Principle 2: *Good Design* states that good design should be the aim of all those involved in housing development and will be encouraged everywhere;
- 3 Principle 3: *Sustainable Forms of Development* seeks to reduce the use of greenfield land for housing and encourages the accommodation of more urban housing through the recycling of land and buildings. It also encourages the promotion of more housing in city and town centres, including as part of mixed-use developments. Major housing development should be concentrated in sustainable locations in order to facilitate a high degree of integration with centres of employment, community services and public transport and taking advantage of existing infrastructure; and,
- 4 Principle 4: *Balanced Communities* requires social housing to be provided by developers as an integral element of larger housing developments where a need is identified.

2.14 HS4 House Types and Size states:

“planning permission will only be granted for new residential development of 25 or more units, or on sites of one hectare or more, where a mix of house types and sizes is provided.”

Belfast Metropolitan Area Plan (draft, 2015)

2.15 Although formally adopted in 2014, this process of final Belfast Metropolitan Area Plan (BMAP) adoption was declared unlawful as a result of a Court of Appeal judgment delivered on 18 May 2017. However, the draft BMAP (in its most recent, post-examination form) remains a significant material consideration in future planning decisions.

2.16 The District Proposals for Lisburn & Castlereagh form an integral part of the draft BMAP. The distribution of housing growth potential in each area is in accordance with the approach set out in the BMA Housing Strategy within which approximately:

- 1 516ha⁷ land in Lisburn are zoned and designated for housing, including land for the provision of social housing; and,
- 2 Approximately 270ha land in Castlereagh are zoned and designated for housing, including land for housing, including land for the provision of social housing.

Lisburn Area Plan (2001)

2.17 The change in council boundaries as a result of the local government reform on 1 April 2015, and the subsequent quashing of BMAP, means that the Lisburn Area Plan 2001 remains the statutory development plan for the majority of the Council district and for a small portion of Belfast’s district around Dunmurry.

2.18 Policy H1 seeks:

“to make adequate land available within settlements to meet housing needs until such time as the successor Belfast Metropolitan Plan is in place.”

2.19 This policy emphasises that developments will be limited to zoned areas in Lisburn/Dunmurry, Hillsborough and Moira.

2.20 The Belfast Urban Area Plan 2001 (BUAP) and the Carryduff Local Plan 1988-1993 also are retained as the statutory plans covering other parts of the Council area.

⁷ https://www.planningni.gov.uk/index/policy/dev_plans/devplans_az/bmap_2015.htm

Investment Plan

2.21 'Connect, Invest, Transform' is the 10-year investment plan for Lisburn & Castlereagh. There are three priorities in the Plan:

- 1 Communities;
- 2 Economy; and
- 3 Infrastructure.

2.22 The Plan recognises the need to ensure jobs are created in Lisburn & Castlereagh to support the potential for future housing growth. It recognises the areas for future growth in terms of housing as West Lisburn strategic growth, and Hillsborough through the City Deal supported by the recent investment in Hillsborough Castle. However, the plan is very much focused on ensuring there is investment across the different parts of Lisburn & Castlereagh.

West Lisburn Development Framework (2018 review)

2.23 The West Lisburn Development Framework is to be the overarching strategy document for a portion of the Local Plan area and will establish a vision and strategy and give direction and guidance for future planning and investment for the next 20 years. This document was subject to review in 2018.

2.24 Objective 5 of the Development Framework seeks to:

"Encourage the development of new residential development to support growth in the area, whilst respecting existing settlements."

Preferred Options Paper (2017)

2.25 As set out in the Council's Statement of Community Involvement, the purpose of the Preferred Options Paper is to outline the key planning issues affecting the Council area and identify the options available to address them. Strategic Objective A (Enabling Sustainable Communities and Delivery of New Homes) seeks:

"To support the existing settlement hierarchy across the Council area; recognising Lisburn & Castlereagh as a growth area for new homes reflective of its strategic location."

"To support the provision of housing to cater for a range of types and tenures and the need to support social housing identified."

2.26 The Emerging Local Development Plan Preferred Options Paper provides four themes on the settlement hierarchy and facilitating future housing growth in urban and rural areas along with education, health, community and cultural facilities.

Summary

2.27 A number of key summary issues can be drawn from the policy review in respect of housing as follows:

- 1 The policies recognise the importance of identifying housing need and meeting it through an appropriate supply of sustainable land.
- 2 The policies also seek to ensure that an adequate mix of housing types, tenures and sizes can be delivered to meet the needs of the whole community in each local government district. This includes the need to make an appropriate provision of affordable housing.
- 3 In terms of housing supply:

- a Although not adopted, the Belfast Metropolitan Area Plan is influential in shaping planning decisions. The BMA Housing Strategy identifies 516ha land for housing in Lisburn and 270ha in Castlereagh.
 - b The West Lisburn Development Framework establishes a vision and strategy for the area which is focused on supporting new residential development across West Lisburn.
 - c This provides a clear basis for the identification of future supply as part of the Lisburn & Castlereagh Local Plan, although all sources of supply should be re-examined to ascertain whether they are likely to be able to contribute towards meeting the identified future demand for housing growth.
- 4 The various policies also provide a framework for the testing of the suitability and sustainability of proposals for residential development, taking account of matters such as location, density, and impact. Although not directly relevant to this study, these are important considerations that will affect the ability of sites to meet the identified housing requirement for Lisburn & Castlereagh.

3.0 Review of the Housing Market

3.1 This section provides an overview of the Belfast Housing Market Area (HMA) and considers the position of Lisburn & Castlereagh within this.

Housing Market Area

3.2 The Northern Ireland Housing Executive (NIHE) commissioned Newhaven Research to update the analysis to review and update the 11 broad HMAs which were originally defined in 2009.

3.3 The review, which was undertaken between February and June 2018 and published in August 2018, was based on:

- 1 Census 2011 data and an anonymised sample of over a million records from the Medical Cards Registration (MCR); and
- 2 Validation through discussion with stakeholders.

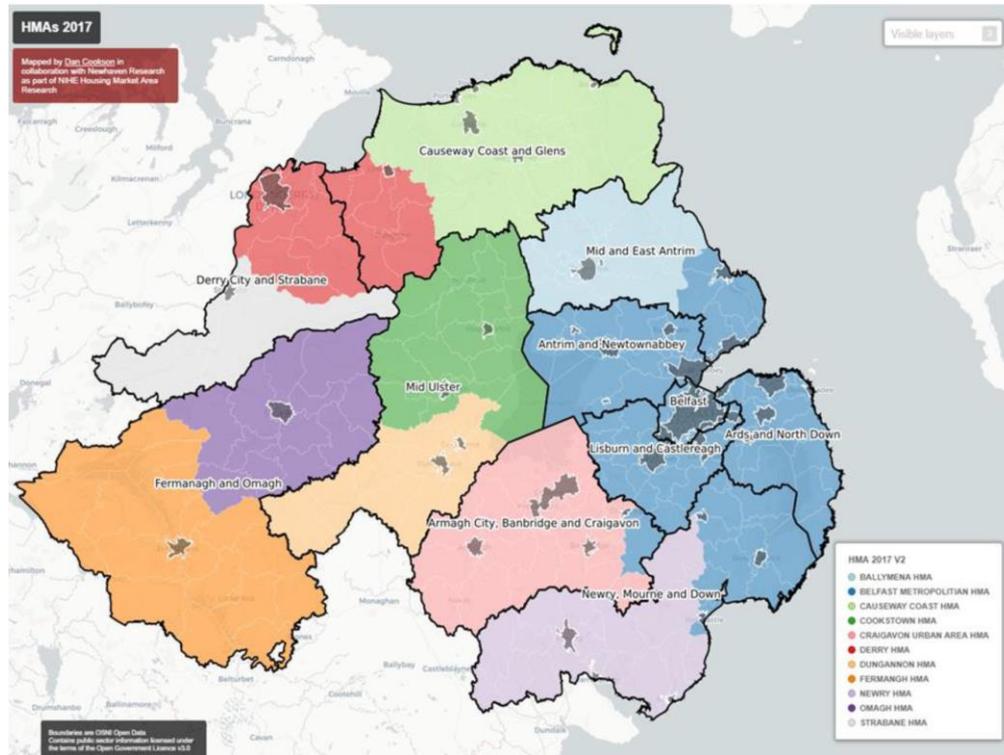
3.4 MCR records were used to explore the residential patterns observed between 2011 and 2017. The findings of this were then compared to the travel-to-work-areas (TTWAs) taken from the 2011 Census.

3.5 The study established boundaries for the 11 functional HMAs operating across Northern Ireland. It identified a number of modest changes to the spatial extent of the HMA, most noticeably for the Belfast Metropolitan HMA and those housing market areas that adjoin it.

3.6 The study highlighted that Lisburn & Castlereagh remains part of the Belfast Metropolitan HMA. In terms of local markets for the Belfast Metropolitan HMA, Lisburn & Castlereagh is identified as part of the Core Belfast Local HMA which was assessed as having 75% containment in terms of commuting and migration⁸.

⁸ Containment is where at least 75% of the area's resident workforce who work in the area and at least 75% of the people who work in the area also live in the area

Figure 3.1 Housing Market Areas 2017



Source: 'Mapping of NI Housing Market Areas' Newhaven Research (August 2018)

3.7 Recognising that most HMAs are not aligned to local authority boundaries, the report states at page 7:

“The literature suggests that HMA boundaries are fuzzy and can overlap”

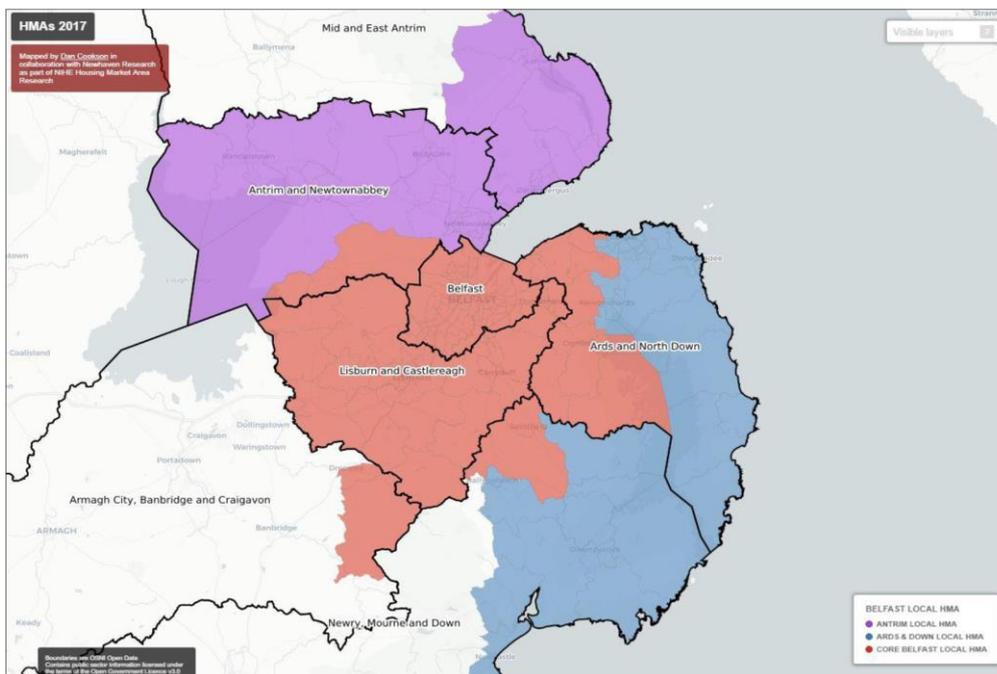
3.8 In the light of this, the report concludes that the HMA boundaries identified are the ‘best’ fit boundaries to support and enable data collection and analysis.

Belfast Core HMA

3.9 The Belfast Core HMA is identified in the study as the largest and most complicated HMA across Northern Ireland. It can be broken down into three local HMAs:

- 1 Antrim Local HMA;
- 2 Ards and North Down Local HMA; and,
- 3 Core Belfast Local HMA.

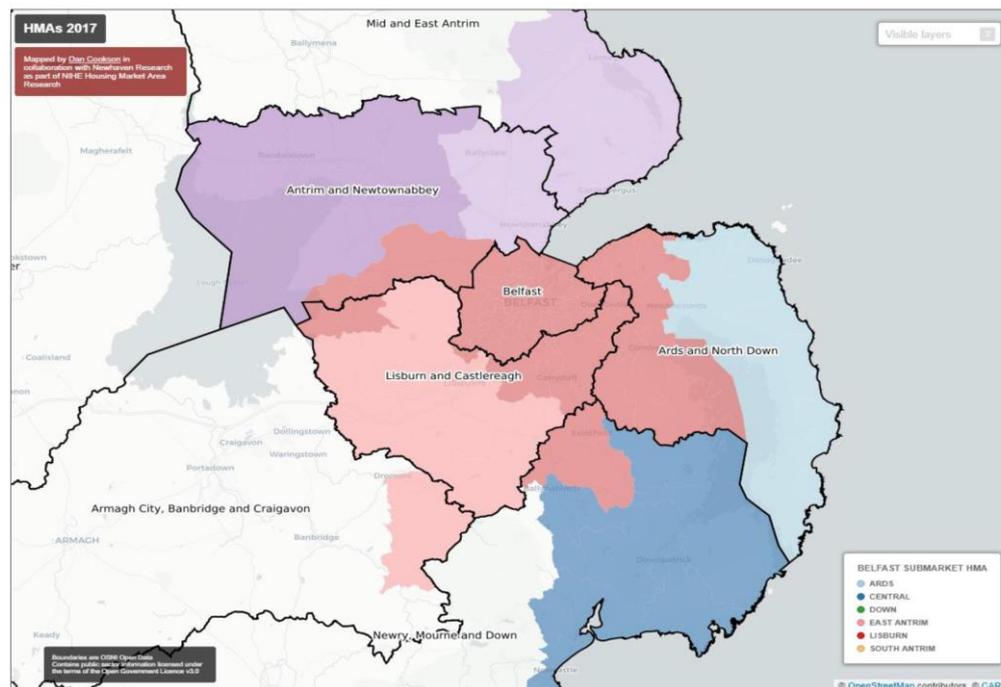
Figure 3.2 Belfast Metropolitan HMA



Source: 'Mapping of NI Housing Market Areas' Newhaven Research (August 2018)

- 3.10 The three sub-markets set out in Figure 3.1 Housing Market Areas 2017 Figure 3.1 do not follow the administrative boundaries although the report recognises that this reflects the reality of housing demand in the Belfast Metropolitan HMA which is driven by households with a preference to live in the core, north or south areas of the HMA.
- 3.11 The Core Belfast HMA can be further broken down into local/submarket HMAs as follows.

Figure 3.3 Belfast Local HMAs broken down by sub-area



Source: 'Mapping of NI Housing Market Areas' Newhaven Research (August 2018)

3.12 The report prepared by Newhaven Research does not provide any further clarity on the local sub-markets, and the colours on the plan replicated above⁹ do not match with its key. It is, however, interesting to note that the Belfast Core HMA includes both the LGDs of Belfast and Lisburn & Castlereagh in totality, whereas only part of some of the other LGDs are included, highlighting the strength of relationship between Belfast and Lisburn & Castlereagh.

3.13 The study considered demand-side self-containment rates and used a minimum self-containment rate of 75%. This compares with the self-containment rates of single tier HMAs that operate across Northern Ireland (94.3%). The analysis identified the following self-containment rates:

- 1 All Core Belfast Local HMA – 86.3%;
- 2 Central Local HMA – 84.6%; and,
- 3 Lisburn Local HMA – 64.5%.

3.14 This report does not seek to test the analysis set out within the review of the HMA. However, a clear implication of this review is to highlight the important relationship between Lisburn & Castlereagh and the wider Core Belfast HMA. Any future housing growth identified must consider whether:

- 1 It meets the identified need for Lisburn & Castlereagh going forward; and,
- 2 If any unmet need is required to be met within the wider market within which it operates. The reverse is also true, particularly given the ambitious economic and housing growth proposals contained within the Belfast draft Plan Strategy.

⁹ Mapping of NI Housing Market Areas Figure 4.6

3.15 However, given the status of the emerging Belfast Local Development Plan, it is beyond the scope of this report to consider the implications of any such unmet needs on the housing requirement for Lisburn & Castlereagh.

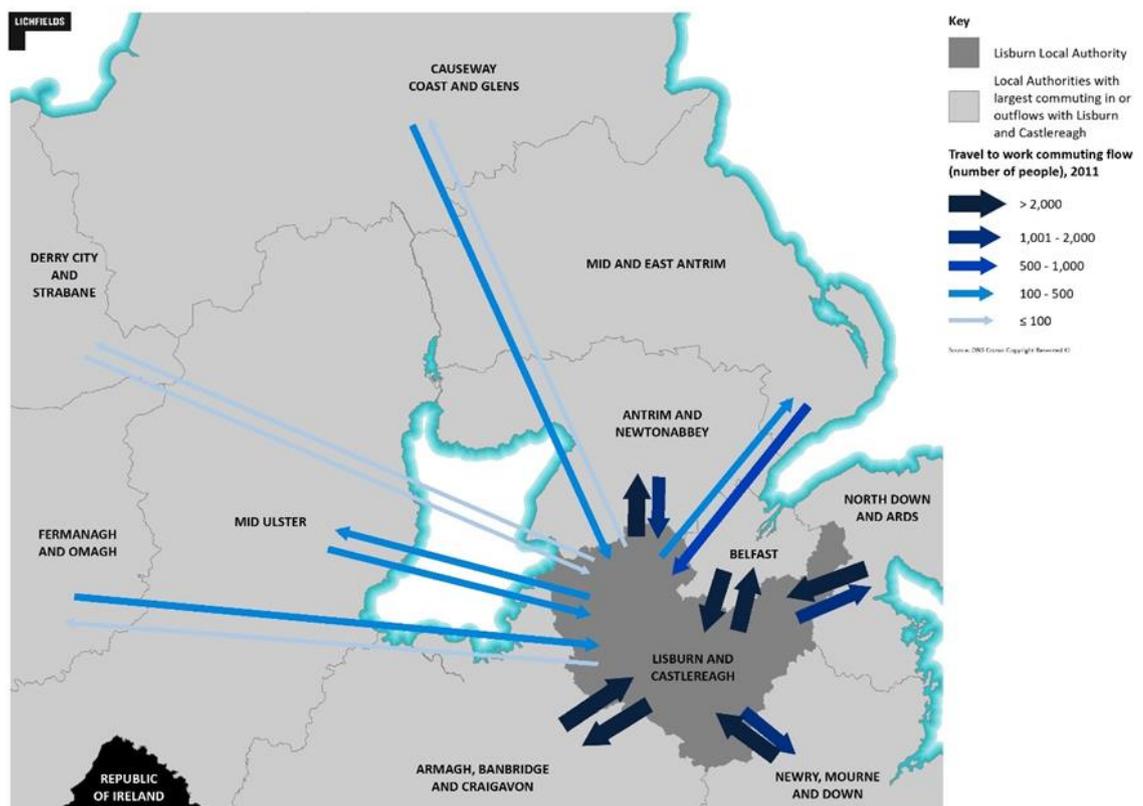
Travel to Work Areas

3.16 In 2011, approximately 43.2% of working residents in Lisburn & Castlereagh travelled outside of the local authority for employment. The authority's self-containment rate¹⁰ was equivalent to 49.6%. The worker outflow in 2011 equated to 30,620, with the largest flows to Belfast (22,630; 74%), Antrim and Newtonabbey (2,470; 8%) and Armagh City, Banbridge and Craigavon (2,080; 7%).

3.17 At the same time, around 22,780 workers commuted into Lisburn & Castlereagh for work in 2011, primarily coming from the adjoining authorities of Belfast (7,700; 34% of in commuters), Armagh City, Banbridge and Craigavon (4,920; 22%) and Ards and North Down (4,270; 19%).

3.18 Lisburn & Castlereagh is therefore a net exporter of labour, with a net outflow of around 7,840 workers – equivalent to around 14.8% of the total workplace population within the local authority. This clearly confirms its very close relationship with Belfast.

Figure 3.4 Travel to Work Commuting Flow



Source: Census 2011 / Lichfields analysis

¹⁰ i.e. The share of the area's resident workforce who work in the area and the proportion of people that work in the area and also live within Lisburn & Castlereagh

Migration Patterns

- 3.19 Based on the 2011 Census, evidence contained in the *'Mapping Northern Ireland's Housing Market Areas'* report identified that there were low rates of population turnover in Northern Ireland with and only Belfast and Coleraine having rates of population churn higher than the median rate for all local authorities across the UK. This trend is consistent with a downward trend across many OECD (Organisation for Economic Cooperation and Development) countries and was linked to the impact of the recession and the resulting housing market downturn.
- 3.20 Analysis of Census longer distance flows identified:
- 1 People moving from Great Britain were concentrated in the Belfast Urban Area and in particular Belfast, Lisburn and Ards and North Down. The age profile suggested that some of these moves involved people retiring back to Northern Ireland;
 - 2 Inter-district moves were concentrated in Belfast and Coleraine and (to a lesser extent) Newtownabbey and Castlereagh. A large proportion of these were student-related movements; and,
 - 3 People aged 30 and older who moved to other government districts typically remained a commutable distance of their previous address. In the case of Belfast, the vast majority had moved within an hour's drive from the City. This is likely to be as a consequence of people moving into a different life-stage and requiring a different housing product to meet their needs. Given the character and market role of different local government districts, this might necessitate a migration movement.
- 3.21 These trends highlight the importance of the relationship between Lisburn & Castlereagh and Belfast given the increased desire of people to move by a distance which still enables commuting to an existing place of employment.
- 3.22 Providing jobs aligned with future housing will be important for Lisburn & Castlereagh to enable future residents to live and work in the local area.

4.0 Housing Market Dynamics

4.1 This section provides an overview of a number of key metrics relating to the housing market in Lisburn & Castlereagh relative to other local government districts in Northern Ireland.

House Prices

4.2 NISRA publish quarterly reports regarding property prices in Northern Ireland. The latest report, which relates to Quarter 1 2019 provides mean average house prices for all local government districts compared to the Northern Ireland average.

Table 4.1 Average House Price and Number of Sales by local government district (Q1 2019)

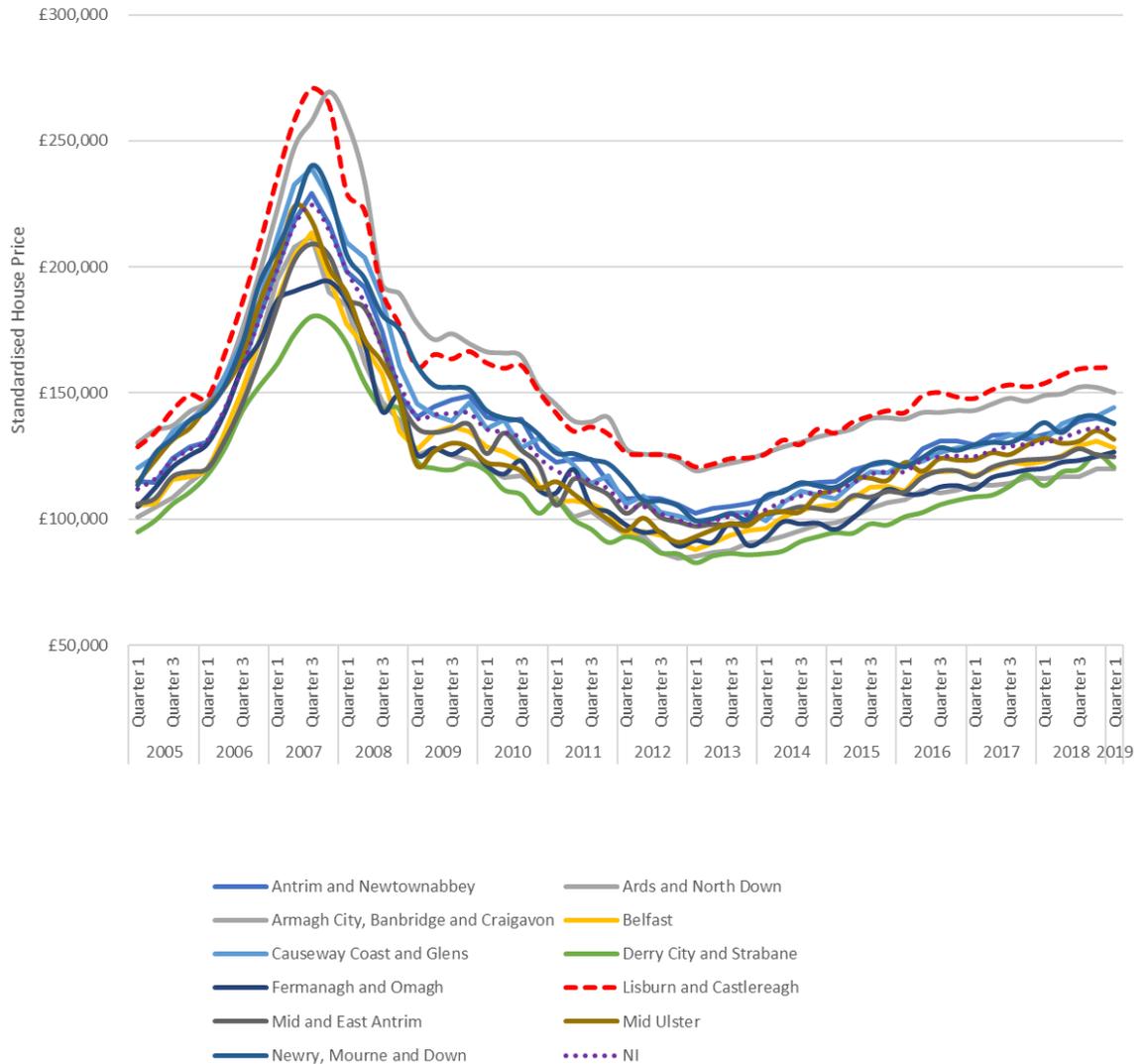
	Number of Sales	Standardised Price ¹¹ (Q1 2019)	Deviation from NI average
Lisburn and Castlereagh	398	£160,301	+18.9%
Ards and North Down	444	£150,247	+11.5%
Causeway Coast and Glens	328	£144,168	+6.9%
Antrim and Newtownabbey	414	£138,060	+2.4%
Newry, Mourne and Down	303	£137,768	+2.2%
Northern Ireland	4,272	£134,811	-
Mid Ulster	214	£131,751	-2.3%
Belfast	868	£128,386	-4.8%
Fermanagh and Omagh	177	£126,575	-6.1%
Mid and East Antrim	397	£124,575	-7.6%
Derry City and Strabane	300	£120,651	-10.5%
Armagh City, Banbridge and Craigavon	429	£119,247	-11.5%

Source: NISRA 2019

4.3 Data from Q1 2019 highlights Lisburn & Castlereagh had the highest average house price, outstripping the Northern Ireland average by 18.9%. Analysis of standardised prices from 2005 to 2019 shows that Lisburn & Castlereagh together with Ards and North Down have consistently had the highest house prices over a 14-year period.

¹¹ The standardised price is defined as a hypothetical value based on a weighted combination of prices and index based on this is seen as providing a better measure of pure price change.

Figure 4.1 Standardised house prices 2005 to 2019



Source: NISRA 2019

4.4

Figure 4.1 highlights that the recession (post-2007) had a significant impact on average house prices across Northern Ireland. Whilst prices remain significantly lower than the 2007 peak, there has been a steady increase in average prices since Q1 2013. Lisburn & Castlereagh has experienced the greatest absolute and the second highest percentage increase (after Derry City and Strabane) in house prices from Q1 2005 to Q1 2019. The level of increase in Lisburn & Castlereagh over this period has been 38% higher than in Belfast City.

Table 4.2 House price change Q1 2015 to Q1 2019

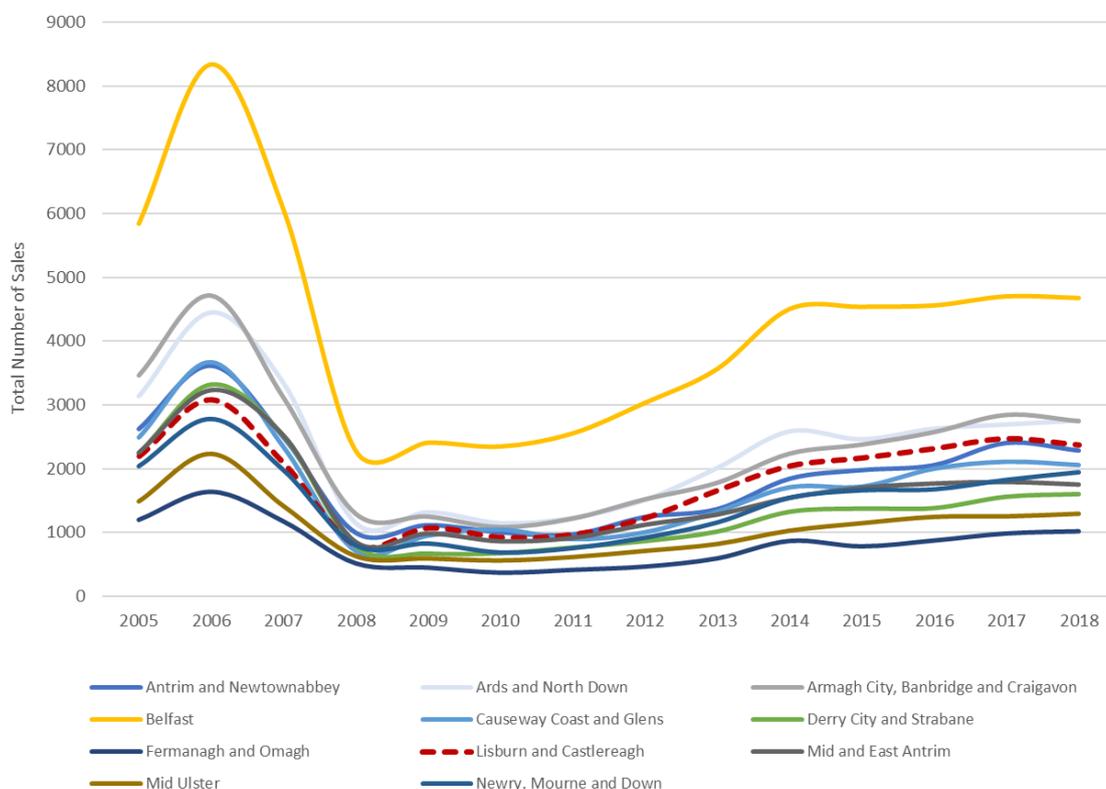
	2005 to 2019	% Change
Lisburn and Castlereagh	£31,472	24.4%
Derry City and Strabane	£25,707	27.1%
Newry, Mourne and Down	£24,347	21.5%
Causeway Coast and Glens	£24,047	20.0%
Antrim and Newtownabbey	£23,209	20.2%
Northern Ireland	£22,891	20.5%
Belfast	£22,869	21.7%

	2005 to 2019	% Change
Fermanagh and Omagh	£21,700	20.7%
Ards and North Down	£19,848	15.2%
Armagh City, Banbridge and Craigavon	£19,166	19.0%
Mid and East Antrim	£18,709	17.7%
Mid Ulster	£16,868	14.7%

Source: NISRA 2019

4.5 In terms of number of sales, Lisburn & Castlereagh has experienced an overall trend of increasing sales since 2011, with a slight tailing off experienced in 2018. This reflects overall number of sales across the other local government districts, suggesting that the market in Northern Ireland remains strong, with a return to the number of sales experienced prior to 2007, albeit not to the peak levels experienced at the height of the market.

Figure 4.2 Number of Sales Lisburn & Castlereagh



Source: NIHE 2010

Affordability

4.6 NIHE draws upon Ulster University’s Affordability Index, the most up-to-date version of which was published in 2016. The Affordability Index shows that affordability has improved since 2012 in Lisburn & Castlereagh with the percentage of properties which were unaffordable having reduced from 69% in 2012 to 58% in 2016¹². The implication of this is that in 2016, Lisburn & Castlereagh was the joint fourth least affordable local government district in Northern Ireland. Despite the evidence of above-average increases in house prices, this represents an improvement from its position as the second least affordable local government district in 2012.

¹² Housing Market Analysis Update (April 2018) Page 29 Table 1.5

Table 4.3 Change in Affordability Index - % unaffordable

	2012	2016	% Change 2012 to 2016
Belfast	73.0%	75.0%	2.0%
Armagh & Craigavon	58.0%	71.0%	13.0%
Newry, Down & Banbridge	63.0%	66.0%	3.0%
Lisburn & Castlereagh	69.0%	58.0%	-11.0%
Antrim & Newtownabbey	66.0%	58.0%	-8.0%
Magherafelt, Cookstown & Dungannon	58.0%	58.0%	0.0%
Moyle, Ballymena, Ballymoney & Coleraine	57.0%	54.0%	-3.0%
Derry, Strabane & Limavady	68.0%	50.0%	-18.0%
North Down & Ards	58.0%	49.0%	-9.0%
Fermanagh & Omagh	27.0%	43.0%	16.0%
Carrickfergus & Larne	25.0%	23.0%	-2.0%

Note: Data not available for Mid Ulster

Source: NIHE Housing Market Analysis Update (April 2018)

4.7 The University of Ulster also consider the deposit gap by looking at the loan to value ratio. This assumes a household's ability to save 30% of its annual disposable income and estimates a 'savings ratio' which represents the number of years it would take households to save for a deposit. Analysis of this shows that two factors are resulting in continued challenges for prospective homebuyers wishing to access the market:

- 1 Increased house prices, resulting in an increase in the time needed to save for a deposit; and,
- 2 Increasing inflation rates, resulting in declining disposable incomes.

4.8 Based on the two indicators discussed above, Ulster University has established a Multiplier Weighting Ratio. The higher the ratio, the greater the affordability problem in the area.

Table 4.4 Ulster University's Multiplier Weighting Ratio

	Multiplier weighting ratio			
	2013	2014	2015	2016
Belfast	1.007	0.448	1.307	1.312
Antrim & Newtonabbey	0.878	0.426	0.872	0.813
Lisburn and Castlereagh	0.971	0.446	1.040	0.808
North Down and Ards	0.508	0.438	0.612	0.633

Source: Ulster University 2017 / NIHE 2018

4.9 Table 4.4 highlights that affordability is a particular issue in Lisburn & Castlereagh and Antrim & Newtonabbey, even more so in Belfast, but that it is less severe in North Down and Ards. All of these areas form part of the wider Belfast Metropolitan HMA, as identified in Figure 3.2.

Private Rented Sector

4.10 NIHE's 'Housing Market Analysis Update Lisburn & Castlereagh' (April 2018) provides a considerable breadth of data in respect of the housing market in Lisburn & Castlereagh. It identifies a significant increase in the proportion of private rented sector properties from 2.7% in 2001 to 9.2% in 2011, although this is similar to the rate of change experienced across Northern Ireland.

4.11 The growth of the private rented sector has been aligned with the pre-recession housing market boom and was fuelled by house prices increases which resulted in first time buyers being priced out of the market.

4.12 Average rental data for properties in the private rented sector shows that rental levels in Lisburn & Castlereagh are broadly comparable to averages across Northern Ireland, albeit that rents are slightly higher in Lisburn & Castlereagh for detached and semi-detached properties.

Table 4.5 Average rent by property type (pcm)

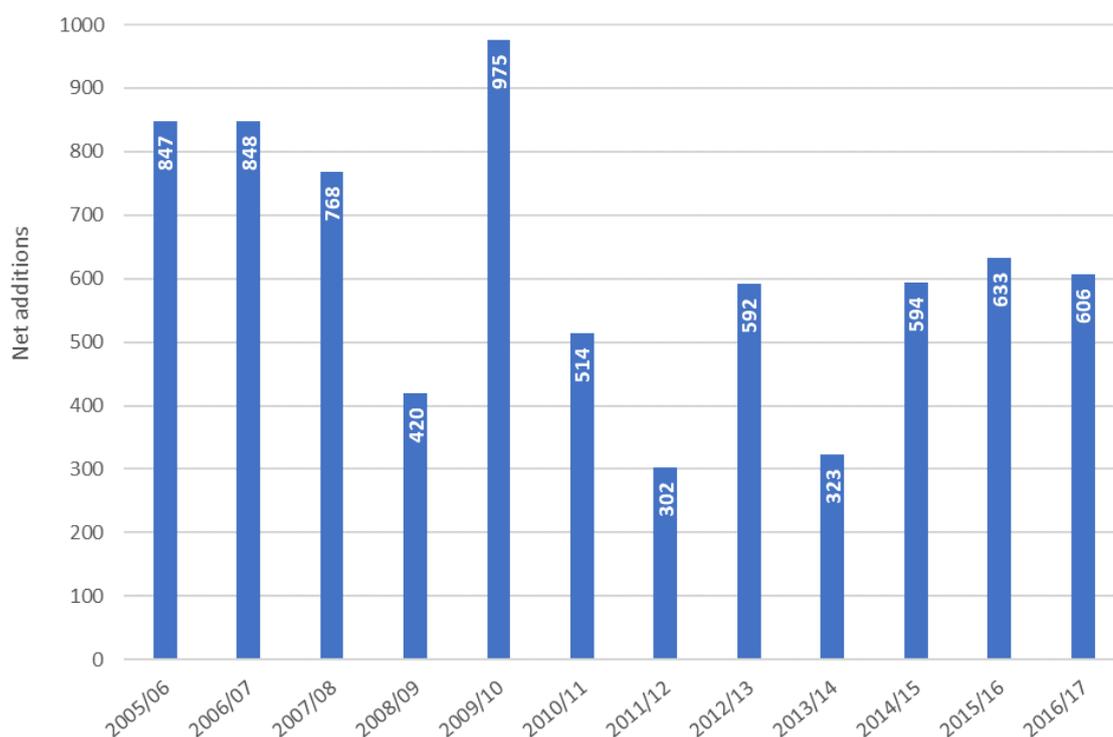
	Apartment	Terrace/Townhouse	Semi Detached	Detached	All
Lisburn & Castlereagh (variation from NI average)	£543 (-5.9%)	£555 (-3.0%)	£631 (+6.4%)	£762 (+4.9%)	£605 (+1.7%)
Northern Ireland	£577	£572	£593	£726	£595

Source: University of Ulster/NIHE (June/July 2017)

Completions

4.13 Housing growth in Lisburn & Castlereagh has varied over the period from 2005 to 2017. Figure 4.3 highlights that in the period pre-recession completions were c. 850 dwellings per annum. Completions have averaged 618dpa since 2005/6.

Figure 4.3 Net housing completions Lisburn & Castlereagh



Source: Emerging LCCC Local Plan (Data for 2013/2014 is based on 8 months of published data pro-rata to calculate a 12-month number of completions)

Summary

- 4.14 This analysis shows that Lisburn & Castlereagh has a strong housing market with high (and rapidly increasing) house prices in comparison to other local government districts in Northern Ireland. Affordability indicators have been rising, albeit with a slight cooling in 2016, and there is evidence of affordability concerns derived from the Multiplier Weighting. This is combined with increasing proportions of private rented properties alongside rents which are at/slightly above the Northern Ireland average.
- 4.15 Completions in Lisburn & Castlereagh have fallen below estimate of future housing need set out in the 2012-based Housing Growth Indicators (HGI) for Lisburn & Castlereagh (9,600 over the period 2012 to 2025, equivalent to 738dpa). This has resulted in a shortfall in housing delivery against the estimated future need which has served to create a situation of undersupply which has exacerbated market pressure, leading to high house prices and an increased reliance on the private rented sector.
- 4.16 The evidence of market pressure in Lisburn & Castlereagh implies there is a need for more housing and evidence that basing the future requirement solely on the official projections may not be sufficient to deal with the housing challenge that exists in Lisburn & Castlereagh.

5.0 Demographic baseline

5.1 This section provides an overview of the current demographic position in Lisburn & Castlereagh and considers the key drivers of anticipated future change in the population and number of households within the local area.

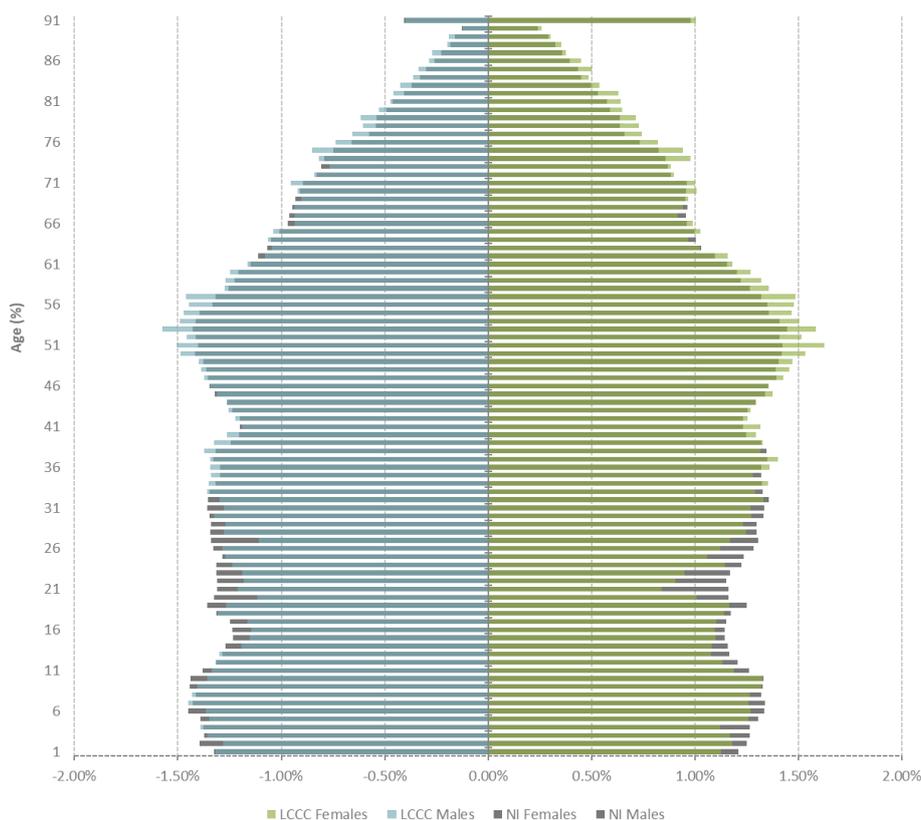
Current Population

5.2 The 2017 Mid-Year Population Estimates (MYEs) are the most up-to-date population estimates for Northern Ireland and its constituent local government districts. In 2017 the population of Lisburn & Castlereagh was 142,640, with an even split between males and females.

5.3 As illustrated in Figure 5.1, Lisburn & Castlereagh had an older population than Northern Ireland, with:

- 1 A lower proportion of young people aged 16 to 31 (18.9% of the local population) compared to the Northern Ireland average (20.5% of the total population of Northern Ireland); and,
- 2 A higher proportion of people over the age of 65 (17.2% of the local population) than the Northern Ireland average (16.2% of the total population).

Figure 5.1 Demographic profile of Lisburn & Castlereagh compared to NI (2017)



Source: Mid-Year Estimates 2017

5.4 Since 2001, the population in Lisburn & Castlereagh has increased by 18,055 (14.5%); this compares to an overall population growth over the same period across Northern Ireland of 10.8% and is higher than all but three local government districts.

Table 5.1 Population change between 2001 and 2017 by local government district

Local Government District	Population change 2001-2017
Mid Ulster	22.9%
Armagh City, Banbridge and Craigavon	20.4%
Newry, Mourne and Down	16.4%
Lisburn & Castlereagh	14.5%
Northern Ireland	10.8%
Antrim and Newtownabbey	10.0%
Fermanagh and Omagh	10.0%
Causeway Coast and Glens	9.5%
Mid and East Antrim	8.4%
Ards and North Down	7.0%
Derry City and Strabane	4.6%
Belfast	3.5%

Source: Mid-Year Estimates

5-5

Table 5.2 compares the population structure for Lisburn & Castlereagh from 2001 and 2017 and highlights that the proportion of total population over the age of 45 increased from 36% to 44% over this period whilst the proportion of children and younger adults fell from 64% to 56%. This corresponds to a 40% increase in the number of people over the age of 45 compared to a 0.1% increase in the number of younger people.

Table 5.2 Age Structure Comparison

	Proportion of total population		Change in population between 2001 and 2017
	2001	2017	
0-17	25.0%	22.4%	2.8%
18-44	39.0%	33.5%	-1.6%
45-64	22.6%	26.9%	36.2%
65-84	12.1%	15.0%	42.7%
85+	1.4%	2.1%	79.0%
Total	-	-	14.5%

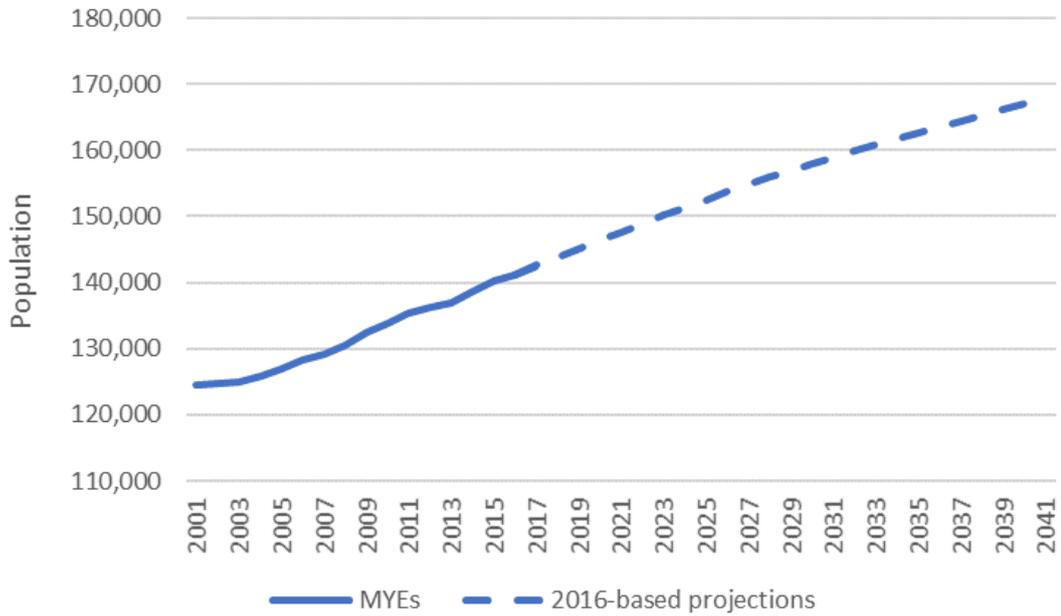
Source: Mid-Year Estimates

Population Projections

5-6

The 2016-based population projections project future population growth over the 25-year period 2016 to 2041. For Lisburn & Castlereagh the projections indicate population growth of 26,710 (18.9%) over the full 25-year period. Over the Lisburn & Castlereagh Plan period (2017 to 2032) there is a projected growth of 17,285 (12.1%). This equates to an annual change of 0.8%, which is slightly lower than the annualised level of growth that was experienced in Lisburn & Castlereagh between 2001 and 2017 (0.9% pa).

Figure 5.2 Historic population growth compared to projected growth Lisburn and Castlereagh

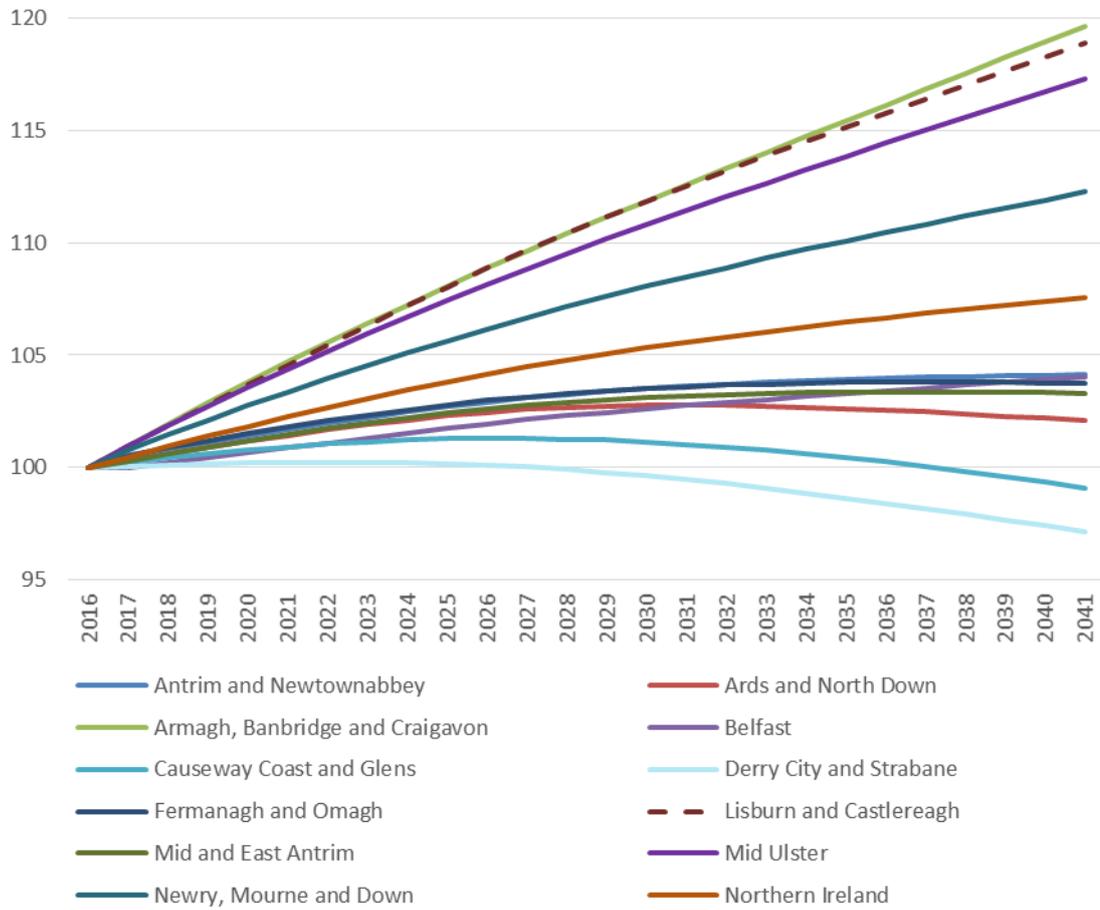


Source: MYEs and 2016-based population projections

5.7

Figure 5.3 overleaf compares the relative projected growth for Northern Ireland and all of the constituent local government districts. The projected 19% increase in Lisburn & Castlereagh is higher than in all other local government districts, apart from Armagh, Banbridge and Craigavon (+20%). It is more than double the average for Northern Ireland (+8%) and almost five times the projected level of growth for Belfast (+4%).

Figure 5.3 Relative population projections by Local Government District

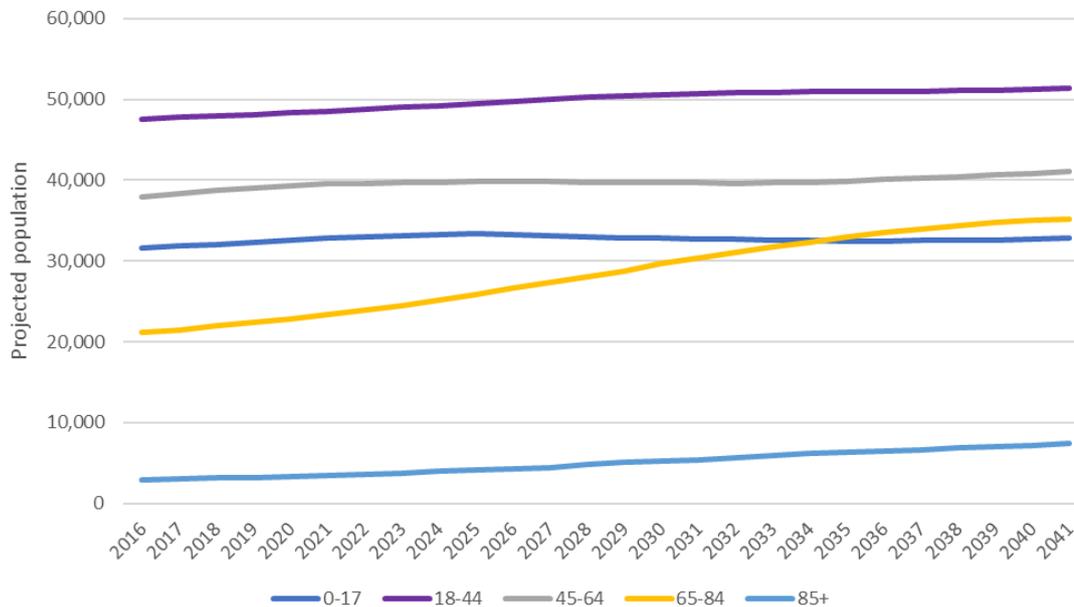


Note: 2016 total population for each local government district indexed to 100.

Source: 2016-based population projections

- 5.8 Figure 5.4 overleaf shows the population projections broken down by different age groups. Reflecting the current demographic profile, this highlights that future population growth is projected to be driven by the 65 to 84 (+66%) and 85+ (+153%) age cohorts. The implication of this is that by 2041, more than 25% of the population of Lisburn & Castlereagh is projected to be over the age of 65, compared to 13.5% in 2001 and 17.1% in 2017.
- 5.9 Although none of the younger age cohorts are expected to decline in size, all are projected only to experience a small level of growth, such that there is expected to be reduction in the proportion of the total population of working age (falling from 60% of the population aged between 18 and 64 in 2016 to 55% in 2041). This could have significant implications for the economic well-being of Lisburn & Castlereagh and highlights the need to ensure that there is a sufficient labour force to support future jobs growth and to help rebalance the ageing population. An adjustment to the baseline household projections may be important in this regard.

Figure 5.4 Projected population broken down by age



Source: NI 2016-based population projections

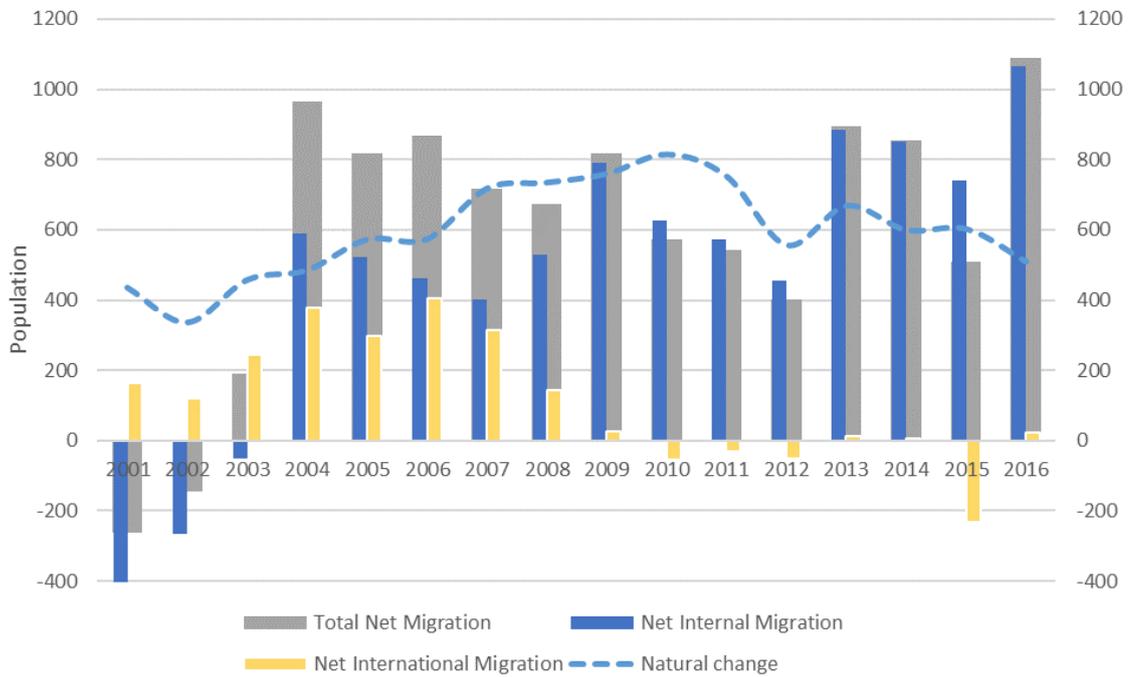
Drivers of Change

5.10

Historic population change in Lisburn & Castlereagh has been driven by a combination of positive natural change (where the number of births outweighs the number of deaths) and internal net migration, with total net migration greater than natural change. There has been a rise net in-migration¹³ since 2013, such that net migration in 2016 (+1,089) exceeded the pre-recession peak of +965 in 2004.

¹³ Net migration represents the difference between migration in-flows and out-flows. Net in-migration therefore reflects a position whereby there is a larger flow of in-migrants than out-migrants. The number of internal migration represents movements of people between Lisburn & Castlereagh and the rest of Northern Ireland and Great Britain whilst total migration is the sum of UK and international flows.

Figure 5.5 Historic components of change in Lisburn and Castlereagh

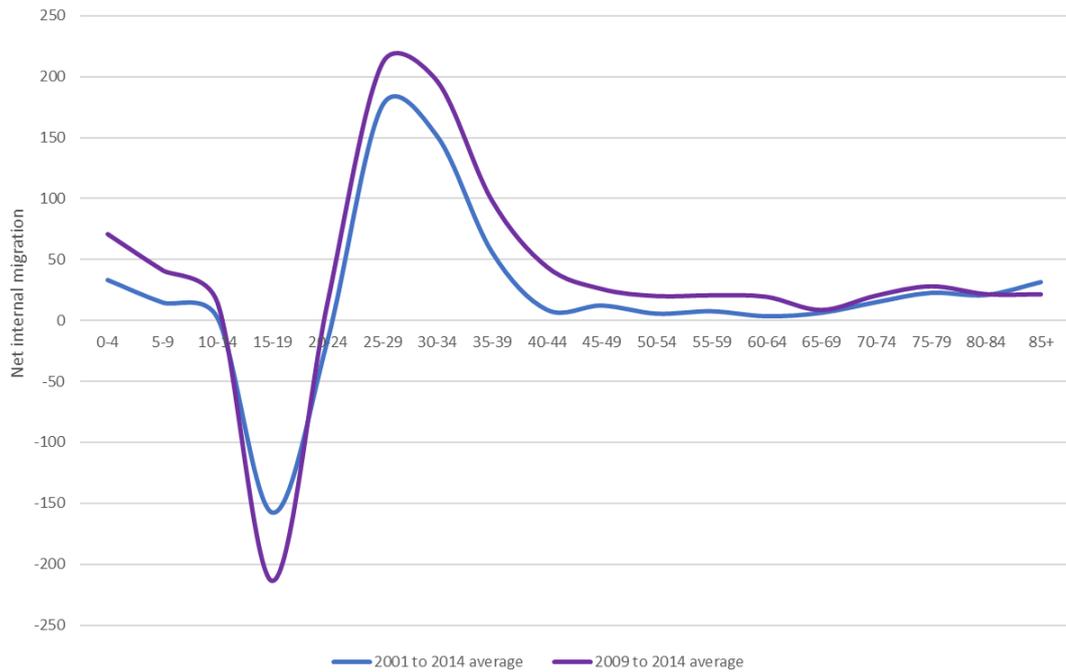


Source: Mid-Year Estimates

5.11

Detailed MYE data relating to migration flows is available at a local authority level up to 2014. An analysis of 5-year age bands shows that net internal migration (which is the primary driver of population change) is largely driven by net in-flows of 25 to 29 and 30-34 year olds which offsets the net out-flow of people in the 15-19 age cohort. Short term trends (2009 to 2014) show a rise internal net in-migration compared to longer term trends where net internal migration was lower; average net internal migration was 665 people (2009 to 2014) compared to 391 people on average between 2001 and 2014, an increase of 70% over the longer period.

Figure 5.6 Average net internal migration to Lisburn and Castlereagh



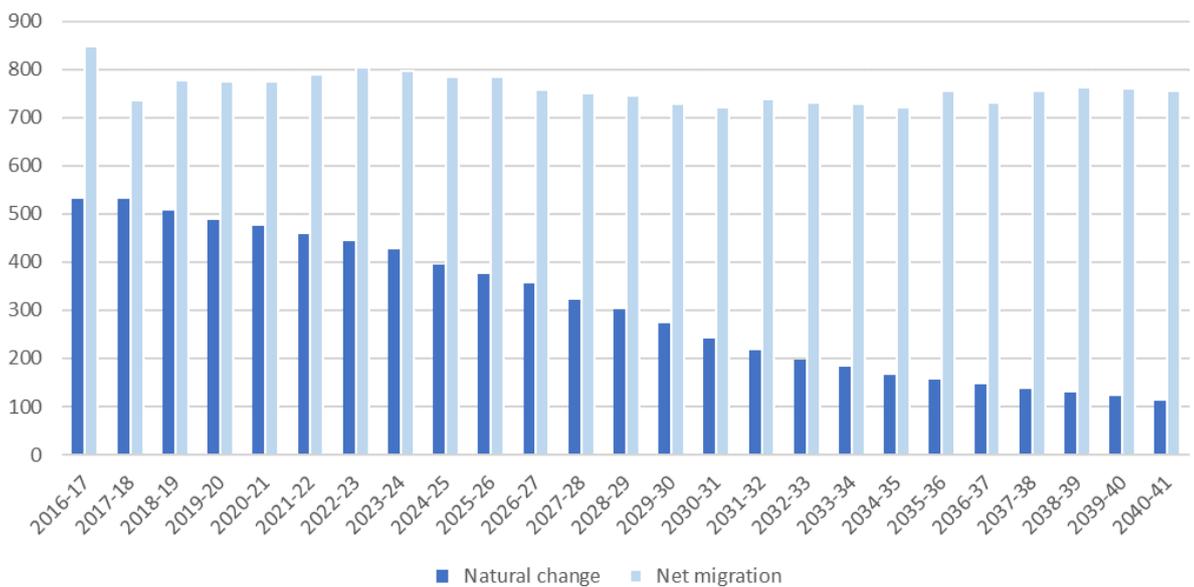
Sou

Source: Mid-Year Estimates

5.12

Analysis of the 2016-based population projections highlights that net migration is anticipated to continue to drive population growth in the future. Natural change remains a positive driver of population change but is projected to decline significantly in impact over the Plan period. This is likely to be a consequence of the ageing population.

Figure 5.7 Projected future drivers of population change for Lisburn and Castlereagh

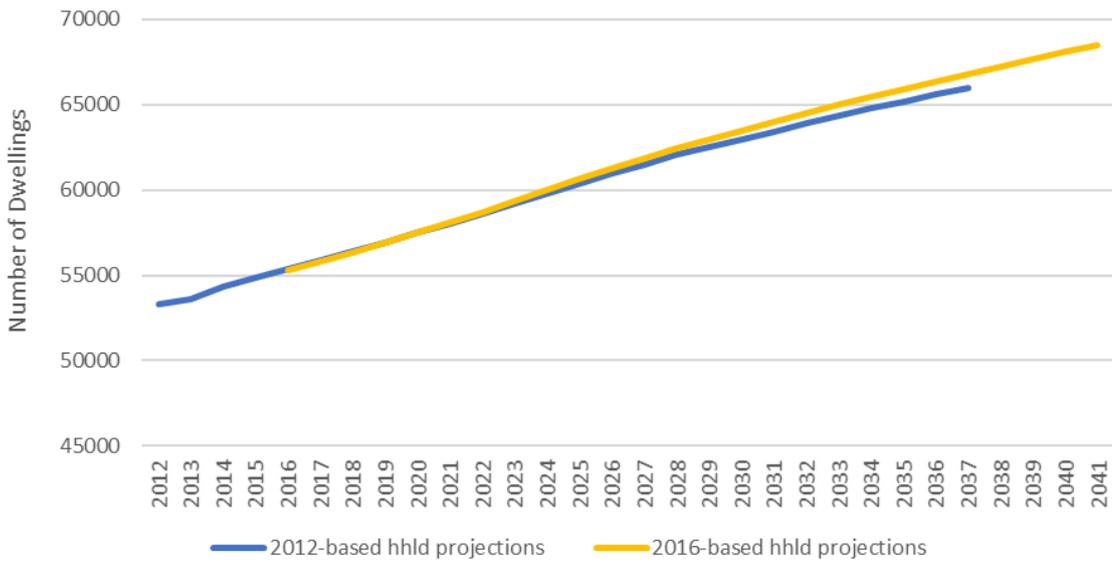


Source: 2016-based population projections

Household Projections

5.13 NISRA published the 2016-based household projections in December 2018. Over the Plan period they project a total growth of 8,722 households (581 pa). This is 9.4% higher than the growth of 531 pa over the same period based on the 2012-based projections (7,900 total dwellings between 2017 and 2032).

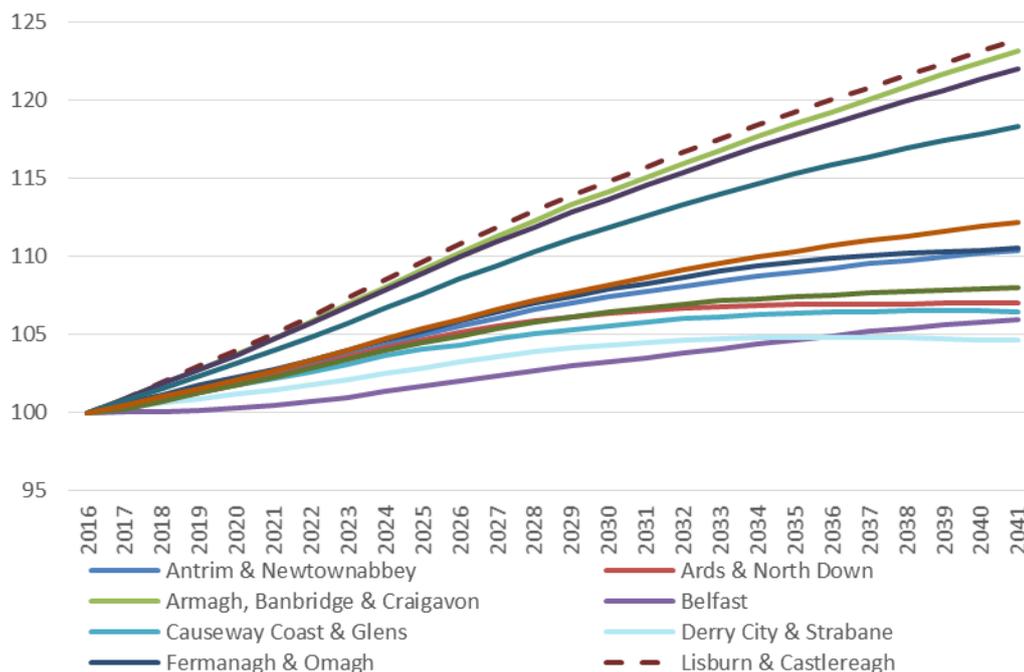
Figure 5.8 Comparison of projected household growth 2017 to 2032 for Lisburn and Castlereagh - 2012 and 2016-based household projections



Source: NISRA 2016-based Household Projections

5.14 As shown in Figure 5.9, over the full modelling period from 2016 to 2041, the relative level of household growth in Lisburn & Castlereagh (+24%) is expected to be double that of Northern Ireland as a whole (+12%) and is greater than all other local government districts. The projected growth in Armagh, Banbridge and Craigavon is +23% whilst the number of households in Belfast is projected to increase by just +6%.

Figure 5.9 Relative population projections by local government district



Source: NISRA 2016-based Household Projections

5.15

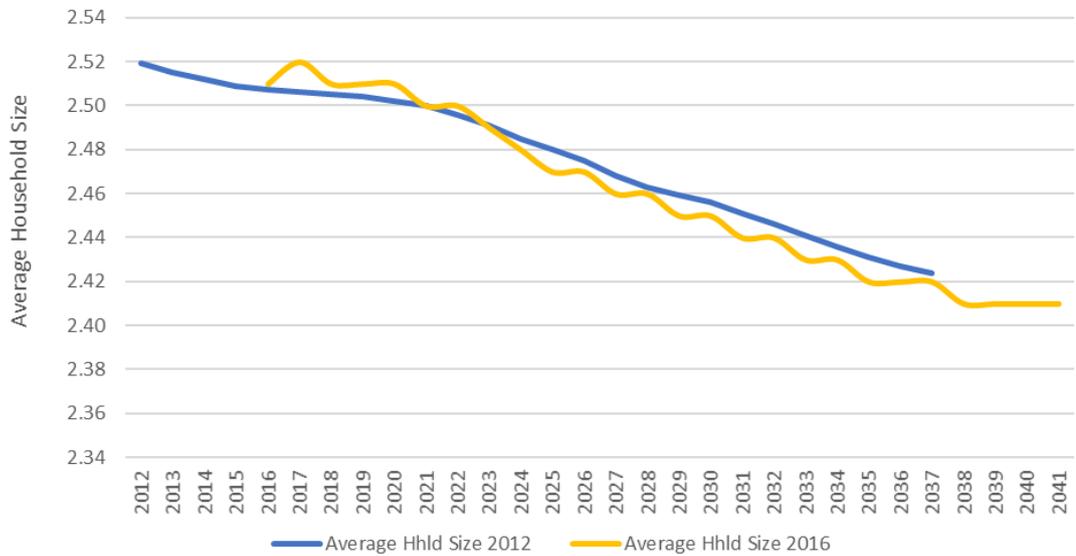
The fact that the relative scale of household growth is projected to exceed that of population growth in all local government districts is a reflection of declining average household size. In respect of this, the 2016-based household projections anticipate a slightly greater decline in the average household size in Lisburn & Castlereagh compared to the 2012-based projections, such that by 2041 the average household size in Lisburn & Castlereagh will be 2.41, compared to 2.51 in 2016. As shown in Table 5.3, however, this is one of the lowest levels of change of all of the local government districts in Northern Ireland.

Table 5.3 Projected average household size by local government district

	2016		2041		Change	
	Hh size	Rank	Hh size	Rank	Amount	%
Causeway Coast & Glens	2.56	6	2.37	7	-0.19	-7.4%
Derry City & Strabane	2.58	5	2.39	6	-0.19	-7.4%
Fermanagh & Omagh	2.67	3	2.49	4	-0.18	-6.7%
Antrim & Newtownabbey	2.50	8	2.36	8	-0.14	-5.6%
Newry, Mourne & Down	2.73	2	2.58	2	-0.15	-5.5%
Ards & North Down	2.39	10	2.27	11	-0.12	-5.0%
Northern Ireland	2.54		2.42		-0.12	-4.7%
Mid & East Antrim	2.45	9	2.34	9	-0.11	-4.5%
Mid Ulster	2.88	1	2.76	1	-0.12	-4.2%
Lisburn & Castlereagh	2.51	7	2.41	5	-0.10	-4.0%
Armagh City, Banbridge & Craigavon	2.63	4	2.55	3	-0.08	-3.0%
Belfast	2.33	11	2.28	10	-0.05	-2.1%

Source: NISRA 2016-based Household Projections

Figure 5.10 Projected average household size in Lisburn and Castlereagh

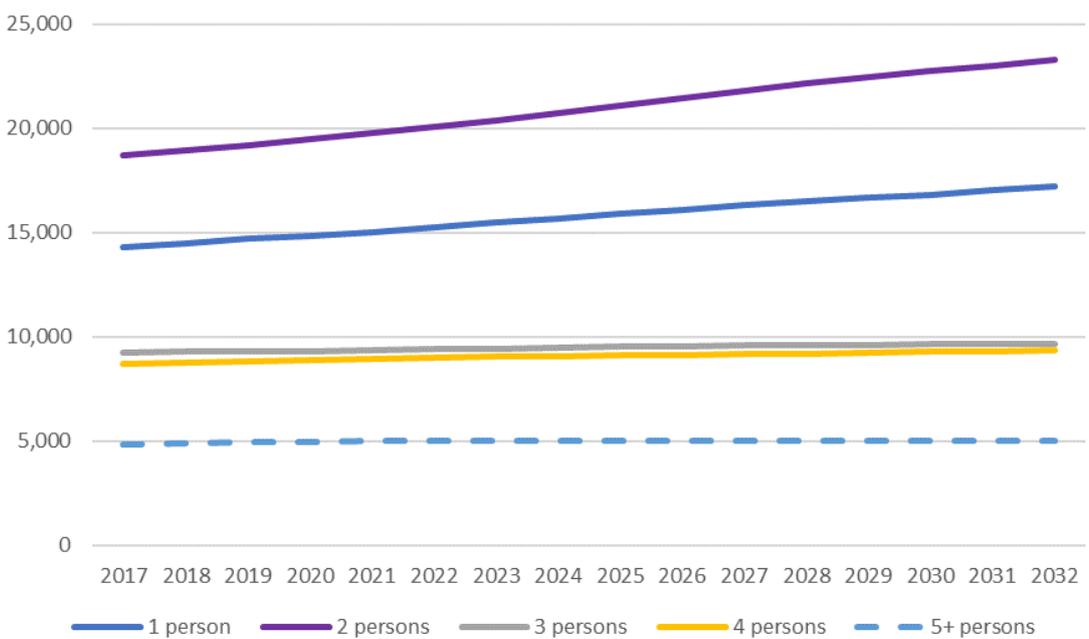


Source: NISRA 2012 and 2016 based household projections

5.16

Figure 5.11 draws on the 2016-based projections and illustrates the types of households which are likely to grow in the future. This shows that smaller households (one and two person) are expected to grow at a greater rate over the Plan period compared to larger households. Growth in one and two-person households are expected to account for 85% of the future household growth in Lisburn & Castlereagh between 2017 and 2032 (+7,470 households). However, as explained in Section 7, this will not equate to a need for a larger proportion of smaller dwellings.

Figure 5.11 Projected growth in household type in Lisburn and Castlereagh



Source: NISRA 2016-based household projections

Summary

- 5.17 Lisburn & Castlereagh has experienced high population change over the period 2001 and 2017. The population projections suggest continued growth going forward over the Plan period. Growth is projected particularly within the older age groups with a decline in the proportion of younger working age people. This decline of the working age population could impact on ensuring sufficient labour force to support future jobs growth and rebalance the impact of an ageing population.
- 5.18 In terms of household growth, the 2016-based projections anticipate a greater level of household growth than by the 2012-based projections. Household size is projected to decline at a greater rate than anticipated by the 2012-based projections, but Lisburn & Castlereagh is expected to experience one of the lowest changes in household size compared to other local government districts. This relates to future household growth being driven by smaller households with 85% of future household growth in Lisburn & Castlereagh is projected to be driven by the growth in one and two-person households. The past and future demographic trends in Lisburn & Castlereagh highlight the need to continue to ensure that future housing can meet the needs of families and young working age population, together with an increasing proportion of smaller households and the elderly (75+).

6.0 Future Housing Growth

6.1 In order to support the preparation of the Local Development Plan for Lisburn & Castlereagh, it is important to consider the level of future housing required over the Plan period. Following consideration of historic demographic trends and the likely future drivers, this section considers a range of future scenarios for growth and, in particular, whether the level of future housing growth in Lisburn & Castlereagh should be uplifted beyond the baseline growth associated with the 2016-based household projections. It does this by:

- 1 Considering the Housing Growth Indicators; and
- 2 Testing a number of demographic and economic-led housing growth scenarios through the use of the PopGroup suite of software.

Review of Housing Growth Indicators

6.2 The Housing Growth Indicators ('HGI') provide an estimate of future need in Northern Ireland, broken down to a local government district level. The most recent HGI is based on the 2012-based household projections, which identify future housing need between 2012 and 2025.

6.3 The HGI are based on the 2012-based household projections together with a number of adjustments in response to:

- 1 Vacant housing stock – based on NI data apportioned using local government district level vacant data;
- 2 Second homes – NI data apportioned using local government district level second homes data from a combined survey sample; and,
- 3 Net conversions/closures/demolitions – estimates produced using published Land and Property Services data on new dwelling completions and housing stock.

6.4 The HGI identified a future demand for housing for Lisburn & Castlereagh of 9,600 homes between 2012 and 2025 (738dpa).

6.5 The HGI methodology document is clear that the HGI should be used as a guide rather than a cap on development. This is a consequence of it being based on household projections which are trend based and projecting these into the future.

6.6 Table 6.1 sets out the implications of these adjustments to the baseline 2012-based household projections for Lisburn & Castlereagh.

Table 6.1 Estimate of housing need for Lisburn & Castlereagh

	No Households	Second homes	Vacant stock	Net conversions, closures and demolitions	New stock estimate	Housing stock	Projected new dwelling requirement
Year	2025			2012 to 2025	2025	2012	2012 to 2025
Number	60,400	500	3,500	700	65,000	55,400	9,600 738dpa

Note data rounded to the nearest 100. Figures may not sum due to rounding.

Source: 2012 based Housing Growth Indicators (HGI)

6.7 Following publication of the 2016-based household projections, the official HGIs are now out of date. It is understood that an update is currently being undertaken, although the updated figures are not available at the time of preparing this report. In the interim, it is possible to

undertake an update of the HGI taking into account the 2016-based household projections, and applying the adjustments identified in the HGI 2012 methodology note.

Table 6.2 Estimate of housing need of Lisburn and Castlereagh

	No Households	Second homes	Vacant stock	Net conversions, closures and demolitions	New stock estimate	Housing stock	Projected new dwelling requirement
Year	2032			2017 to 2032	2032	2017	2017 to 2032
Number	64,510	500	3,500	800*	69,310	58,930	10,380 692dpa

Note data rounded to the nearest 100. Figures may not sum due to rounding.

*This is calculated on the 2012 HGI net conversions, closures and demolitions per annum multiplied by the number of years in the plan period

Source: 2012-based Housing Growth Indicators (HGI) updated with 2016-based household projections data

- 6.8 Table 6.2 shows that updating the HGI to consider the latest household projections data results in a projected new dwelling requirement of 10,380 dwellings for Lisburn & Castlereagh between 2017 to 2032 (692 dpa).
- 6.9 It is noted that the updated (annualised) HGI is slightly lower than the 2012 HGI set out in Table 6.1, even though the 2016-based projections project a higher level of growth than the 2012-based projections. The reason for this is the differing periods upon which the HGI has been based; the 2012 HGI is based on the period 2012 to 2025 (13 years), with the updated HGI based on the Plan period 2017 to 2032 (15 years).
- 6.10 If the 2012-based HGI was rebased to a 15 year period, as per the Lisburn & Castlereagh Local Development Plan, the comparative figure for the re-based 2012 HGI would be 640 dpa (i.e $9,600 \div 15$), with the revised figures using the 2016-based household projections resulting in a higher figure of 692 dpa (Table 6.2).

Scenario Modelling

- 6.11 Lichfields has tested a number of growth scenarios to consider the demographic, housing and economic implications of different growth options. A number of assumptions have been used to enable a range of scenarios to be considered. These are detailed below.
- 1 Births and deaths based on 2016-based population projections from which Total Fertility Rate (TFR) and Standard Mortality Rate (SMR) assumptions are drawn and utilised in all scenarios other than the baseline.
 - 2 Migration utilising net migration numbers identified in the 2016-based population projections, drawing on five-year past trends in respect of five-year age cohorts taken from Mid-Year Estimates data.
 - 3 In order to translate the projected population into households, we have utilised the data contained in Annex 2 of the 2016-based Household Projections Methodology Note in respect of household membership rates recorded in the 2001 and 2011 Census. These have been used to generate future projected membership rates over the Plan period which have subsequently been used in the modelling. The outputs of the modelling using these rates have been recalibrated to ensure the baseline scenario is fully aligned with the 2016-based household projections for Lisburn & Castlereagh.

- 4 The number of households is translated into dwellings through the application of an assumption concerning the proportion of vacant properties/second homes based on Census 2011 data.
- 5 To determine the scale of housing required to support a given level of jobs growth, some assumptions must be made about future economic activity, unemployment and commuting. These assumptions have been modelled as follows:
 - a Unemployment – the latest unemployment data available from NISRA is 2017 data which identifies a rate of 3.9% for Lisburn & Castlereagh. This rate has been kept constant over the Plan period.
 - b Economic Activity Rates – these rates are applied to the overall population (by sex and each five-year age cohort) to determine how many people are active in the labour market ('active' being either in employment or unemployed and available for work). To project economic activity rates, the modelling uses labour market participation rates published by the Office for Budget Responsibility (OBR) in January 2017. These provide long-term projections at the national level by sex and age, by the trends can be applied to local authority areas to provide local projections.
 - c Labour Force Ratio – this comprises the ratio of the number of residents who are economically active in an area to the number of jobs in that area. It therefore implicitly captures both commuting patterns and 'double-jobbing' (where one person may occupy more than one job). Applying the economic activity rates to the base population in 2017 gives an estimate of the total labour force as at 2017. This is then compared with the total number of jobs (detailed in forecasts provided by Oxford Economics) to create the labour force ratio which is held constant across the Plan period.

A labour force ratio of 1.15 has been held constant in the modelling from 2017 onwards; as discussed previously this demonstrates that Lisburn & Castlereagh is a net exporter of labour – a characteristic that reflects its close functional relationship with Belfast.
 - d Other assumptions – inputs related to births, deaths, migration and household formation are the same as those applied in the demographic scenarios i.e. are taken from the 2016-based SNPP/SNHP. The modelling constrains/inflates migration to a level which, taking account of the profile of migrants moving in and out plus natural change and the ratio of labour to jobs, produces a labour force sufficient to support forecast job growth.

Scenario A 2016-based projections

- 6.12 Scenario A considers the implications of the 2016-based population and household projections over the Plan period. This results in a household growth of 8,720 over the period 2017 to 2032. Through the application of the vacancy/second home rate taken from Census 2011 data, this equates to a total dwelling requirement of 9,100 (605 dpa).
- 6.13 Through the application of future economic activity rates based on the OBR future economic projections this level of future housing growth would generate a growth in the labour force of c. 10,765 people who could support a jobs growth of around a total of 9,000 new jobs (600 per annum) over the plan period.

Scenario B - Baseline – updated HGI

- 6.14 As set out in paragraphs 6.2 to 6.10, given the importance of the HGI which sets the baseline level of future housing growth across the various local government districts in Northern Ireland, Lichfields have sought to update the 2012-based HGI through use of 2016-based household projections data together with the adjustments set out within the 2012 HGI methodology note.

6.15 This identifies a baseline future growth of 10,380 households over the plan period (692 dpa). This is 14% above the baseline figure and 12% above recent trends in housing delivery in Lisburn & Castlereagh which have averaged 618 dpa since 2005/6.

6.16 This level of housing growth in the future would help to support a growth of jobs that broadly reflects the historic jobs growth experienced in Lisburn & Castlereagh between 1993 and 2017 (651 jobs per annum).

Jobs-led scenarios

6.17 Ensuring a sufficient supply of homes within easy access employment opportunities represents a central facet of an efficiently functioning economy and can help to minimise housing market pressures. An adequate supply of suitable housing is essential for achieving employment growth.

6.18 The following three employment-led scenarios have been considered to understand what level of future household growth would be required to support future jobs-led change.

- 1 Scenario C – Oxford Economic (OE) baseline economic forecast – 307 jobs per annum between 2017 and 2032;
- 2 Scenario D – Long term past trends (1993 to 2017) – 651 jobs per annum; and,
- 3 Scenario E – Short term past trends (2002 to 2017) – 442 jobs per annum.

6.19 Scenarios C to E have been modelled based on the 2017 MYEs for Lisburn & Castlereagh, set out by single year of age for males and females, alongside the different levels of jobs growth assumed under each scenario.

Scenario C – OE Baseline

6.20 Updating the population base to 2017 using the latest MYE together with the OE baseline economic forecast of 307 jobs per annum, the projected housing need over the period 2017 to 2032 equates to 433 dpa.

6.21 A summary of the demographic outcomes under Scenarios C is shown in Table 6.3.

Table 6.3 Summary of demographic outcomes - Scenario C

	Scenario C – OE Baseline
Job growth	4,605
Jobs growth per annum	307
Labour force growth	5,505
Population change	10,950
<i>of which natural change</i>	<i>5,520</i>
<i>of which net migration</i>	<i>5,430</i>
Households	6,230
Dwellings	6,490
Dwellings per annum	433

Source: Lichfields using PopGroup

Scenario D – Long term past trends

6.22 Updating the population base to 2017 using the latest MYE together with long term past trends in jobs growth observed over the period 1993 and 2017 (651 jobs per annum), the projected dwelling requirement over the period 2017 to 2032 equates to a total dwelling requirement of 10,775. This equates to 718dpa.

6.23 A summary of the demographic outcomes under Scenarios D is shown in Table 6.4.

Table 6.4 Summary of demographic outcomes - Scenario D

	Scenario D – Jobs-led Long Term Past Trends
Job growth	9,765
Jobs growth per annum	651
Labour force growth	11,670
Population change	21,590
<i>of which natural change</i>	<i>10,080</i>
<i>of which net migration</i>	<i>11,510</i>
Households	10,345
Dwellings	10,775
Dwellings per annum	718

Source: Lichfields using PopGroup

Scenario E – Short term past trends

6.24 Updating the population base to 2017 using the latest MYE together with short term past trends in jobs growth observed over the period 2002 and 2017 (442 jobs per annum), the projected dwelling requirement over the period 2017 to 2032 equates to 8,960 dwellings, equivalent to 597dpa.

6.25 A summary of the demographic outcomes under Scenarios E is shown in Table 6.5.

Table 6.5 Summary of demographic outcomes - Scenario E

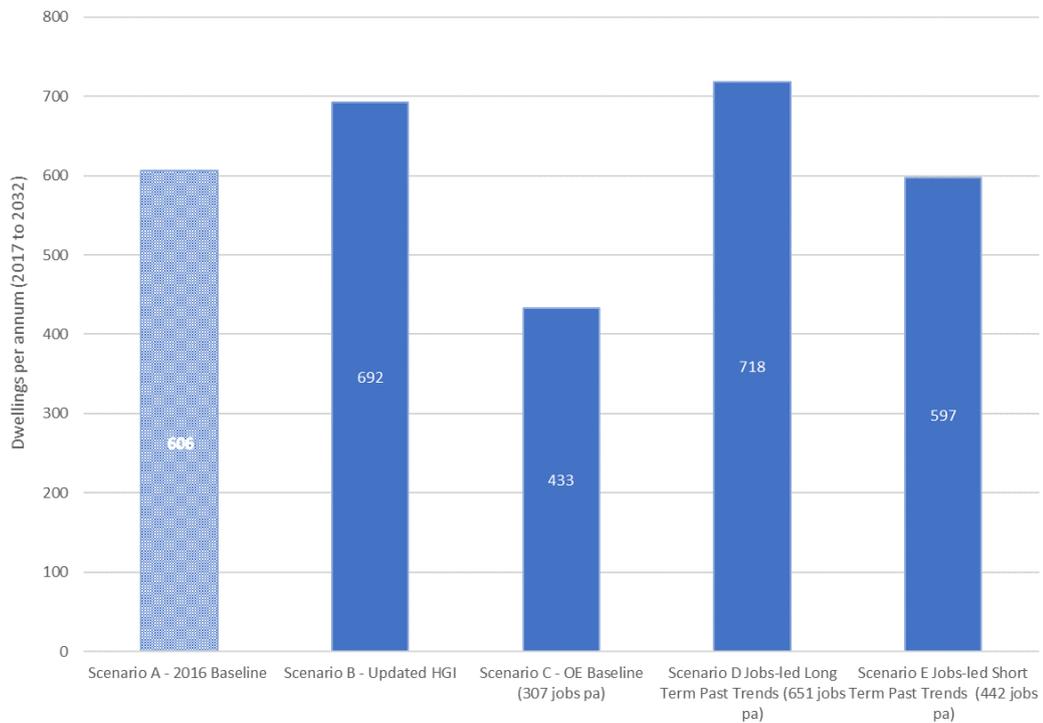
	Scenario E – Jobs-led Short Term Past Trends
Job growth	6,630
Jobs growth per annum	442
Labour force growth	7,925
Population change	17,036
<i>of which natural change</i>	<i>10,080</i>
<i>of which net migration</i>	<i>6,956</i>
Households	8,602
Dwellings	8,960
Dwellings per annum	597

Source: Lichfields using PopGroup

Summary and implications

- 6.26 A summary of the scenarios assessed is shown in Figure 6.1.
- 6.27 Updating the HGI to take account of the 2016-based projections results in a future housing need of 692 dpa over the Plan period. This is a 15% uplift on the future need projected by the 2016-based projections and only 4% below a future housing growth which would support the long-term employment trend experienced in Lisburn & Castlereagh. Discounting the OE-based scenario which results in a housing requirement that is significantly below the baseline, it also equates to a figure that is close to the mid-point of all other scenarios. The future need projected by the updated HGI also broadly correlates to past trends in housing completions, which have averaged 618 dpa since 2005/6.
- 6.28 Based on this analysis, it is considered that the level of housing need identified by the updated HGI represents a robust and appropriate basis for the long-term planning of Lisburn & Castlereagh. It would provide a level of future housing growth which would support economic growth above the OE baseline. This will be important to ensure that future housing growth does not act as a constraint on economic growth and potential.
- 6.29 In addition to aligning future housing with future jobs growth, it would also assist in addressing the market challenges which have been identified in Lisburn & Castlereagh. Moreover, whilst the ability of an area to deliver a specific level of housing need does not in itself affect the need that may exist, it is nevertheless an important consideration in the preparation of the Local Development Plan and, to this end, the fact that the HGI figure of 692 dpa is broadly aligned with past trends indicates that this level of growth is entirely achievable over the forthcoming Plan period.

Figure 6.1 Summary of scenarios



Source: Lichfields analysis

7.0 Estimating the Future Housing Mix

- 7.1 An understanding of the mix of housing that is required in Lisburn & Castlereagh in the future represents a critical component of meeting the identified housing need. A failure to deliver the right mix of housing may result in the creation of imbalanced communities and a deterioration in the affordability of particular types of property.
- 7.2 Any assessment of housing mix must be grounded upon a clear understanding of the differences between housing need and demand. This is particularly acute in the open market sector where households are free to occupy housing in accordance with what they want and can afford. In this context, whilst housing *need* draws solely upon the size and structure of individual households, housing *demand* reflects the reality that many people will often deliberately under-occupy their homes and thereby will express a demand for a property that is larger than they specifically need. For example, a couple might only *need* a one-bedroom property but might seek a larger property.
- 7.3 If the emerging housing supply does not reflect the type of housing that existing and potential future residents want, there is a risk that an imbalance will emerge between the supply of and demand for certain types of (particularly larger) properties. The implication of this will be that the prices of those properties may increase at a faster rate than that of the overall housing stock. This could then result in households who *need* larger homes (e.g. families) being potentially unable to meet their needs as they are increasingly forced to compete with smaller households as well as other families for a limited supply of increasingly expensive properties.
- 7.4 The situation is different in the affordable sector, within which households are allocated housing based on their specific needs, which depend upon the number of people within a household and the age/gender of children.
- 7.5 The approach that we have applied in respect of housing mix is based on an analysis of future household change, set against an appreciation of existing occupancy rates.
- 7.6 Data on the occupation of dwellings by size (number of bedrooms) and household type is not available at a local government district level for Northern Ireland. In the light of this, we have applied the following data on (under and over) occupation taken from the 2011 Census for Northern Ireland as a whole and applied it to the household projections for Lisburn & Castlereagh. Although the data is set out for different housing tenures (owner occupied, rented from NIHE, rented from housing association or charitable trust and private rented) our analysis has considered the occupancy levels across all tenures. This is because the household projections are not split down by tenure.

Table 7.1 Household composition by occupancy rating

Household type / occupancy level	+2 or more	+1	0	-1 or less
Single Person <65	57.3%	24.1%	13.4%	5.2%
Single Person 65+	62.6%	21.0%	12.1%	4.3%
Two or more adults <65	65.6%	19.9%	10.2%	4.4%
Two or more adults 65+	81.5%	11.9%	4.8%	1.9%
Families	45.0%	25.8%	18.9%	10.3%
Other	31.7%	26.7%	22.6%	18.9%

Total	56.7%	22.4%	14.0%	6.9%
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Source: 2011 Census table DC4408N

7.7 Our starting point in the assessment of future housing mix was a review of the number of bedrooms *needed* for each household type, based on the allocation of a bedroom to:

- 1 An adult couple;
- 2 A person aged 16 or over;
- 3 Two children up to the age of 16 years of the same gender; and,
- 4 Two children up to the age of 10 years of different gender.

7.8 Recognising the importance of understanding housing wants/demands as distinct from housing need, we have applied an adjustment to this minimum requirement to reflect actual occupation patterns by way of an indicator of future demand.

7.9 In the absence of any specific data on household type by precise dwelling size, it is not possible to provide clear evidence on the required dwelling mix by number of bedrooms. For example, a single person household might only need a 1-bedroom property, but the evidence set out above shows that c.60% of such households currently have 2+ spare bedrooms. From this it is not possible to distinguish between the number of such households that would require 3- or 4-bedroom properties.

7.10 In the light of this, our approach has been to provide a broad categorisation of housing mix by reference to smaller (1 and 2 bedrooms) and family (3 and 4+ bedrooms), as detailed below.

Table 7.2 Estimated housing mix requirements for Lisburn and Castlereagh

Dwelling type	Small (1 and 2 bedrooms)	Family (3 and 4+ bedrooms)
Proportion of housing	32.7%	67.3%

Source: Lichfields analysis

7.11 We consider this to be a robust approach that provides sufficient clarity for the purposes of plan making, recognising:

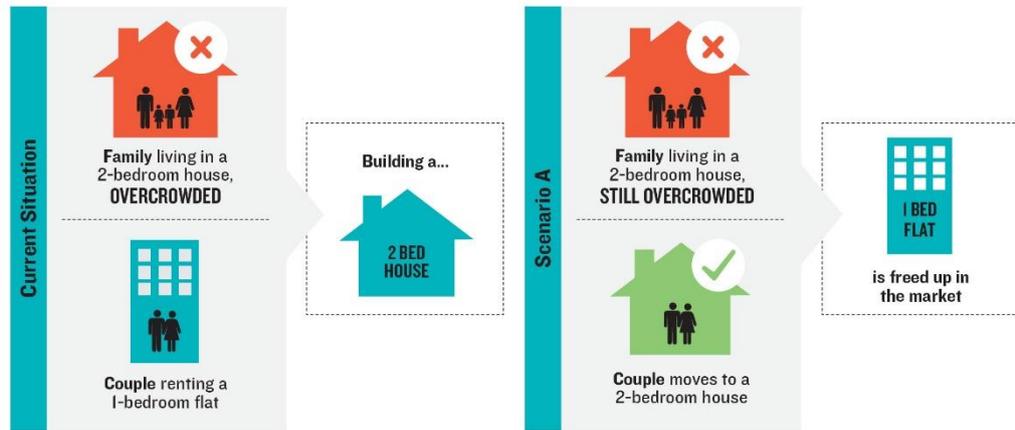
- 1 The importance of the market in determining the specific mix that is more appropriate in any particular development and location, not least because an authority-wide mix should not be sought on every residential development site. Regard should clearly be given to the specific nature of the site and surrounding area; it would not necessarily be appropriate to apply the same mix to a city centre scheme as to a lower density suburban development site.
- 2 This approach still recognises the importance of family housing to the market. New housing does not cater solely for net growth in households, but instead provides a mechanism for people to move around within the market and free up housing along the housing ladder. This could mean, for example, that a family currently living in a smaller property might move into a new build 4-bed home, freeing up their previous house for a newly forming household. Through this, new housing can also help to address overcrowding issues in local areas, where the opportunity for overcrowded households to upsize is currently limited due to a lack of larger stock (or stock which is being taken up by smaller households).

This trend is illustrated below through a simplification of the broad dynamics that are at play:

- a Figure 7.1 illustrates the potential impact of building a 2-bedroom home in an area where there is already a need/demand for larger housing. This scenario indicates that the provision of additional smaller properties would not necessarily meet the demands

of the overall population as it would only facilitate movement between smaller dwellings in the housing market.

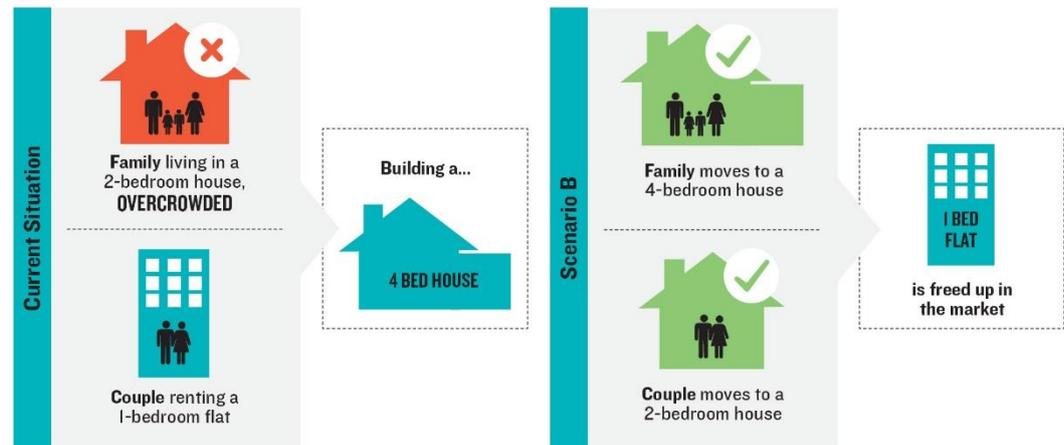
Figure 7.1 Housing ladder outcomes: Scenario A – building a 2-bed home



Source: Lichfields

- b Figure 7.2 demonstrates the impact of building a larger property in the same housing market scenario. In this case, the result is a movement up the housing ladder for both households and again results in the release of a smaller dwelling back into the market to cater for the needs of newly forming/smaller households.

Figure 7.2 Housing ladder outcomes: Scenario B – building a 4-bed home



Source: Lichfields

Ultimately, larger housing provision can therefore play a two-fold role within meeting the wider needs of household growth across the market by:

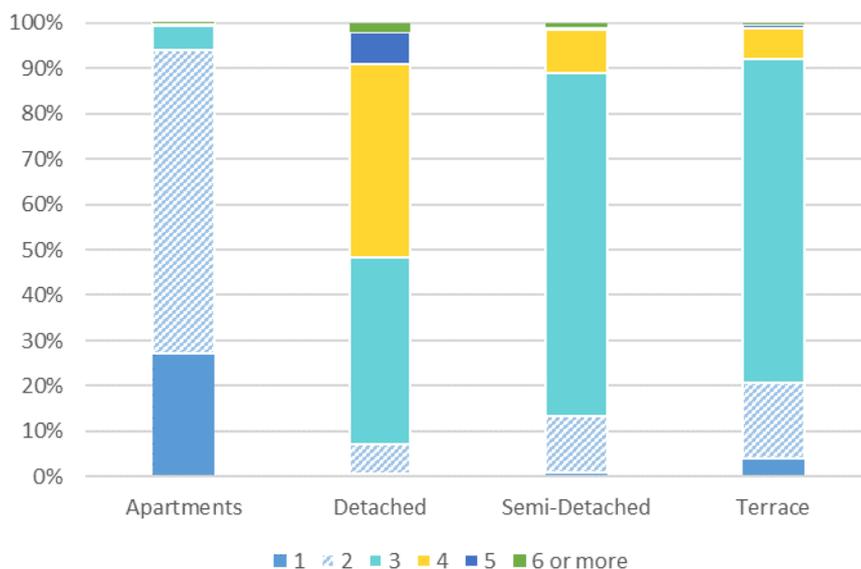
- a Meeting the **needs** of households, in terms of current overcrowded households who are in need of larger housing – this in turn means that the needs of smaller, newly forming households can be met as smaller housing is freed up further down the ladder; and,

- b Meeting the **demands** of households, in terms of smaller households aspiring to upsize within the market – this again also results in smaller housing further down the ladder being freed up.

7.12 The housing mix set out in Table 7.2 relates to all tenures (market and affordable); again this is a function of data availability. It is likely that there would be a greater proportion of smaller dwellings amongst affordable housing, although clearly all tenures would require a range of dwelling types and sizes. This aligns with the requirements of PPS12 (Policy HS4) which sets out the need to ensure a mix of house types and sizes are provided on sites of 25 units of more. The guidance provided in Policy HS4 is clear that a mix of different types and sizes of houses, apartments and maisonettes will help provide and assist in the creation of a balanced community in a local area.

7.13 Data made available from the Northern Ireland Valuation List for Lisburn & Castlereagh shows that 75.5% of total stock is made up of 3 and 4-bedroom properties, the majority of which are detached and semi-detached properties.

Figure 7.3 Current house type and number of bedrooms Lisburn and Castlereagh



Source: Valuation List Data (April 2019)

7.14 Figure 7.3 illustrates that detached properties are dominated by 3 and 4-bedroom houses and semi-detached properties are dominated by 3-bedroom properties with a greater proportion of smaller 2-bedroom properties.

7.15 Apartments contribute to less than 10% of the current stock and over two thirds are 2-bedroom properties and a further 27.1% of apartments 1-bedrooms.

7.16 Whilst the proposed housing mix outlined above is broadly aligned with the existing mix of properties in Lisburn & Castlereagh, it would result in the delivery of a slightly greater proportion of smaller dwellings. In the context of a pressured housing market, this would help to ensure there is a broad mix of housing choice on offer at a range of price points which would help meet future needs, address issues in respect of the ageing population and broadening the housing offer to enable young people to stay in the Council area. However, it would seek to achieve these aims within the context of a clear appreciation of the nature of the housing market in Lisburn & Castlereagh, the role of the area within the Belfast HMA, and the continued importance of family housing stock to the whole market.

8.0 Affordable Housing Needs

- 8.1 NIHE manage a Common Waiting List which is the basis upon which future social housing need is assessed in terms of defined geographic areas. NIHE undertake an assessment every year and identify projected need over the following 5-year period.
- 8.2 The 2017 assessment for Lisburn & Castlereagh identified a future need for 800 units between 2017 and 2022, with the area of greatest need focused in and around Lisburn City. Castlereagh has a lower demand with demand for affordable housing needs focused on small family accommodation.
- 8.3 The NIHE assessment identified a total requirement of 2,490 new build social units over the Local Development Plan period in Lisburn & Castlereagh. This is built into the HGI figure for Lisburn & Castlereagh and represents 24% of the total housing requirement identified by the HGIs, as updated in section 6.0.
- 8.4 In terms of the type of households who are on the NIHE housing waiting list (as of March 2017), Table 8.1 identifies the majority Lisburn & Castlereagh's waiting list for those households in housing stress as being for single, older persons and small families. This aligns with the analysis on future housing mix which suggests that smaller units are more likely to be required as affordable homes.

Table 8.1 Lisburn & Castlereagh household composition of housing applicants as of March 2017

Type	Single person	Small Adult	Small Family	Large Adult	Large Family	Older Person	Total
Applicant	907	135	572	47	128	425	2,214
App (HS)*	526	62	355	23	70	232	1,268
Allocation	209	23	139	<10	33	105	515

Source: NIHE Note: *Housing stress applicants at March 2017 (i.e. 30 points or more)

- 8.5 NIHE provide a breakdown of where the need is focussed in terms of settlements. For Lisburn & Castlereagh the need is largely focused in Lisburn/Dunmurry Urban followed by Castlereagh Urban and Lambeg.
- 8.6 In terms of the current stock of social housing, there are approximately 7,000 social dwellings across Lisburn & Castlereagh, of which 5,410 are owned by NIHE (77%), with the remainder (1,590/23%) owned by a variety of housing associations.
- 8.7 The NIHE analysis highlights that there are issues across Lisburn & Castlereagh for Housing Associations being able to acquire sites in areas where the need is greatest as these are largely within main urban areas. The impact is there are a low number of sites available and competition is high. This will impact on the delivery of affordable homes identified to meet needs. These issues will need to be considered further by LCCC in terms of housing policies which will help deliver future affordable needs.
- 8.8 NIHE plays a key role in facilitating investment and change in the social housing stock through:
- 1 Stock investment programmes;
 - 2 The promotion of grants;
 - 3 Delivering neighbourhood-based services and community development; and,

4 Promoting tenure diversity and mixed communities through the House Sales Scheme and land releases.

8.9 NIHE aims to ensure that new social and affordable housing promotes shared space and shared living and that residential development is inclusive and should offer choice through the development of a mix of housing tenures including affordable housing to buy or rent as part of larger developments.

8.10 It will be important going forward to ensure that identified affordable housing needs within smaller settlements are addressed by NIHE through the delivery of a range of types of affordable homes, both social and intermediate, across Lisburn & Castlereagh.

9.0 Meeting Future Housing Need

- 9.1 In assessing the future housing needs across Lisburn & Castlereagh, a range of likely future growth scenarios have been considered. It is understood that the HGI is currently being updated. In the interim, this study seeks to update the HGI using the 2016-based household projections; this results in a future need of 692 dpa across the plan period in Lisburn & Castlereagh.
- 9.2 It is appropriate to consider whether actual housing need going forward is higher than the minimum figure identified by the household projections.
- 9.3 In order to identify the appropriate level of future housing growth in the emerging Local Development Plan, LCCC should give consideration to whether an upwards adjustment is required to:
- 1 Address the housing market conditions in Lisburn & Castlereagh;
 - 2 Meet a particular identified strategic economic ambition, such as supporting the strategic proposals at West Lisburn – particularly given the levels of future jobs growth anticipated to come forward at this site and the need to ensure there is alignment between future economic and housing needs;
 - 3 Help address the impact of an ageing population through the provision of a diverse choice of homes in the right location which will attract and retain younger households; and,
 - 4 Support net in-migration, particularly of younger, economically-active population
- 9.4 Analysis of the market conditions in Lisburn & Castlereagh highlights a strong housing market with high and increasing house prices which exceed the Northern Ireland average. The number of house sales has also increased since 2010. As a consequence, affordability is a particular issue supporting the need for a percentage-based policy approach in Lisburn & Castlereagh and Belfast and less so in North Down and Ards, all of which are part of the wider Belfast Metropolitan HMA.
- 9.5 Jobs-led scenarios tested within this report result in levels of growth that are both lower (in the case of the OE projections) and higher (in the case of past trend-based scenarios) than Scenario B. The HGI is largely aligned with long term past jobs growth. This gives confidence that the level of future growth identified through Scenario B is appropriate for Lisburn & Castlereagh as the long term past jobs growth takes into consideration a period of economic growth, recession and recovery and likely future demographic trends. The housing market in Lisburn & Castlereagh shows resilience based on past trends and it is reasonable to assume that this will continue.
- 9.6 In terms of housing delivery, completions since 2005/6 have averaged 618dpa. The scenarios considered highlight that a level of housing growth aligned with the updated HGI would be broadly aligned with the level of past housing delivery and would also support a level of future jobs growth aligned with past trends.
- 9.7 Analysis of the demographic characteristics of Lisburn & Castlereagh highlight that the area is projected to experience strong population growth going forward over the plan period. Growth is projected particularly within the older age groups with a decline in the proportion of younger working age people. It is important that the future housing supply in Lisburn & Castlereagh meets the needs of the younger working age population to ensure there is a sufficient labour force to support future jobs growth and rebalance the impact of an ageing population, resulting in the need to uplift beyond the demographic baseline. The proposed housing requirement

figure will assist in this regard as it will help to attract more working age people into Lisburn & Castlereagh in order to support the delivery of the economic growth aspirations.

- 9.8 The relationship between Lisburn & Castlereagh and Belfast should continue to be acknowledged. The Belfast Draft Plan Strategy which proposes a future growth almost twice the HGI level of need and almost 50% greater than the most recent delivery trends (2018/19), which in turn are significantly higher than annual completions of 600dpa achieved since the recession. Given this is currently a Draft Plan Strategy, the potential implications have not been considered through this study. However, this will need to be considered going forward as the Draft Plan Strategy progresses. 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.

Housing land supply

- 9.9 Further to the consideration of the quantum of future housing required to meet future needs, it is important to consider housing monitor data on housing land supply, particularly patterns of past delivery which can give an indication of where:
- 1 Additional land is required going forward to ensure national planning policy is aligned with local policy; and,
 - 2 There have been issues of non-delivery in the past.
- 9.10 Based on the identified housing need set out through an update of the HGI (692 dpa) set against the latest available evidence of supply (as of 31 March 2017), there appears to be a healthy supply of housing land across Lisburn & Castlereagh which would cover the Plan period 2017 to 2032.
- 9.11 No assessment has been undertaken in this study in respect of the distribution of future housing land and its alignment with the Local Plan Strategy. However, a review of the distribution of completions over the last 12 years shows c.55% delivery in the Lisburn area, with a further 16% in Castlereagh (70% across the two main areas).
- 9.12 It will be for LCCC to consider the spatial strategy of the emerging Local Development Plan. However, given the direction of national policy guidance to focus on housing within existing urban areas, if the distribution of future need in Lisburn & Castlereagh is similar to past trends, this could lead to an imbalance between existing housing supply and past completions in some areas. It is important that the future housing needs of all settlements are addressed through the emerging Local Development Plan.

Table 9.1 Housing land supply as of 31 March 2017

	Past trends		Supply				No. years supply
	Average past delivery	Future Distribution of growth based on past trends	Potential units				
			Undeveloped sites	Ongoing sites	Total		
No.	% of L&C						
Lisburn, incl West Lisburn	54.5%	377	1,569	4,673	6,242	48.5%	16.6
Castlereagh, incl Dundonald	16.3%	113	360	1,449	1,809	14.1%	16.0
Carryduff	2.8%	19	410	1,154	1,564	12.2%	82.3
Hillsborough and Calcavy	3.4%	24	0	468	468	3.6%	19.5
Moira	3.7%	26	269	337	606	4.7%	25.3
Other settlements and countryside	19.2%	133			2,178	16.9%	16.4
Total	100%	692			12,867	100%	18.6

Note that breakdown of ongoing sites and undeveloped sites in villages and small settlement/countryside is not available.

Source: LCCC

- 9.13 It is to be noted that Table 9.1 does not relate to a five-year land supply and hence does not deal with the deliverability over the period. The past trend is based from 2003/4 until 2016/17 and for Carryduff would indicate a low level of uptake and hence a very low past delivery trend. This masks protracted applications on land in the area which have been recently approved¹⁴, totalling 340 dwellings. The build out of these recent approvals will reduce the number of years supply dramatically, and it is noted that the supply of undeveloped sites in Carryduff is just 410 units, equivalent to 21.5 years at the build rate set out above. It is difficult to achieve an even build rate across all areas, which largely explains what may be considered anomalies in Table 9.1.
- 9.14 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 Lisburn supply is also heavily reliant on ongoing sites; these account for 98.5% of the potential units (excluding West Lisburn).
- 9.15 Likewise, the supply for Castlereagh is also focused towards ongoing sites (equivalent to 80% of the total supply). It is understood that the potential for further growth at Moira and Hillsborough is limited given infrastructure and environmental constraints. The supply across the “other settlements” is below the average for the local government district as a whole. This is aligned with national policy and the focus on growth in and around the main settlements, with a lower proportion of growth in smaller settlements.
- 9.16 As part of the development of the Local Development Plan it will be important for LCCC to consider the future deliverability of sites to ensure that the identified future housing growth can be delivered on sites across the Plan period. Data contained in the Housing Monitoring Report (2017) highlights more than 60% of remaining supply on existing sites have not yet started. Around 14.5% of units which are not started are on sites of 10 or fewer and 30% of the sites are

¹⁴ y/2007/0455 for 107 dwellings, y/2008/0224 for 117 dwellings and y/2009/0114 for 126 dwellings

in ‘other’ settlements. It will important to ensure a mix of different sites are identified across Lisburn & Castlereagh, in terms of both location and size, which can support the identified future housing requirement. Development is needed across a range of settlements to ensure local needs are met and the market provides housing choice and diversity for a range of different households.

9.17 Overall there is an identified future supply of c.12,800 across Lisburn & Castlereagh. This is sufficient to meet the identified HGI figure of 692 dpa over the 15-year period (10,380) plus a “buffer” of 24% to ensure deliverability. However, this level of supply:

- 1 Is dependent on the West Lisburn strategic site coming forward to ensure the long-term supply; and,
- 2 May reduce following an assessment of deliverability of the sites which should be undertaken by LCCC as part of the preparation of the emerging Local Plan.

West Lisburn

9.18 West Lisburn is a key area of future regeneration and growth which is a priority in Lisburn & Castlereagh for the next 20 years. The future redevelopment of the area is supported by the West Lisburn Development Framework which recognises the need for investment in the transport infrastructure to secure its future potential. Future development is proposed to be a mix of employment use and housing.

9.19 The recent Planning Appeals Commission (PAC) Report for West Lisburn set out the issues from various parties in respect of the future zoning requirements of the masterplan for the area. At the Inquiry the Department agreed with the objectors that the zoning should be for mixed use, comprising equal proportions of employment and residential development with the provision of a linear park and large area of open space. This was identified as important to ensure the delivery of the Knockmore Relief Road needed to fully unlock the site.

9.20 West Lisburn has the capability of delivering a significant number of new homes which would contribute to ensuring future needs can be met within Lisburn & Castlereagh and provide a mix of house types and sizes. This will be important in addressing the wider strategic objectives to address the ageing population and help retain and attract younger people to the area.

Housing Mix

9.21 Household size is projected to decline in the future. However, Lisburn & Castlereagh is expected to experience one of the lowest changes in household size compared to other local government districts. This relates to future household growth being driven by smaller households (one and two person); 85% of future household growth in Lisburn & Castlereagh is projected to be driven by the growth in 1 and 2-person households. The past and future demographic trends in Lisburn & Castlereagh highlight the need to continue to ensure that future housing can meet the needs of families and young working age population, together with an increasing proportion of smaller households and the elderly.

9.22 In identifying the future housing mix in an area, it is important to take into account and recognise that housing wants/demands are distinct from housing need. In order to provide a guide for the future mix of homes to be brought forward in Lisburn & Castlereagh, we have considered current occupancy trends (available at a Northern Ireland level). This has shown that in the future around 33% of new homes should be smaller (1 and 2 bedroom) properties and 67% family homes (3 and 4 bedrooms). This would provide a greater proportion of smaller homes than the current housing stock split which identifies only 25% of existing stock is of smaller properties.

9.23 This broad mix for further consideration in the development of the Local Plan is considered to be robust given the importance of the market in determining a specific mix brought forward on a site, which is impacted upon by a number of factors including; the site and its surroundings, viability and local demand. Over-prescriptive policies on housing mix and type can act as a constraint on future delivery.

9.24 Given the trends highlighted in section 8.0 of this report in terms of existing demand for affordable homes in Lisburn & Castlereagh, it is anticipated a greater proportion of new affordable provision would be for smaller homes given the dominance of smaller homes on the NIHE waiting list.

Policy Recommendations

9.25 The following policy recommendations should be considered by LCCC whilst developing the emerging Local Development Plan:

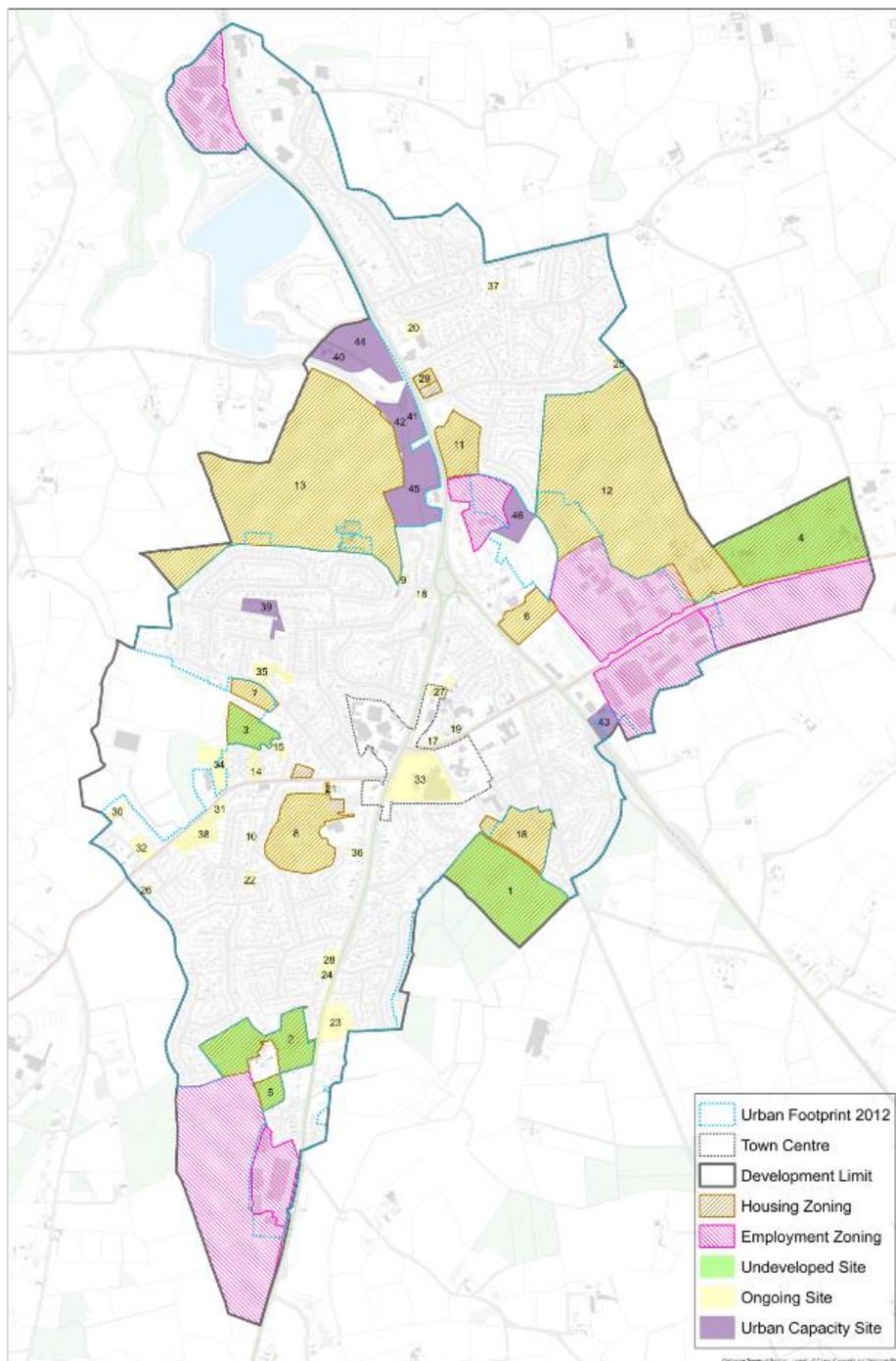
- 1 To plan based on a future housing growth in alignment with the updated HGI based on the 2016-based household projections c. 692 dpa over the plan period. It is recommended that the future housing growth is identified as 700 dpa within the emerging plan;
- 2 Ensuring there is a plentiful supply of land for housing to ensure the delivery of new homes which can support a future economic scenario aligned with past trends in economic growth. This is likely to comprise a mix of land within existing settlements and a strategic allocation such as West Lisburn which can provide choice within the housing market to address key challenges of an ageing population and retaining and attracting young, economically active people to the area;
- 3 Consider the over-allocation of sites identified in the plan which can meet the future housing requirement and take into account issues for future delivery given the resilience in the market;
- 4 Consider the future housing mix set out in this report to help guide the housing mix brought forward on future developments in Lisburn & Castlereagh. However, it is important to recognise the role of the market in delivering future housing in a local area, recognition that a one-size fits all approach should not be applied in respect of future mix;
- 5 Consider the importance and role of family housing in the future housing supply in Lisburn & Castlereagh to serve existing and future population alongside the current and future supply of smaller dwellings;
- 6 Review existing allocations to ensure site suitability and viability for future housing delivery;
- 7 Continue to monitor housing delivery against requirements to highlight, in a timely manner, issues of non-delivery;
- 8 Engage positively with neighbouring authorities; and,
- 9 Provide for the delivery of affordable housing through a mix of social and intermediate housing provision, across different settlements in Lisburn & Castlereagh to ensure affordable housing meets needs and demand both numerically and geographically across the area.

Appendix A

Maps showing Housing Land Availability of Urban Areas (used for purpose of Urban Capacity Study):

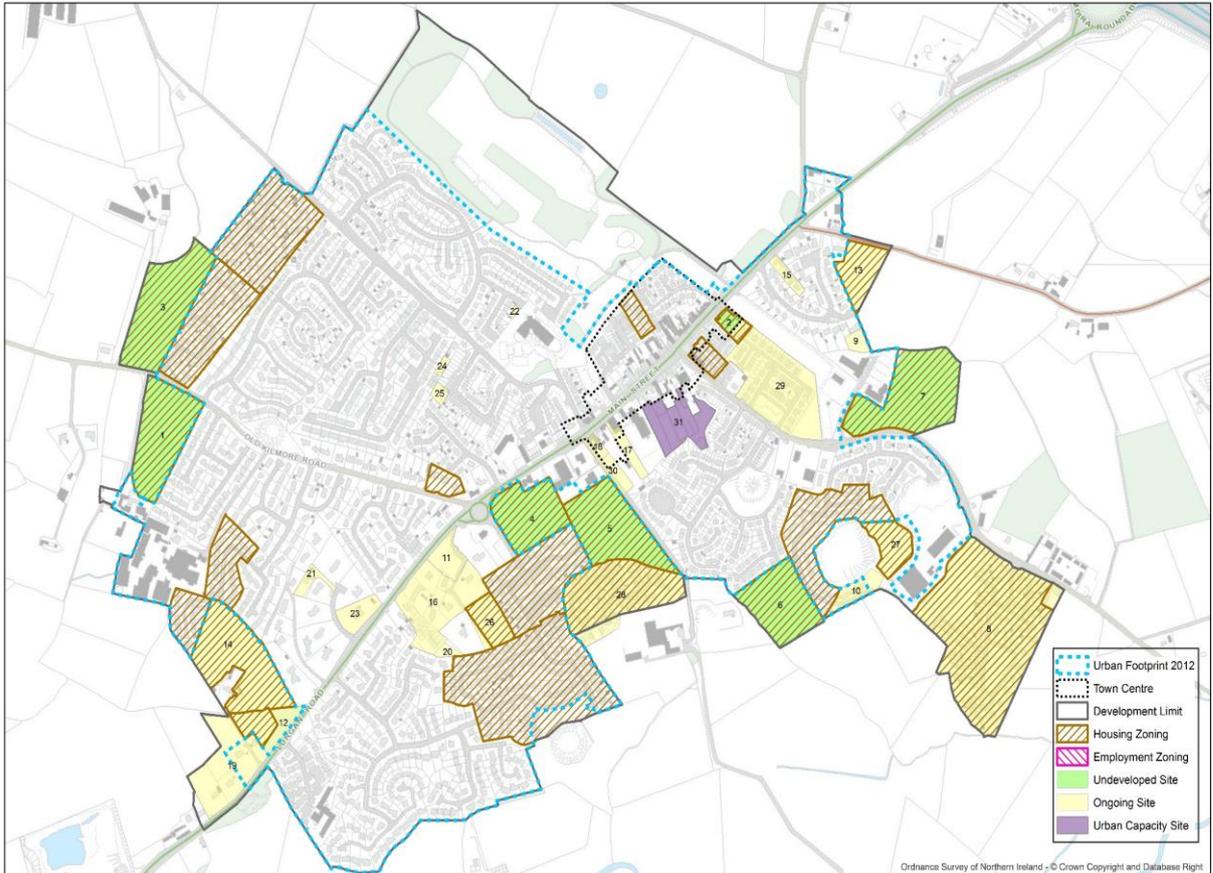
- **Carryduff**
- **Moira**
- **Hillsborough & Culcavy**
- **Dundonald**
- **Castlereagh Greater Urban Area**
- **Lisburn Greater Urban Area**
- **Lisburn City**

Carryduff



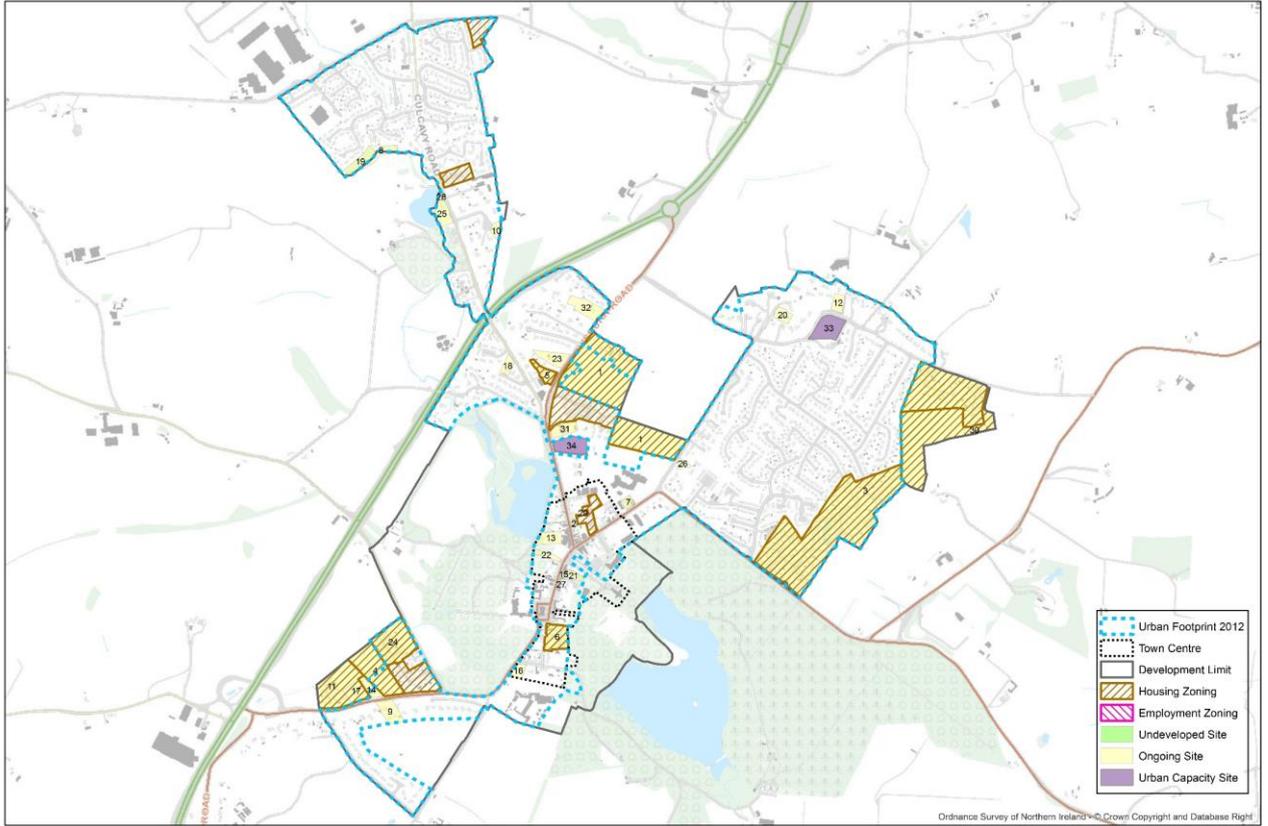
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Moira



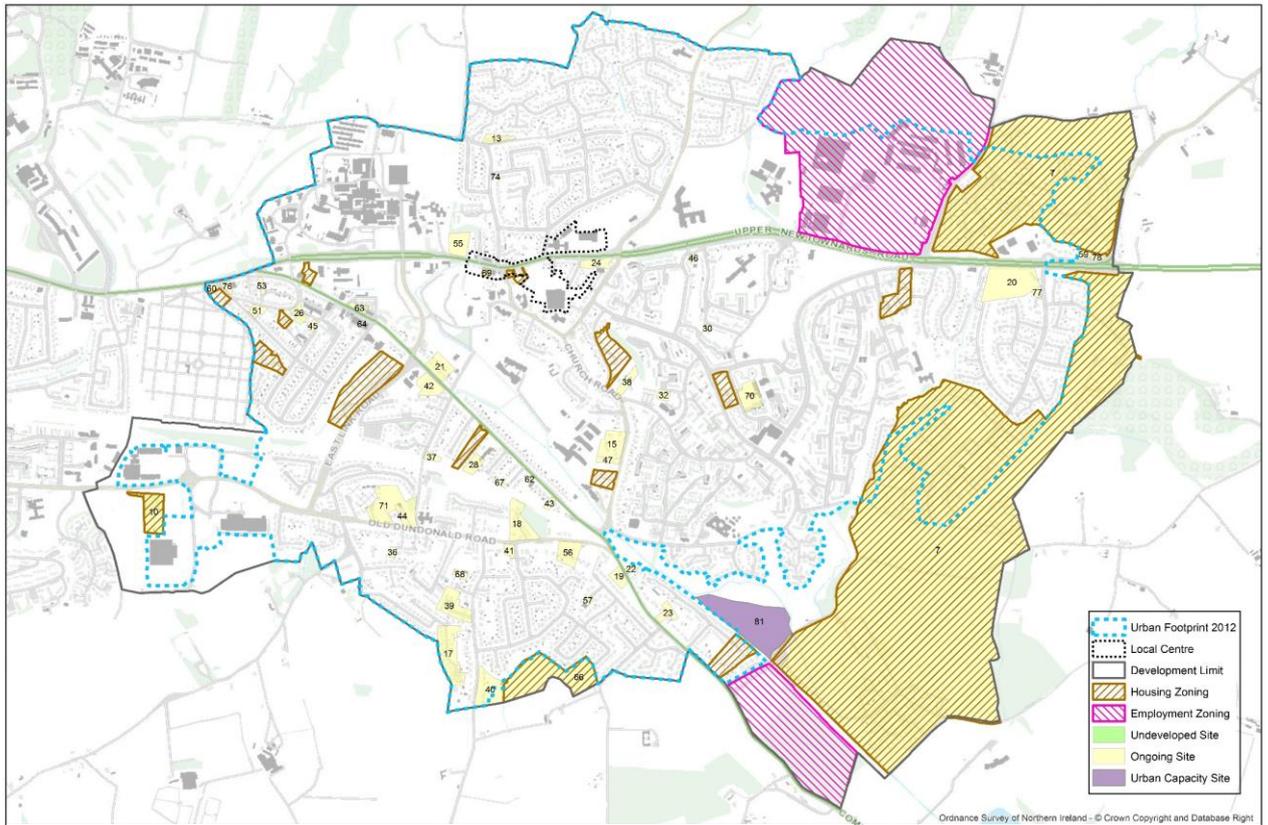
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Hillsborough & Culcavy



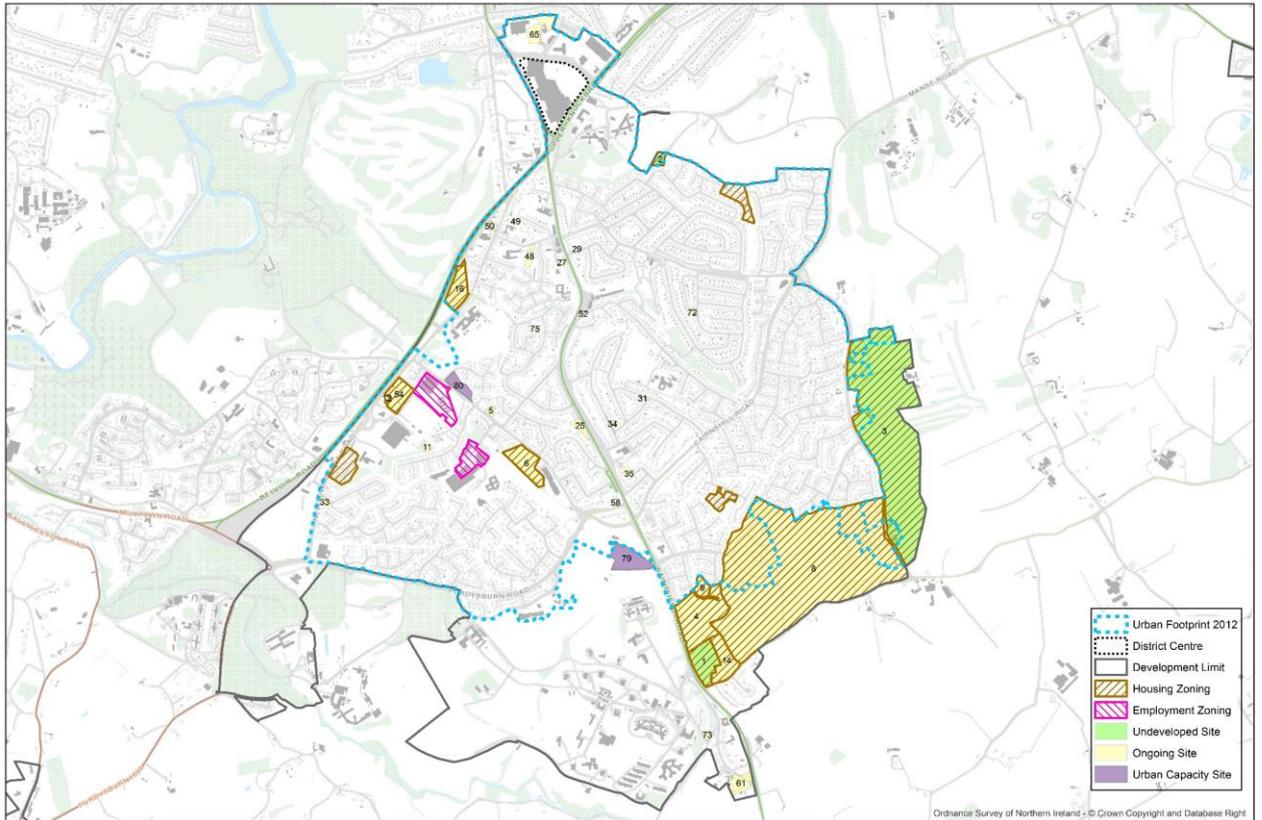
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Castlereagh Greater Urban Area 1 (Dundonald)



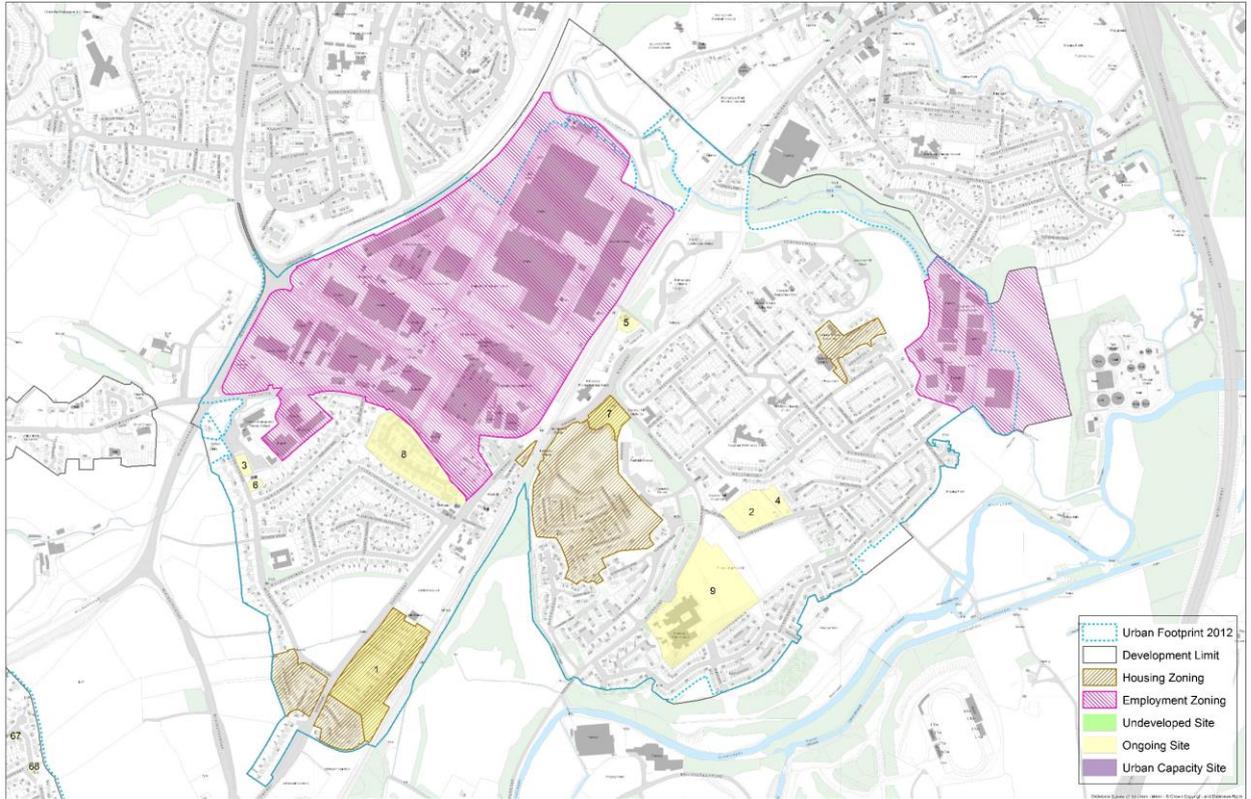
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Castlereagh Greater Urban Area 2



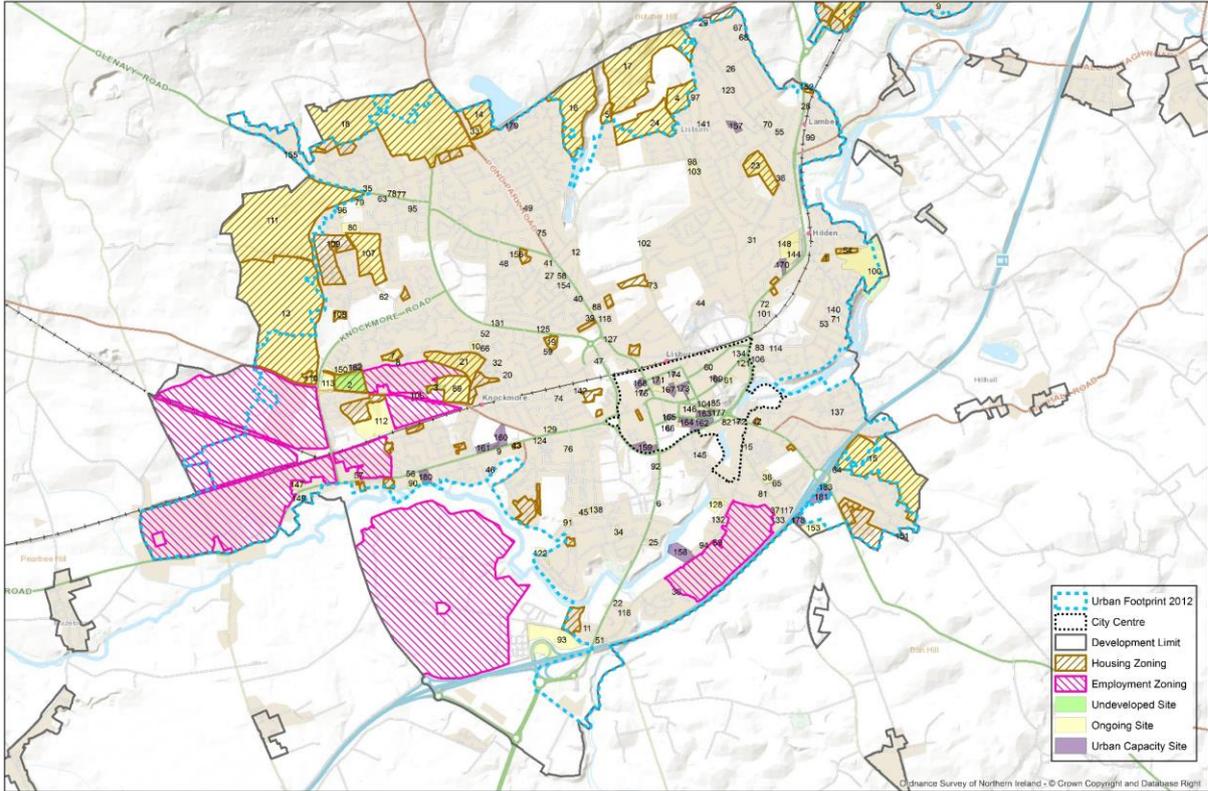
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Lisburn Greater Urban Area



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Lisburn City



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