Belfast Metropolitan Area Plan (BMAP) 2015

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Technical Supplement 1

Population & Housing

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An Agency within the Department of the
Environment

Housing Need Assessment
for the
Belfast Metropolitan Area Plan

Final Version September 2004

Housing
Executive

Preface [Volume III of Population and Housing]

The **Northern Ireland Housing Executive [NIHE]**, following guidance from the Regional Development Strategy 2025 and Draft Planning Policy Statement 12 [PPS12], carried out a Housing Needs Assessment [HNA] in the Belfast Metropolitan Area to inform the Belfast Metropolitan Area Plan [BMAP] 2015.

The approach used in the HNA was agreed with the Planning service and with the Department for Regional Development. It was based on the NIHE's approved "HNA Guidance Manual [PPS12]". The interim HNA, dealing with social housing, housing in a regeneration context and housing for the travelling community was made available to the Plan Team in August 2003.

The final HNA was made available in July 2004. It deals with the full range of Housing Needs, including affordable housing, second homes and certain specialist housing. The assessment of need covers the period up to 2010/2011.

The HNA has involved the collation, analysis and interpretation of a range of data and information and has involved additionally the examination of trends and those factors which influence such trends as they affect the local housing market. The following nine categories were considered within the HNA:

1. **Regeneration**
2. **Social Housing**
3. **Supported Housing Need**
4. **Travellers**
5. **Second Homes**
6. **Empty Homes**
7. **Affordable Private Rented**
8. **Affordable Owner Occupied**
9. **Students**

The NIHE HNA is contained within this Technical Supplement and has informed the Plan Proposals. The Department has given careful consideration to the NIHE's findings and has resolved in the main to incorporate its findings.

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1.0 INTRODUCTION

1.1 Background

The Regional Development Strategy (RDS) sets the strategic planning framework and planning context for Northern Ireland up to the year 2025. The RDS was approved by the Assembly in September 2001 following an extensive period of statutory and public consultation dating back to 1999.

Implementation of the Strategy will be facilitated by a range of Planning Policy Statements (PPS's) and the Development Plan process.

PPS12 *"Housing in Settlements"* seeks to address a number of housing and planning policy issues including that of Housing Need Assessment (HNA). HNA's are to be prepared by the Housing Executive as the regional strategic housing authority for Northern Ireland. The HNA will assist DOE Planning interpret local housing markets and their drafting of Area Development Plans.

The approach used in this HNA has been agreed with DOE Planning Service and the Department of Regional Development and is based on the Housing Executive's approved "Housing Need Assessment Guidance Manual (PPS12). The manual and the recommended approach have been developed with reference to best practice and current thinking from GB and the Republic of Ireland. The manual reflects best practice as set out in the DETR's "Local Housing Needs Assessment - A Guide to Good Practice" (2000); and Communities Scotland's "Local Housing Systems Analysis Best Practice Guide" (2000). In addition, the manual and approach adopted have been examined (Dec 2003) by an external reference group of prominent academics from across the UK in the field of housing need assessment who have confirmed that it *"sets out a very systematic and professional approach to housing need assessment. It is compatible with best practice advice that currently exists…".*

There is general Government recognition of the need to adopt a strategic, long term view of housing demand. This is considered an essential framework within which to assess both social and cross tenure housing demand. This is illustrated in the Office of the Deputy Prime Minister (ODPM) publication entitled "Housing Market Assessment Manual" (February 2004) which highlights that "increasingly local authorities are being tasked with developing a more strategic, long term view of housing demand and need". At the same time the ODPM also stress that authorities are required to also understand their local housing markets across all tenures to better ensure a robust framework for their wider housing, planning and regeneration strategies within their regions.

The ODPM considers that the Housing Market Assessment (HMA) for a region will, therefore, be central to setting the context for any Housing Need Assessment (HNA). This principle has been followed in the preparation of this HNA which incorporates a Northern Ireland regional context, together with an examination of housing needs.

In addition to the regional context, the HNA will consider specific categories of the housing market. The resulting output from the HNA will identify future land use requirements in relation to supported housing, travellers and affordable housing.

In following the approach outlined, this HNA will set out a housing need assessment that will:

- Highlight housing trends to provide a descriptive baseline and draw attention to any issues that are significant.
- Analyse housing trends and the factors that are driving the housing market and give an indication of the relative importance of those drivers.
- Project local housing needs by examining both demand and supply and highlight the projected balance between demand and supply.
- Assess the impacts of local housing needs on the wider housing market.

Housing Need Assessments are currently required for PPS12 in relation to the following 9 housing categories. This list will develop subject to any new policies or data becoming available or as otherwise agreed with the Planning Service and Department for Regional Development.

The following categories require to be considered within the HNA report:

1) Regeneration
2) Social Housing
3) Supported Housing Need
4) Travellers
5) Second homes
6) Empty homes
7) Affordable Private Rented
8) Affordable Owner Occupied
9) Students

In order to produce a Housing Need Assessment a range of data and information will be collated, analysed and interpreted. This analysis will involve examining trends and the range of factors that influence those trends. The analysis will not be merely a description of the data collated; it will consider how the various parts of the housing market are changing or likely to change over time and how this will affect the local housing market.

As stated earlier, these categories will be set within the context of existing and anticipated supply and will be assessed within the strategic context for Northern Ireland. This analysis will result in an indication of the housing requirement for the Plan area in respect of the nine categories.

Given the dynamic nature of the housing market and the factors that influence it, any assessment of need will be for between 5 and 7 years ahead. It should be noted however that projections are subject to ongoing review annually. A formal re-run of the HNA will be carried out after 5 years. This will involve drafting an updated HNA report.

1.2 Belfast Metropolitan Area Plan

The DOE Planning Service initiated the Belfast Metropolitan Area Plan process by publishing the Issues Document in August 2002. Following on from initial consultation, work is now underway in preparing the Draft Plan.

In August 2003 the Housing Executive, in line with its new role under the proposed Planning Policy Statement 12 (Housing in Settlements), submitted an Interim Housing Need Assessment to DOE Planning Service for the Belfast Metropolitan Area. The Interim Housing Need Assessment assessed housing need for the following categories:

- Affordable Social Rented Housing
- Regeneration
- Travellers

The Interim Housing Needs Assessment is now superseded by this Housing Needs Assessment Statement.

1.3 Area Definition

The Belfast Metropolitan Area Plan comprises six Borough/City Councils:

1. Belfast City Council
2. Castlereagh Borough Council
3. Carrickfergus Borough Council
4. Lisburn City Council
5. Newtownabbey Borough Council
6. North Down Borough Council

Planning Service has requested the Housing Executive assess housing need for the District Town, Local Towns, Villages and Small Settlements with in each District Council. The definition for the various settlement levels are determined by DOE Planning Service.

The settlements considered for housing need assessment in the Belfast Metropolitan Area Plan have been set in the hierarchy of settlements table overleaf.

Table 1 Hierachy of Settlements by Borough/District Council

	Belfast City	Carrickfergus Borough	Castlereagh District	Lisburn City	Newtownabbey Borough	North Down Borough
Main Urban Centre	Belfast City	Carrickfergus Town	Castlereagh Urban	Lisburn Urban	Newtownabbey Urban	Bangor Town
Local Towns		Greenisland Whitehead	Carryduff	Culcavey Hillsborough/ Moira	Ballyclare	Holywood
Villages			Moneyrea	Aghalee Annahilt Lower Ballinderry Upper Ballinderry Dromara Drumbeg Drumbo Glenavy Magaberry Milltown Ravarnet Stoneyford	Ballyeaston Ballynure Ballyrobert Cogry/ Doagh Kilbride Straid	Groomsport Crawfordsburn Helens Bay Seahill
Small Settlements		Knocknagulliagh Trooperslane	Carnacreevy	Ballyaghlis Ballylesson Ballyskeagh Boardmills Drumlough Dundrod Edenderry Feymore Halfpenny Gate Hillhall Kesh Bridge Lambeg Legacurry Long Kesh Lwr & Upp Broomhedge Magherconluce Purdysburn St James Tullynacross	Ballycor Ballycraigy Craigarogan Kingsmoss Lowtown Millbank Roughfort Tildarg	Six Roads End

1.4 Executive Summary

Structure of HNA Report

The HNA reports follow the structure set out in the Housing executive's approved guidance manual. The substantive sections of the HNA include:

- *Northern Ireland Context* – this establishes the key issues affecting the housing market in Northern Ireland. The previously published "N.I. Housing Market – Review & perspective 2004 – 2007" has been quoted extensively in the narrative of this section. It highlights a buoyant market with increasing house prices, but at a sustainable level. It suggests increasing pressures in relation to affordability and in the social rented sector.

- *Local Context* – A housing context specifically relating to the BMAP area which summarises socio-economic, tenure, housing conditions and specific housing and regeneration issues.

- *Assessment of specific needs* – The 9 identified categories of housing need are each considered in detail within this section and appropriate implications of housing need for land use requirements highlighted.

BMAP - Key Findings

The key findings from the BMAP Housing Need Assessment report are summarised below.

1) Regeneration:

- Large scale regeneration programme in Belfast City Council area with 25 Urban Renewal / Economic Appraisal areas currently at various stages of implementation

- 3,614 dwellings have been demolished within these appraisal areas to date, with a further 967 approved for demolished

- New housing put back of 1,114 has been completed or is under construction. A further 888 new dwellings are anticipated

- In the council areas outside of Belfast, the Housing Executive continues to develop estate based strategies e.g. Rathcoole, Ballybeen, New Mossley, Old Warren, Glenfield, Seymour Hill and Rathgill

- Programmes of physical improvement schemes and selective demolition together with small new housing infill developments form the basis of the estate strategy programmes

- There is ongoing partnership working with a wide range of agencies.

2) Social Housing:

- BMAP overall housing stress waiting list figures in BMAP have increased 32% since March 2001

- A significant element of this housing stress waiting list comprises single person household. In BMAP singles account for 42% of total housing stress

- The largest percentage increases in housing stress have been in North Down (63%) and Lisburn (54%) council areas – again single persons make up a significant percentage of this demand (Lisburn 42% and North Down 34%)

- At September 2003, the largest number of applicants in housing stress (4,689) were located within the Belfast City Council

- There is generally a high level of social housing need throughout Belfast, with the exception of the Shankill area

- The adjusted 7 year projected housing need figures indicate a requirement for an additional 6,494 new dwellings within Belfast

- Similar projected need outside of Belfast indicates a requirement for an additional 2,233 dwellings

3) Supported Housing:

- A total of 477 units of supported accommodation have been identified for the BMAP area for the period (2003/4 to 2008/9)

- 283 of the supported housing schemes identified are within the Belfast City Council area

- New schemes will cater for households with a range of support needs and include those with learning or physical disability; vulnerable women and young people; those that are homeless and the frail elderly.

4) Travellers:

- Traveller's accommodation is proposed at 3 locations within Belfast.

- Land at Glen Road and Monagh Road Belfast has been identified for 2 group housing schemes delivering 32 units of accommodation

- Further need for a 6 unit transit site has also been confirmed.

5) Second Homes:

- The largest incidence of second homes occurs within Belfast wards close to the Queens University in South Belfast and also at Jordanstown close to the University of Ulster

- The number of second homes is relatively small and it is not perceived as a significant issue within BMAP.

6) Empty Homes:

- Empty homes currently represent 5.2% of total housing stock within the BMAP area (based on RCA and NIHE data @ 2003)
- There is an increasing trend in vacant properties across most council areas with the exception of Carrickfergus
- All council areas except Belfast (6.9%) have levels of vacant property below the Northern Ireland average of 6.5%
- All districts have vacancy rates at or very close to the Regional Development Strategies target of 4.5%
- There is a correlation of concentrations of vacant stock with areas of high private rented accommodation. This suggests that such vacant properties are vacant for short periods between reletting of tenancies rather than reflecting a long term problem.

7) Private Rented :

- The number of households living in private rented accommodation within BMAP was 17,921 (census 2001)
- This represents a 34.2% inter-census increase
- All district council areas experienced percentage increases with the exception of Lisburn which declined by 24%
- Of total households living in private rented accommodation within BMAP, 70% do so within Belfast City Council area
- Private rented stock increased as a percentage of total housing stock from 8% in 1991 to 11% in 2001
- The incidence of Houses in Multiple Occupation and private sector Housing Benefit are concentrated in the same wards as identified by the census
- Private renting plays an important role in providing tenure choice within the BMAP area, particularly Belfast.

8) Students:

- 33,500 students are registered as attending the University of Ulster or Queens University campuses in Belfast. 18,500 attend QUB and 15,000 attend the University of Ulster
- Significant concentrations of students reside during term time in areas around the campuses. In particular south Belfast / “Holyland” and at Jordanstown
- HMO’s are a significant element of the accommodation used by students

- The Universities envisage relatively small incremental increases in the number of students requiring term-time accommodation as more turn to part time courses or commute from family homes

9) Affordable Owner Occupation:

- Lisburn City displayed the largest affordability gap (£15,250) compared to other council areas in the BMA for 2003.
- Castlereagh Borough recorded the second largest affordability gap (£8, 620) and Belfast City the third largest (£8,250).
- Carrickfergus, Newtownabbey and North Down Boroughs all recorded a sufficient supply of affordable owner occupied housing.
- All sectors of Belfast recorded affordability gaps however South Belfast displayed the largest affordability gap (£30,550) in Northern Ireland for 2003.
- In 2003, the percentage of affordable stock in the BMA increased or remained constant in every Council area compared to 2001, apart from Castlereagh which demonstrated a substantial 6% drop in the number of affordable stock.

2.0 NORTHERN IRELAND REGIONAL CONTEXT

2.1 Regional Overview

The specific needs assessments undertaken within the HNA must be set against an overall Regional housing context. This context, together with the identified strategic perspectives and the various initiatives and opportunities, will help ensure that the planning lead approach takes account of the function and nature of housing markets.

"The Northern Ireland Housing Market - Review & Perspectives", is published each autumn by the Housing Executive and sets out the regional context for housing as follows (some figures have been updated):

2.2 Policy Developments

The Housing (Northern Ireland) Order 2003 was enacted in February, putting in place a number of important measures including;

- Introductory tenancies for tenants in the social sector
- New powers for courts to deal with antisocial behaviour
- A statutory right to buy for tenants of registered housing associations
- The transfer of responsibility for the private sector Rent Register to the Housing Executive
- A statutory registration scheme for Houses in Multiple Occupation
- The introduction of a discretionary Home Renovation Grants Scheme
- The transfer of responsibility for the provision of accommodation for the Traveller Community from District Councils to the Housing Executive

2.3 Need for Sustained Improvement of Housing Conditions

The Review publishes confirmed figures from the 2001 House Condition Survey. Although the figures show steady progress there is still much work to be done:

- 31,600 (4.9%) homes are unfit for habitation compared to 44,000 (7.3%) in 1996. This is clear evidence that the tools we have for tackling unfitness are effective e.g. through regeneration and private sector grants
- The greatest incidence of unfit dwellings occurs in dwellings built before 1919, (62% of all unfits) and 44 per cent of all unfit dwellings are located in isolated rural areas
- In addition 3,300 properties fall into unfitness each year. This underscores the need for sustained investment to tackle disrepair and reduce unfitness throughout the residential sector
- It is estimated that around 206,000 Northern Ireland homes failed to meet the 'Decent Home' standard. Government introduced this standard in England in

March 2002, but as yet it has not been introduced here. Almost nine tenths (88%) of these failed on the basis of the thermal comfort criterion, less than one fifth on the basis of disrepair and 10 per cent because of the lack of modern facilities and amenities

- Some 10,000 Housing Executive homes still need to be brought up to modern day standards, and there is a backlog of revenue replacement work estimated at £150 million. Over 70,000 Housing Executive homes 5 failed the 'Decent Home' standard mainly due to inefficient electric or solid fuel heating systems

- There is also a growing demand for adaptations for people with a disability and older people, requiring around £30 million annually including almost £10m for Disabled Facilities Grants

- Over £1 billion will be needed to build new social housing, to reduce unfitness and to maintain and improve housing conditions in Northern Ireland over the next 3 years

2.4 Rising Demand for Social Housing

- The Waiting List for social housing, including the number of applicants in housing stress, has continued to grow, with approximately 28,000 applicants of which around 14,000 are in housing stress,(an increase of 6% on the previous year)

- The Waiting List is dominated by three household types; singles(44%), small families (26%) and older people (19%) • There is a geographical concentration of housing need with two thirds of the growth in housing stress coming from twelve Housing Executive Districts in and around Belfast

- A 16% increase in the number of households presenting as homeless (16,426) during 2002/2003 due to relationship breakdown, and higher levels of vulnerability through alcohol and drug abuse and mental health problems

- The Housing Executive's Homelessness Strategy which was launched in September 2002 is being implemented. A number of significant recommendations were progressed including steps to reduce reliance on private shared accommodation

- Almost 15% of those presenting as homeless in Northern Ireland are from rural backgrounds

2.5 The Provision of New Social Housing

- The demand for social housing is primarily met by supply of relets from the existing stock which is currently some 8,000 per annum

- However the provision of new social housing is an important element of supply and the programme is not keeping pace with rising levels of housing stress

- The programme in the past two financial years (2001-2003) delivered approximately one half of the required 1,500 new homes per annum estimated under the Net Stock Model

- A major piece of research carried out by the University of Ulster /University of Cambridge has estimated the annual new social house building programme requirements to be between1, 400 and1,500 per annum. Allowing for the backlog which has built up and for local supply/ demand variations the Housing Executive estimates 1,750 dwellings are required each year

- The programme over the next 5 years will need to increase by more than 2,000 dwellings to meet this requirement

- During the year the Department for Social Development commissioned a study to identify the issues which were affecting the delivering of the new build programme. Land availability, acquisition and price, planning, and long lead in times were identified as significant factors. These are currently being addressed by a Tripartite Group consisting of the Department, the Housing Executive and the Federation of Housing Associations

2.6 Affordable Housing

- The average house price in Northern Ireland according to the Nationwide is £90,265 in Quarter 2,2003 compared to the UK average of £125,382

- The University of Ulster's house price index shows that the average price of a home in Northern Ireland for Quarter 3, 2003 was £105,779 compared to £99,787 for the same period in 2002 - an annual unweighted increase of 6 per cent

- The buoyancy of the owner-occupied sector is leading to signs of an emerging affordability problem in some parts of Belfast and beyond

- The sale of Housing Executive homes to sitting tenants continues to provide the most affordable route into home ownership in Northern Ireland. With over 100,000 sales, and the creation of many mixed tenure estates, former Housing Executive properties account for nearly 21% of the owner-occupied sector and 15% of the housing market as a whole

- Demand continues to increase for Co- Ownership Housing. This provides a valuable bridge between renting and home ownership which is confirmed by research commissioned by the Department for Social Development and presented in the Document. Since 1978 some 17,500 households have been able to purchase their home with the help of the Co-Ownership scheme, and of these more than 13,000 have" staircased" out of the scheme to become full owners

2.7 The Private Rented Sector

- The 2001 House Condition Survey shows that there has been a marked increase in the private rented sector from 32,000 units in 1996 to 49,000 in 2001. Representing a significant element of the housing market, we are looking to the private rented sector to provide good quality, safe accommodation, and at a reasonable cost. A draft strategy for the private rented sector was published for consultation in early 2003. The Strategy recognises the complexity and diversity of the sector, and emphasises the necessity for partnership and a multi-agency approach which will exchange and promote good practice. The Department for Social Development is also reviewing the private rented sector legislation

- The number of Houses in Multiple Occupation (HMOs) continues to rise. Good progress has already been made in improving conditions and raising management standards through the Voluntary Licensing Scheme. A mandatory registration scheme for HMO units will be introduced and the proposed scheme is currently out for consultation

- There are signs, in the private rented sector, that the apartment investment boom, based on buy-to-let and capital gains, is coming to an end

2.8 Grants for the Private Sector

Grant aid continues to play an important role in reducing unfitness, particularly in rural areas, with an average of more than 9,000 grants being completed at a cost of over £40 million each year throughout a five year period. However, this overall picture disguises a number of trends, such as the continued demand for grant aid for people with a disability, resulting in the approval of 1,600 grants last year spending £9.5m.

- As part of the Housing Executive's Houses in Multiple Occupation strategy, 178 HMO grants were approved at a cost of £3.7m

- Under the provisions of the Housing (NI) Order, 2003, the Housing Executive's Grants Scheme has changed from one that is mainly mandatory to one that is mainly discretionary. Targeting of grant aid is an essential element of the new scheme with the aim of concentrating resources on areas, property and households in greatest need

2.9 Energy Efficiency and Fuel Poverty

- For the five year period 1996-2001 the Housing Executive, as the Home Energy Conservation Authority, has improved the energy efficiency of Northern Ireland's housing stock by 13% compared to an 8% improvement recorded in England

- The 2001 House Condition Survey showed that 203,000 households, (32% of the total) were in Fuel Poverty, that is, having to spend more than 10 per cent of their income to heat their homes to an adequate standard. This compares with 9 per cent of households in England. The main factors are lower incomes in Northern Ireland, together with higher dependency on benefits and higher fuel prices. In Northern Ireland where 1,000 people die from cold related illnesses each year the Warm Homes Scheme is making a steady contribution to the reduction in fuel poverty in the private sector, while the Housing Executive's heating programme is having a similar effect on the social housing stock

2.10 Planning

- Land pressures and issues around transport, density and design are important if the Government's target of 60% of new housing provision on brownfield sites is to be met

- Alongside this, other issues of religious segregation, anti-social behaviour and social exclusion raise matters of considerable breadth and complexity that demands a comprehensive response from all agencies

2.11 Neighbourhood Renewal

The Department for Social Development's Neighbourhood Renewal Strategy represents an important framework for tackling a wide range of problems including deprivation, unemployment, low attainment levels, anti-social behaviour, community safety and environmental dereliction. The Housing Executive will support the Department's Strategy through a range of neighbourhood-based plans and programmes.

2.12 Summary

Over the past twelve months Northern Ireland's housing market has remained buoyant. House prices have risen, but at a sustainable level. Northern Ireland's economy continued to expand with a further increase in the number of jobs. However, most of these were part time and in the service sector. The traditional manufacturing base has continued to decline. There is no sign of an imminent recession but the global economy remains weak indicating that Northern Ireland's economy, the most important factor underlying the housing market, may well experience greater difficulties over the next three year period.

Despite the continued economic growth and buoyancy in the housing market there are increasing signs of strain. In the owner occupied sector affordability is becoming a more important issue for first time buyers, particularly those trying to find a property within commuting distance of Belfast.

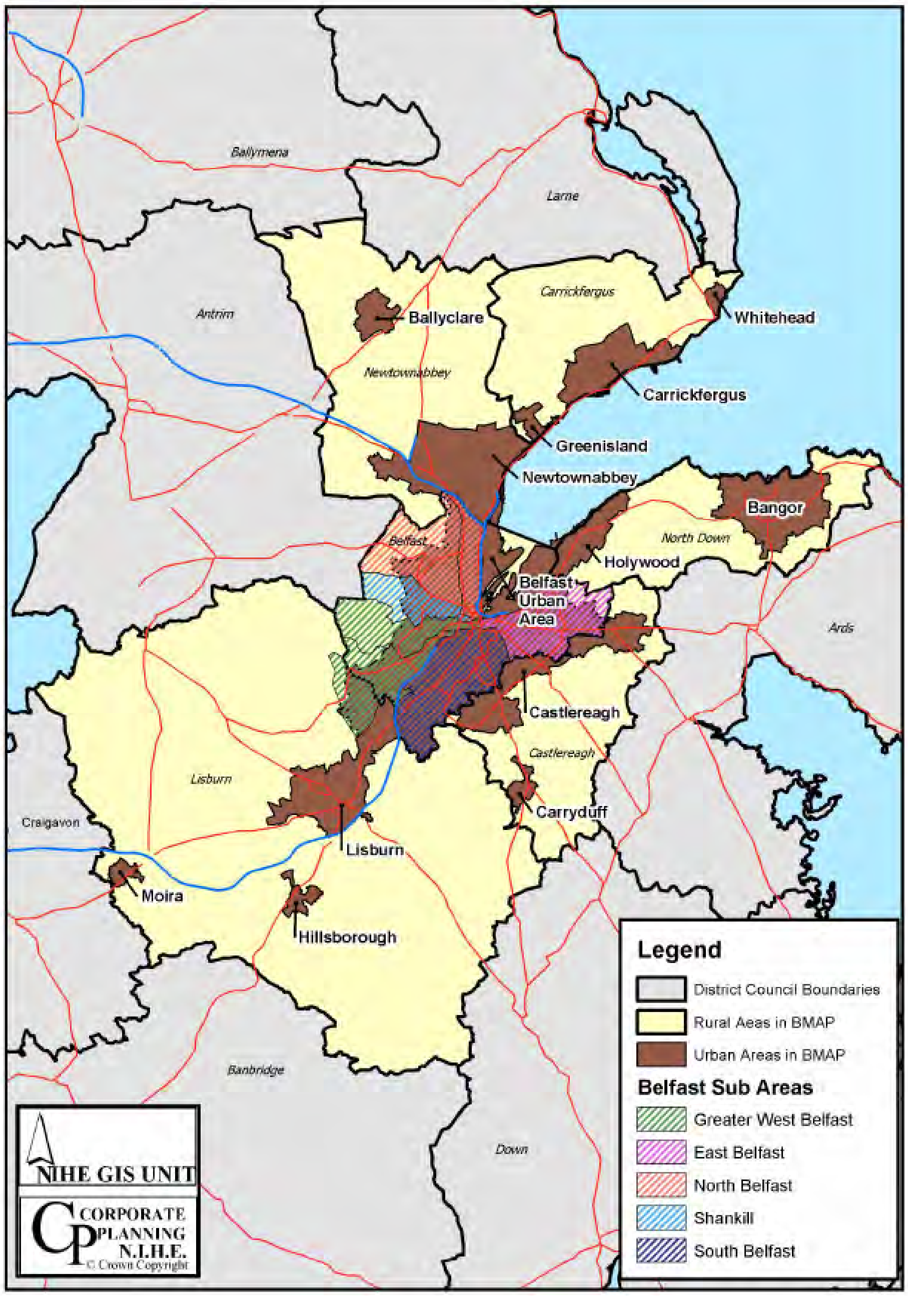
In the social sector too there are increasing pressures. On the demand side rising waiting lists and rising housing stress are in evidence particularly in the Belfast Metropolitan Area (BMA). On the supply side a smaller number of new social dwellings are being built, and the Housing Executive is continuing to sell around 5,000 properties a year.

The 2001 House Condition Survey confirmed the steady progress which has been made in improving housing conditions and energy efficiency over the last five years, but it has also highlighted the work that remains to be done, particularly on the issue of fuel poverty.

3.0 BMAP - LOCAL CONTEXT

3.1 Geographic Area

The BMAP area includes Belfast and Lisburn City Councils; and North Down, Carrickfergus, Newtownabbey, and Castlereagh Borough Councils. The local context for each District is set out in the annual District Housing Plan. Below is a summary of the local context for the BMAP Districts.



3.2 *Socio-Economic Profile*

The 2001 Census shows that the population within BMAP in 2001 was 645,138. Belfast City Council had a population of 277,391, a decrease of 0.6% on the 1991 figure of 279,237. All council areas outside of Belfast exhibited increased population growth. Over the same period the Northern Ireland population increased by 6.8%.

The 2001 Census states that there were 257,658 households within the BMAP area and 113,934 households within Belfast City Council. All council areas within BMAP saw an increase in household numbers from the 1991 census. The highest rate of increase was in Carrickfergus (24.6%) with the other council areas increasing by around 16% to 20% on 1991 figures. The only exception was Belfast City Council which increased by a much lower rate (6.1%). Over the same period the number of households in Northern Ireland increased by 18.2%.

Chart 1 Population

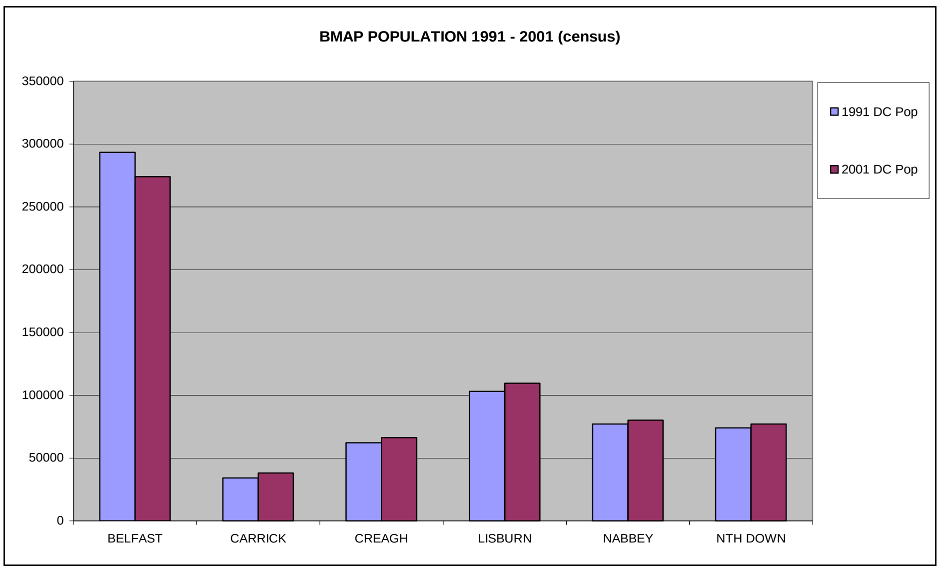
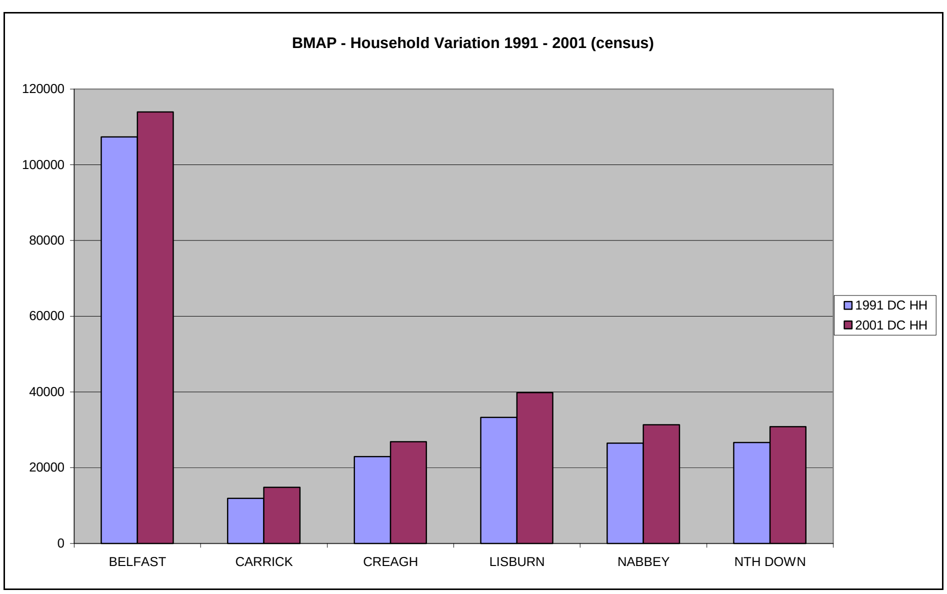
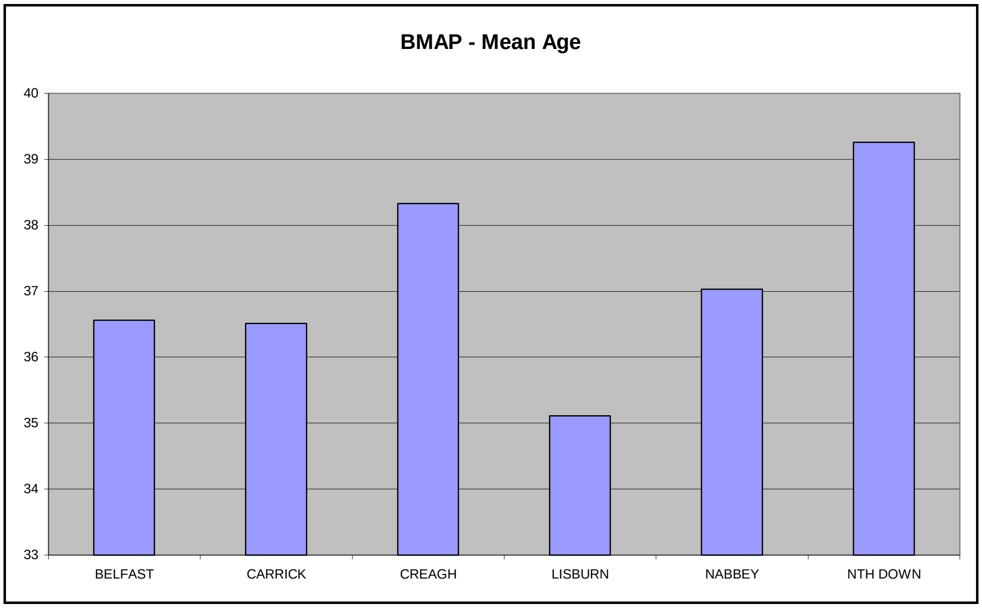


Chart 2 Household Numbers



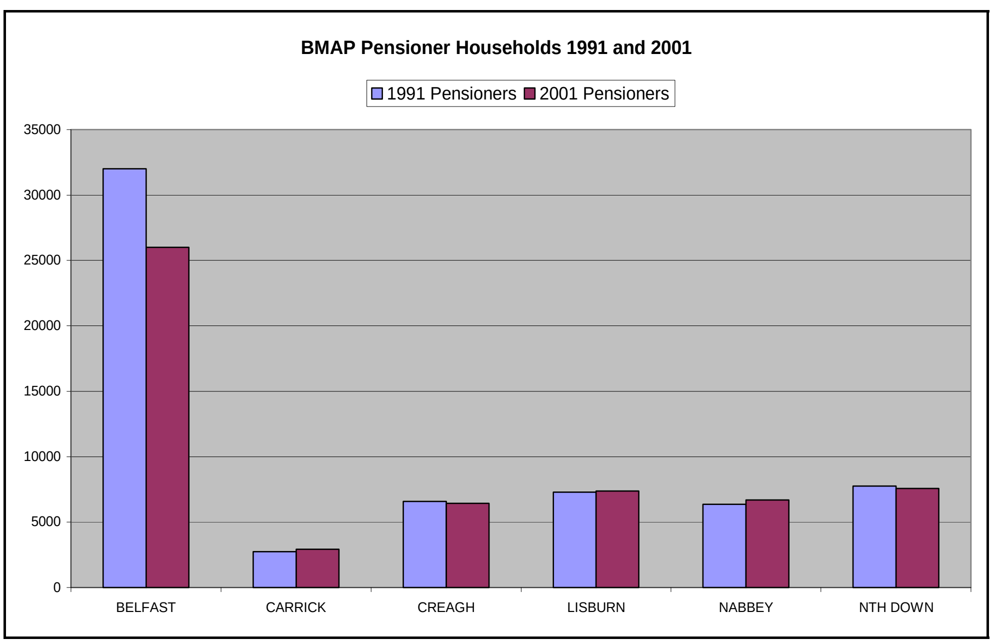
The mean age of the 2001 population within BMAP ranges from 35.1 years in Lisburn to 39.3 in North Down. In Belfast the mean age was 36.6. This compares with 35.8 for Northern Ireland. The chart below shows the mean age for all council areas based on 2001 census data.

Chart 3 Mean Age



It is apparent that there is an increased age profile within the BMAP population particularly in the North Down and Castlereagh areas. This is confirmed when the level of pensioner households are considered. The chart below shows the inter-census change in pensioner household numbers and confirms that all council areas have either experienced increases or remained fairly static, with the exception of Belfast, which declined in line with the overall loss in its population.

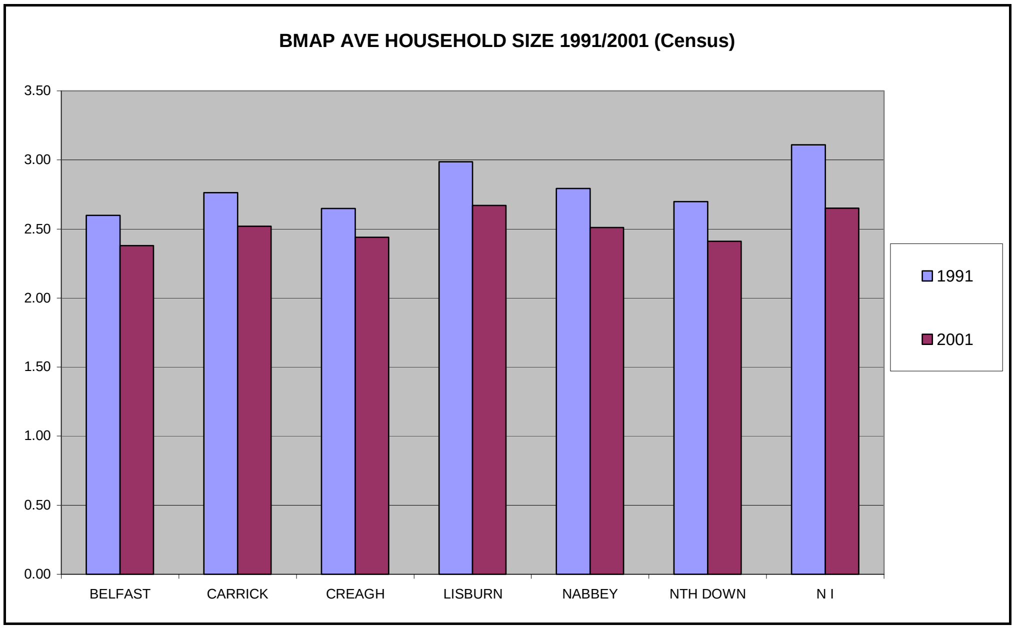
Chart 4 Pensioner Households



The household composition at 2001 in BMAP indicates 58% family households, 23% pensioner households and 19% single non pensioner households. The comparable figures for Northern Ireland were 62%, 20% and 14.5%. BMAP has proportionally more pensioners, single person households and fewer families compared to Northern Ireland as a whole.

The average household size at 2001 in BMAP ranges from 2.38 in Belfast to 2.67 in Lisburn, this compares with 2.65 for Northern Ireland. The table below sets out the inter-census changes in average household size and indicates that it has reduced in all council areas.

Chart 5 Average Household Size

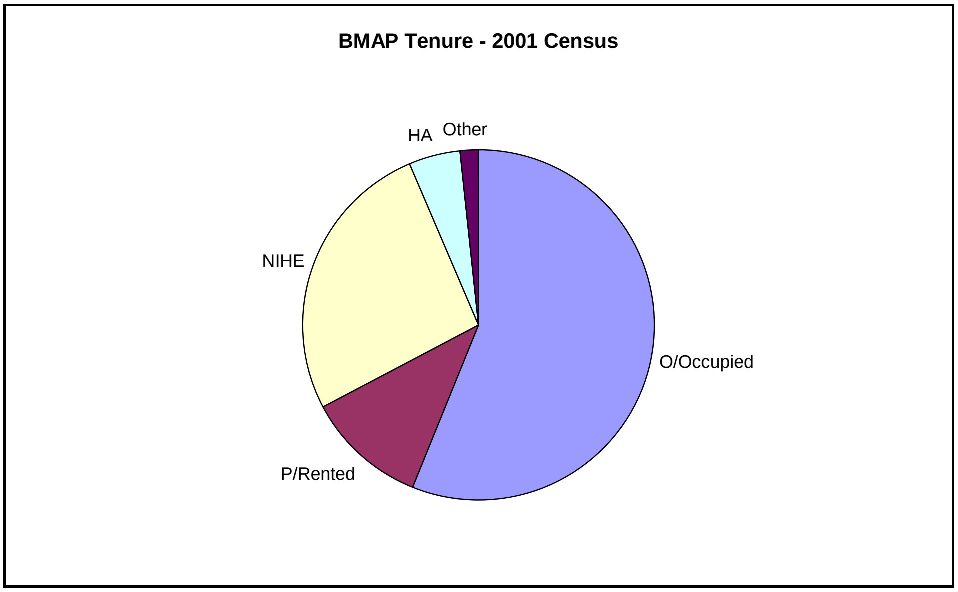


From the demographic information it is apparent that there has been an overall loss of population from Belfast, with older and smaller (single person) households increasingly prevalent. The council areas outside of Belfast City Council all exhibit increased population albeit slightly older in profile to the rest of Northern Ireland. Single persons are increasingly emerging as a more significant household type.

3.3 Tenure

Within BMAP owner occupation is the largest tenure group with North Down having the highest level at 78.6% and Belfast the lowest at 56.1%. Housing Executive stock as a tenure accounts for 26.4% in Belfast to as low as 10.8% in North Down council areas. The Private rented ranges from 2.3% in Lisburn to 11% in Belfast. The table below illustrates the spread of tenures in all council areas.

Chart 6 Tenure



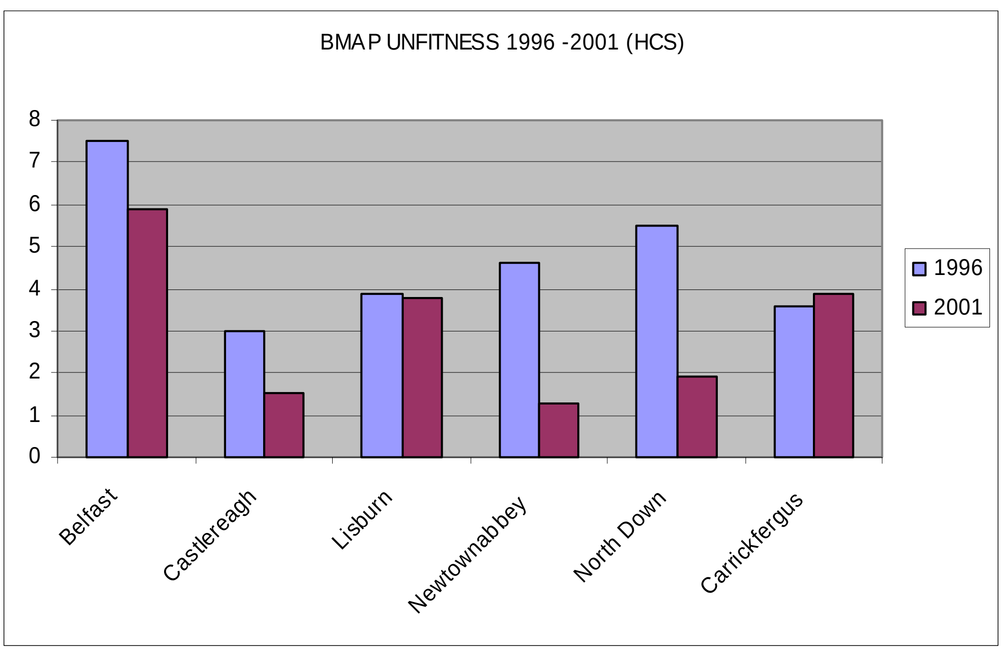
The Housing Executive's house sales policy enables tenants to purchase their homes on a discounted basis, thereby facilitating tenure choice and affordable home ownership.

The Northern Ireland Co-Ownership Housing Association is continuing to assist households to purchase their homes.

3.4 Housing Conditions

The 2001 House Condition Survey recorded a fall in unfitness across all districts within the BMAP area, except Carrickfergus.

Chart 7 Unfitness



The Survey shows that unfitness in Belfast decreased from 7.5% (8,468 dwellings) in 1996 to 5.9% (6,990 dwellings) in 2001 compared with a Northern Ireland unfitness figure of 4.9% in 2001. North Down has also seen considerable decreases in unfitness from 5.5% to 1.9% in the same period. The overall reduction in unfitness is the result of the continuing programme of Urban Renewal and Private Sector Grants.

3.4.1 Sectoral / District Housing Issues and Strategies:

A summary of the housing related issues and regeneration activity for each council area is summarised below. Section 4 “Regeneration” examines these issues in more detail.

(i) Belfast City

There are a range of issues impacting on housing within Belfast. The NIHE has carried out a number of sectoral studies and strategies the current range of which are outlined below.

(a) North Belfast

The third year of the North Belfast Strategy is now complete with £50 million having been spent on a range of activities.

During the last financial year a total of 270 additional social dwellings were either acquired or construction commenced on site. Approval to secure a strategic development site at the former St. Patrick’s School has been granted and negotiations are at an advanced stage. Vesting of four additional sites is proceeding. Major land feasibility studies are underway at Ligoniel and Library Quarter. The North Belfast Housing Partnership compromising DSD, the Housing Executive and nine Housing Associations, continues to act as an important vehicle for delivery of the social new build programme in an efficient and effective manner. Some 11 properties have been purchased under the ASH scheme and discussions continue with private developers and the Co-Ownership Housing Association to ensure provision of quality affordable private sector homes.

During the past year three new areas have been identified for potential urban renewal activity, Fortwilliam & Queen Victoria Gardens, Parkside and Upper New Lodge for which appropriate regeneration plans will be presented to the Board of the Executive during the incoming year. This is in addition to the seven ongoing Urban Renewal Areas at New Lodge, Clifton/Oldpark, Torrens, Glenbryn, Grove, Gainsborough and Mountcollyer. Private Sector grant aid including Group Repair expenditure was £2.48m.

The North Belfast Inter-Agency Group meets quarterly to co-ordinate the implementation of the strategy. Community consultation remains an important factor and the North Belfast Housing and Environmental Forum, comprising community groups working in North Belfast, the NIHE and chaired by the North Belfast Partnership Board’s Chief Executive, meets monthly to discuss progress and other items of interest to the group. The Housing Executive is represented on two groups.

This strategic approach within north Belfast is set within the particular issues impacting on housing within Belfast. In north Belfast housing is characterised by sectarian interfaces and distinct areas of housing identified with one community or the other. There tends to be high social housing demand in catholic areas with associated problems of land cost and supply. Conversely there tends to be potential housing surpluses in protestant areas which gives rise to different problems such as empty dwellings, dereliction and unfitness. Programmes of redevelopment and regeneration have been delivered and are ongoing in order to tackle the high levels of unfitness.

(b) Shankill

Following the publication of the Greater Shankill Sectoral Study the Housing Executive undertook extensive consultation with relevant Public Representatives, Community Groups, Statutory Agencies and the general public. As part of this consultation exercise issues raised by the Sectoral Study were presented to and debated by the community during the Shankill Housing Conference held in February 2003. It is proposed that the strategy document will review the current situation and set out an assessment of future housing requirements. The housing strategy is due for publication in the summer 2004 and will highlight the need for a partnership based approach to enable the regeneration of the Greater Shankill area.

(c) West Belfast

In April 2002, the Housing Executive published the Greater West Belfast Sectoral Study which set out the facts on housing and related issues. Following a period of extensive consultation, the Executive published the Greater West Belfast Housing Strategy later this year. The strategy covers a seven year period commencing 2003 and sets out the Executive's priorities for the Greater West Belfast Area, which includes the Lisburn Dairyfarm District.

The issues that impact on West Belfast include high levels of social need, lack of housing land and associated high land values. This in turn impacts on tenure choice and presents affordability problems for people wanting to live there. In addition, there remain some areas of unfit housing that are subject to ongoing redevelopment and regeneration.

(d) South Belfast

The Housing Executive commenced the greater south Belfast sectoral study in April 2004. This study will examine key housing issues and trends with a view to developing a housing and regeneration strategy for the area.

In doing so the issues of high social housing demand, in particular from single persons wil,l be addressed. In addition the issues of HMO concentrations, the private rented sector and students are particularly relevant to south Belfast. The high cost of land and affordability issues are also occur within parts of south Belfast.

(e) East Belfast

There is a distinction to be made between Inner East and Outer East Belfast. In Inner East there are particular issues surrounding sectarian interfaces with associated empty homes. Inner east has significant unfitness, empty properties and dereliction. This is being addressed by redevelopment and urban renewal activity through the work of the NIHE and other strategic partners. The Laganside and Titanic Quarter have also provided an opportunity for regeneration in this part of the city.

Outer East Belfast is characterised by generally high levels of housing demand for social and private owner occupation and renting.

3.4.2 Other BMAP Council Areas:

The range of issues that affect the council areas outside Belfast are summarised below:

(i) Carrickfergus

Carrickfergus is characterised by having high demand for housing in the inner parts of the town. This however is set against relatively low demand for many of the outer areas of the town. As a result, a number of NIHE estates have had to address problems by way of estate strategies.

An Estate Strategy has been developed for the Glenfield Estate. The strategy included environmental improvements, selective demolition and community development to help achieve long term sustainability for the estate.

An Estate Based Strategy has also commenced for Greenisland. The strategy will cover a wide variety of issues.

(ii) Castlereagh

Castlereagh has generally high levels of housing demand. Affordability is an emerging issue in some parts of the district. In particular, there are high levels of demand for elderly social housing.

However, in some of the NIHE estates, problems have been exhibited in relation to the popularity of some of the housing within them. A number of estate based strategies have sought to address these issues. In Ballybeen, the Ballybeen Improvement Group is an umbrella group with membership made up of representatives from a wide range of community associations and church groups together with statutory and public sector bodies. The Housing Executive is currently looking at the regeneration of Ballybeen and is considering a number of initiatives.

Another issue relevant to Castlereagh is the level of Housing Executive house sales and their use as private rented accommodation. These have subsequently had an impact on social housing demand.

(iii) Lisburn

Lisburn is also characterised by generally high housing demand across all tenures. House prices are buoyant and affordability is becoming an issue. Towns such as Moira and Hillsborough have particularly high levels of demand. Set against this however, some of the larger estates have unpopular housing stock with associated high levels of turnover, voids and anti-social behaviour. Such estates are subject to strategic regeneration involving selective demolition, physical improvement to stock and community development. These strategies include:

Hillhall

Following the publication of the Hillhall Household Survey, the District has been working closely with the Hillhall Regeneration Group to tackle the issues highlighted by residents in the area.

Milltown

The Milltown estate, Derriaghy, has been selected as one of the 40 most disadvantaged communities under the Green Spaces and Sustainable Communities Programme, managed by the Creating Common Ground Consortium. As well as responding to environmental deprivation in the Milltown estate, other factors affecting deprivation and disadvantage will also be responded to within a wider neighbourhood and regeneration strategy.

Old Warren

The regeneration of the Old Warren estate, Lisburn has been a high priority for the local District Office. 87 demolitions have already taken place with a further 65 due to be undertaken.

Seymour Hill

The implementation of the Estate Action Plan for the Seymour Hill estate, Dunmurry, is well advanced. Of the nine phases of improvements originally identified, six are now complete.

Twinbrook

The Jasmine Way and Summerhill House flats have been demolished and the sites transferred to Housing Associations for the provision of traditional social housing.

Summary

Such strategies have helped stimulate demand in the Lisburn district. As a result the Housing Executive is currently carrying out a sectoral study of Lisburn. This is expected to be completed at the end of the 2004 and is likely to lead to a sectoral housing strategy being published for the greater Lisburn area (excluding Lisburn Dairyfarm). Prior to this, local investigation of open spaces within existing estates, to examine potential for development is underway. Seymour Hill, Areema and Rathvarna are included.

(iv) North Down

North Down exhibits broadly similar issues to Castlereagh. There are generally high levels of housing demand, high house prices and specific demand from elderly households for social housing. Set against this however are some Housing Executive estates which have local problems. The Housing Executive is currently developing strategies for three of its estates – Rathgill, Breezemount and Kilcooley.

Although the housing stock in Rathgill was built recently, the estate is included in the top 10% of the most deprived enumeration districts in the province in terms of ‘economic deprivation’. The major focus of the Rathgill Regeneration Strategy is the appraisal of various proposals for the high numbers of blocks of flats on the estate.

Breezemount is similar to Rathgill in many respects. The flat blocks have a high tenancy turnover and are difficult to manage. The estate experiences high levels of social and economic deprivation. A major focus of the Regeneration Strategy relates to improving the housing stock, community safety and health issues.

Kilcooley is the largest estate in the Borough, with 1,360 properties in total, including 816 in Housing Executive ownership. The Estate Strategy, approved by the Housing Executive Board in 1988 and reviewed in 1998, has been successful in improving housing conditions.

(v) Newtownabbey

Newtownabbey has a number housing related issue most of which relate to the large Housing Executive estates. Many of these estates have exhibited a range of problems in the past and the Housing Executive has been actively involved in the regeneration. This is being delivered through a number of estate based strategies for Rathcoole, New Mossley and Monkstown. Social housing demand is generally met, however the additional demand arising from regeneration in north Belfast has suggested additional social housing is required in Glengormley and along the fringe of Newtownabbey.

The Rathcoole estate strategy is the largest single estate strategy undertaken by the Housing Executive. It has been in operation for approximately twelve years. The Strategy continues to improve the quality of housing while also addressing environmental concerns.

The Housing Executive is continuing to invest substantial resources in the Monkstown estate. This combination of refurbishment and demolition in Monkstown has resulted in the image of the estate being transformed and consequently the estate has increased in popularity.

A New Mossley estate strategy was approved by the Board of the Housing Executive in January 1994. Selective demolition and two phases of environmental improvements, which were proposed in the strategy, have been completed to date. The third phase of environmental improvements will commence during 2004. Further improvements in the top section of the estate will follow after completion of environmental improvements in the lower section of New Mossley.

3.4.2 Conclusion

The local sub-regional context for housing within the BMAP area as outlined above forms the backdrop against which the detailed assessment of housing needs is set. The following section of the HNA report details the categories of the housing market as required by PPS12.

4.0 REGENERATION

BMAP - Regeneration Issues

This section outlines the wide range of Housing Executive regeneration activity that is currently in progress or has been approved for implementation over the next seven years. Consideration will also be given to regeneration initiatives from other providers in the context of their impact and influence exerted on the affordable housing market.

The Housing Executive, as the Strategic Housing Authority in the Province, plays a key role in identifying regeneration needs within the housing market and has within its capacity the powers to introduce a series of measures to address a range of issues from unfit housing to neighbourhood renewal.

In recent years there have been important changes in the role of the Housing Executive, away from being a predominantly landlord focused organisation. It now works in a wide variety of housing markets and includes the following;

- The move to a more strategic role in assessing housing need across all tenures
- Greater involvement in urban and rural neighbourhood renewal
- The Home Energy Conservation Authority in relation to all residential sectors
- The administration of the housing grants scheme
- The regulator of the Private Rented Rent Register sector and Houses in Multiple Occupation
- Responsibility for the accommodation needs of Travellers
- Powers to intervene in cases of anti-social behaviour and a key role in working to achieve Community Safety Partnerships

4.1 Belfast City

Empty Homes

The number of empty homes in the Belfast Area has given cause for concern and in response the Housing Executive is currently undertaking specific research on this issue and will report its findings during the coming year. The total number of empty private sector dwellings recorded by the Rate Collection Agency for Belfast at December 2003 was 7,605, representing 9.5% of the private sector dwelling stock. This compares with a figure of 7,063 empty private sector dwellings in December 2002. The wards with relatively high numbers of empty private sector dwellings correspond generally with wards demonstrating high levels of private rented accommodation.

It is anticipated the introduction by the Housing Executive of a statutory registration scheme for Houses in Multiple Occupation will play a major role in reducing the number of vacant dwellings. The Housing Executive has declared a number of HMO Action Areas in Belfast whereby all HMO properties within the Action Area will be inspected for registration. The first three HMO Action Areas declared in Belfast are Fitzroy, Eglantine and Waterworks Phase 1.

Unfitness

The 2001 House Condition Survey recorded unfitness in Belfast City has fallen from 7.5% in 1996 to 5.9% in 2001. This compares to the Northern Ireland average of 4.9%. In addition levels of fuel poverty have been measured through the 2001 House Condition Survey. At that point, 36.1% of homes within Belfast Area were considered to be in fuel poverty, which compares with the Northern Ireland average of 33%. The primary objective of the grants scheme is to reduce private sector unfitness and Disrepair. The provision of Renovation Grants, Houses in Multiple Occupation (HMO) Grants and Group Repair to owner occupiers, private tenants and landlords play an important role in reducing unfitness and promoting housing choice by ensuring improved standards throughout the private sector.

In the Belfast area, a total of 2,579 preliminary enquiries were received in 2003/04 and 2,254 approvals issued. A total of £9.1m was paid out against 1999 completed grant works for 2003/04.

Urban Renewal and Regeneration

Housing continues to play an important role in urban regeneration. The Housing Executive's broad range of activities both support and drive regeneration in Belfast. This approach, which is predominantly aimed at improving the quality of life and sustainability of communities, is threefold;

- Urban Renewal and Redevelopment Programme
- Neighbourhood Renewal activity.
- Involvement and support in wider regeneration strategies which impact on housing.

The Housing Executive's Belfast City Housing Strategy directs public sector intervention and involvement in the city. It broadly seeks to address Belfast's needs by tackling poor housing conditions and market failures. The emphasis of regeneration activity is aimed at improving the circumstances, physical, social and environmental in which communities live. This is achieved by ensuring quality residential environments and creating balanced communities through partnering a range of housing providers including Housing Associations and private developers.

The Housing Strategy is driven at sectoral level by specific planning studies/strategies and is largely driven through the Urban Renewal programmes all of which relate to wider strategic regeneration initiatives. Reducing unfitness and improving housing conditions remains the cornerstone of the Housing Executive's regeneration programme. While overall unfitness has reduced to its current 5.9% there are pockets in the middle city areas of Belfast with high levels of unfitness and poor housing conditions, particularly in North Belfast and Shankill.

The decision as to whether intervention is required involves a planning process known as 'Urban Renewal Assessment'. This approach entails the evaluation of housing conditions in designated areas and the recommendation of future action. Urban regeneration may include redevelopment, improvement of existing properties, or a combination of the two.

Following approval of Urban Renewal Area assessments recommending redevelopment the Housing Executive in conjunction with representatives of the local community, produce a Development Plan for submission to Planning Service for Outline Planning permission. The Development Plan proposes, future land use, road and service infrastructure etc, as a guide to future development within the Urban Renewal Area.

The 'Urban Renewal Assessment' process is normally initiated through a programme of 'Housing Market Profiles'. The procedure monitors the performance of the private and public sector housing markets on a local geographical basis throughout the city. The local Housing Market Profile programme is prioritised around areas which may exhibit physical deterioration.

The Local Housing Market Profiles examine the following issues:

- Physical Housing and Environmental Conditions
- Socio-Economic Conditions
- Housing Demand – Private and Public Sectors
- Social, Community, Commercial and Industrial Facilities
- Housing and urban regeneration opportunities

The following 25 No. Urban Renewal/Economic Appraisal Areas are currently at various stages of implementation:

North Belfast Sector
New Lodge (Lower) URA
Gainsborough URA
Mountcollyer URA
Grove URA
Torrens URA
Glenbryn URA
Wheatfield EA
Clifton/Oldpark URA
Lower Oldpark EA
Jamaica Street EA

South Belfast Sector
Roden Street (Donegall Road) URA

East Belfast Sector
Connswater URA
Willowfield URA
Lord Street URA
Spring/Halcombe URA
Woodlee/Lecumpher URA
Harland Walk URA
Glenluce EA

Shankill Sector
Tudor URA
Ainsworth URA
West Woodvale URA
Forthriver Maisonettes (Voids) EA

Greater West Belfast
Beechmount URA

Devonshire Tradas EA
Rossnareen EA

This process has an overall impact on the housing stock levels in Belfast.

- At March 2004 a total of 3,614 dwellings have been demolished in these 25 Urban Renewal/Economic Appraisal Areas with a putback of 1,114 number of dwellings either completed or under construction.

- The implementation of Development Plans in each of these redevelopment areas will involve a further demolition of 967 properties and the construction of 888 dwellings. This will be on a mixed tenure basis 513 social units and 375 private units.

- This represents a put-back ratio 2:1.

- The Housing Executive has been demolishing on average 670 properties annually over the previous 5 years. It is anticipated that this will begin to slow down after a further 3 year period and continue to decline.

Neighbourhood Renewal Activities

Renewal of the most disadvantaged neighbourhoods is a priority for the Housing Executive. Neighbourhood Renewal encompasses a broad range of activities which includes investment through physical programmes in our estates and neighbourhood services which entails estate management, community safety and community involvement.

The Department for Social Development's Strategy 'People and Places' provides the necessary framework for developing and delivering sustainable programmes of regeneration aimed at reviving years of social decline and exclusion. The Housing Executive continues to make an impact through environmental and improvement programmes. It is important to link these with Belfast Regeneration Office neighbourhood renewal initiatives.

The following estates have neighbourhood Renewal strategies which go beyond estate-based landlord responsibility; they are at various stages of implementation:

North Belfast Sector
Carlisle
Ballysillan
Lower Oldpark
Wheatfield

South Belfast Sector
Taughmonagh (EI strategy)

East Belfast Sector
Lower Newtownards Road

Shankill Sector
Lower Shankill
Glencairn

Greater West Belfast Sector
Roden Street (Grosvenor Road)
Twinbrook

The Housing Executive works closely with the Creating Common Ground Consortium, which is formed from a range of strategic statutory and voluntary agencies. The consortium has been created to develop integrated neighbourhood renewal strategies for the most disadvantaged communities.

Programmes have been developed to improve the social and physical environment. These will be resourced through a package of funding including, the New Opportunities Fund and the Green Spaces and Sustainable Communities Programme. This programme is targeting the most disadvantaged estates which include the following within the Belfast and Greater West Belfast Areas.

North Belfast Sector
Carlisle
Upper/Lower Duncairn
Lower Oldpark

East Belfast Sector
Albertbridge Road area
Lower Newtownards Road

Shankill Sector
Lower Shankill

Greater West Belfast Sector
Aitnamona
Lower Falls
Glasvey, Twinbrook
Glenwood, Poleglass
Glenbawn, Poleglass

Wider Regeneration Strategies

The Housing Executive has a statutory responsibility for the regeneration and redevelopment of poor housing. It also works closely with a wide range of organisations and stakeholders such as Belfast City Council, Belfast Regeneration Office, D.O.E. Planning Services, Laganside Corporation and local community groups in supporting wider strategic regeneration initiatives. These include;

Belfast City Centre Master Plan

The Department for Social Development as the lead organisation responsible for urban regeneration proposes to prepare a Master plan for the North West Quarter of Belfast City Centre. The aim of this master plan is to identify how the full regeneration potential of the area can be realised. A future implementation plan will determine land use and impact on the availability of land for residential use.

Arterial Routes

It is recognised that the arterial routes are a vital element for the social and economic funding of Belfast City and for any future regeneration and prosperity. A number of routes have themselves been caught in a trap of urban decay exemplified by outward migration, high rates of unemployment, poor housing and increased commuter traffic.

The Housing Executive has been working with Belfast City Council and Belfast Regeneration Office to identify priorities and programmes aimed at regenerating the Belfast arterial routes. This may have an important effect on housing by promoting initiatives such as ‘living above the shop’ and retail outlets with residential use above ground floor.

Titanic Quarter

This former part of Harland and Wolff shipyard comprises 185 acres of prime development land in a dramatic waterfront position, within walking distance of the city centre. The Master plan has indicated that 39% of land use is allocated for residential purposes, potentially providing 3,000 waterfront apartments and family townhouses. While this will be fundamentally private development it may impact on both the private and social housing markets of East and South Belfast. It is difficult to assess how far the new development will follow Laganside with the vast majority of apartments being bought for investment purposes or second homes. There should be an element of social housing included in the proposed mixed use regeneration and development plan. This would assist in creating balanced communities and meeting housing demand from the East Belfast Sector.

4.2 Carrickfergus Borough

Empty Homes

Carrickfergus Borough records 4.3% of the total housing stock as vacant. This figure is below the province average of 6.5% and the target rate of 4.5% set by the Regional Development Strategy.

The Killycrot ward situated in Carrickfergus Town includes a number of relatively new apartment blocks at the sea front, many of which are privately rented. Indeed Killycrot has the greatest number of private rented dwellings in the Borough (16%) and may explain the higher than average number of vacant dwellings in the ward.

Unfitness

The 2001 House Condition Survey recorded the levels of unfitness for Carrickfergus Borough as rising from 3.6% in 1996 to 3.9% in 2001. This compares favourably to the Northern Ireland average of 4.9%.

In Carrickfergus Borough Council area, a total of 209 preliminary enquiries were received in 2003/04 and 104 approvals issued. A total of £477k was paid out against 102 completed grant works for 2003/04.

Urban Renewal and Regeneration

Eden, situated on the outskirts of Carrickfergus Town, is a popular area with a strong waiting list and low turnover. Approximately 90 orlit bungalows at Eden are being redeveloped and replaced with family houses and bungalows.

There are 18 remaining dwellings at Eden to be demolished 9 of which are occupied. The nine tenants will be re-housed within 28 new dwellings planned for Eden Phase 2. Redevelopment by FOLD will go ahead at Eden Phase 2. A review of housing need will be carried out prior to any commitment to commence with Eden Phase 3 programmed for 10 units. It appears the need will be met by Eden 2 and it is likely that remaining land will be transferred to Carrickfergus District Council for provision of a community centre.

The Housing Executive has approved the sale of surplus land at Irish Street Quarter for commercial development as well as land at Bridewell Drive for church enlargement.

Estate Strategies

The Glenfield Estate Strategy has identified demolition for 27 vacant dwellings followed by environmental works. A feasibility study for a further demolition of 8 to 12 dwellings will be considered following the demolition of the initial 27 demolitions. This may require 1 household to be re-housed within the estate. It is anticipated that the requirement to re-house the displaced tenant will be through normal re-lets rather than additional new build. Further regeneration initiatives at the Glenfield Estate include environmental and house improvement works.

Glenfield has been identified as a Creating Common Ground Consortium estate and as a result additional environmental improvements are progressing on the estate. To date walkways have been improved at adjacent nature garden as well as floral displays and entrance features.

In conclusion there is an adjustment required to the Social Housing need assessment of 9 units for the Carrickfergus Borough at Carrickfergus Town Outer to allow the progress of approved demolition at Eden (9).

4.3 Castlereagh Borough

Empty Homes

Castlereagh Borough records the lowest percentage of vacant stock against the total housing stock (2.6%) for the Belfast Metropolitan Area. This figure is below the province average of 6.5% and the target rate of 4.5% set by the Regional Development Strategy.

Unfitness

The 2001 House Condition Survey recorded low levels of unfitness for Castlereagh Borough having fallen from 3.0% in 1996 to 1.5% in 2001. This compares favourably to the Northern Ireland average of 4.9%.

In the Castlereagh Borough Council area, a total of 359 preliminary enquiries were received in 2003/04 and 172 approvals issued. A total of £457k was paid out against 157 completed grant works for 2003/04.

Urban Renewal and Regeneration

Ballybeen strategy was originally approved in 1988 and reviewed in 2000. The current document which was Board approved in 2002 is a review of the regeneration to date and a 'visionary' document to provide a framework for the future. This Regeneration Strategy will highlight development opportunities on a number of sites within the estate for both public and private developments. Ballybeen estate currently has 2,485 homes and at March 2004 there were 1,233 properties sold to tenants.

Some Housing Executive stock has already been identified for regeneration. This stock has been vacant or has already been demolished therefore the existing tenants have been accommodated. There is an estimated put back potential for 120 new units subject to detailed feasibility work and potential site constraints. Around half of these units would be on land that will be sold to the private sector, subject to planning approval.

The Housing Executive is considering a similar regeneration strategy for Tullycarnet Estate in the Castlereagh East area. Following an extensive series of option and economic appraisals, a large block of flats Granton Heights at Tullycarnet was placed on the property market. The building has now been acquired by a private developer who intends to demolish the existing building within the near future.

In conclusion there is no adjustment required to the Social Housing need assessment for the Castlereagh Borough as programmed demolitions are already vacant.

4.4 Lisburn City

Empty Homes

Lisburn Borough displays 1778 vacant properties but a relatively low percentage of vacant properties against the total stock (4.3%). This figure is below the province average of 6.5% and the target rate of 4.5% set by the Regional Development Strategy.

Unfitness

The 2001 House Condition Survey recorded low levels of unfitness for Lisburn City having fallen from 3.9% in 1996 to 3.8% in 2001. This compares favourably to the Northern Ireland average of 4.9% unfitness levels.

In the Lisburn City Council area, a total of 1,012 preliminary enquiries were received in 2003/04 and 397 approvals issued. A total of £910k was paid out against 363 completed grant works for 2003/04.

Urban Renewal and Regeneration

The Northern Housing Executive is currently undertaking a Sectoral Study of the Lisburn Council area to analyse housing markets and to summarize the main trends and issues, in the locality. However a number of initiatives to regenerate Northern Ireland Housing Executive estates within the area have already been undertaken or are underway. Details of the current and proposed regeneration of Social Housing Stock in the area are as follows:

<u>Old Warren Estate</u>

The Old Warren Estate lies in the Lisburn City Urban area. There are 1,006 homes in this estate, 255 of which had been sold to tenants. Within the Old Warren estate an extensive programme of regeneration is underway.

24 bed-sit flats are currently being converted to 12 townhouses. A further 28 flats have been identified for demolition to facilitate 26 new dwellings and a new access road. No tenants require to be permanently re-housed as all flats proposed for demolition are vacant

The redevelopment detailed above will result in the net loss of 44 dwellings. These however are currently vacant, and will have minimum impact on housing need. Earlier completed phases have impacted positively, improving the physical environment and making the area more desirable. An area of land at Old Warren has been transferred to the Old Warren Partnership for community facilities and a Business Park. It is hoped this will contribute to the regeneration of the Estate. Further phases of regeneration are planned for the future.

<u>Hillhall Road/ Cromwells Close</u>

At Hillhall Road/ Cromwells Close 12 properties (TRADA houses) have been recommended by NIHE Board for demolition and been DSD approved. It is proposed replacing the TRADA dwellings with 12 new dwellings, (subject to DSD approval). Three of the TRADA dwellings are occupied and will necessitate re-housing if demolition proceeds.

Knockmore

An estate based strategy has recently been completed in the Knockmore Estate. However a further 20 new dwellings have been programmed to commence in 2006/07 on land reclaimed from previous demolitions.

Seymour Hill

An estate based strategy has been ongoing in Seymour Hill to improve the physical environment of the estate. Four phases of improvement work have been completed with further phases under consideration.

In conclusion there is no adjustment required to the Social Housing need assessment for the Lisburn City as those dwellings approved for demolition are already vacant.

4.5 Newtownabbey Borough

Empty Homes

In September 2003 Newtownabbey Borough exhibited the second lowest percentage of vacant properties against total stock (3.6%) for the Belfast Metropolitan Area. The number of vacant properties was recorded at (1,172). This figure is below the province average of 6.5% and the target rate of 4.5% set by the Regional Development Strategy.

Unfitness

The 2001 House Condition Survey recorded low levels of unfitness for Newtownabbey Borough having fallen from 4.6% in 1996 to 1.3% in 2001. This compares favourably to the Northern Ireland average of 4.9% unfitness levels.

In Newtownabbey Borough Council area, a total of 489 preliminary enquiries were received in 2003/04 and 197 approvals issued. A total of £795k was paid out against 166 completed grant works for 2003/04.

Urban Renewal and Regeneration

<u>Rathcoole</u>

The largest single Estate Based Strategy undertaken by the Housing Executive is in Rathcoole. It has been operational for approximately 13 years. The Strategy seeks to improve the quality of housing while also addressing environmental issues.

The Strategy document indicated that a variety of proposals would be necessary to address the diversity of the problems that existed at that time and estimated the overall cost to be around £30 million over a ten year period. Four hundred dwellings still require upgrading at an estimated cost of £7 million.

Rathcoole Redevelopment

The demolition of 48 maisonettes at Green Walk will make way for a scheme to construct 22 no. two storey family houses. One maisonette earmarked for demotion remains occupied. This tenant will require being re-housed to allow the renewal work at Green Walk to proceed.

Twenty four bed-sit bungalows Deerfin Park, Beechwood Avenue, Doagh Road & The Oaks have been approved for demolition. As a result fifteen residents require being re-housed. It is proposed to replace the bed-sits with 46 new social housing bungalows.

Sixty nine flats and maisonettes at Clonmore Green, Rathcoole, are currently the subject of a feasibility study. The study is considering a range of options for regeneration which include demolition and conversion to town houses through de-capitation.

The Estate Strategy will promote other housing tenures at Rathcoole with the sale of surplus Land at Rathcoole Drive/Ballyronan Park.

It is anticipated that the sixteen residents to be displaced as a result of regeneration activity will be re-housed in new, additional dwellings. .An adjustment of 16 to the social housing need for Rathcoole in Section 5 is required.

New Mossley

Work associated with the Estate Based Strategy approved by the Board in January 1994 has continued in New Mossley. Selective demolition and two phases of environmental improvements have been completed to date. A third phase of environmental improvements is due to commence during 2005.

A number of tenants living the flats in New Mossley have indicated they would prefer to have individual entrances because of the incidents of anti social behaviour associated with the communal hallways. A scheme has been developed (on-site August 2004) to address this problem which will improve the entrances to 88 flats in the estate. In the majority of cases the work will result in the accommodation being increased from one bedroom to two bedroom accommodation.

New Mossley environmental improvements are due to commence May 2005 and necessitates the demolition of one occupied property. It is anticipated the resident to be displaced will be re-housed through normal re-lets.

Monkstown

A substantial investment is being made by the Housing Executive in Monkstown estate to continue the work associated with the Estate Based Strategy, approved by the Board of the Housing Executive in August 1991. The first four phases of the multi-element improvements are complete. Four further phases of multi-element improvements are planned for the estate to complete the strategy. Proposals, which still await formal approval, include the demolition of nine vacant dwellings at the Monkstown location.

Ballyclare

Approval has been granted to demolish 24 flats in Thornhill, Ballyclare. Two of the flats are occupied at this point in time and require being re-housed. It is anticipated these residents to be displaced will be re-housed through normal re-lets. In addition 2a – 8b Thornhill Gardens and 1a – 7b Thornhill Parade (16 units) are being considered for demolition. The dwellings are all vacant, final decisions concerning the future of the flats will be made as the environmental improvements for the estate are progressed.

Multi-Agency Work

Under the umbrella of the Creating Common Ground Consortium planning applications have been submitted for two Community Resource Centres, one at Longlands and the other at Glenville Road in Whiteabbey

The Grange/Thornhill estate has been highlighted in a Department of Social Development document as an area to be included in the programme for Neighbourhood Renewal.

In conclusion there is an adjustment required to the Social Housing need assessment of 16 units for the Newtownabbey Borough to allow the progress of approved demolition at Rathcoole (16),

4.6 North Down Borough

Empty Homes

In September 2003 the North Down Borough recorded 1,478 empty dwellings and the percentage of vacant stock against the total housing stock as 4.6%. The figure is below the Provincial average of 6.5% and only marginally above the target rate of 4.5% set by the Regional Development Strategy.

The Harbour ward situated in Bangor Town centre, displays significant levels of empty properties 292 (18.6%). Substantial regeneration of Bangor is planned and in anticipation of this development many properties in the area have become vacant and are 'blocked up'.

The Harbour ward also contains the greatest percentage of private rented accommodation (30%) in the Borough. The associated high turnover of stock in this tenure may give further explanation for the higher than average number of private sector vacant dwellings at this location.

Unfitness

The 2001 House Condition Survey recorded low levels of unfitness for North Down Borough having fallen from 5.5% in 1996 to 1.9% in 2001. This compares favourably to the Northern Ireland average of 4.9% unfitness levels.

In the North Down Borough Council area, a total of 401 preliminary enquiries were received in 2003/04 and 221 approvals issued. A total of £886k was paid out against 198 completed grant works for 2003/04.

Urban Renewal and Regeneration

The Board of the Housing Executive has approved a Regeneration Strategy for the Rathgill estate situated close to the Bloomfield area of Bangor. There is housing need in this area although some of the properties have been unpopular and difficult to let.

The Regeneration Strategy focuses on the physical renewal and partnering with other voluntary and statutory agencies to improve the general quality of life for residents at this location.

The first improvement scheme arising from the strategy is programmed to commence towards the end of 2005 for conversion of some flats to bungalows. There will be a reduction of 20 units in the first phase of the scheme. These properties are vacant. Other phases of the Strategy are at feasibility stage and no decision has yet been made regarding the increase or decrease of units.

The Housing Executive is considering Regeneration strategies for another two estates in the Bangor area.

Housing Executive stock in the Kilcooley estate, reduced as a result of 32 flats sold to the private sector to facilitate the construction of town houses, will provide some low cost housing for owner occupation when completed.

A multi element improvement scheme has been programmed for Holywood which will consider demolition and new build, and this scheme will have a possible net loss of one empty dwelling.

In addition to the Housing Executive's work above, the North Down Borough Council in partnership with others have plans for substantial regeneration of Bangor seafront at the Queen's Parade/Main Street area. This will incorporate a mix of retail, residential and leisure facilities and will extend the retail sector of Bangor Town. The proposals are still subject to planning and other statutory approval. It is anticipated this work will further attract those seeking to live in the Bangor area.

In conclusion there is no adjustment required to the Social Housing need assessment for the North Down Borough as programmed demolitions are already vacant.

5.0 SOCIAL RENTED HOUSING

5.1 Housing Stress

Table 2 shows applicants in Housing Stress for the BMAP area by council

Table 2: Housing Stress trends –Belfast Metropolitan Area (PRAWL Mar 2001 – Sep 2003)

	Mar 01	Sep 01	Mar 02	Sep 02	Mar 03	Sep 03	% Var. 01-03
Belfast City Council							
North Belfast	761	876	942	973	968	1,001	32%
South Belfast	692	777	853	881	862	901	30%
East Belfast	706	867	906	868	846	942	33%
Shankill	292	310	276	297	302	325	11%
Gtr. West Belfast	1,298	1,292	1,423	1,530	1,479	1,520	17%
Total	**3,749**	**4,122**	**4,400**	**4,549**	**4,457**	**4,689**	**25%**
Carrickfergus Borough Council							
Carrickfergus Town	296	351	357	388	352	356	20%
Local Towns	66	67	66	64	58	60	-9%
Villages	-	-	-	-	-	-	-
Small Settlements	-	-	-	-	-	-	
Total	**362**	**418**	**423**	**452**	**410**	**416**	**15%**
Castlereagh Borough Council							
Castlereagh Urban	306	383	446	443	418	444	45%
Local Towns	15	26	27	27	28	33	120%
Villages	4	4	9	6	8	9	125%
Small Settlements	1	1	2	1	2	2	100%
Total	**326**	**414**	**484**	**477**	**456**	**488**	**50%**
Lisburn City Council							
Lisburn Urban	345	414	526	591	557	561	63%
Local Towns	57	71	69	79	74	61	7%
Villages	67	69	78	87	91	102	52%
Small Settlements	6	8	10	7	7	9	50%
Total	**475**	**562**	**683**	**764**	**729**	**733**	**54%**
Newtownabbey Borough Council							
N,Abbey Urban	416	489	574	567	577	599	44%
Local Towns	67	91	106	96	104	90	34%
Villages	8	8	7	13	11	15	88%
Small Settlements	13	9	6	7	6	5	-62%
Total	**504**	**597**	**693**	**683**	**698**	**709**	**41%**
North Down Borough Council							
North Down Urban	301	361	391	474	459	499	66%
Local Towns	95	102	123	141	139	150	58%
Villages	17	16	21	26	16	22	29%
Small Settlements	0	0	0	0	0	0	0%
Total	**413**	**479**	**535**	**641**	**614**	**671**	**63%**
BMA Total	**5,828**	**6,592**	**7,217**	**7,566**	**7,364**	**7,706**	**32%**

- Between March 2001 and September 2003 the number of applicants in Housing Stress increased by 32% for the Belfast Metropolitan Area. This represents an increase of 1,878 in numerical terms.

- Over the three year period Belfast City experienced the largest numerical increase of applicants in Housing Stress (940) whilst North Down Borough recorded the largest percentage increase (63%). Carrickfergus Borough recorded the smallest percentage increase of 54 (15%).

- The pattern at Borough/District level is replicated in the Main Urban Centres and District Towns which recorded increases in Housing Stress in all Council areas. North Down Borough recorded the largest increase of applicants in Housing Stress between March 2001 and September 2003 (66%). Lisburn Urban also exhibited a large increase (63%).

- Significant increases of applicants in Housing Stress were also recorded for North, South and East Belfast as well as North Down Local Towns and Lisburn Villages.

5.2 Settlement Assessments

In calculating the projected housing need for individual settlements a number of factors have been taken into account. These are as follows:

- Best Practice advocates a housing need assessment should consider a range of inputs and an analysis of the data. In the case of the BMA Plan the assessment includes the projected housing need calculation and the residual housing need calculation. The projected housing need calculation is provided for both 5 years and 7 years. The former represents a forecasting period used by the Housing Executive and is seen as a robust method which forms the basis of the 5 year Social Housing Development Programme. The seven year projection, which Planning Service has specifically requested, is tentative and should be accepted as such. A sensitivity analysis is applied to both the 5 and 7 year projections.

- The 'Stage 1 Projected Housing Need' figure for five and seven years reflects the projected housing need calculation based on waiting list trends set over recent years. The 'Projected Housing Need Adjusted' figure demonstrates the outcome of a sensitivity analysis carried out on the Stage1 projected housing need figure. The sensitivity analysis considers a range of factors such as projected housing need calculation, residual housing need, trend validity, household trends, regeneration requirements, rural proofing and local intelligence gained at the local District level. This process is essential in discerning waiting list trends and latent demand issues.

5.3 Belfast City Council

The Housing Executive has assessed and projected the need for Social housing for each District Council area within BMAP. Belfast District Council has been further subdivided into five areas on the basis of local housing markets. The five Belfast sub-areas are as follows:

- North Belfast
- South Belfast
- East Belfast
- Shankill
- Greater West Belfast

Greater West Belfast includes the area covered by the Housing Executive's Lisburn Dairy Farm office, i.e. Twinbrook and Poleglass. These local areas are distinct from the rest of Lisburn Council area and are more related to the West Belfast Housing market. These areas also form part of the Housing Executive's West Belfast Housing Strategy.

Table 3 shows a summary of projected housing need within Belfast by sector for both a five year period and a seven year period.

Table 3 Assessment of Main Belfast Sectors

Sector	Base Data			Stage 1 Projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-Lets 2001-03	Residual Housing Need Sept 03	5 years	7 years	5 years	7 years
North Belfast	**1,001**	**468**	**533**	**1,405**	**1,729**	**1,574**	**1,898**
South Belfast	**901**	**290**	**611**	**997**	**1,169**	**662**	**852**
East Belfast	**942**	**306**	**636**	**1,260**	**1,558**	**1,021**	**1,196**
Shankill	**325**	**316**	**9**	**309**	**377**	**156**	**206**
Greater West Belfast	**1,520**	**258**	**1,262**	**1,983**	**2,293**	**1,983**	**2,293**
Belfast Total	**4,689**	**1,638**	**3,051**	**5,954**	**7,126**	**5,396**	**6,445**

5.3.1 North Belfast Sector Assessment

The North Belfast sector boundary extends from Whitewell in the north, to the city centre in the south, Ligoniel/Crumlin Road in the west and to the Shore Road in the East. The 'Troubles' have impacted on the housing market more than any other part of Northern Ireland due to religious geography, the high concentration of 'Peace Lines' and civil unrest.

Table 4 Assessment of Catchment Area North Belfast

Settlement/ Catchment	Base Data			Stage 1 Projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-Lets 2001-03	Residual Housing Need Sept 03	5 years	7 years	5 years	7 years
North Belfast	**1,001**	**468**	**533**	**1,405**	**1,729**	**1,574**	**1,898**

- The deep rooted divisions in North Belfast have created two distinct Catchment areas, Catholic North Belfast and Protestant North Belfast.
- The nature of housing need differs between the communities. Catholic communities are characterised by higher waiting lists and longer waiting times for housing. Whereas, housing conditions in the Protestant Communities in North Belfast are substantially worse than those in Catholic areas.
- Parts of North Belfast Social Housing market are characterised by very high demand with annual re-lets unable to meet current and projected Housing Stress. These areas with acute housing need tend to be located in Catholic communities.
- A significant portion of the development programme is targeting unfitness. Areas with high levels of unfitness and poor housing conditions tend to be in Protestant communities.

Catholic North Belfast

Table 5 Assessment of Catchment Area Catholic North Belfast

Settlement/ Catchment	Base Data			Stage 1 Projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-Lets 2001-03	Residual Housing Need Sept 03	5 years	7 years	5 years	7 years
Catholic North Belfast	**827**	**180**	**647**	**1,405**	**1,729**	**1,405**	**1,729**

- The demand for social housing in Catholic North Belfast has increased since September 2001 from 699 in Housing Stress to 827 at September 2003.
- There are localised 'Hot Spots' of high demand where there is a marked shortfall between supply through re-lets and new build allocations and

demand for social housing. These include the Clifton, Ardoyne, Cliftonville/Antrim Road Cavehill, Newlodge and Oldpark Local Housing Areas.

- The predominant household group is families constituting 44% of the housing stress waiting list followed by singles 41% and the elderly making up 11% of housing stress applicants.

- The average waiting time for housing stress applicants in Catholic North Belfast is 23 months compared to the Belfast average of 25 months and the Northern Ireland average of 19 months.

Protestant North Belfast

Table 6 Assessment of Catchment Area Protestant North Belfast

Settlement/ Catchment	Base Data			Stage 1 Projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-Lets 2001-03	Residual Housing Need Sept 03	5 years	7 years	5 years	7 years
Protestant North Belfast	**174**	**288**	**-114**	**0**	**0**	**169**	**169**

- The demand for Protestant North Belfast has remained relatively unchanged since September 2001.

- The dominant household group is singles, 44%, on the Housing Stress waiting List. In contrast to Catholic North Belfast elderly Protestant households represent 26% of the Housing Stress waiting list, the second largest household group.

- Re-lets of existing properties have been exceeding demand with the exception of elderly household groups who are receiving a small percentage of allocations and are waiting longer than other household groups.

- The projected housing need has been adjusted upward to meet redevelopment needs in this catchment area.

Conclusion

The composition of the North Belfast waiting list indicates that Catholic households make up 83% of the total Housing Stress waiting list.

The adjusted projected Housing Need for 5 years is 1,574 dwellings to reflect the high demand within Catholic communities and the regeneration needs of Protestant communities. This Housing Needs Assessment is broadly in line with the Housing Executive's North Belfast Strategy.

5.3.2 South Belfast Sector Assessment

The South Belfast sector extends from the city centre in the north, to Castlereagh Borough Council in the south and from West Link/Boucher Road in the west to the Ravenhill Road in the east.

Table 7 Assessment of Catchment Area South Belfast Sector

Settlement/ Catchment	Base Data			Stage 1 Projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-Lets 2001-03	Residual Housing Need Sept 03	5 years	7 years	5 years	7 years
South Belfast Sector	**901**	**290**	**611**	**997**	**1,169**	**662**	**852**

- The South Belfast Social Housing Market is characterised by very high need with annual relets and new build allocations unable to meet current and projected demand.
- Housing Stress has increased by 16% during the period September 2001 to September 2003.
- This high demand is not homogenous in the South Belfast Sector and there are pockets of low housing need.
- The predominant household group is singles 58% followed by families who constitute 21% of the Housing Stress waiting list.

The sector is subdivided into five ‘catchment areas’:

Markets/Lower Ormeau,
Donegall Pass/Sandy Row/Donegall Road,
Ballynafeigh/Annadale/Upper Ormeau,
University Area/Lisburn Road/Malone/Stranmillis
Finaghy/Taughmonagh

Markets/Lower Ormeau

Table 8 Assessment of Catchment Area Markets/Lower Ormeau

Settlement/ Catchment	Base Data			Stage 1 Projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-Lets 2001-03	Residual Housing Need Sept 03	5 years	7 years	5 years	7 years
Markets/Lower Ormeau	**169**	**32**	**137**	**242**	**284**	**150**	**200**

- The number of applicants in Housing Stress has demonstrated a small increase (10%) since September 2001.

- Average annual re-lets are low and are unable to meet rising demand.

- The predominant household group is singles 54% followed by families who constitute 34% of the housing stress waiting list. Local knowledge would suggest that singles are rehoused through alternative tenure choice. Also this household group displays shorter tenancy duration and hence projected need should be adjusted downwards.

Donegall Pass/Sandy Row/Donegall Road/The Village

Table 9 Assessment of Catchment Area Donegall Pass/Sandy Row/Donegall Road/The Village

Settlement/ Catchment	Base Data			Stage 1 Projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-Lets 2001-03	Residual Housing Need Sept 03	5 years	7 years	5 years	7 years
Donegall Pass/ Sandy Row	**170**	**137**	**33**	**93**	**127**	**50**	**60**

- The Housing Stress waiting list has fluctuated during the period September 2001 to September 2003.

- Generally housing demand is being met by the high number of relets of existing housing stock.

- There are difficult to let and void properties in the Donegall Road area.

- The predominant household group is singles who constitute 66% of the Housing Stress Waiting List.

- These factors would indicate a downward adjustment of projected need.

- Some investment in new build to meet redevelopment demands will be required in the Roden Street Urban Renewal Area

Ballynafeigh

Table 10 Assessment of Catchment Area Ballynafeigh/Annadale/Upper Ormeau

Settlement/ Catchment	Base Data			Stage 1 Projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-Lets 2001-03	Residual Housing Need Sept 03	5 years	7 years	5 years	7 years
Ballynafeigh/Annadale/ Upper Ormeau	**184**	**44**	**140**	**212**	**242**	**212**	**242**

- Demand for social housing has remained constant over the period 2001 to 2003, with 184 housing stress applicants on the waiting list in September 2003.

- Supply through re-lets has been low, averaging 44 annually, which is failing to meet current demand.

University Area/Lisburn Road/Malone/Stranmillis

Table 11 Assessment of Catchment Area University Area/Lisburn Road/Malone/Stranmillis

Settlement/ Catchment	Base Data			Stage 1 Projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-Lets 2001-03	Residual Housing Need Sept 03	5 years	7 years	5 years	7 years
University Area/ Lisburn Rd /Malone/Stranmillis	**268**	**28**	**240**	**292**	**316**	**150**	**200**

- Housing need has been consistently high with 268 housing stress applicants requiring housing in the area.
- Average annual re-lets have been low, with an average annual figure of 28.
- Social housing stock within this catchment area is low with only 196 properties in Housing Executive ownership.
- The predominant household group is singles representing 68% of all households in housing stress.. Single households tend to be more transient and have greater mobility than other household groups. Just over 50% of this group originate from outside the catchment area. This is unique and significantly higher than most areas. This high level reflects a preference from young singles from other areas rather than a local need.
- The Private Rented Sector largely caters for the singles housing market.
- These factors indicate that the projected housing need figure should be adjusted downwards.

Finaghy/Taughmonagh

Table 12 Assessment of Catchment Area Finaghy/Taughmonagh

Settlement/ Catchment	Base Data			Stage 1 Projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-Lets 2001-03	Residual Housing Need Sept 03	5 years	7 years	5 years	7 years
Finaghy/ Taughmonagh	**110**	**49**	**61**	**158**	**200**	**100**	**150**

- This catchment area has the lowest demand for social housing in the South Belfast Sector, with 110 housing stress applicants on the waiting list at September 2003.
- As with most of South Belfast the predominant household group is singles making up 48% of the housing stress waiting list.

- Supply through relets is meeting demand in Taughmonagh but additional supply is required in Finaghy. The projected need has been adjusted downwards.

Conclusion

South Belfast historically has a high demand for social housing. Overall singles constitute 58% of the Housing Stress Waiting List and in some 'catchment areas' is higher. This household group traditionally has been more mobile with weaker connections to the local communities in South Belfast. There is a vibrant private rented housing market which is meeting this demand necessitating the downward adjustment of the projected housing need to 662 for the five year period.

5.3.3 East Belfast Sector Assessment

The East Belfast sector boundary is defined by the River Lagan and Ravenhill Road to the east extending to Holywood in the north and Castlereagh to the west and south.

Table 13 Assessment of East Belfast Sector

Settlement/ Catchment	Base Data			Stage 1 Projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-Lets 2001-03	Residual Housing Need Sept 03	5 years	7 years	5 years	7 years
East Belfast Sector	**942**	**306**	**636**	**1,260**	**1,558**	**1,021**	**1,196**

- Overall the East Belfast Social Housing Market is characterised by high demand. The number of applicants in Housing Stress has increased from a high starting point of 867 in September 2001 to 942 in September 2003.
- The predominant household groups are made up from singles 40%, elderly 27% and families at 26% of the Housing Stress waiting List.
- House Sales activity remains high with some 47% of the social stock contributing to the private sector.

This sector is subdivided into three ‘catchment areas’ Inner East, Short Strand and Outer East Belfast.

Inner East Belfast

The Inner East ‘catchment area’ incorporates the Local Housing Areas Castlereagh/Lower Beersbridge/The Mount, Ballymacarret and Woodstock/Lower Ravenhill/Roseberry.

Table 14 Assessment of Catchment Area Inner East Belfast

Settlement/ Catchment	Base Data			Stage 1 Projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-Lets 2001-03	Residual Housing Need Sept 03	5 years	7 years	5 years	7 years
Inner East Belfast	**268**	**174**	**94**	**359**	**502**	**120**	**140**

- The total number of applicants in Housing Stress is 268 and has demonstrated only a small increase since September 2001.
- Singles are the largest household group with 56% in housing stress which is well above the East Belfast average.

- Turnover of property is high with 174 annual average re-lets. The average length of time on the waiting list is 17 months.

- There are a total of 94 void properties in this catchment area which could be made available for letting.

- There is currently considerable redevelopment activity which will produce additional social housing.

- House sales have been historically relatively low 24% of total stock.

- These factors indicate a need to revise and adjust the projected housing need figure downwards.

Short Strand

This catchment area is made up of one Local Housing Area and is considered separately from the remainder of Inner East Belfast. This is a small Catholic community located in predominately Protestant East Belfast

Table 15 Assessment of Catchment Area Short Strand East Belfast

Settlement/ Catchment	Base Data			Stage 1 Projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-Lets 2001-03	Residual Housing Need Sept 03	5 years	7 years	5 years	7 years
Short Strand	**56**	**9**	**47**	**41**	**39**	**41**	**39**

- The Housing Stress waiting list has remained relatively unchanged with a small decrease since September 2001.

- Additional social housing is required over the next five years as turnover of stock is low with an average re-let figure of 9 annually.

Outer East

This catchment area incorporates the majority of 'hot spot' Local Housing Areas in East Belfast. These include Ardcarn/Stormont, Ballyhackamore, Holywood Arches/Bloomfield, Sydenham/Holywood Road, Knocknagoney/Garnerville, Belmont and Castlereagh/Willowfield.

Table 16 Assessment of Catchment Area Outer East Belfast

Settlement/ Catchment	Base Data			Stage 1 Projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-Lets 2001-03	Residual Housing Need Sept 03	5 years	7 years	5 years	7 years
Outer East Belfast	**618**	**123**	**495**	**860**	**1,017**	**860**	**1,017**

- Housing Stress applicants increased from 555 in September 2001 to 618 in September 2003. This represents an increase of 11%.

- Turnover of stock is low with average annual re-lets 123 and house sales activity has been high indicating an increasing high demand for social housing.

Conclusion

The Housing Needs Assessment for the East Belfast Sector for the next five years demonstrates increasing need for social housing. There are a number of 'hot spots' where supply of housing through re-lets is not meeting need.

The projected housing needs assessment indicates that 1,021 new social housing units will be required during the five year period up to 2008.

5.3.4 Shankill Sector Assessment

The Shankill sector extends from Brown Square in the east to Glencairn in the west and is wedged between the Crumlin Road and the Falls Road 'Peace Line' to the north and south.

Table 17 Assessment of Shankill Sector

Settlement/ Catchment	Base Data			Stage 1 Projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-Lets 2001-03	Residual Housing Need Sept 03	5 years	7 years	5 years	7 years
Shankill Sector	**325**	**316**	**9**	**309**	**377**	**156**	**206**

- Housing Stress levels in most Local Housing Areas has remained unchanged since September 2001.

- Overall the Shankill Social Housing Market is characterised by low demand with annual re-lets and new build allocations meeting current and projected need.

- There are two exceptions to this rule. Firstly, The Greater Shankill Housing and Regeneration Strategy indicates continued emphasis on redevelopment strategies and estate regeneration aimed at improving housing conditions which will require investment in new social housing. Secondly, there is an imbalance of social housing stock with elderly households having an average waiting time of 51 months.

- The Shankill sector is divided into four 'catchment areas' Lower Shankill, Mid Shankill, Ainsworth/Woodvale and Ballygomartin.

Lower Shankill

Table 18 Assessment of Catchment Area Lower Shankill

Settlement/ Catchment	Base Data			Stage 1 Projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-Lets 2001-03	Residual Housing Need Sept 03	5 years	7 years	5 years	7 years
Lower Shankill	**18**	**109**	**-91**	**0**	**0**	**0**	**0**

- The supply through the annual average re-lets greatly outstrips any demand and difficult to let void dwellings remain a problem in this 'catchment' area.
- Investment in limited new build will be required to rationalise unpopular housing stock through future redevelopment programmes.

Mid Shankill

Table 19 Assessment of Catchment Area Mid Shankill

Settlement/ Catchment	Base Data			Stage 1 Projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-Lets 2001-03	Residual Housing Need Sept 03	5 years	7 years	5 years	7 years
Mid Shankill	**130**	**29**	**101**	**166**	**200**	**66**	**91**

- Housing need in this 'catchment' area remains relatively low.
- Singles are the predominant household group at 40% of housing stress applicants followed by elderly households who represent 27% of the housing stress waiting list.
- Average time on the waiting list is 22 months. This is the longest average waiting time in the Shankill sector particularly for elderly household groups which have an average waiting time of 51 months.
- House Sales have been relatively low at 17% of the total housing stock.
- Projected housing need has been revised downwards. The level of redevelopment activity has resulted in a high number of allocations creating an inflated projected housing need. There is also an oversupply of social housing stock in terms of re-lets in other parts of the Shankill, and an oversupply of new social housing in mid Shankill would adversely affect other areas in the Shankill.
- New build is aimed at regeneration and addressing the imbalance in the housing supply for elderly accommodation.

Ainsworth/Woodvale

Table 20 Assessment of Catchment Area Ainsworth/Woodvale

Settlement/ Catchment	Base Data			Stage 1 Projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-Lets 2001-03	Residual Housing Need Sept 03	5 years	7 years	5 years	7 years
Ainsworth/ Woodvale	**125**	**59**	**66**	**143**	**177**	**90**	**115**

- The Housing Stress waiting list has decreased from 144 applicants in September 2001 to 125 applicants at September 2003.
- The predominant household group is elderly who represent 55% of the Housing Stress waiting list.
- New build is aimed at regeneration and addressing the imbalance in the housing supply for elderly accommodation.

Ballygomartin

Table 21 Assessment of Catchment Area Ballygomartin

Settlement/ Catchment	Base Data			Stage 1 Projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-Lets 2001-03	Residual Housing Need Sept 03	5 years	7 years	5 years	7 years
Ballygomartin	**52**	**119**	**-67**	**0**	**0**	**0**	**0**

- The Housing Stress waiting list for this catchment area is low and existing supply through re-lets is meeting demand.

Conclusion

Housing Stress in the Shankill sector has remained constant over the last number of years and there is no indication that this will change. Generally demand is being met through re-lets and the current new build programme.

There is a need for continued investment in redevelopment and regeneration aimed at reducing unfitness and improving housing conditions.

5.3.5 Greater West Belfast Assessment

The Greater West Belfast sector extends from the Falls/Shankill ‘Peaceline’ in the north to Poleglass/Twinbrook in the south from the Belfast Hills in the west to Hamill Street in the City Centre.

Table 22 Assessment of Greater West Belfast Sector

Settlement/ Catchment	Base Data			Stage 1 Projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-Lets 2001-03	Residual Housing Need Sept 03	5 years	7 years	5 years	7 years
Greater West Belfast	**1,520**	**258**	**1,262**	**1,983**	**2,293**	**1,983**	**2,293**

- The social housing market in Greater West Belfast has traditionally been characterised by very high demand. Housing Stress has increased from 1,292 at September 2002 to 1,520 at September 2003, an increase of 17%.

- The geographical distribution of demand within the Greater West sector has shown substantial changes.

- Family households remain the predominant household group with singles taking an increased proportion of the Housing Stress waiting list.

- The supply of housing through relets is generally low and fails to meet demand.

The Greater West Belfast sector is subdivided into three ‘Catchment Areas’ Inner, Middle and Outer West Belfast.

Inner West Belfast

Table 23 Assessment of Catchment Area Inner West

Settlement/ Catchment	Base Data			Stage 1 Projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-Lets 2001-03	Residual Housing Need Sept 03	5 years	7 years	5 years	7 years
Inner West Belfast	**535**	**87**	**448**	**602**	**668**	**602**	**668**

- The total number of applicants in housing stress has remained relatively unchanged since 2001, with 535 in Housing Stress at September 2003.

- Relets of existing properties are failing to meet demand.

Middle West Belfast

Table 24 Assessment of Catchment Area Middle West

Settlement/ Catchment	Base Data			Stage 1 Projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-Lets 2001-03	Residual Housing Need Sept 03	5 years	7 years	5 years	7 years
Middle West Belfast	**695**	**111**	**584**	**858**	**970**	**858**	**970**

- The Housing Stress Waiting list has increased from 574 at September 2001 to 695 at September 2003.
- Single households are the predominant group representing 46% of Housing Stress applicants, followed by families who make up 39% of the Housing Stress waiting list. Historically, singles have demonstrated the greatest increase.
- Supply through re-lets of existing dwellings is low, failing to meet demand.
- House sales have been very active with 59% of stock having been sold.

Outer West Belfast

Table 25 Assessment of Catchment Area Outer West

Settlement/ Catchment	Base Data			Stage 1 Projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-Lets 2001-03	Residual Housing Need Sept 03	5 years	7 years	5 years	7 years
Outer West Belfast	**290**	**60**	**230**	**523**	**655**	**523**	**655**

- While Outer West Belfast has the lowest levels of stress it has demonstrated the greatest percentage increase, 41% since September 2001.
- Relets of existing properties are failing to meet demand.

Conclusion

Demand for inner West Belfast is reducing while Middle and Outer is increasing.

The Housing Need Assessment for social housing suggests 1,983 new units of accommodation will be required over the next 5 years and 2,293 over a seven year period. These figures are broadly in line with the Greater West Belfast Strategy.

5.4 Carrickfergus Borough Council

Table 26 shows a summary of projected housing need within Carrickfergus Borough by Settlement level for both a five year period and a seven year period.

Table 26 Assessment of Carrickfergus Borough

Sector	Base Data			Stage 1 Projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-Lets 2001-03	Residual Housing Need Sept 03	5 years	7 years	5 years	7 years
C'fergus Town	**356**	**142**	**214**	**226**	**234**	**64**	**64**
Other Towns	**60**	**85**	**-25**	**0**	**0**	**5**	**5**
Carrickfergus Borough Total	**416**	**227**	**189**	**226**	**234**	**69**	**69**

Main Urban Centre

Table 27 Projected Housing Need (PRAWL)

Settlement/ Catchment	Base Data			Stage 1 projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-lets 2001-2003	Residual Housing Need Sept 03	5 Years	7 Years	5 Years	7 Years
C'fergus Town Inner	**255**	**101**	**154**	**56**	**20**	**36**	**36**
C'fergus Town Outer	**101**	**41**	**60**	**170**	**214**	**28**	**28**
C'fergus Town Total	**356**	**142**	**214**	**226**	**234**	**64**	**64**

- The housing assessment for social rented housing in Carrickfergus Town shows a variation in housing need across the Town. A number of estates have experienced letting difficulties, vacancies and anti-social activity.

  The result is that the remaining estates in the Town are extremely popular showing high levels of demand with little turnover. It is the Housing Executives assessment that it would not be prudent to simply state the projected housing need figure of those areas demonstrating housing need for the next seven years without recourse to the regeneration work which the Housing Executive is currently carrying out in the low demand estates. Rather than further drain these estates through new build activity elsewhere in the Town it is adjudged that a more cautious approach to assessing social housing need is required to facilitate a balanced approach through regenerating existing stock together with the gradual introduction of a more limited number of social new build.

The situation will be closely monitored and reviewed in a further 5 years.

In light of the issues raised above the housing need assessment for Carrickfergus Town over the next five years is 64 units.

Other Towns

Greenisland

Table 28 Projected Housing Need (PRAWL)

Settlement/ Catchment	Base Data			Stage 1 projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-lets 2001-2003	Residual Housing Need Sept 03	5 Years	7 Years	5 Years	7 Years
G'island	**34**	**64**	**-30**	**0**	**0**	**0**	**0**

- The housing assessment for social rented housing in Greenisland shows housing supply meeting housing need over the next five to seven years.

Whitehead

Table 29 Projected Housing Need (PRAWL)

Settlement/ Catchment	Base Data			Stage 1 projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-lets 2001-2003	Residual Housing Need Sept 03	5 Year s	7 Years	5 Years	7 Years
Whitehead	**26**	**21**	**5**	**0**	**0**	**5**	**5**

- The number of applicants in Housing Stress on the waiting list for Whitehead has steadily declined over recent years. The local District Office interpret this trend as applicants choosing to register their areas of choice away from Whitehead due to the relative lack of available housing in the area. This is despite the unusually high levels of re-lets over the past year. Nevertheless all applicants in housing stress are waiting an average of 2 years on the waiting list and those applicants in Housing Stress outnumber average annual re-lets by 5 units. Consequently the housing need assessment for Whitehead for the next five to seven years is 5 units.

Conclusion

In summary, the social housing need assessment for Carrickfergus Borough from September 2003 to September 2008/10 identifies a requirement for an additional 69 units.

5.5 Castlereagh Borough Council

Table 30 shows a summary of projected housing need within Castlereagh Borough by Settlement level for both a five year period and a seven year period.

Table 30 Assessment of Castlereagh Borough

Sector	Base Data			Stage 1 Projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-Lets 2001-03	Residual Housing Need Sept 03	5 years	7 years	5 years	7 years
Castlereagh Urban	**444**	**308**	**136**	**303**	**387**	**341**	**383**
Other Towns	**33**	**6**	**27**	**40**	**47**	**40**	**47**
Villages	**9**	**2**	**7**	**16**	**21**	**6**	**8**
Small Settlements	**2**	**0**	**2**	**5**	**6**	**0**	**0**
Castlereagh Borough Total	**488**	**316**	**172**	**364**	**461**	**387**	**438**

Main Urban Centre

Table 31 Projected Housing Need (PRAWL)

Settlement/ Catchment	Base Data			Stage 1 projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-lets 2001-2003	Residual Housing Need Sept 03	5 Years	7 Years	5 Years	7 Years
Castlereagh East Urban	**126**	**124**	**2**	**72**	**114**	**80**	**80**
Castlereagh Central Urban	**233**	**90**	**143**	**231**	**273**	**231**	**273**
Castlereagh West Urban	**85**	**94**	**-9**	**0**	**0**	**30**	**30**
Castlereagh Urban Total	**444**	**308**	**136**	**303**	**387**	**341**	**383**

- The Castlereagh Urban East area incorporates the Local Housing Areas of Dundonald Urban, Dundonald Small Estates and Tullycarnet. The housing assessment for social rented housing in this area shows that housing is required over the next five years. The figure has been adjusted as local knowledge suggests that some housing will be required due to the regeneration strategy within the Ballybeen estate. The number of applicants in Housing Stress has shown an increasing trend since September 2001. The singles and the elderly household groups show the greatest number of applicants in Housing Stress and local knowledge suggests that more family housing is also required. Given the history of surplus housing new build dwellings should be introduced through a sensitive and managed approach.

The current waiting list is showing signs of recovery after a period of time when there was an oversupply of housing. Through an estate based strategy and now a regeneration strategy, considerable progress has been made in rationalizing social housing supply and demand through demolition and improvement works.

- The Castlereagh Urban Central area incorporates the Local Housing Areas of Ballygowan Road (excluding Moneyreagh), Braniel and Cregagh/Castlereagh. This is predominantly a built up area on the edge of the Belfast boundary. Land has been difficult to acquire in the Castlereagh Central area, and for this reason some new build schemes have been programme as overspill in nearby Castlereagh Urban West. The number of applicants in Housing Stress has increased since September 2001. The small family household group has shown the greatest increase although there is need in all household groups. Re-lets are not meeting demand and statistics show that the elderly household group waits the longest time to be housed.

- The Castlereagh Urban West area incorporates the Local Housing Area of Newtownbreda (incorporating Belvoir, Best's Hill, Shaws Bridge and Newtownbreda Village). The projected housing need calculation for this area shows that housing need has been met by re-lets in this area. Historically, however, the area has been popular with social housing applicants and local knowledge suggests applicants are not applying for this area because of the relatively limited prospects of being re-housed. This may have resulted in an artificially low waiting list. For the above reasons, the projected need has been adjusted to reflect the perceived need.

- Within the Castlereagh Urban area an additional 341 to 383 dwellings are required to meet the social housing need over the next five to seven years.

Local Towns

Table 32 Projected Housing Need (PRAWL)

Settlement/ Catchment	Base Data			Stage 1 projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-lets 2001-2003	Residual Housing Need Sept 03	5 Years	7 Years	5 Years	7 Years
Carryduff	**33**	**6**	**27**	**40**	**47**	**40**	**47**

- The housing assessment for social rented housing in the Carryduff area shows that additional social housing is required over the next five to seven years to address housing need. The number of applicants in Housing Stress has increased since September 2001, with family household groups showing the greatest increase. Re-lets are not meeting demand as this is an area of low turnover and decreasing stock and to the sale of properties. New build proposals for Carryduff have not proceeded in the past as Housing Associations have not been successful in securing sites.

- The area is identified as one of the potential growth areas within the BMA and local knowledge suggests that the projected need can be supported. Consequently the social housing need assessment for Carryduff for the next five to seven years demonstrates a requirement for an additional 40 to 47 units.

Villages

Table 33 Projected Housing Need (PRAWL)

Settlement/ Catchment	Base Data			Stage 1 projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-lets 2001-2003	Residual Housing Need Sept 03	5 Years	7 Years	5 Years	7 Years
Moneyreagh	**9**	**2**	**7**	**16**	**21**	**6**	**8**

- The social housing provision in Moneyreagh is concentrated within the village of Moneyreagh, with a small number of rural cottages on the outskirts. The housing assessment for social rented housing in this area shows that there is a small projection of housing need over the next five to seven years. The number of applicants in Housing Stress has shown an increasing trend since September 2001, while the number of allocations has fluctuated. There has been no turnover of social housing stock in the last year to September 2003. The need is focused in the singles and small family groups. Over 70% of Housing Executive stock has been sold in this area and with diminishing stock, the opportunity for re-lets will reduce.

- Local knowledge suggests that housing need can be met through re-lets, and that latent need is not an issue in Moneyreagh. For this reason the projected need was adjusted down. The social housing need assessment for Moneyreagh for the next five to seven years demonstrates a requirement for an additional 6 to 8 units.

Castlereagh Borough Council Rural Cottages

Table 34 Projected Housing Need (PRAWL)

Settlement/ Catchment	Base Data			Stage 1 projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-lets 2001-2003	Residual Housing Need Sept 03	5 Years	7 Years	5 Years	7 Years
Castlereagh Rural Cottages	**2**	**0**	**2**	**5**	**6**	**0**	**0**

- The Local Housing Area of Castlereagh Rural cottages, consists of individual cottages dotted throughout the Borough. The need is likely to be for individual properties rather than a general area. Local knowledge suggests that there is no requirement for new build. The projected housing need has been adjusted to zero.

Conclusion

In summary, the social housing need assessment for Castlereagh Borough from September 2003 to September 2008/10 shows a requirement for an additional 387 to 438 units.

5.6 Lisburn City Council

Table 35 shows a summary of projected housing need within Lisburn City by Settlement level for both a five year period and a seven year period.

Table 35 Assessment of Lisburn City

Sector	Base Data			Stage 1 Projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-Lets 2001-03	Residual Housing Need Sept 03	5 years	7 years	5 years	7 years
Lisburn/Dunmurry Urban Total	**561**	**328**	**233**	**540**	**697**	**468**	**589**
Other Towns	61	12	49	26	17	49	49
Villages	102	42	60	141	175	112	131
Small Settlements	9	2	7	18	23	5	5
Lisburn City Total	**733**	**384**	**349**	**725**	**912**	**634**	**774**

Main Urban Area

Lisburn Urban Area consists of the Lisburn City urban area and Dunmurry. Within the urban city area social housing need has been assessed in four local housing areas, which reflect the locations of current social housing stock: Lisburn Town Centre, Lisburn North, Greenwood and Old Warren.

Table 36 Projected Housing Need (PRAWL)

Settlement/ Catchment	Base Data			Stage 1 projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-lets 2001-2003	Residual Housing Need Sept 03	5 Years	7 Years	5 Years	7 Years
Lisburn Town Centre	**182**	**73**	**109**	**197**	**252**	**197**	**252**
Lisburn North	**105**	**48**	**57**	**115**	**140**	**115**	**140**
Greenwood	**70**	**48**	**22**	**90**	**124**	**30**	**41**
Old Warren	**40**	**65**	**-25**	**0**	**0**	**26**	**26**
Lisburn Urban Total	**397**	**234**	**163**	**402**	**516**	**368**	**459**

- **Lisburn Town Centre** includes the Knockmore, Tonagh, Manor, Causeway and Warren estates. Additional social housing will be required to address housing need. Trends indicate elderly and single applicants to be in greatest need, followed by small families. Projected need indicates 197 to 252 dwellings are required to meet the need over the next five to seven years.

- **Lisburn North** includes Ballymacoss and Flush Park Estates. Additional housing will be required to meet housing need. The need is greatest for families. Social Housing stock has been reduced by more than half due to house sales to occupiers. Adjusted projected need indicates 115 to 140 dwellings are required over the next five to seven years to address housing need. The requirement would be for family accommodation and elderly accommodation.

Greenwood excluding Porters Row (see small settlement-Hillhall)

- The **Greenwood** sector includes Greenwood, Hillhall and Hill Street estates. Trends show a significant rise in the number of housing stress applicants on the waiting list over the between 2001 and 2003 (100%). However the need for most household groups is met through re-lets apart from the Singles group which showed a residual need of 39 at September 2003. Adjusted projected need therefore indicates a requirement of 30 to 41 dwellings over the next five to seven years to cater mostly for singles households. The Housing Executive will closely monitor waiting list developments for evidence to see if the rise in waiting list numbers is sustained.

- The estate of **Old Warren** has no projected need. However a major regeneration strategy including redevelopment and refurbishment is ongoing and has resulted in greater stability and increased demand over the last couple of years. The current waiting list is showing signs of recovery after a period of time when there was an oversupply of housing. A further 26 dwellings has been programmed for the Old Warren Estate which will assist in the continuing regeneration of the area and will cater for overspill demand from neighbouring local housing markets in the Lisburn Urban location.

- Within the **Lisburn City urban** area a total of 368 to 459 dwellings are required to meet the need over the next five to seven years.

Table 37 Projected Housing Need (PRAWL)

Settlement/ Catchment	Base Data			Stage 1 projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-lets 2001-2003	Residual Housing Need Sept 03	5 Years	7 Years	5 Years	7 Years
Dunmurry	**164**	**94**	**70**	**138**	**181**	**100**	**130**

Dunmurry excluding Milltown CLA and Lambeg (See Villages)

- While there is need across all groups, elderly applicants are waiting longer to be housed. Land for social housing has been difficult to acquire. Local knowledge indicates that generally Dunmurry is perceived as a separate area for social housing and need cannot be met by provision of social housing in the greater Lisburn urban area. Housing need is met in part from turnover of existing Social Housing stock. Additional social housing of 100 to 130 dwellings over the next five to seven years will be required to address remaining housing need for this area.

Local Towns

Table 38 Projected Housing Need (PRAWL)

Settlement/ Catchment	Base Data			Stage 1 projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-lets 2001-2003	Residual Housing Need Sept 03	5 Years	7 Years	5 Years	7 Years
Hillsborough/ Culcavey	38	6	32	20	15	32	32

The Local Town of Hillsborough/Culcavy includes the small settlement of St James.

- Land for Social Housing in the Hillsborough area has been difficult to acquire. Local knowledge would indicate latent demand for the area due to the lack of available housing. Applicants are choosing alternative areas where they can be housed more readily. This has contributed to fluctuating housing stress levels, making predicting need more difficult. The adjusted figure for 5 year projection, 32 dwellings, gives a better indication of the requirement. The tentative requirement for the seven years is estimated to be at least 32 at lowest, and this prediction will be monitored and adjusted to reflect ongoing trends. The group in most need is the elderly although other groups in particular those requiring family houses are waiting an excessive time to be housed.

Table 39 Projected Housing Need (PRAWL)

Settlement/ Catchment	Base Data			Stage 1 projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-lets 2001-2003	Residual Housing Need Sept 03	5 Years	7 Years	5 Years	7 Years
Moira	23	6	17	6	2	17	17

Moira incl. - Lower Broomhedge, Upper Broomhedge, Lurganville & Halfpenny Gate.

- Housing need has dropped slightly over recent years. Land for Social Housing in Moira has been difficult to acquire. Local knowledge would indicate latent demand for the area due to the lack of available housing. Applicants are choosing alternative areas where they can be housed more readily. This has contributed to a reduced calculated projected housing need figure. An adjusted projected need of 17 dwellings is required to address housing need over the five year period to September 2008. The tentative seven year figure is estimated also as 17. The elderly are in greatest need as they are waiting a longer time for housing than other household groups.

Villages

Table 40 Projected Housing Need (PRAWL)

Settlement/ Catchment	Base Data			Stage 1 projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-lets 2001-2003	Residual Housing Need Sept 03	5 Years	7 Years	5 Years	7 Years
Aghalee	**2**	**0**	**2**	**2**	**2**	**2**	**2**

- Projected social housing need for Aghalee has been assessed as 2 dwellings for the period to September 2008. This is an area of limited social housing stock with very low turnover of stock. Numbers of applicants in housing stress are low. An additional two dwellings would address social housing need for the next five to seven years.

Table 41 Projected Housing Need (PRAWL)

Settlement/ Catchment	Base Data			Stage 1 projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-lets 2001-2003	Residual Housing Need Sept 03	5 Years	7 Years	5 Years	7 Years
Annahilt	**1**	**3**	**-2**	**0**	**0**	**0**	**0**

- There is no projected housing need in Annahilt for the period to September 2010. It is assessed housing demand will be met through the existing supply of social housing.

Table 42 Projected Housing Need (PRAWL)

Settlement/ Catchment	Base Data			Stage 1 projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-lets 2001-2003	Residual Housing Need Sept 03	5 Years	7 Years	5 Years	7 Years
Dromara	**5**	**1**	**4**	**4**	**4**	**4**	**4**

- Projected housing need for Dromara is estimated at 4 dwellings for the period to September 2008. The level of social housing is low, and there is very little turnover of stock. Single applicants in particular wait long periods for housing and any future requirement would include single accommodation.

Table 43 Projected Housing Need (PRAWL)

Settlement/ Catchment	Base Data			Stage 1 projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-lets 2001-2003	Residual Housing Need Sept 03	5 Years	7 Years	5 Years	7 Years
Drumbeg/ Lambeg/ Ballyskeagh	**48**	**8**	**40**	**81**	**98**	**81**	**98**

The Village of Drumbeg incorporating the small settlements of Lambeg, Ballyskeagh and the larger urban area now commonly known as Lambeg.

- Projected need for this area is estimated at 81 to 98 dwellings for a five to seven year period. This area is popular with applicants originating from the Lambeg and the surrounding Dunmurry and Lisburn areas. Trends indicate increasing housing need for all types of households, but particularly for the elderly, which cannot be met from existing social housing stock. Over the seven year period to September 2010 it is tentatively estimated that a total of 98 dwellings would be required to meet housing need, if current trends continue.

Table 44 Projected Housing Need (PRAWL)

Settlement/ Catchment	Base Data			Stage 1 projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-lets 2001-2003	Residual Housing Need Sept 03	5 Years	7 Years	5 Years	7 Years
Drumbo	**5**	**6**	**-1**	**4**	**6**	**4**	**4**

Drumbo includes Drumbo Village and the small settlements of Ballyaghlis, Ballylesson and Tullynacross.

- The projected need for the period to September 2008 to 2010 is estimated at 4 dwellings. Examination of trends indicates that while there is no overall residual housing need, there is some need for additional family accommodation. Local knowledge highlights latent demand issues with some applicants choosing alternative locations due to low levels of social housing supply reducing the prospect of being housed in the Drumbo area. It is estimated that 4 dwellings over the next five to seven years is required to meet the social housing need.

Table 45 Projected Housing Need (PRAWL)

Settlement/ Catchment	Base Data			Stage 1 projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-lets 2001-2003	Residual Housing Need Sept 03	5 Years	7 Years	5 Years	7 Years
Glenavy	**13**	**1**	**12**	**7**	**5**	**10**	**10**

- Projected housing need for Glenavy is calculated at 10 dwellings for the period to September 2008/10. Trends indicate the level of need is relatively high given the low turnover of stock. Local knowledge suggests latent demand for this area due to the lack of available housing. Applicants are choosing alternatives areas where they can be housed more readily. This has contributed to a reduced projected housing need figure, which has been adjusted accordingly. It is estimated that 10 dwellings would be required over the next five to seven years to address housing need.

Table 46 Projected Housing Need (PRAWL)

Settlement/ Catchment	Base Data			Stage 1 projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-lets 2001-2003	Residual Housing Need Sept 03	5 Years	7 Years	5 Years	7 Years
Lower & Upper Ballinderry	**3**	**2**	**1**	**6**	**8**	**1**	**2**

- Projected need for the Ballinderry area, incorporating Lower and Upper Ballinderry was initially estimated as 6 dwellings for the next five years. However actual numbers are low and local trends indicate that demand is mostly met from existing stock. It is estimated that 1/2 additional dwellings would address the need for the next five/seven years.

Table 47 Projected Housing Need (PRAWL)

Settlement/ Catchment	Base Data			Stage 1 projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-lets 2001-2003	Residual Housing Need Sept 03	5 Years	7 Years	5 Years	7 Years
Maghaberry	**3**	**1**	**2**	**10**	**13**	**4**	**4**

- Although waiting list numbers are increasing need is low. It is estimated that 4 dwellings over the next five to seven years will address housing need at Maghaberry. The housing need estimate will be kept under review.

Table 48 Projected Housing Need (PRAWL)

Settlement/ Catchment	Base Data			Stage 1 projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-lets 2001-2003	Residual Housing Need Sept 03	5 Years	7 Years	5 Years	7 Years
Maze	**3**	**3**	**0**	**0**	**0**	**2**	**2**

Maze Village includes the small settlement of Lurganure

- While housing need for the period to September 2008 is calculated as nil, local knowledge would indicate a small demand in the area. Latent demand testing (which invites expressions of interest in Social Housing in the area) is to be carried out in 2004 to assess the demand. The development of the former prison site may also impact on social housing need in the area. Adjusted projected need has been estimated as 2 dwellings for the five to seven year period. This will be reviewed to reflect results of the latent demand testing.

Table 49 Projected Housing Need (PRAWL)

Settlement/ Catchment	Base Data			Stage 1 projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-lets 2001-2003	Residual Housing Need Sept 03	5 Years	7 Years	5 Years	7 Years
Milltown	**11**	**13**	**-2**	**7**	**12**	**0**	**0**

- Projected need for the next 5 years is calculated at 7 dwellings, however local knowledge reports demand is adequately met through the current supply of social dwellings. There is a reasonable turnover of stock. .Adjusted projected need indicates no additional housing is required.

Table 50 Projected Housing Need (PRAWL)

Settlement/ Catchment	Base Data			Stage 1 projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-lets 2001-2003	Residual Housing Need Sept 03	5 Years	7 Years	5 Years	7 Years
Ravernet	**2**	**4**	**-2**	**3**	**5**	**0**	**0**

Ravernet includes the small settlement of Legacurry

- Projected need for the next five years is estimated to be 3 dwellings. Analysis of trends indicate need is being met through supply as there is no residual housing need.

Table 51 Projected Housing Need (PRAWL)

Settlement/ Catchment	Base Data			Stage 1 projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-lets 2001-2003	Residual Housing Need Sept 03	5 Years	7 Years	5 Years	7 Years
Stoneyford	**6**	**0**	**6**	**17**	**22**	**4**	**5**

- Projected need for the next five years is estimated for 17 dwellings. Analysis of trends would reveal this may be a high estimate as actual numbers in need are low. Low Social Housing stock levels and slow turnover of stock has resulted in unmet demand. Adjusted projected need indicates 4 to 5 additional dwellings would meet the need over the next five to seven years.

Lisburn City Council Small Settlements

Table 52 Projected Housing Need (Prawl)

Settlement/ Catchment	Base Data			Stage 1 projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-lets 2001-2003	Residual Hsg Need Sept 03	5 Years	7 Years	5 Years	7 Years
Long Kesh / Kesh bridge	**0**	**0**	**0**	**0**	**0**	**0**	**0**
Purdysburn (including Edenderry)	**3**	**0**	**3**	**7**	**9**	**3**	**3**
Boardmills (Use Dunmurry Rural CLA)	**2**	**1**	**1**	**0**	**0**	**0**	**0**
Drumlough Road / Drumlough Rockview CLA	**0**	**0**	**0**	**0**	**0**	**0**	**0**
Dundrod	**2**	**0**	**2**	**7**	**9**	**2**	**2**
Feumore	**0**	**0**	**0**	**0**	**0**	**0**	**0**
Hillhall (Porters Row CLA)	**0**	**1**	**-1**	**0**	**0**	**0**	**0**
Ballynadolly	**0**	**0**	**0**	**0**	**0**	**0**	**0**
Lisburn Rural (including Magheragall)	**2**	**0**	**2**	**4**	**5**	**0**	**0**

- Purdysburn has a projected housing need of 3 dwellings. While numbers are low, social housing stock is also low and need cannot be met from turnover of existing stock. It is assessed that three dwellings would be required to meet the need over the next five/seven years.

- Dundrod has an adjusted projected housing and residual need of 2 dwellings. While numbers in housing stress are low, they cannot be accommodated within the low levels of existing social housing stock.

- Lisburn Rural including Magheragall has calculated projected need of 4 dwellings. However local knowledge would indicate that current housing need can be met from existing stock.

- The remaining small settlements listed above exhibit little or no social housing need currently, although levels of social housing stock are low and applicants may have little chance of being housed in these areas.

Conclusion

In summary, the housing need assessment for Lisburn Antrim Street District (Lisburn City council area excluding Twinbrook/Poleglass/Lagmore) from September 2003 to September 2008 to 2010 is 634 to 774 units.

5.7 Newtownabbey Borough Council

Table 53 shows a summary of projected housing need within Newtownabbey Borough by Settlement level for both a five year period and a seven year period.

Table 53 Assessment of Newtownabbey Borough

Sector	Base Data			Stage 1 Projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-Lets 2001-03	Residual Housing Need Sept 03	5 years	7 years	5 years	7 years
Newtownabbey Urban Total	**599**	**344**	**255**	**413**	**561**	**255**	**255**
Other Towns	**90**	**56**	**34**	**10**	**9**	**10**	**10**
Villages	**15**	**5**	**10**	**33**	**35**	**11**	**11**
Small Settlements	**5**	**3**	**2**	**5**	**5**	**0**	**0**
Newtownabbey Borough Total	**709**	**408**	**301**	**461**	**611**	**276**	**276**

<u>Main Urban Centre</u>

Table 54 Projected Housing Need (PRAWL)

Settlement/ Catchment	Base Data			Stage 1 projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-lets 2001-2003	Residual Housing Need Sept 03	5 Years	7 Years	5 Years	7 Years
N'abbey Sth Rathcoole	**276**	**202**	**74**	**153**	**244**	**80**	**80**
Bawnmore/ Hightown	**36**	**16**	**20**	**22**	**24**	**50**	**50**
Whiteabbey	**74**	**25**	**49**	**92**	**110**	**50**	**50**
Glengormley	**103**	**19**	**84**	**82**	**90**	**50**	**50**
N'abbey Nth Ballyduff	**110**	**82**	**28**	**64**	**93**	**25**	**25**
N'abbey Urban	**599**	**344**	**255**	**413**	**561**	**255**	**255**

- The assessment of need for social housing in the Newtownabbey Urban area demonstrates a requirement for additional social housing stock in all sectors of this large conurbation. This is a remarkable turn around for this area and bears witness to the substantial commitment and investment made by the Housing Executive and channelled through a number of Regeneration Strategies.

- The adjusted housing need figure for each sector in the Newtownabbey area is well within the projected housing need figure and generally reflect the residual housing need. It is assessed that any additional social housing requirement for this area should reflect a conservative estimate given the past history of over supply, blight and dereliction.

- The exception to this rule relates to the Bawnmore/Hightown area. The Hightown area has very limited numbers of social housing stock and consequently receives only a limited number of applicants registering this location as an area of choice in which they want to live. The District Office is extremely confident of being able to let 30 additional properties without any detrimental impact to neighbouring social housing areas. .

- Within the Newtownabbey Urban area a total of 255dwellings are required to meet the need over the next five to seven years.

Local Towns

Table 55 Projected Housing Need (PRAWL)

Settlement/ Catchment	Base Data			Stage 1 projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-lets 2001-2003	Residual Housing Need Sept 03	5 Years	7 Years	5 Years	7 Years
Ballyclare	**90**	**56**	**34**	**10**	**9**	**10**	**10**

- Ballyclare is increasing in popularity for Social Housing accommodation. Housing Stress has increased significantly over the past 4 years. The purchase of Housing Executive properties is perceived as the most accessible route for first time buyers and has resulted in loss of Social Housing stock. There is high demand and relatively low turnover of stock in the Town centre area however there a number of vacant dwellings in outlying estates

  The social housing need assessment for Ballyclare shows a requirement for additional 10 units over the next five to seven years to meet housing need.

Villages

Table 56 Projected Housing Need (PRAWL)

Settlement/ Catchment	Base Data			Stage 1 projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-lets 2001-2003	Residual Housing Need Sept 03	5 Years	7 Years	5 Years	7 Years
Doagh	**12**	**5**	**7**	**30**	**32**	**8**	**8**

- The rural area of Doagh is popular with low turnover. The projected housing need figure demonstrates a rise in the number of applicants in housing stress seeking to be housed in the Doagh area. Nevertheless the District assess the requirement needed to meet additional demand is reflected better by the residual housing need figure. The social housing need assessment for Doagh therefore, shows a requirement for an additional 8 units over the next five to seven years to meet housing need.

Table 57 Projected Housing Need (PRAWL)

Settlement/ Catchment	Base Data			Stage 1 projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-lets 2001-2003	Residual Housing Need Sept 03	5 Years	7 Years	5 Years	7 Years
Ballynure	**3**	**0**	**3**	**3**	**3**	**3**	**3**

- The rural area of Ballynure is popular with no re-lets being available over the past three years The social housing need assessment for Ballynure shows a requirement for an additional 3 units over the next five to seven years to meet housing need

<u>Small Settlements</u>

Table 58 Projected Housing Need (PRAWL)

Settlement/ Catchment	Base Data			Stage 1 projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-lets 2001-2003	Residual Housing Need Sept 03	5 Years	7 Years	5 Years	7 Years
Hyde Park Parkmount	**3**	**2**	**1**	**0**	**0**	**0**	**0**
Oakmount	**2**	**1**	**1**	**5**	**5**	**0**	**0**

- The housing assessment for social rented housing in the small settlements of Newtownabbey shows the existing housing supply meeting housing need over the next five to seven years.

Conclusion

In summary, the social housing need assessment for Newtownabbey Borough from September 2003 to September 2008 to 2010 identifies a requirement for an additional 276 units.

5.8 North Down Borough Council

Table 59 shows a summary of projected housing need within North Down Borough by Settlement level for both a five year period and a seven year period.

Table 59 Assessment of North Down Borough

Sector	Base Data			Stage 1 Projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-Lets 2001-03	Residual Housing Need Sept 03	5 years	7 years	5 years	7 years
Bangor Urban	**499**	**295**	**204**	**545**	**720**	**300**	**396**
Other Towns	**150**	**34**	**116**	**191**	**239**	**191**	**239**
Villages	**13**	**2**	**11**	**24**	**30**	**24**	**30**
Small Settlements	**9**	**3**	**6**	**2**	**2**	**10**	**10**
North Down Borough Total	**671**	**334**	**337**	**762**	**991**	**525**	**675**

Main Urban Centre

Table 60 Projected Housing Need (PRAWL)

Settlement/ Catchment	Base Data			Stage 1 projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-lets 2001-2003	Residual Housing Need Sept 03	5 Years	7Years	5 Years	7 Years
Bangor Urban	**499**	**295**	**204**	**545**	**720**	**300**	**396**

- The Bangor Urban area incorporates the Local Housing Areas of Bangor Central, Bangor East (excluding Groomsport), Bloomfield/Balloo, Kilcooley and Conlig. The housing assessment for social rented housing in the Bangor Urban area shows that 300 to 396 additional social houses are required over the next five to seven years. The number of applicants in Housing Stress has shown an increasing trend since September 2001 and this is most evident in the elderly household group. The other household groups have also shown an increase in applicants in Housing Stress over the period, However, re-lets of existing properties and allocations to new build social housing have been mostly matching current demand. Demand is greatest in the Bangor Central, Bloomfield/Balloo and Bangor East areas of Bangor, with less demand in the areas on the periphery.

- Analysis and local knowledge would suggest that the need is not as great as the projection suggests. A small percentage of the household group in most need (elderly group) are registering an interest on the waiting list for the future but are not wishing to be housed presently. This household group are more inclined to wait for Town Centre accommodation, thus choosing to wait longer.

- The Housing Executive does not own property in Six Road Ends, but this hamlet would be closest to the Local Housing Areas of Conlig and Bloomfield/Balloo and therefore lies within the Bangor Urban boundary.

Local Towns

Table 61 Projected Housing Need (PRAWL)

Settlement/ Catchment	Base Data			Stage 1 projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-lets 2001-2003	Residual Housing Need Sept 03	5 Years	7 Years	5 Years	7 Years
Holywood	**150**	**34**	**116**	**191**	**239**	**191**	**239**

- The Holywood Town area incorporates the Local Housing Areas of Holywood Outer and Holywood Central. The housing assessment for social rented housing in Holywood Town shows a need of 191 to 239 additional social housing. over the next five to seven year period. The number of applicants in Housing Stress has shown an increasing trend since September 2001 and this is partly due to properties being held void for decanting due to improvements works on existing stock. Future requirements are likely to be for the elderly household group, small families and to a lesser extent the singles, Constraints to meeting social housing need within Holywood are high land costs and competition from the private sector for these sites.

Villages

Table 62 Projected Housing Need (PRAWL)

Settlement/ Catchment	Base Data			Stage 1 projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-lets 2001-2003	Residual Housing Need Sept 03	5 Years	7 Years	5 Years	7 Years
Groomsport	**13**	**2**	**11**	**24**	**30**	**24**	**30**

- The housing assessment for social rented housing in Groomsport shows a small need for additional social housing of 24 to 30 over a five to seven year period. The number of applicants in Housing Stress has shown an increase since September 2001. Local knowledge reports latent demand exists for Groomsport and could support the projected need for additional units. Future requirements are likely to be for the elderly household group, small families and to a lesser extent singles. In addition social housing stock has been reducing as a result of the sale of Housing Executive dwellings.

Table 63 Projected Housing Need (PRAWL)

Settlement/ Catchment	Base Data			Stage 1 projected Housing Need		Projected Housing Need Adjusted	
	Housing Stress Sept 03	Ave. Ann. Re-lets 2001-2003	Residual Housing Need Sept 03	5 Years	7 Years	5 Years	7 Years
Crawfordsburn /Helen's Bay & Rural Area	**9**	**3**	**6**	**2**	**2**	**10**	**10**

- Rural North Down consists of the Local Housing Areas of Helen's Bay, incorporating Seahill Road, and Crawfordsburn. The number of applicants in Housing Stress has fluctuated over the period and also within the needs groups. There are a small number of void properties being held for improvement which will assist in meeting need when returned to stock. The fluctuations in the trends, makes it difficult to predict future need in this area, although local knowledge suggests that there are latent demand issues at this location and could support a greater number than the projection suggests. The social housing stock has been reducing as a result of the sale of Housing Executive dwellings.

  The housing assessment for social rented housing in Crawfordsburn/Helen's Bay & Rural Area shows a need for additional social housing of 10 units over a five to seven year period.

Conclusion

In summary, the social housing need assessment for North Down Borough from September 2003 to September 2008 to 10 identifies a requirement for an additional 525 to 675 units.

6.0 SUPPORTED HOUSING NEED

Assessment from September 2003/04 – 2008/09

The term supported housing relates to accommodation with complementary housing support services to cater for people with a range of special needs. From the 1st April 2003 new arrangements for funding supported housing came under the auspices of the Supporting People programme. The overall responsibility for administration of the Supporting People programme is the Supporting People Commissioning Body. This is chaired by the Housing Executive and is made up of representatives from the Department of Health Social Services and Public Safety, the Probation Board for Northern Ireland and the four Health and Social Services Boards. This body will set the strategic direction including planning and commissioning of the Supporting People programme. Reporting to this Commissioning Body will be 4 Area Supporting People Partnerships(ASPPs). Each ASPP is responsible for a geographic area reflecting the 4 Health and Social Service Board boundary areas.

Joint Planning meetings for Carrick and Newtownabbey Boroughs are administered under the Northern ASPP whilst the North Down, Castlereagh, Lisburn Boroughs and Belfast City are administered as part of the Eastern ASPP. This planning process informs the Area Supporting People Partnership.

New capital and revenue programmes require prioritising and guidance issued by the Commissioning Body indicated the following type of scheme would attract funding;

- Schemes that are related to the closure of a long-stay institution or hospital, or have been the subject of a long-term planning process.
- Schemes related to Housing Executive Homeless Action Plans.
- Replacement schemes with revenue funding streams already in place (i.e. where there is existing Supporting People funding and/or complementary care funding).
- Schemes that fit into the regional strategic priorities identified by Boards, Trusts, or the Probation Board.

The New build provision for supported housing has been agreed and prioritised over a five year period and is shown in tables 59 & 60. Year One (2004/05) is committed with funding approved for all projects programmed to start within this time period. Schemes programmed after 2004/05 are tentative with no formal commitment of finance against them from the Supporting People commissioning body.

Key

LTBI – Land to be identified
LTBA - Land to be acquired (site identified but not yet acquired)
HALO – Housing Association land owned
NIHE LO – Northern Ireland Housing Executive land owned
Trust LO – Health Trust land owned

Table 64 Supported Programme 2003/04 – 2008/09

ID No	District	Housing Association	Scheme Name	Client Group	Start Date	Land Status	No of Units
197	Belfast	Open Door	Cliftonpark Avenue	Homeless	2004/05	LTBA	20
141	Belfast	Newington	Mater Dei Hostel, Antrim Road	Homeless Families	2004/05	LTBA	13
160	Belfast	To be confirmed	Rosemount, Antrim Road	Homeless	2004/05	LTBA	20
71	Belfast	Oaklee	Cluain Mor, Springvale	Physically Disabled	2005/06	HALO	10
111	Belfast	Transfer Scheme	Brunswick Replacement Hostel	Homeless	2005/06	NIHE LO	30
49	Belfast	Choice	Dunmisk/ Andersonstown Phase 2	Physically Disbaled	2006/07	HALO	14
125	Belfast	Transfer Scheme	Lower Shankil, Category 3	Frail Elderly	2007/08	Trust LO	25
107	Belfast	BIH	Malone/ Windsor	Frail Elderly	2004/05	LTBA	30
270	Belfast	Oaklee	Oaklee Ballyhackamore (MACS)	Young Vulnerable Adults	2004/05	LTBA	06
113	Belfast	Habinteg	Ardkeen Replacement	Physically Disabled	2004/05	LTBA	13
187	Belfast	Oaklee	L'Arche Phase 2	Learning Difficulties	2004/05	HALO	06
No Map	Belfast	Triangle	South & East Trust Phase 5B	Learning Difficulties	2004/05	LTBI	04
94	Belfast	Oaklee	Hosford House, Skianus	Homeless	2005/06	HALO	22
No Map	Belfast	Triangle	Annadale, S/E Belfast Phase 7	Learning Disabilities	2005/06	LTBI	10
112	Belfast	Habinteg	Hillmount Court, Finaghy Road South	Physically Disabled	2005/06	LTBA	05
95	Belfast	Wesley	Westbank Home (Palmerston)	Frail Elderly	2006/07	HALO	39
188	Belfast	ARK	Roseville House	Vulnerable Women	2005/06	LTBA	06
No Map	Belfast	Ulidia	57 Wellington Park	Physically Disabled	2007/08	LTBA	10
	Total						**283**

Table 65 Supported Programme 2003/04 – 2008/09

ID No	District	Housing Association	Scheme Name	Client Group	Start Date	Land Status	No of Units
4	Carrickfergus	Fold	Railway Cottages/ Taylors Avenue	Frail Elderly	2004/05	HALO	30
258	Carrickfergus	NIHE	Marine Court	Homeless	2004/05	NIHE LO	25
No Map	Carrickfergus	To be confirmed	Carrickfergus Phase 1	Learning Disabilities	200708	LTBI	2
No Map	Carrickfergus	To be confirmed	Carrickfergus Phase 2	Learning Disabilities	2008/09	LTBI	3
	Total						**60**
No Map	Newtownabbey	To be confirmed	Newtownabbey	Learning Disabilities	2007/08	LTBI	3
	Total						**3**
No Map	Bangor	Oaklee	Princetown Road Re-Provision	Learning Difficulties	2005/06	Trust LO	16
No Map	Bangor	To be confirmed	Dispersed Spot Purchases	Learning Difficulties	2007/08	LTBI	4
	Total						**20**
No Map	Castlereagh	Triangle	Castlereagh Spot Purchases	Learning Difficulties	2006/07	LTBI	10
No Map	Castlereagh	To be confirmed	Knockbracken	Mental Health	2006/07	Trust LO	20
	Total						**30**
266	Lisburn	Triangle	Ballymacoss Central PH 3	Learning Difficulties	2005/06	NIHE LO	10
265	Lisburn Dairyfarm	BIH	Old pumping station	Homeless	2005/06	LTBA	12
No Map	Lisburn	Fold	Spot Purchases	Learning Difficulties	2006/07	LTBA	12
26	Lisburn	Choice	Ballinderry Rd Ph 2	Elderly Cat 3	2006/07	HALO	8
No Map	Lisburn	To be confirmed	Dunmurry Homeless	Homeless	2007/08	LTBI	10
No Map	Lisburn	To be confirmed	Dispersed Spot Purchases	Assorted Needs Groups	2007/08	LTBI	7
No Map	Lisburn	To be confirmed	Lisburn	Mental Health	2007/08	LTBI	15
No Map	Lisburn	To be confirmed	Dispersed Spot Purchases	Assorted Needs Groups	2008/09	LTBI	7
	Total						**81**
	BMAP TOTAL						**477**

7.0 TRAVELLERS

A Housing Need Assessment has been carried out for the period 2003 to 2008 and has resulted in the schemes listed below in the following table being programmed.

A five year programme of schemes to address the accommodation needs of Travellers has been drawn up. This consists of group housing schemes, serviced sites and transit sites.

This programme will be reassessed on a rolling basis to reflect changes in need, land availability and funding.

Table 66 Travellers Programme 2003/04 – 2008/09

Housing Association	Scheme Name	Client Group	Start Date	Land Status	No of Units
Clanmil	Glen Road (Travellers Site "G")	Travellers (Group Housing)	On Site Feb. 2004	HALO	16
North & West	Monagh Road (Travellers Site)	Travellers (Group Housing)	2004/05	LTBA	16
	Transit Site (Belfast Area)	Travellers	2004/05	LTBI	6

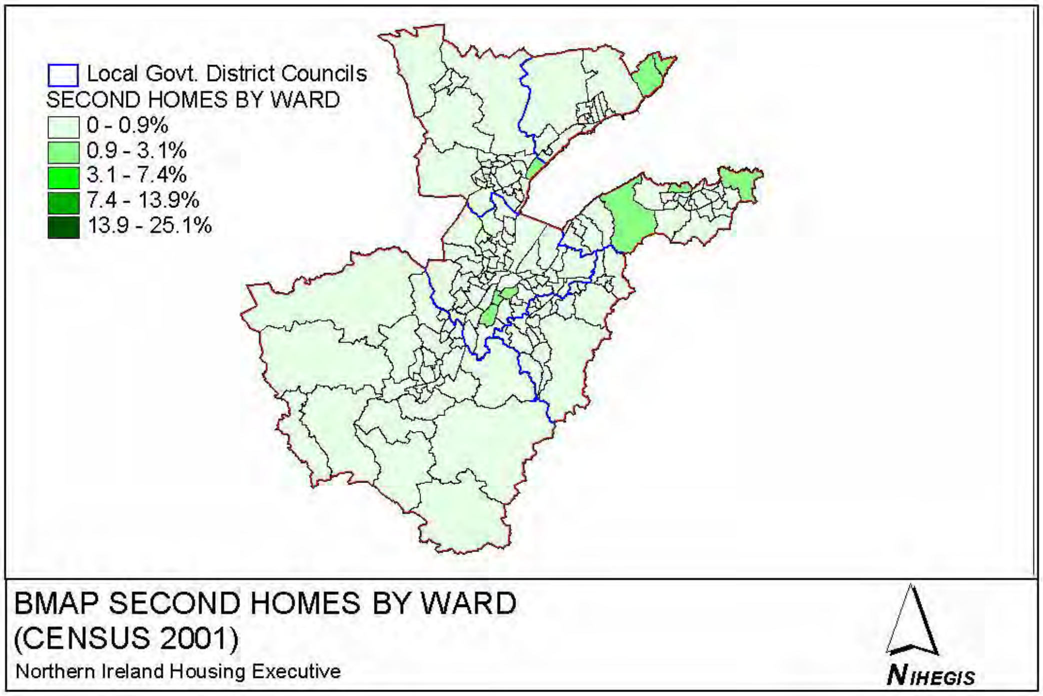
As Travellers on the existing Council Serviced sites expressed a preference for Group Housing schemes this is reflected in the five year programme.

The future use/need of the Colin Glen Serviced Site will be reviewed in three years time.

District Councils have highlighted an increase in unauthorized encampments across Northern Ireland. In view of this development district councils have been contacted regarding the need for transit site accommodation. The outcome of this exercise may result in programme changes.

8.0 SECOND HOMES

The incidence of second homes in Northern Ireland is concentrated around the coastal fringes of the North Coast, the coasts of Ards and Down, the Mournes and in Fermanagh. Within the BMAP area there are a number of second homes but at a relatively lower level. The occurrence of second homes within the BMAP area is illustrated in the map below. Figures are taken from the 2001 Census. The total number of second homes declared in the census is 653.

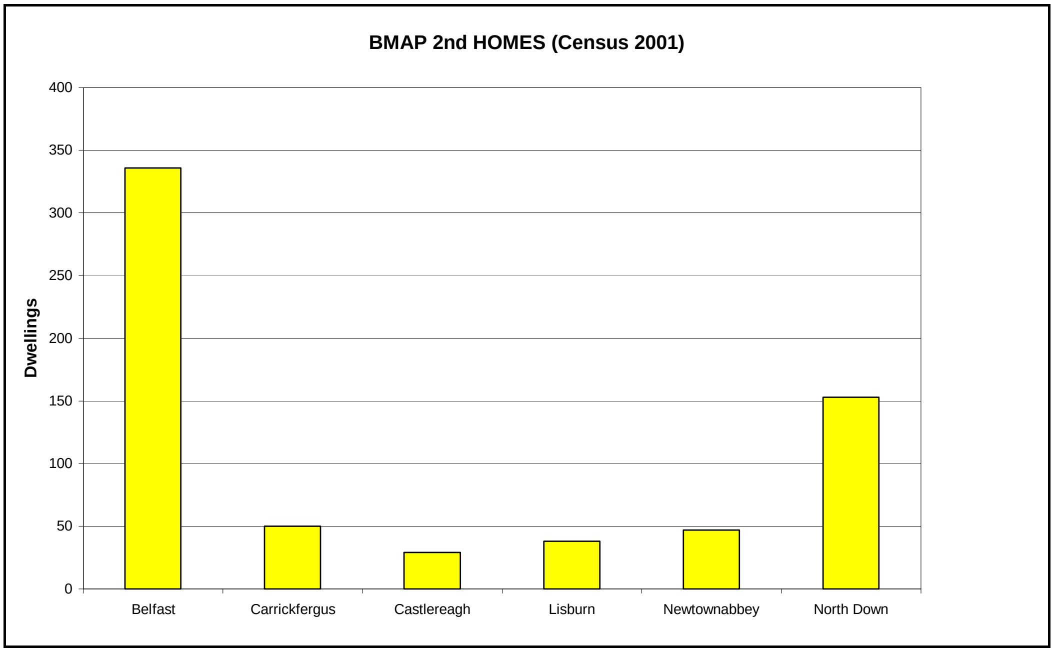


The highest density (336) occurs within Belfast mostly in south Belfast in proximity to the university campus. The University of Ulster (UU) campus at Jordanstown also has a number of second homes concentrated close to the campus. Parents buying property for their student offspring is likely to be a major contributing factor. North Down has the second highest incidence of second homes at 153.

There are small concentrations in Holywood and Bangor which may possibly link into an investors market. This issue is considered in the Empty Homes section of the HNA.

The other council areas have small numbers of second homes as set out in the following chart.

Chart 6 Second Homes



The numbers involved are relatively small compared to other council areas where the issue of second homes is more prevalent and their impact on the wider housing market is therefore less obvious or problematic. It is not envisaged that second homes will make a significant impact upon the BMAP housing growth indicator.

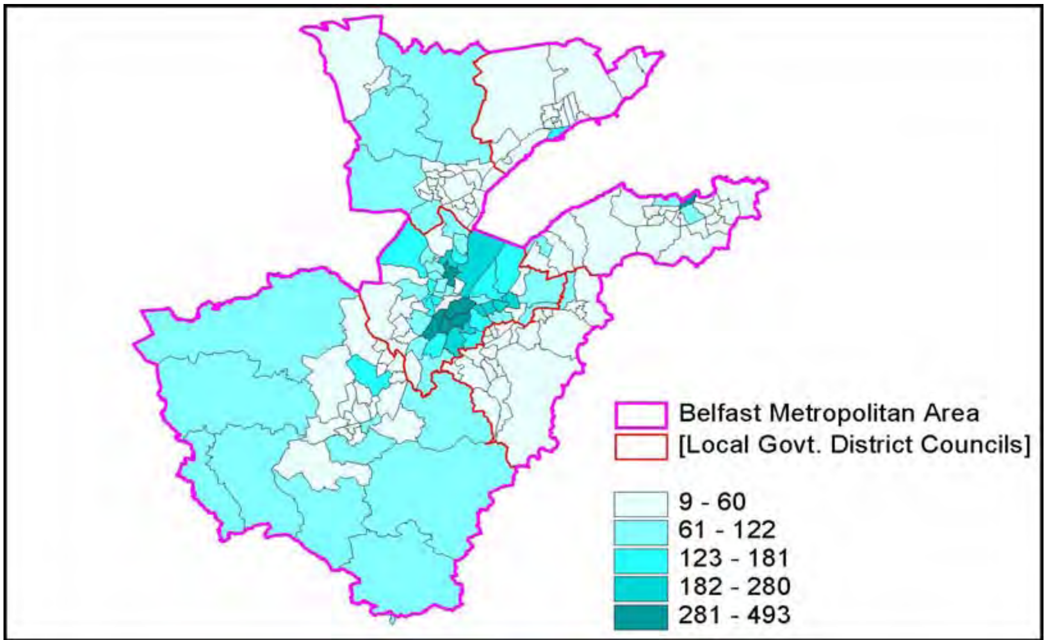
9.0 EMPTY HOMES

For this section the data sources detailing the numbers of empty dwellings are provided by the Rates Collection Agency, NISRA and the Housing Executive. It should be noted that the RCA are currently undergoing a review of their data and whilst there may be discrepancies In terms of absolute figures, it is generally agreed that RCA data provides acceptable information on trends and concentrations of empty dwellings and their geographic distribution.

The table below shows the trend pattern for the number of private sector vacant dwellings between 1999 and 2003 across the Council areas in the Belfast Metropolitan Area. The September 2003 figure is the total number of vacant dwellings across all house tenures. The Housing Executive void dwelling figures are highlighted in brackets. In September 2003 the overall rate of vacant dwellings for the Belfast Metropolitan Area has been estimated at 5.2% and is below the 6.5% figure assessed for the Province as a whole. It should be noted that the trends show increasing private sector vacancy levels over the five year period for all Council areas, apart from Carrickfergus Borough, which reached a peak in 2001.

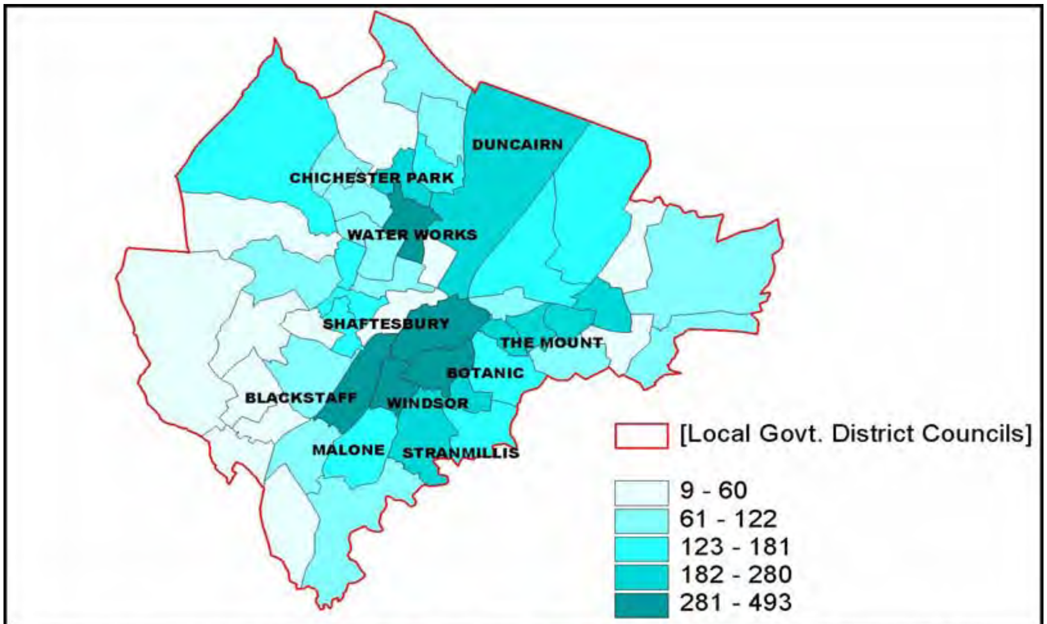
Table 67 Empty Properties 1999 – 2003

Council	1999	2000	2001	2002	Sept 03	(inc HE Voids)	% Tot H'hlds 2003
Belfast	6,186	6,943	5,314	7,063	8,261	(656)	6.9%
Castlereagh	518	667	602	550	706	(90)	2.6%
Carrickfergus	555	588	725	475	671	(91)	4.3%
Lisburn	1,223	1,406	1,240	1,281	1,778	(223)	4.3%
Newtownabbey	794	1,052	788	787	1,172	(226)	3.6%
North Down	1,149	1,319	1,178	1,137	1,478	(147)	4.6%
BMAP Total	10,425	11,975	9,847	11,293	14,066	(1433)	5.2%



Private Sector Empty Dwellings by Ward for the Belfast Metropolitan Area (2003)

Belfast City



Private Sector Empty Dwellings by Ward for Belfast City (2003)

In September 2003 Belfast City exhibited the highest number of vacant properties (8,261) compared to other Council's in Northern Ireland. The percentage of vacant properties against the total housing stock (6.9%) showed it to be slightly above the Province average (6.5%) and above the target figure set by the Regional Development Strategy (4.5%). Belfast City also recorded the highest level of Housing Executive void dwellings in the BMA (656) compared with the five other council areas.

Approximately two thirds of Housing Executive empty dwellings are located in the North Belfast / Shankill sectors (65%). Many of these dwellings are classified 'long term' vacancies located at interface areas or are sited in estates with 'difficult to let' issues. The Housing Executive is and has been working extensively with local community and resident groups and the statutory and voluntary sectors toward creating solutions to the problem of empty dwellings created by years of sectarian strife.

There are further concentrations of empty Housing Executive dwellings located in the Lower Newtownards Road and Donegall Road which are being held pending major repair/improvement work.

There are a number of wards showing a high percent of private sector vacant properties to total household stock. These are as follows:

Table 68 Private Sector Empty Dwellings – Belfast

Ward	Number Void	% of Total Hhld Stock	% Priv Rented Stock of Total Hhld Stock
Botanic	493	12.3%	53.7%
Chichester	204	9.6%	12.6%
Duncairn	199	9.2%	8.1%
Malone	220	9.7%	13.8%
Shaftsbury	380	11.7%	9.2%
Stranmillis	230	9.2%	21.5%
The Mount	285	12%	18.5%
Waterworks	305	15%	18.0%
Windsor	482	13.6%	46.1%

An analysis of the private sector vacant dwellings is difficult to assess given the limited of attribute data. However, it is noted that apart from Duncairn and Shaftsbury, the remaining wards, mentioned above sited north and south of the City centre have some of the highest levels of private rented accommodation in Belfast. This pattern would conform to the view that Private Rented housing is more flexible in that it caters for those seeking short term accommodation and is therefore likely to undergo more periods of vacancy compared to other tenures. Nevertheless these wards are popular with tenants and it is assessed the vacancy levels are short term due to normal turnover as opposed to vacant dwellings of a long-term nature.

Duncairn ward has witnessed high levels of unfit and vacant dwellings for some time. Sectarian strife and out migration has resulted in urban decline at Gainsborough and Mountcollyer housing areas. The Housing Executive has carried out an Urban Renewal Assessment for both Gaiinsborough and Mountcollyer and has approved funding of approximately £25m to provide for the removal of unfit properties replacing them with much needed attractive new properties on a mixed tenure basis. Building work on the physical renewal of Gainsborough and Mountcollyer is currently underway.

Lisburn City

Private Sector Empty Dwellings by Ward for Lisburn City (2003)

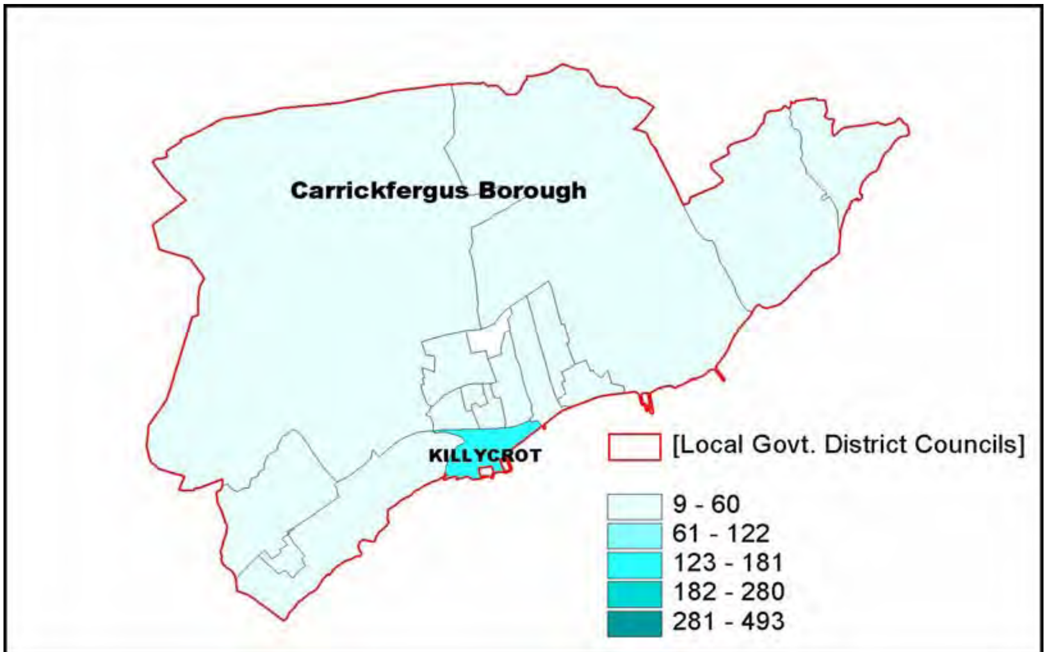
Lisburn Borough displays the second highest number of vacant properties (1,778) compared to other Council's in the Belfast Metropolitan Area but a relatively low percentage of vacant properties against the total stock (4.3%). This figure is below the province average of 6.5% and the target rate of 4.5% set by the Regional Development Strategy.

Glenavy is the only ward showing significant levels of private sector empty properties in the Lisburn City Council area. There were 109 dwellings (7.8%) recorded as vacant.

There are over two hundred Housing Executive void dwellings in Lisburn City, the majority of which are located at Old Warren Estate. This area has received substantial investment to the physical fabric of the dwellings and the vacant properties have either been earmarked for major improvement work or are being held for decanting purposes.

Most of the empty dwellings in Lisburn City Centre Local Housing Area (49) and Seymour Hill (40) are also classified vacant for decanting or improvement work. Five of the 19 vacant properties at Greenwood Local Housing Area have been approved for demolition.

Carrickfergus Borough



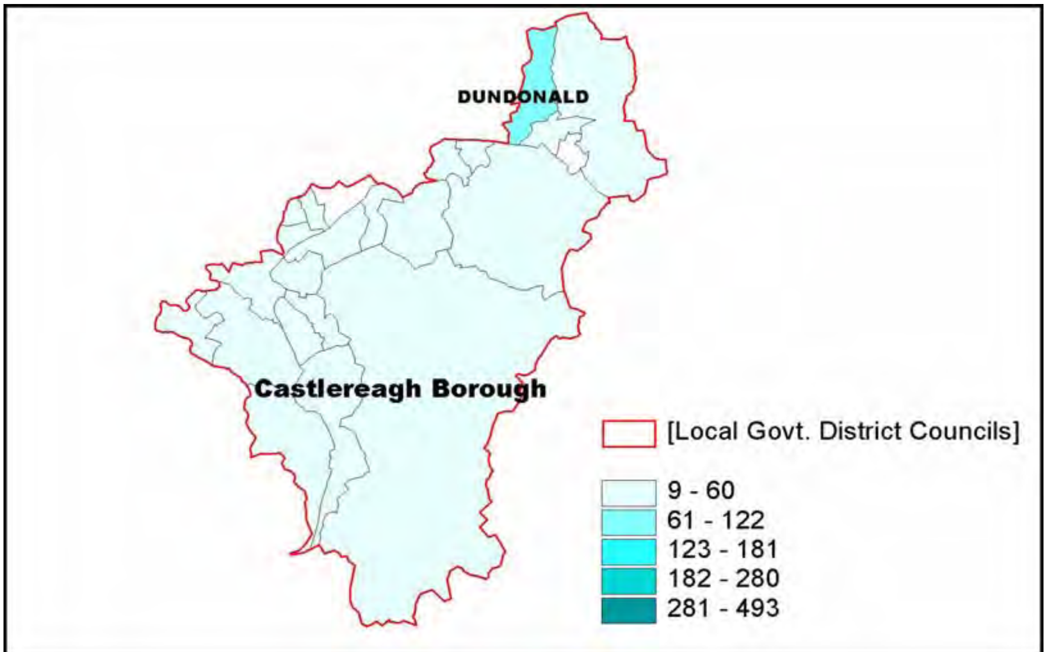
Private Sector Empty Dwellings by Ward for Carrickfergus Borough (2003)

Carrickfergus Borough records the same percentage of vacant stock against the total housing stock (4.3) as Lisburn City. Like Lisburn City this figure is below the province average of 6.5% and the target rate of 4.5% set by the Regional Development Strategy.

Killycrot ward showed significant levels of private sector empty properties with 145 dwellings (10.4%) recorded as vacant in September 2003. Killycrot is situated in Carrickfergus Town and includes the Castle and harbour within its boundary. This area includes a number of relatively new apartment blocks at the sea front, many of which are privately rented. Indeed Killycrot has the greatest number of private rented dwellings in the Borough (16%) and may explain the higher than average number of vacant dwellings in the ward.

In September 2003 approximately 90 Housing Executive properties were recorded as empty, being located mostly in the Lower Woodburn, Greenisland and Glenfield Estates. Many of these vacant dwellings are programmed to receive major improvement work as part of regeneration strategies for their areas. There is a small number of dwellings which are difficult to let at Lower Woodburn and Greenisland..

Castlereagh Borough



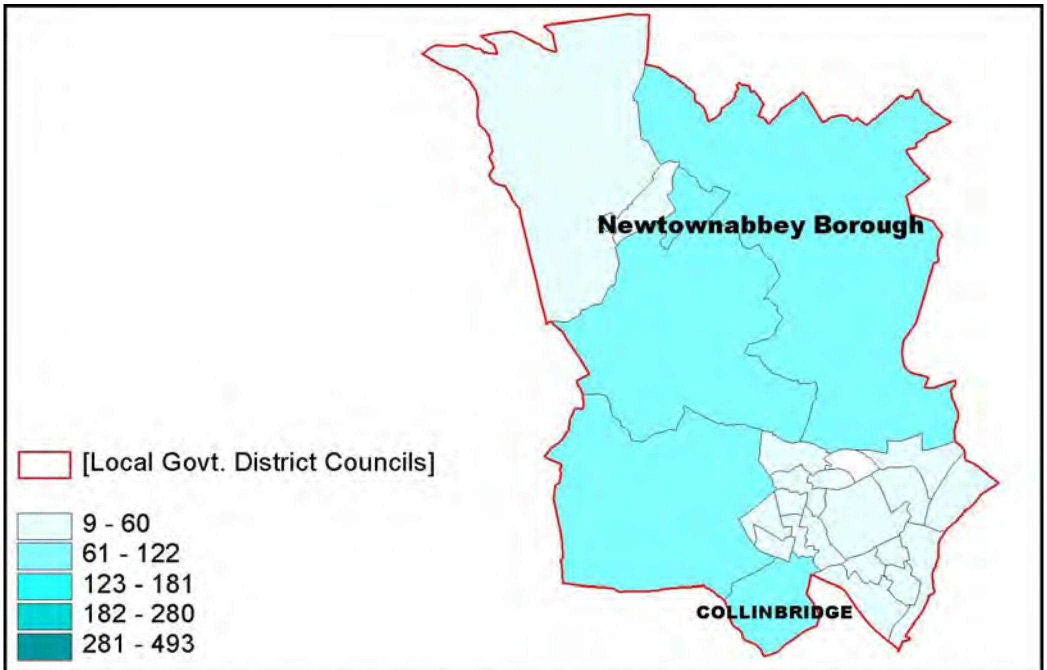
Private Sector Empty Dwellings by Ward for Castlereagh Borough (2003)

Castlereagh Borough records the lowest percentage of vacant stock against the total housing stock (2.6) for the Belfast Metropolitan Area. This figure is below the province average of 6.5% and the target rate of 4.5% set by the Regional Development Strategy.

All wards within the Castlereagh Borough achieve the RDS target rate for empty dwellings.

There were approximately 90 Housing Executive properties recorded as empty in September 2003, being located mostly in the Ballybeen and Belvoir Estates. Twenty seven of the thirty five void dwellings at Ballybeen are classified as 'void for decanting' or 'pending improvement work'. Twenty eight of the thirty voids at Belvoir Estate are located in the high rise flats which are currently undergoing major improvement work.

Newtownabbey Borough



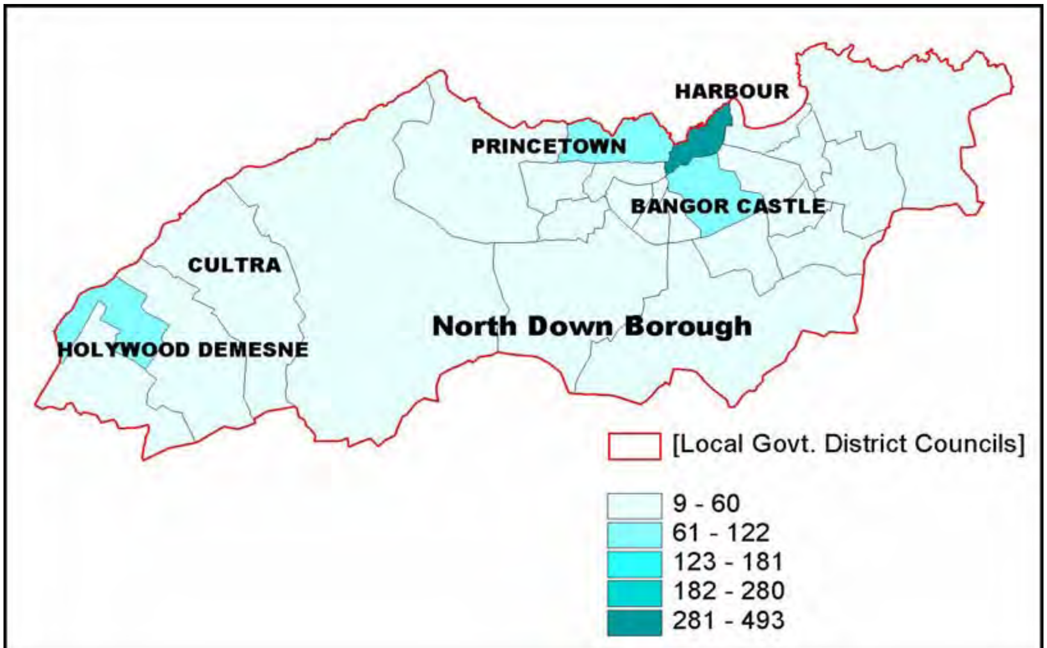
Private Sector Empty Dwellings by Ward for Newtownabbey Borough (2003)

In September 2003 Newtownabbey Borough exhibited the second lowest percentage of vacant properties against total stock (3.6%) for the Belfast Metropolitan Area. The number of vacant properties was recorded at (1,172). This figure is below the province average of 6.5% and the target rate of 4.5% set by the Regional Development Strategy. Newtownabbey Borough recorded the second highest number of Housing Executive void dwellings in the Area (226).

The majority of vacant Housing Executive dwellings are located in Newtownabbey Urban and in particular at Rathcoole/Rathfern, New Mossley and Monkstown. In Rathcoole 60 properties are 'pending improvement's while 40 are due for demolition subject to NIHE Board/DSD approval. A further 26 empty dwellings have been identified for demolition at New Mossley and Ballyclare. The majority of the remaining void properties at New Mossley, Monkstown and Queens Park are being held for decanting and major improvement work as part of the overall renewal strategy for the Newtownabbey Urban area..

Collinbridge is the only ward in the Borough showing significant levels of private sector empty properties, 112 dwellings (10.3%). This area has been and is still undergoing extensive new build housing development at the Hightown Road location. The area is settled with no significant levels of dereliction. It is likely that the high levels of empty dwellings relate to a number of completed new build dwellings awaiting occupation.

North Down Borough



Private Sector Empty Dwellings by Ward for North Down Borough (2003)

In September 2003 the North Down Borough recorded 1,478 empty dwellings and the percentage of vacant stock against the total housing stock as 4.6%. The figure is below the province average of 6.5% and only marginally above the target rate of 4.5% set by the Regional Development Strategy.

The Harbour ward situated in Bangor Town centre, displays significant levels of empty properties 292 (18.6%). The North Down Borough Council, in partnership with others, have plans for substantial regeneration of Bangor seafront at the Queen's Parade/Main Street area. This will incorporate a mix of retail, residential and leisure facilities and will extend the retail sector of Bangor Town. In anticipation of this development many properties in the area have become vacant and are 'blocked up'.

The Harbour ward also contains the greatest percentage of private rented accommodation (30%) in the Borough. The associated higher than average turnover of stock in this tenure may give further explanation for the higher than average number of private sector vacant dwellings at this location.

There are 147 vacant Housing Executive dwellings. Forty five are located in Holywood where they are classified as vacant for decanting purposes or pending major improvement work. Of the 52 empty dwellings at Rathgill Estate Bangor, 20 have since been approved for demolition. The remainder are subject to improvement work as part of a regeneration strategy for the area.

Conclusion

In summary, it is noted that the private sector vacancy rates for the Belfast Metropolitan Area have fluctuated between 9,800 and 12,600 over the five year period from 1999 to 2003. All of the Council areas, with the exception of Belfast City, record vacancy levels below the Northern Ireland average and the target set by the Regional Development Strategy.

The number of private sector vacancies was increasing in all Council areas at September 2003. There is a consistent geographical association in the location of vacant dwellings and the greatest concentrations of private rented housing, particularly in Belfast City. It is anticipated that the introduction of the Statutory Registration Scheme for Houses in Multiple Occupation in May 2004 will help improve housing conditions and reduce vacancies.

In addition, Housing Executive empty properties continue to be addressed through regeneration strategies, improvement work and low level demolition to reconcile social housing demand and supply in particular locations.

10.0 PRIVATE RENTED HOUSING

BMAP PRIVATE RENTED SECTOR

General

This sector now accounts for 7.6% of the total housing stock within Northern Ireland and plays a vital role within the overall housing market. It makes a significant contribution to meeting housing need and the rising demand from the social housing waiting list.

The Housing Executive now has responsibility for maintaining the Rent Register and we will be contributing to a review of the private rented sector legislation, currently being undertaken by the Department for Social Development.

In April 2004 the Housing Executive published a joint strategy with DSD for managing our relationships with the private rented sector. The aim of the strategy is to promote a healthy private rented sector, which offers choice and flexibility. This will be achieved by influencing supply and securing a better quality, better managed sector. After consultation a final strategy and implementation plan for effectively influencing the private rented sector will be prepared.

Within the BMAP area, all but one of the council areas experienced increases in the number of households living in the private rented sector in the period 1991 to 2001. The exception was Lisburn which saw a decline of -24% (see table below).

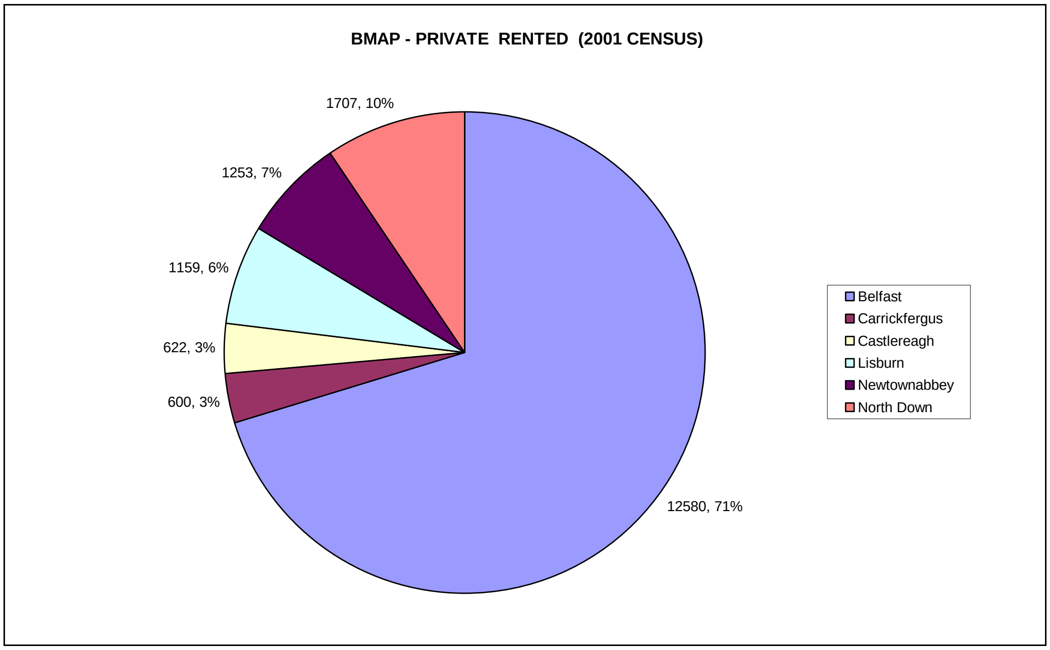
Table 69 Private Rented – BMAP

COUNCIL AREA	1991 H'holds	1991 PVT RENTED	%		2001 H'holds	2002 PVT RENTED	%	% Inter-census Change
Belfast	105,953	8,524	8.05		113,934	12,580	11.04	47.58
Carrickfergus	11,814	419	3.55		14,785	600	4.06	43.20
Castlereagh	22,816	472	2.07		26,887	622	2.31	31.78
Lisburn	33,105	1,528	4.62		39,862	1,159	2.91	-24.15
Newtownabbey	26,325	1,023	3.89		31,302	1,253	4.00	22.48
North Down	26,535	1,388	5.23		30,888	1,707	5.53	22.98
Total H'holds	**226,548**	**13,354**			**257,658**	**17,921**		**34.20**

By far the largest percentage (70%) of households, living in the private rented sector, are doing so within Belfast City Council area. The 1991 Census records that Belfast Area had 9,528 privately rented dwellings representing 8% of the total housing stock. By 2001 this had increased to 12,578 dwellings, 11% of the housing stock.

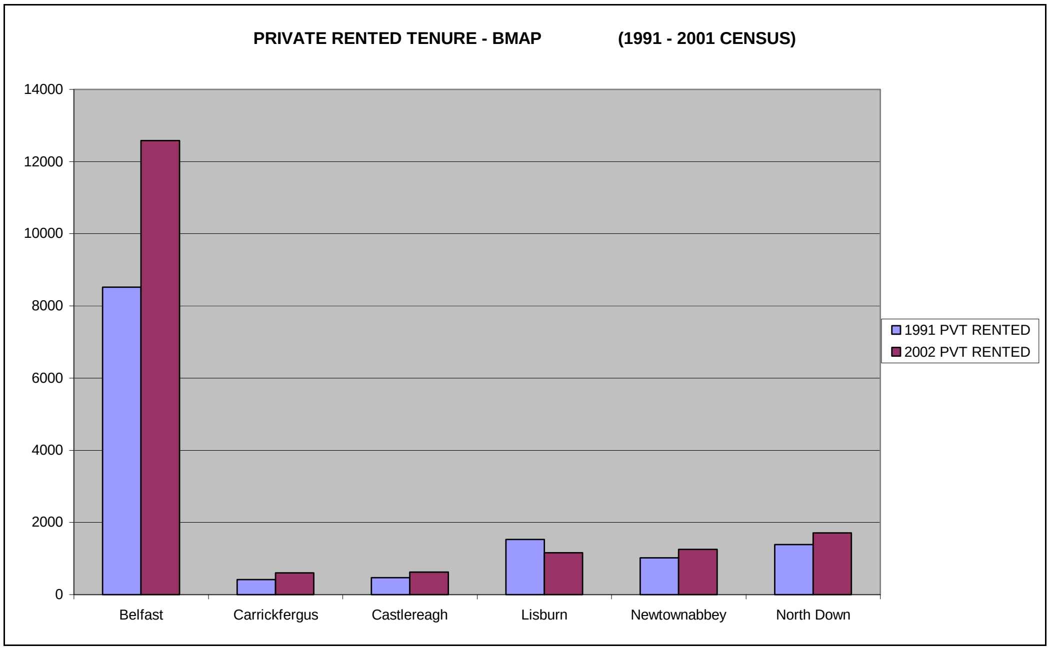
The chart below clearly illustrates the dominance of Belfast in relation to the other council areas in respect of the incidence of private renting.

Chart 7 Private Rented

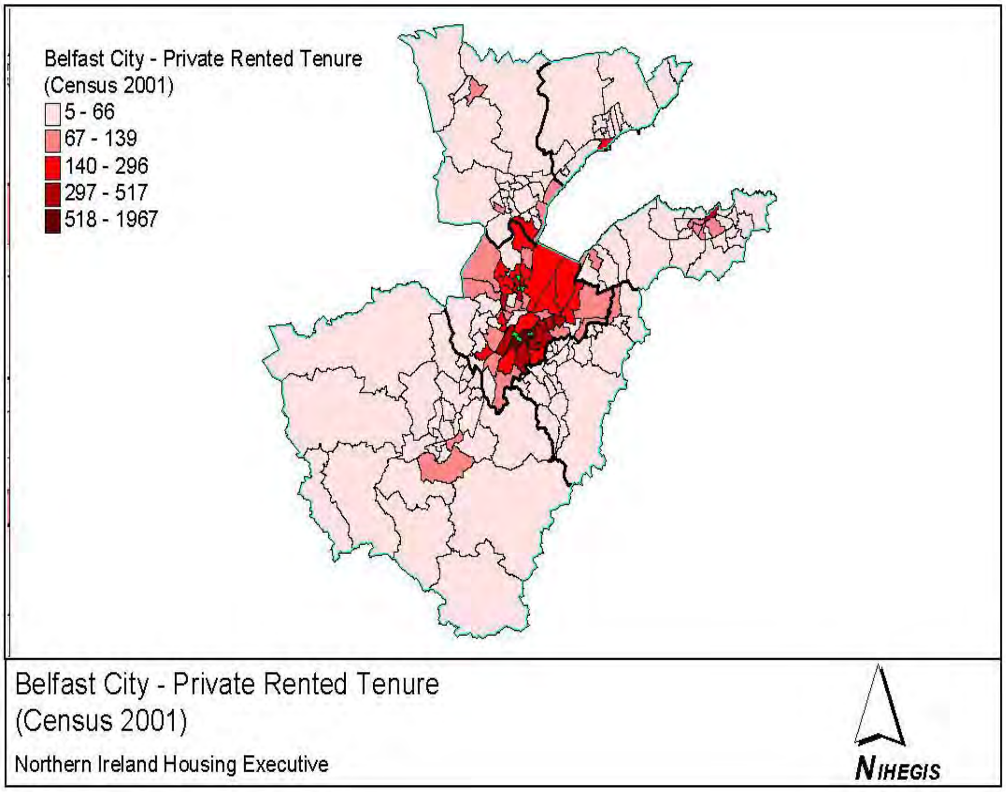


Belfast has also experienced the highest inter-census increase of 47.58%.

Chart 8 Tenure x District



Using the data on tenure from the 2001 census it is possible to plot the incidence of private renting by ward. The map below clearly shows the concentration of private rented accommodation within Belfast. Outside Belfast there are also significant concentrations of private rented accommodation in Bangor, Holywood, Lisburn, Jordanstown and Ballyclare.



(The areas highlighted in green are the currently declared HMO Priority Areas; these will be discussed later in this section).

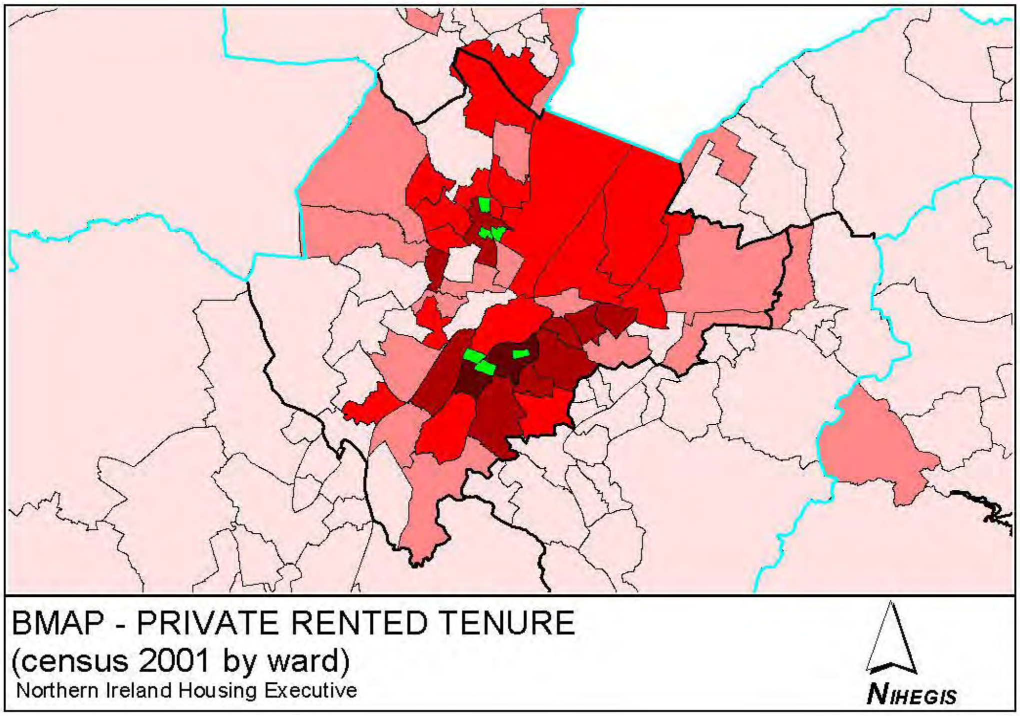
The top ten wards within BMAP with the highest concentrations of private rented accommodation are highlighted in the table below. These wards are located mostly in the south of the city, with some concentrations in east and north Belfast.

Table 70 Private Rented Accomodation

WARD NAME	HOUSEHOLDS	NUMBER PRIVATE RENTED	PERCENTAGE PRIVATE RENTED
Botanic	3,663	1,967	53.70
Windsor	3,147	1,452	46.14
Stranmillis	2,403	517	21.51
Ballynafeigh	2,538	494	19.46
Bloomfield	2,649	463	17.48
Water Works	2,477	446	18.01
Blackstaff	2,036	434	21.32
Woodstock	2,542	415	16.33
The Mount	2,210	410	18.55
Harbour	1,358	400	29.46

Census 2001

The map below displays this information graphically.



Houses in Multiple Occupation (HMOs)

The Housing (NI) Order 2003 took effect on 27th February 2003. Article 144 and Schedule 3 to the Order took effect on 1st January 2004 and contained provision requiring the Housing Executive to prepare a statutory registration scheme for Houses in Multiple Occupation (HMOs). In May 2004 the statutory registration scheme for Houses in Multiple Occupation came into effect.

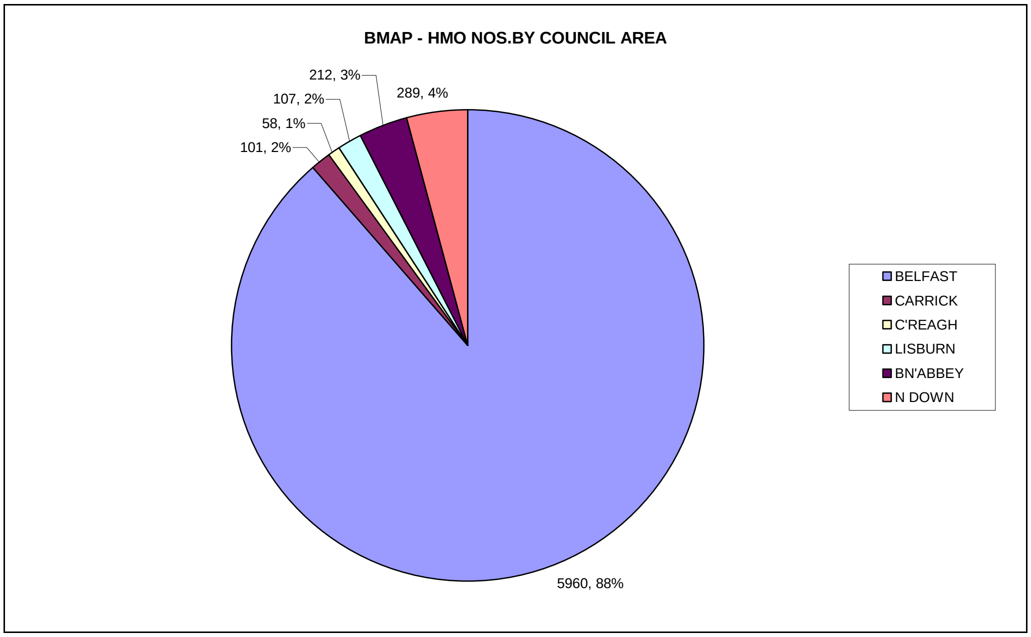
An HMO is "A house occupied by more than 2 qualifying persons, being persons who are not all members of the same family". Such properties form a significant element of the private rented sector.

The total number of HMO's identified within the BMAP area is 6,727 this is followed by Bangor at 289 (see below).

Table 71 HMO's

COUNCIL AREA	HMO NOS.
BELFAST	5,960
CARRICKFERGUS	101
CASTLEREAGH	58
LISBURN	107
NEWTOWNABBEY	212
NORTH DOWN	289
TOTAL	6,727

Chart 10 HMO' Numbers

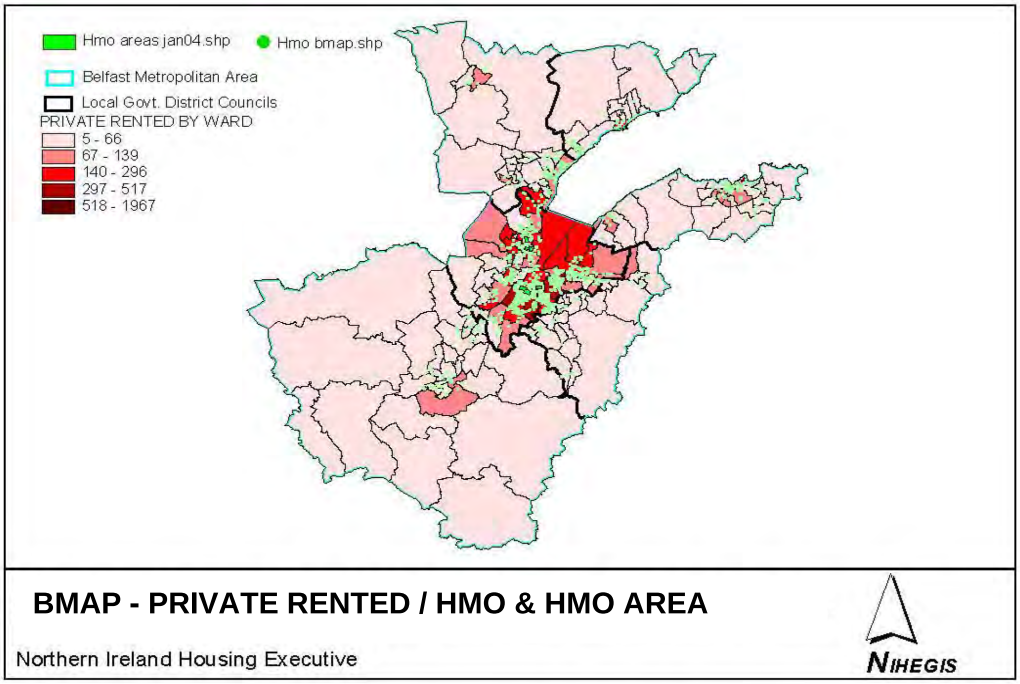


HMO's are concentrated in the south of Belfast City Council area in the same wards as highlighted by the census data. The Housing Executive have declared a number of HMO priority areas which will be tackled using the Housing (NI) Order 2003 legislation. These HMO areas are situated at the following locations and are shown in the map below:

Table 72 HMO Locations

1) Kansas/Marsden	Belfast
2) Ulsterville Ave	Belfast
3) Eglantine Avenue	Belfast
4) Fitzroy	Belfast
5) Waterworks 1	Belfast
6) Waterworks 2	Belfast

Data on Houses in Multiple Occupation (HMO's) reflects the same pattern of dispersal as the census data (see below).



Private Sector Housing Benefit Claims

The incidence of private sector Housing Benefit claims also mirrors the tenure patterns already discussed.

The total number of claims for each council area is set out below:

Table 73 Private Housing Benefit

BELFAST	13,074
CARRICKFERGUS	686
CASTLEREAGH	740
LISBURN	1,598
NEWTOWNABBEY	1,383
NORTH DOWN	1,559
TOTAL	**19,040**

HB data (Feb 2003)

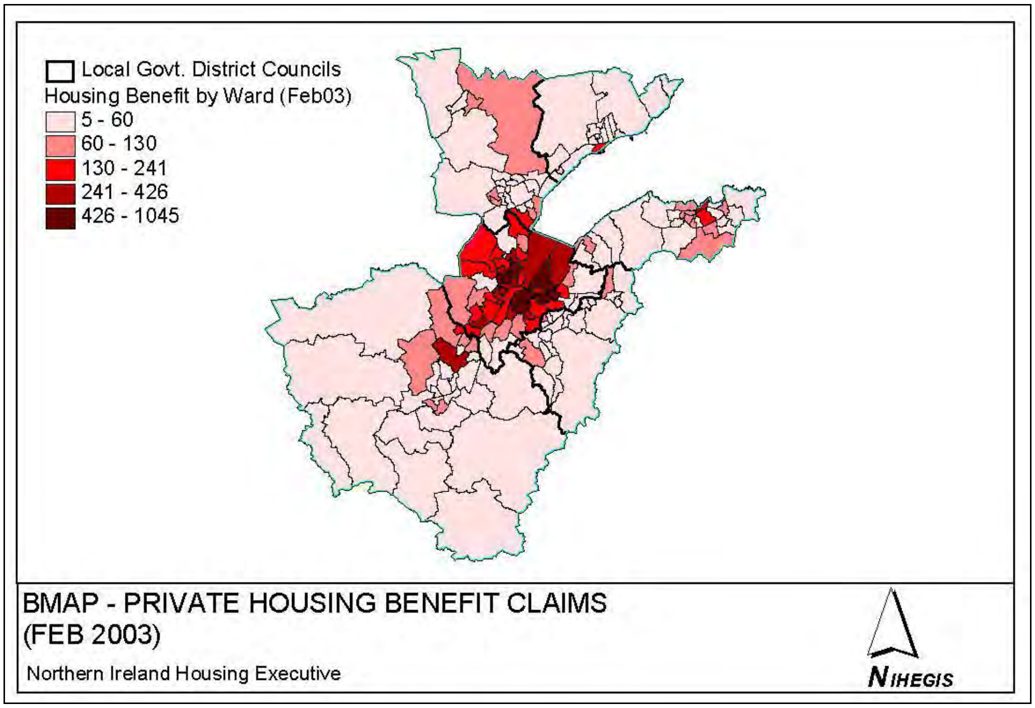
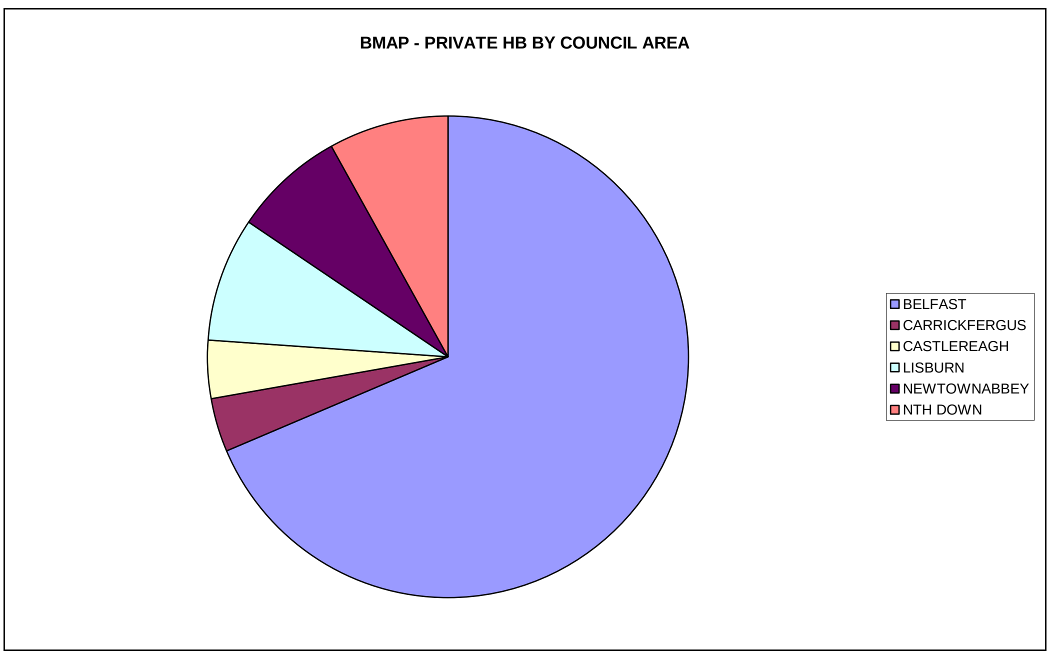


Chart 11 Private HB by Council



Conclusion

The private rented sector in Northern Ireland plays a vital role in the overall housing market and provides accommodation for those who are unable, or would prefer not to, access home ownership or the social rented sector. Although the sector experienced decline through most of the twentieth century, there has been a steady increase since 1991 in the number of dwellings available for private renting and it now makes a significant contribution to meeting housing need and rising demand. The sector is diverse and complex and until recently there had been little research carried out into its position within the housing market.

It has been acknowledged that the legislation governing the sector, the Rent (NI) Order 1978, is cumbersome and outdated. This complex legislation focuses primarily on rent control which is determined by the letting history of the property. As such, it does not focus on unfitness or provide remedies for poorer quality housing in the sector. Initial consultation has demonstrated that there is widespread support for the introduction of a coherent strategic framework for the private rented sector in Northern Ireland.

The Department for Social Development has consulted on proposals for amendments to the legislation pertaining to the sector and the Housing Executive has consulted on proposals for a strategic approach to private renting. Following on from consultation, the Department for Social Development has determined a new legislative structure for the private rented sector which aims to target unfitness and disrepair, reduce inequities between tenure types and simplify, clarify and raise awareness of landlord and tenant obligations. The Housing Executive has also developed a strategy which will introduce practical and achievable goals for policy and practice, to improve both the perception and operation of the sector.

Partnership working between a range of government and voluntary agencies will be a key feature of this integrated strategy which has been designed to have a positive impact on the supply, condition and management of the private rented sector.

11.0 STUDENT HOUSING

The University of Ulster at Jordanstown (UUJ) and Queens University Belfast (QUB) generate the majority of students living within the BMAP area. In addition there are also the teacher training universities at Stranmillis College and St Mary's college which are linked academically to QUB.

11.1 University of Ulster

The UU have several campus locations: Jordanstown and York Street in Belfast; Magee in (London)Derry and the Coleraine campus. The student population totals approximately 23,000, with Belfast accounting for around 15,000.

Jordanstown and York Street are within the BMAP area. In Jordanstown the university corporate plan indicates that there is a need to modify the distribution of student places between there and York Street over the plan period. This will involve the reduction of student numbers by 5% at Jordanstown within an overall context of an incremental increase of around 11% within the Greater Belfast area campuses.

The university is reviewing the physical condition and the future of the York Street campus. A number of options for its future are being considered to ensure adequate standards and opportunities for diversification. This will be carried out within the context of it's prime city centre location in an area (the Cathedral Quarter) which has been earmarked for major redevelopment.

The University of Ulster have a number of university owned halls of residence properties (444) within the BMAP area. In addition to the "Halls", a number of head leasing schemes (224 units) have been developed at Glenville and Abbeyville close to the Jordanstown campus in Whiteabbey.

There is no university owned accommodation in Belfast, but a small proportion of students attending York Street campus live at Jordanstown. Others, estimated at approximately 2,500 UU students, choose to live in private rented accommodation mostly in the south of the city.

11.2 Queens University Belfast

In its Corporate Plan 2002 - 2007, QUB state that student numbers at the university currently amount to 18,500 full and part-time students taking under graduate and post graduate courses in 2004. Approximately 85% of degree students come from Northern Ireland with the rest coming from the Republic of Ireland or other countries. The university indicates that student numbers have increased incrementally at around 1% each year from 2002 and that this modest rate of increase should continue to 2006 / 2007. If such an increase is sustained until 2015 student numbers would increase to around 20,500. Not all odf these students would require termtime accommodation. Indeed the universities are noticing an increase in the number of part time students.

QUB own property primarily located in south Belfast. There are five major university sites: University Road, Stranmillis Road, the Royal Hospital, the City Hospital and the sports complexes on the River Lagan and at Upper Malone. The University is undertaking a remodelling of the Queen's Elms Halls of Residence to create a new Student Village.

The QUB student accommodation is dispersed between halls of residence and individually owned properties as follows:

Table 74 Student Accommodation

QUB Student Accommodation:	Number of Places
Halls of Residence	1,520
QUB Houses	535
Total places in QUB owned property / Halls	2,055

11.3 Teacher Training Colleges

Stranmillis University College is located on the Stranmillis Road in Belfast. It provides just over 400 units in halls of residence with self catering accommodation for a further 360 students in the adjacent "Refectory" building. St Mary's University College is situated on the Falls Road in West Belfast. It has no university owned accommodation and students rely on the private rented sector.

11.4 Student Numbers and Term-time Accommodation

Detailed data sourced directly from the universities is not currently available to the Housing Executive. However, using data sourced from the Higher Education Statistical Agency (HESA), the accepted reporting agency for higher education establishments, indicates the following student numbers for each of the universities within the BMAP area in 2002/03.

Table 75 Term Time Accommodation

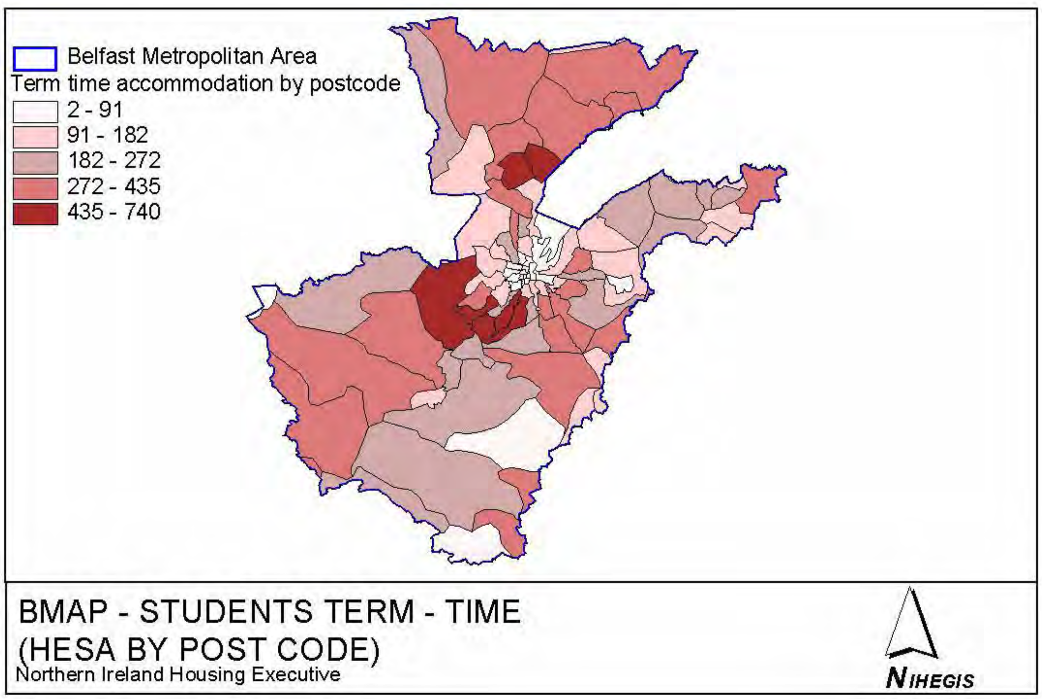
UNIVERSITY	TERM TIME ACCOMODATION TYPE	NUMBER	Percentage
U/Ulster	University maintained	887	(6%)
	Parent / Guardian	3,920	(25%)
	Own Home (inc private rented)	2,481	(16%)
	Not known / applicable / other	8,337	(53%)
	Total	**15,625**	**(38%)**
QUB	University maintained	1,890	(8%)
	Parent / Guardian	4,111	(18%)
	Own Home (inc private rented)	7,356	(32%)
	Not known / applicable / other	9,617	(42%)
	Total	**22,974**	**(56%)**
Teacher Training Colleges	University maintained	339	(14%)
	Parent / Guardian	415	(16%)
	Own Home (inc private rented)	1,165	(46%)
	Not known / applicable / other	607	(24%)
	Total	**2,526**	**(6%)**
BMAP	**TOTAL STUDENTS**	**41,125**	

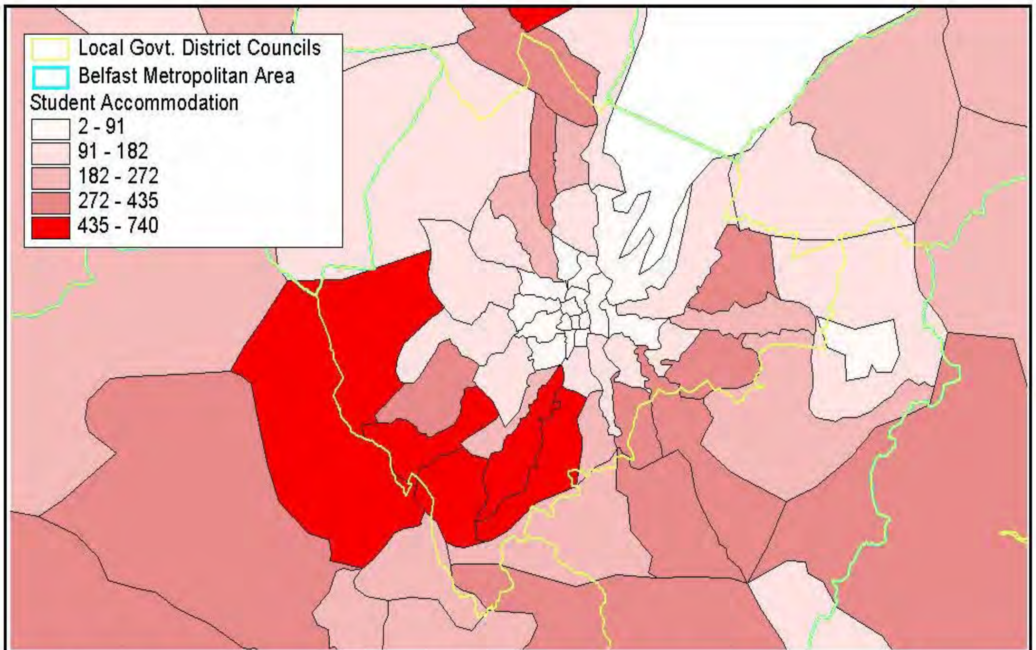
Source HESA 2002/03

Although not all term-time addresses are given, the data suggests that students attending QUB are more likely to live in their own home or in university maintained accommodation (40%) than their University of Ulster counterparts (32%). The percentage of UU students living at parents or guardian home is correspondingly higher (25%). Within the Teacher Training Colleges 60% of students live in their own home or university owned accommodation.

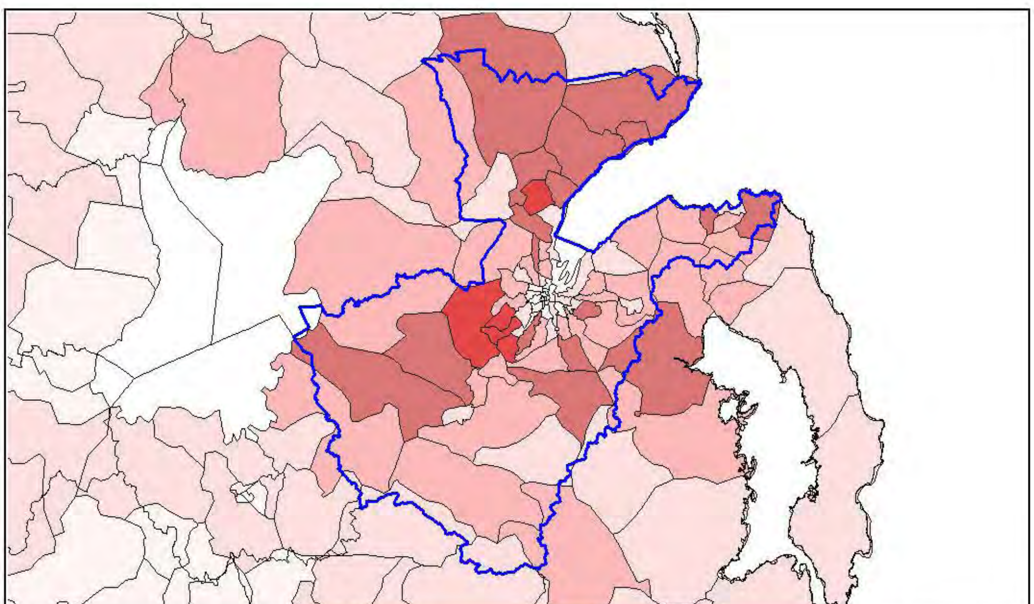
Discounting those numbers (18,561) of students with no term-time address given, 11,002 (49%) of total students live in their own accommodation which includes private renting. 3,116 (14%) live in university owned / managed accommodation. Those students living with parents total 8,446 (37%). The universities have indicated that increasing numbers of students are living with parents and / or taking part-time courses and therefore do not require accommodation close to the campuses. It is believed that this trend may increase if "top-up" fees are introduced to Northern Ireland.

Using data from HESA it is possible to map the term time addresses of students attending Higher Education establishments in BMAP. The map below shows the total numbers of students attending university by their term time location for the year 2002/03.





BMAP - STUDENTS TERM-TIME BELFAST CITY COUNCIL (HESA)
Northern Ireland Housing Executive
NIHEGIS



BMAP - Students living with
Parent / Guardian (HESA 2002/03)
Northern Ireland Housing Executive
NIHEGIS

From both maps it is apparent that the concentrations of students living within the BMAP area during term-time do so predominantly in south and west Belfast and at Jordanstown. The maps also indicate that the areas in close proximity to the campuses at Jordanstown and QUB have the highest populations of students living in their own accommodation. The wards with high concentrations of students correlate closely with the incidence of vacant property highlighted in the Empty Home section, table 67. Significant numbers of students however live with parents in those areas on the periphery of the city, in particular west Belfast, Lisburn, Carryduff and Newtownabbey.

Summary

The concentrations of students living in their own homes are in the immediate areas close to the university campuses (Jordanstown and the "Holyland" / South Belfast). There have been issues concerning loss of traditional communities. Additionally the impact of anti social behaviour involving student lifestyles is an issue for local residents and the universities actively seek to resolve.

The private rented market is currently meeting the demand from students by utilising larger houses in multiple occupation (HMO). In using such properties landlords can house larger numbers of students sharing facilities and in turn obtain a high enough rental income to provide an adequate return for their investment.

The universities have suggested that the number of part-time students has been increasing and that more students are living at the parental home and travelling as the most economic solution. This coupled with the recently implemented HMO legislation requiring compulsory registration by landlords and consequently compliance with physical and management standards is likely to mean that there will be no significant increase in student numbers living in their own accommodation. Indeed such factors may mean a reduction. The private rented sector will in such circumstances have to seek alternative markets. This in turn may lead to increases in vacant stock within the private rented sector.

12.0 AFFORDABILITY

12.1 Research on Affordability

In the late 1990s a combination of greater political stability and economic growth in Northern Ireland resulted in substantial rises in house prices. Between 1995 and 2000 the average house price for Northern Ireland rose from £47,661 to £82,816 (an increase of 74%). In the BMA the average price of a dwelling increased by 90% and in the four sectors of Belfast (North, South, East and West) prices increased by over 100%. The highest rate of increase was recorded in East Belfast (142%). Earnings on the other hand rose only 20% over this five year period.

It was against this background that in October 2000 the Housing Executive, in partnership with the Council of Mortgage Lenders, commissioned a study entitled "Affordable Housing in the Private Sector in Northern Ireland". The research was undertaken by the Universities of Ulster and Birmingham.

The key finding of this research which was published in 2001 was that at that time affordability was not an immediate or widespread problem, due primarily to the low interest rate environment, but also to the availability of a more flexible range of mortgage products. These factors combined to ensure that debt servicing costs generally remained at manageable levels. However, the researchers indicated that already in 2001 affordability was an emerging problem for first time buyers, particularly in Belfast and its commuter belt. The researchers warned that a rise in interest rates of even 1 – 2% could pose major difficulties, notably for first time buyers and recommended that the Housing Executive in its role as the regional strategic housing authority tracked affordability. This research bears out other indications of a growing affordability problem produced by the Council of Mortgage Lenders. In 1995 Northern Ireland's house price to income ratio was 2.54 whereas in 2002 the figure was 3.33. More recently in 2001, 59% of house sales went to first time buyers in Northern Ireland but by 2003 this had fallen to 38%.

12.2 Modelling Affordability

In response to this the Housing Executive asked the researchers to develop a working model for monitoring and maintaining an awareness of affordability issues in Northern Ireland. They emphasised the importance of simplicity with a model based on a limited number of variables that are easily obtainable on a regular basis and are defensible. The researchers confirm that there is no single "correct" measure of affordability and the model developed is designed to establish a baseline of affordability indicators based on key variables: house prices, incomes and interest rates, which will monitor

1. changes over time
2. differences between district councils and the four sectors of Belfast.

The model recognises that as data sources and quality improve (in relation to prices and incomes) the model can be applied at a lower level and the Housing Executive is proposing to carry out some preliminary analysis on this in relation to "hot spots".

The actual affordability model uses a typical Building Society annuity formula to calculate the <u>maximum price</u> a household with a <u>median household income</u> can afford to pay, assuming a <u>typical interest rate</u> (5.75% 2001-2003), a <u>95% mortgage</u>

(loan to value ratio) and a 25 year repayment period. 30% of household income is considered the maximum reasonable proportion of income which can be used to service mortgage payments. This figure is compared with what is considered to be a typical affordable house: a house priced at the upper boundary of the first quartile of house prices (25th percentile) in that district or sector (i.e., low cost home ownership).

There was considerable consultation on the actual values picked and while there was no universal agreement (for example, on the 30% of household income being the most appropriate measure) there was general confidence in the principles and methodology expressed by lenders, developers, planners, elected representatives and other key players in the housing market. It is important to reiterate therefore that the model established a 2001 baseline to measure change over time and geographically rather than attempting to provide an absolute measure of affordability.

12.3 Affordability in Northern Ireland

The average house price for Northern Ireland as a whole rose by nearly 20% between 2001 and 2003, from £86,754 to £103,719, however household incomes also rose by an estimated 18% indicating that the overall position did not change significantly. The analysis below however, shows that the overall picture conceals a different pattern at district council level.

Tables 76 and 77 show the model applied for 2001 and 2003 for each District Council in Northern Ireland and for each of the four sectors of Belfast.

Comparison of these figures shows a number of key points.

1. A significant increase in affordability problems in some areas of Northern Ireland between 2001 and 2003. In 2001 12 district councils had an affordability gap. By 2003 there were still only 12 but the affordability gap (column 5), (the difference between the affordable price band on median household income and the price of a typical affordable dwelling (25th percentile)) had grown in 8 of these district councils – often by a substantial amount. In addition Craigavon developed a significant affordability gap by 2003.

2. This pattern is confirmed by examining the percentage affordable (column 6) (the proportion of dwellings considered affordable i.e., at below the affordable price – column 4). In Northern Ireland the district council average for the percentage affordable declined a little – from 30% to 29% between 2001 and 2003. However in 2001 only 2 districts had less than 10% of dwellings, by 2003 there were 5.

3. The geographical pattern confirms the view that affordability issues are concentrated in Belfast and surrounding areas and in some remoter rural districts: Magherafelt, Cookstown, Moyle and Fermanagh, Lisburn and Antrim. There are considered to be two factors in this (a) proximity to good roads leading to Belfast or (b) construction of second homes in remoter rural areas.

12.4 Affordability in the Belfast Metropolitan Area

The affordability model would indicate the following pattern of affordability for the BMAP area (see table 78). Housing became less affordable in four out of six district council areas (Carrickfergus, Castlereagh, Lisburn and Newtownabbey). However, in only two of these are there signs of a more serious affordability problem: in Castlereagh where the affordability gap jumped from -£3,797 in 2001 to -£8,620 in 2003 and the proportion of affordable dwellings fell from 23% to 17% and in particular in Lisburn where the affordability gap grew from -£13,712 (2001) to -£15,250 (2003) and the proportion of affordable dwellings remained very low (8% in 2003).

In the other two district councils (Carrickfergus, Newtownabbey) the model indicates that there is no affordability problem. In Carrickfergus in 2003 the median household income could support a dwelling price of £15,380 in excess of what was required to buy an affordable home. Indeed 50% of all dwellings sold in Carrickfergus Borough were below the affordable price of £86,380. Similarly in Newtownabbey in 2003 median household income was £21,280 more than required to purchase an affordable home and 60% of dwellings were priced below the affordable price of £86,380.

Within Belfast the analysis shows that in North Belfast affordability became a much more serious problem. The “affordability gap” by 2003 had increased by a further £4,100 to become -£11,044 although 13 % of dwellings were affordable in both 2001 and 2003. This development reflects the particularly low average price of dwellings in North Belfast in 2001 and the relatively rapid increase in the prices of dwellings in this two year period. The price of the 25th percentile grew by 25% in North Belfast, more than double the figure for South Belfast – 12%. In West Belfast and East Belfast the comparable figures were 8% in both cases.

In South Belfast, traditionally the least affordable area of Belfast, the affordability gap grew a little to £30,550 in 2003 and only 4% of dwellings were affordable to a household with median income.

In West and East Belfast the affordability gaps actually reduced between 2001 and 2003 at -£5,550 and -£8,288 respectively. In both sectors 15% of houses were considered affordable in 2003.

Conclusion

For Northern Ireland as a whole the emerging picture of affordability 2001-03 is one of a very marginal increase overall, but this disguises contrasting sub regional trends. In geographical terms the problem does not seem to have widened significantly – it tends to be focussed in the same areas in and around Belfast and areas with concentrations of second homes – and it is in these areas where the problem has deepened. In the Belfast Metropolitan Area the picture is also mixed with affordability problems in Belfast, Castlereagh and Lisburn but no sign of a real issue in Carrickfergus, Newtownabbey or North Down.

It is significant to remember however that the 2003 figures do not take account of the 1.25% increase in base rates introduced by the Bank of England since Autumn 2003. There is no doubt that as prices have continued to rise (10% in the year to June 2003) this will exacerbate the affordability gap in Northern Ireland.

Table 76: Affordability by District Council 2001

District Council	Median Income £	Price (25th percentile) £	Affordable Price £	Affordability Gap £	% Affordable
Derry	12,500	55,000	52,288	-2,712	22
Limavady	12,500	54,000	52,288	-1712	20
Coleraine	17,500	53,000	73,203	20,203	49
Ballymoney	12,500	49,500	52,288	2,788	41
Moyle	12,500	56,000	52,288	-3,712	10
Larne	12,500	40,000	52,288	12,288	41
Ballymena	12,500	52,000	52,288	288	25
Magherafelt	12,500	59,500	52,288	-7,212	15
Cookstown	12,500	59,000	52,288	-6,712	15
Strabane	12,500	37,000	52,288	15,288	42
Omagh	17,500	48,000	73,203	25,203	63
Fermanagh	12,500	58,000	52,288	-5,712	16
Dungannon	17,500	45,000	73,203	28,203	60
Craigavon	12,500	41,500	52,288	10,788	37
Armagh	12,500	54,950	52,288	-2,662	24
Newry and Mourne	12,500	73,000	52,288	-20,712	7
Banbridge	17,500	70,000	73,203	3,203	31
Down	17,500	66,000	73,203	7,203	37
Lisburn	12,500	66,000	52,288	-13,712	7
Antrim	12,500	61,250	52,288	-8,962	13
Newtownabbey	17,500	50,500	73,203	22,703	54
Carrickfergus	17,500	55,000	73,203	18,203	50
North Down	17,500	71,000	73,203	2,203	28
Ards	17,500	68,500	73,203	4,703	31
Castlereagh	17,500	77,000	73,203	-3,797	23
Belfast	12,500	61,950	52,288	-9,662	15
North Belfast	8,500	42,500	35,556	-6,944	13
West Belfast	12,500	62,500	52,288	-10,212	12
East Belfast	12,500	64,950	52,288	-12,662	9
South Belfast	12,500	82,250	52,288	-29,962	3

NOTES

Median Income District Council baseline is drawn from the 2001 HCS – banded figures for household income (HoH and partner where applicable). Actual figure is midpoint of median band for each district.

Price (25^{th} percentile) District Council figure for 2001 as a whole from UUJ Survey – 25^{th} percentile (upper boundary quartile 1)

Affordable Price Using annuity formula – what price of house can a household afford to buy

Affordability Gap Measures income gap between Affordable Price and House Price (Q1)

% Affordable Proportion of housing stock in district sold at below affordable price during 2001

Table 77: Affordability by District Council 2003

District Council	Median Income £	Price (25th percentile) £	Affordable price £	Affordability Gap £	% Affordable
Derry	14,750	68,000	61,700	-6,300	19
Limavady	14,750	60,750	61,700	950	26
Coleraine	20,650	80,000	86,380	6,380	34
Ballymoney	14,750	60,000	61,700	1,700	31
Moyle	14,750	80,000	61,700	-18,300	7
Larne	14,750	46,500	61,700	15,200	41
Ballymena	14,750	60,000	61,700	1,700	28
Magherafelt	14,750	79,950	61,700	-18,250	9
Cookstown	14,750	78,750	61,700	-17,050	10
Strabane	14,750	43,000	61,700	18,700	69
Omagh	20,650	56,000	86,380	30,380	55
Fermanagh	14,750	75,000	61,700	-13,300	9
Dungannon	20,650	60,000	86,380	26,380	70
Craigavon	14,750	69,250	61,700	-7,550	16
Armagh	14,750	62,088	61,700	-388	25
Newry and Mourne	14,750	72,750	61,700	-11,050	14
Banbridge	20,650	77,625	86,380	8,755	39
Down	20,650	84,500	86,380	1,880	28
Lisburn	14,750	76,950	61,700	-15,250	8
Antrim	14,750	90,000	61,700	-28,300	3
Newtownabbey	20,650	65,000	86,380	21,380	60
Carrickfergus	20,650	71,000	86,380	15,380	50
North Down	20,650	80,000	86,380	6,380	32
Ards	20,650	77,975	86,380	8,405	37
Castlereagh	20,650	95,000	86,380	-8,620	17
Belfast	14,750	69,950	61,700	-8,250	16
North Belfast	10,030	53,000	41,956	-11,044	13
West Belfast	14,750	67,250	61,700	-5,550	15
East Belfast	14,750	69,988	61,700	-8,288	15
South Belfast	14,750	92,250	61,700	-30,550	4

Table 78: Affordability Variance for BMA 2001-2003

	2001		2003		2001/2003	
	Affordability Gap £	% Affordable	Affordability Gap £	% Affordable	+/- Affordability Gap £	+/- % Affordable
Belfast	-9,662	15	-8,250	16	↓ 1,412	1
North Belfast	-6,944	13	-11,044	13	↑ 4,100	0
West Belfast	-10,212	12	-5,550	15	↓ 4,662	3
East Belfast	-12,662	9	-8,288	15	↓ 4,374	6
South Belfast	-29,962	3	-30,550	4	↑ 588	1
Carrickfergus	18,203	50	15,380	50	↓ 2,823	0
Castlereagh	-3,797	23	-8,620	17	↑ 4,823	-6
Lisburn	-13,712	7	-15,250	8	↑ 1,538	1
Newtownabbey	22,703	54	21,380	60	↓ 1,323	6
North Down	2,203	28	6,380	32	↓ 4,177	4

Appendices

Appendix 1: Preliminary Reconciliation

The Social New Build programme is a 5 year programme of schemes compiled by the NIHE to target identified social housing need within approved strategic guidelines and budgets. Such schemes are delivered through the Housing Association movement.

The table below shows the reconciliation of those settlements within each Borough/District Council exhibiting projected housing need against programmed new housing schemes and un-programmed need (it should be noted that un-programmed need equates to no of units where sites have yet to be identified) for the period 2003/04-2008/09. The programmed schemes have been divided into 3 categories as follows:

KEY		
	HALO	HOUSING ASSOCIATION LAND OWNED
	LTBT	NIHE LAND TO BE TRANSFERRED
	LTBA	LAND TO BE ACQUIRED

North Belfast Sector

ID No.	Scheme Name	Start Date	Proj. Soc Hsg Need 2003 2010	Land Status	No of Units	Shortfall of land committed for housing v projected need
131	Glenbryn Phase1	2003/04	1,898	HALO	30	0
1275	24 Clifton Crescent, Belfast	2003/04		HALO	1	0
No Map	Antrim Road, Belfast Ph1a	2003/04		HALO	3	0
No Map	Antrim Road, Belfast Ph1b	2003/04		HALO	1	0
No Map	Ardilea Street	2003/04		HALO	4	0
No Map	Ardoyne Acquisitions Phase 2a	2003/04		HALO	3	0
No Map	Ardoyne Acquisitions Phase 2b	2003/04		HALO	5	0
No Map	Ardoyne Acquisitions Phase 2c	2003/04		HALO	2	0
No Map	Ardoyne Acquisitions Phase 3a	2003/04		HALO	2	0
No Map	Ardoyne Acquisitions Phase 3b	2003/04		HALO	4	0
132	Clifton Oldpark Ph 5	2003/04		HALO	26	0
139	Herbert Street	2003/04		HALO	32	0
142	Prospect Park Ph 1a	2003/04		HALO	3	0
142	Prospect Park Ph 1b	2003/04		HALO	6	0
133	Wheatfield Phase2	2003/04		HALO	18	0
129	38 Kansas Avenue	2003/04		HALO	3	0
128	Lime Court	2003/04		HALO	5	0
134	New Lodge HAA Phase 4	2003/04		HALO	21	0
135	Coulters Site	2003/04		HALO	32	0
127	Clifton Courtyard, Belfast	2003/04		HALO	25	0
No Map	Newington Ph 3A	2003/04		HALO	11	0
No Map	Newington Ph 3B	2003/04		HALO	4	0
130	Grove Ph 3 (Petrol Station)	2003/04		HALO	17	0
138	Hicks/Bullick site, Ligoniel	2003/04		HALO	41	0
273	13 York Crescent	2003/04		HALO	1	0
No Map	Ardoyne Acquisitions Phase 3c	2004/05		HALO	2	0
No Map	Ardoyne Acquisitions Phase4a	2004/05		HALO	1	0
No Map	Ardoyne Acquisitions Phase4B	2004/05		HALO	7	0
No Map	Church Grounds, Crumlin Rd	2004/05		HALO	1	0
No Map	Antrim Rd, Ph1D	2004/05		HALO	1	0
136	136 - 138 Antrim Road	2004/05		LTBA	8	8
147	19 Brookhill Avenue	2004/05		LTBA	3	3

ID No.	Scheme Name	Start Date	Proj. Soc Hsg Need 2003 2010	Land Status	No of Units	Shortfall of land committed for housing v projected need
146	2 Brookhill Avenue	2004/05		LTBA	9	9
137	22 Cliftonville Road	2004/05		LTBA	12	12
159	304 Antrim Road	2004/05		LTBA	4	4
274	Clifton Park Avenue	2004/05		LTBA	2	2
174	456 Antrim Road, Milk Board	2004/05		HALO	83	0
No Map	Antrim Road, Belfast Ph1c	2004/05		HALO	1	0
150	Henderson Avenue	2004/05		LTBA	12	12
151	Henry Place, Carlisle House Ph 2	2004/05		HALO	9	0
No Map	N Belfast Acquisitions Ph2	2004/05		LTBA	5	5
148	Woodland Ave	2004/05		LTBA	13	13
156	Gainsborough Phase 1	2004/05		LTBT	26	0
No Map	Newington Acqu Ph 4	2004/05		HALO	9	0
152	Crumlin Road Cloisters	2004/05		HALO	29	0
144	156 Ballysillan Rd,(Ballysillan Bun)	2004/05		LTBA	8	8
155	Torrens Phase 2	2005/06		LTBT	34	0
154	Ardoyne Rd (Egg Box Site) Ph1	2005/06		LTBA	52	52
166	Jamacia Street Phase 1	2005/06		LTBT	30	0
162	Carr's Glen / Sunningdale	2005/06		LTBA	8	8
145	36 Brookhill Avenue	2005/06		LTBA	10	10
163	6 Brookhill Avenue	2005/06		LTBA	3	3
153	Kinnaird Terrace	2005/06		LTBA	8	8
164	Cotton Court	2005/06		HALO	5	0
143	Donegall St, Car Park	2005/06		LTBA	92	92
157	Mountcollyer Phase 1	2005/06		LTBT	35	0
No Map	Newington Ph 5	2005/06		LTBA	15	15
161	Summerhill Court	2005/06		LTBT	9	0
172	Ivan Street	2005/06		HALO	6	0
278	185A – 193 York Road	2005/06		LTBA	5	5
170	233 Whitewell Rd, Belfast	2005/06		LTBT	18	0
178	Alliance Avenue	2006/07		LTBT	3	0
175	Ballybone	2006/07		LTBT	18	0
199	155-167 Antrim Rd / Hallidays Rd.	2006/07		LTBT	10	0
226	Frederick St. Car Park	2006/07		LTBA	30	30
182	Nelson Street	2006/07		LTBA	48	48
271	Sunningdale Gdns InFill	2006/07		LTBA	3	3
158	North Street	2006/07		HALO	15	0
177	St Patricks Primary School	2006/07		LTBT	30	0
183	Talbot Street	2006/07		LTBA	40	40
184	Trinity Street	2006/07		LTBA	16	16
276	Upper Library Street	2006/07		LTBT	15	0
179	Queen Victoria Gdns, Fortwilliam Parade	2006/07		LTBA	15	15
No Map	Newington Ph 6	2006/07		LTBA	15	15
10	Ben Madigan/Bawnmore	2006/07		LTBA	31	31
9	Longlands	2006/07		LTBA	50	50
171	Glenside Ligoniel	2006/07		LTBA	30	30
168	Crumlin Rd, Prospect Ph 2	2007/08		LTBA	65	65
167	Stanhope Drive, Belfast	2007/08		LTBT	3	0
180	Glenbryn Phase 2	2007/08		LTBT	20	0
181	Parkside URA Ph 1	2007/08		LTBA	30	30

ID No.	Scheme Name	Start Date	Proj. Soc Hsg Need 2003 2010	Land Status	No of Units	Shortfall of land committed for housing v projected need
200	Mountcollyer Phase 2	2008/09		LTBT	25	0
176	137-143 York Rd	2008/09		LTBA	4	4
	Un-Programmed Need	N/A		LTBA	507	507
	Reconciliation of projected housing need against land availability for North Belfast		**1,898**		**1,898**	**1,183**

South Belfast Sector

ID No.	Scheme Name	Start Date	Proj. Soc Hsg Need 2003 2010	Land Status	No of Units	Shortfall of land committed for housing v projected need
99	Chinese Elders Ph 3 (McAuley St.)	2003/04	852	HALO	10	0
106	Roden/Beit/R'velt [M]	2004/05		LTBT	26	0
100	140 University Avenue, Ph 1	2004/05		LTBA	14	14
104	North Rugby Club Ph 1	2004/05		LTBA	79	79
190	Gate Lodge, Ormeau Road	2004/05		HALO	1	0
109	Posnett Street	2005/06		LTBT	10	0
192	117 Lisburn Road	2005/06		LTBA	18	18
191	1A Essex St	2005/06		HALO	1	0
194	153 Ormeau Road	2005/06		HALO	3	0
110	Candahar Street	2005/06		LTBA	30	30
126	Gallwally, Upper Ormeau	2005/06		LTBA	31	31
86	Onslow Parade	2005/06		LTBA	17	17
No Map	Donegall/Ebor Ph 1	2006/07		LTBA	25	25
195	161 & 171 Lisburn Rd	2006/07		LTBA	30	30
108	Botanic Link	2006/07		LTBA	70	70
105	Mc Clure Street	2007/08		LTBA	16	16
	Un-Programmed Need	N/A		LTBA	471	471
	Reconciliation of projected housing need against land availability for South Belfast		**852**		**852**	**801**

East Belfast Sector

ID No.	Scheme Name	Start Date	Proj. Soc Hsg Need 2003 2010	Land Status	No of Units	Shortfall of land committed for housing v projected need
83	Connswater Ph 2	2003/04	1,196	HALO	56	0
98	Site:126 Lord Street	2003/04		HALO	6	0
84	44 & 46 Beechfield St. Acquisitions	2003/04		HALO	2	0
87	177-187 Newtownards Road	2004/05		LTBA	9	9
90	6-12 Severn Street	2004/05		HALO	5	0
206	Ardgowan Ph3	2004/05		LTBA	10	10
85	Beechfield Street, Short Strand	2004/05		HALO	11	0
207	51 Connsbrook Avenue	2004/05		HALO	3	0
272	Old School House Site, Tamar St.	2004/05		LTBA	10	10
No Map	Willowfield Avenue	2004/05		LTBA	7	7
No Map	Clandeboye Drive, Belfast	2004/05		LTBA	1	1
277	19-21 Knock Road	2004/05		LTBA	10	10
208	Nevis Avenue, Car Park	2005/06		HALO	2	0
210	Glenluce Walk, Laird House	2005/06		LTBA	30	30
92	Castlereagh Street/Upper Frank Street	2005/06		HALO	8	0
97	Ladas Way, Belfast	2005/06		LTBA	18	18
88	Woodlee/lecumpher	2005/06		LTBT	30	0
91	1 Clara Road	2006/07		LTBA	6	6
96	Sandown Road	2006/07		LTBA	25	25
209	17 Knock Road	2006/07		LTBA	18	18
94	Hosford House, Skianus Ph2	2006/07		HALO	15	0
93	Westbank Palmerston Rd	2007/08		LTBA	6	6
	Un-Programmed Need	N/A		LTBA	908	908
	Reconciliation of projected housing need against land availability for East Belfast		**1,196**		**1,196**	**1,058**

Shankill Sector

ID No.	Scheme Name	Start Date	Proj. Soc Hsg Need 2003 2010	Land Status	No of Units	Shortfall of land committed for housing v projected need
115	Edenderry Phase 3	2003/04	206	HALO	15	0
117	Ainsworth	2004/05		LTBT	32	0
116	236 Cambrai Street.	2004/05		LTBA	12	12
No Map	75 Woodvale Road	2004/05		LTBA	1	1
118	Bray Street	2004/05		LTBT	14	0
No Map	West Woodvale Rehabs	2004/05		LTBT	6	0
114	Tudor Phase 3 (M)	2004/05		LTBA	40	40
119	Blackmountain Bungalows	2004/05		LTBT	8	0
120	Ballygomartin Road, Somerdale, Belfast	2005/06		LTBT	35	0
201	366-372 Shankill Road	2005/06		LTBA	3	3
No Map	Broom Street/Parkview	2005/06		LTBA	6	6
121	119 Forthriver Road	2005/06		HALO	13	0
122	Methodist Church:Tennent Street	2005/06		LTBA	10	10
203	Lawnbrook URA	2006/07		LTBA	25	25
123	Donaldson Crescent/West W'oodvale Area	2006/07		LTBA	6	6
205	Ainsworth Ph2	2007/08		LTBT	32	0
204	Upper Woodvale Road	2007/08		LTBT	10	0
	Reconciliation of projected housing need against land availability for Shankill Sector		**206**		**268**	**103**

West Belfast Sector

	Scheme Name	Start Date	Proj. Soc Hsg Need 2003 2010	Land Status	No of Units	Shortfall of land committed for housing v projected need
52	Old Suffolk Road, Ph 1	2003/04	**2,293**	HALO	81	0
57	23 - 25 College Sq Nth	2003/04		HALO	28	0
53	Corpus Christie Church	2003/04		HALO	21	0
No Map	37 Springbank Close, Poleglass	2003/04		HALO	1	0
36	Bellsteel Road, Poleglass	2003/04		HALO	17	0
39	Cherry Road	2003/04		HALO	15	0
34	Cloona House, Poleglass	2003/04		HALO	86	0
37	Stewartstown Rd Site 1, Belfast.	2003/04		HALO	71	0
38	Summerhill House	2003/04		HALO	17	0
No Map	Twinbrook Existing Satisfactory	2003/04		HALO	3	0
No Map	West Belfast Acq	2003/04		HALO	3	0
No Map	12 Pembrook Manor Poleglass	2004/05		LTBA	1	1
59	Horn Drive Lenadoon	2004/05		LTBT	8	0
58	Rossnareen	2004/05		LTBT	18	0
213	65-67 Falls Road	2004/05		LTBA	9	9
60	Devonshire Tradas	2004/05		LTBT	17	0
69	32 Springfield Road	2004/05		HALO	13	0
54	Blackstaff Mill, Malcolmson Street Ph1	2004/05		LTBA	50	50
70	JP Corrys Ph 1, Springfield Rd	2004/05		HALO	71	0
61	Morning Star, 125 Divis Street	2004/05		HALO	19	0
62	Servia Street	2004/05		LTBT	4	0
64	St. Gall's Primary School Site	2004/05		LTBT	32	0
66	Beechmount Ph 5	2004/05		LTBT	41	0
55	Owenvale Ph 2 (Henry Taggart)	2004/05		HALO	2	0
40	Lagmore Phase 6	2004/05		LTBT	80	0
211	Glenhill Park/Glen Rd	2005/06		LTBA	12	12
265	Old Pumping Station, Stewartstown Road, Poleglass	2005/06		LTBA	12	12
78	Old Suffolk Road	2005/06		LTBA	16	16
74	St Patricks, Monagh Road Ph 1	2005/06		LTBA	25	25
217	Devonshire Tradas Ph2	2005/06		LTBT	20	0
212	Percy Street	2005/06		LTBA	10	10
65	BRO Site Forfar St	2005/06		LTBA	23	23
77	Corrys Ph 2, Springfield Road	2005/06		HALO	51	0
63	St Johns, Springfield Rd	2005/06		LTBT	16	0
214	Malcolmson Street Ph2	2005/06		LTBA	20	20
41	Upper Dunmurry Lane, Phas 1	2005/06		LTBA	90	90
47	Good Shepherd Road, Poleglass	2005/06		LTBA	3	3
46	Jasmine Way, Twinbrook	2005/06		LTBT	15	0
45	Lagmore Dale Ph2	2005/06		LTBA	60	60
42	Upper Dunmurry Lane Ph2	2005/06		LTBA	45	45
76	Westrock Dr / Westrock Gdns	2005/06		LTBA	22	22
72	Hannahstown Ph1	2006/07		LTBT	80	0
216	Suffolk Inn Site	2006/07		LTBA	50	50
218	Conway Street, Ph2	2006/07		LTBT	16	0
219	Corrys Ph 3, Springfield Road	2006/07		HALO	71	0

	Scheme Name	Start Date	Proj. Soc Hsg Need 2003 2010	Land Status	No of Units	Shortfall of land committed for housing v projected need
73	St Galls Ph 2	2006/07		LTBT	13	0
75	St Patricks Monagh Ph 2	2006/07		LTBA	31	31
	Lagmore Grove	2006/07		LTBA	20	20
	Lagmore Phase 7A	2006/07		LTBT	40	0
215	Distillery St	2006/07		LTBA	12	12
220	Whiterock Road	2006/07		LTBA	22	22
221	St Galls Ph 3	2007/08		LTBT	16	0
79	St Patricks Monagh Ph 3	2007/08		LTBA	28	28
	Lagmore Dale 3	2007/08		LTBA	80	80
	Lagmore Phase 7B	2007/08		LTBT	40	0
	Pantridge Road, Poleglass (Marker)	2007/08		LTBA	50	50
222	Hannahstown Ph2	2007/08		LTBT	80	0
223	Hannahstown Ph3	2008/09		LTBT	80	0
	Un-Programmed Need	N/A		LTBA	416	416
	Reconciliation of projected housing need against land availability for West Belfast		**2,293**		**2,293**	**1,107**

Carrickfergus

ID No	District/ Borough	Local Housing Area	Scheme Name	Start Date	Proj. Soc. Hsg. Need 2003 -2010	Land Status	No of Units	Shortfall of land committed for housing against projected need
3	Carrick	Inner Town	Bridewell	2004/ 05	36	LTBT	14	0
	Carrick	Inner Town	Un-programmed Need	N/A		LTBA	22	22
1	Carrick	Outer Town	Eden Ph 2	2003/ 04	28	U/C	28	0
	Carrick	Whitehead	Un-programmed Need	N/A	5	LTBA	5	5
	Reconciliation of projected housing need against land availability for Carrickfergus				69		69	27

Castlereagh

ID No.	District/ Borough	Local Housing Area	Scheme Name	Start Date	Proj. Soc. Hsg. Need 2003 -2010	Land Status	No of Units	Shortfall of land committed for housing against projected need
21	C'reagh	East Urban	Bennan Park	2004/05	80	LTBT	30	0
	C'reagh	East Urban	Un-programmed Need	N/A		LTBA	50	50
254	C'reagh	Central Urban	Sunderland Road	2008/09	273	LTBT	2	0
253	C'reagh	Central Urban	Cregagh Community Centre	2005/06		LTBT	10	0
	C'reagh	Central Urban	Un-programmed Need	N/A		LTBA	261	251
23	C'reagh	West Urban	Dunseverick Ave	2004/05	30	LTBT	12	0
22	C'reagh	West Urban	Newtown /breda Depot	2004/05		LTBA	26	26
252	C'reagh	Carryduff	Comber Road	2005/06	47	LTBA	15	15
	C'reagh	Carryduff	Un-programmed Need	N/A		LTBA	32	32
	C'reagh	Moneyreagh	Un-programmed Need	N/A	8	LTBA	8	8
	Reconciliation of projected housing need against land availability for Castlereagh				438		446	382

Lisburn

ID No.	District/ Borough	Local Housing Area	Scheme Name	Start Date	Proj. Soc. Hsg. Need 2003 -2010	Land Status	No of Units	Shortfall of land committed for housing against projected need
27	Lisburn	Town Centre	Chapel Hill, Lisburn	2003/04	252	UC	27	0
29	Lisburn	Town Centre	Wallace Park Gate Lodges, Lisburn (Belsize Road)	2003/04		UC	1	0
28	Lisburn	Town Centre	Magheralave Road, Lisburn	2004/05		HALO	1	0
268	Lisburn	Town Centre	Knockmore	2006/07		LTBT	20	0
31	Lisburn	Town Centre	Tonagh	2005/06		LTBA	30	30
	Lisburn	Town centre	Un-programmed Need	N/A		LTBA	173	173
32	Lisburn	Lisburn North	Ballymacoss Central Ph 2	2004/05	140	LTBT	50	0
32	Lisburn	Lisburn North	Ballymacoss Central Ph 4	2006/07		LTBT	50	0
32	Lisburn	Lisburn North	Ballymacoss Central Ph5	2008/09		LTBT	50	0
	Lisburn	Greenwood	Un-programmed Need	N/A	41	LTBA	41	41
43	Lisburn	Old Warren	Old Warren 2 Ph 3 (Transfer)	2003/04	26	UC	14	0
No Map	Lisburn	Old Warren	Old Warren 3 Phase 3 (Transfer)	2005/06		LTBT	12	0
259	Lisburn	Dunmurry	98-100 Queensway	2004/05	130	LTBA	10	10
30	Lisburn	Dunmurry	Areema/Creight on Dunmurry	2006/07		LTBT	10	0
269	Lisburn	Dunmurry	Ashley Park	2005/06		LTBA	22	22
	Lisburn	Dunmurry	Un-programmed Need	N/A		LTBA	88	88
260	Lisburn	Hillsborough/ Culcavey	25 Lisburn Road, Hillsborough	2005/06	32	LTBA	9	9
	Lisburn	Hillsborough / Culcavey	Un-programmed Need	N/A		LTBA	23	23
	Lisburn	Moira	Un-programmed Need	N/A		LTBA	17	17
	Lisburn	Moira	Un-programmed Need	N/A	17	LTBA	17	17
Continued overleaf					638		648	413

Lisburn cont'd

	District/ Borough	Local Housing Area	Scheme Name	Start Date	Proj. Soc. Hsg. Need 2003 -2010	Land Status	No of Units	Shortfall of land committed for housing against projected need
	Lisburn	Aghalee	Un-programmed Need	N/A	2	LTBA	2	2
	Lisburn	Dromara	Un-programmed Need	N/A	4	LTBA	4	4
	Lisburn	Drumbeg Lambeg Ballyskeagh	Un-programmed Need	N/A	98	LTBA	98	98
	Lisburn	Drumbo	Un-programmed Need	N/A	4	LTBA	4	4
	Lisburn	Glenavy	Glenavy	2005/06	10	LTBA	10	10
	Lisburn	Ballinderry	Un-programmed Need	N/A	2	LTBA	2	2
	Lisburn	Maghaberry	Un-programmed Need	N/A	4	LTBA	4	4
	Lisburn	Maze	Un-programmed Need	N/A	2	LTBA	2	2
	Lisburn	Stoneyford	Un-programmed Need	N/A	5	LTBA	5	5
	Lisburn	Purdysburn	Un-programmed Need	N/A	3	LTBA	3	3
	Lisburn	Dundrod	Un-programmed Need	N/A	2	LTBA	2	2
From Previous page					638		648	413
Reconciliation of projected housing need against land availability for Lisburn.					774		784	549

Newtownabbey

ID No	District/ Borough	Local Housing Area	Scheme Name	Start Date	Proj. Soc. Hsg. Need 2003 -2010	Land Status	No of Units	Shortfall of land committed for housing against projected need
255	N'Abbey	Rathcoole	Derrycoole / Deerfin Pk	2007/08	80	LTBT	30	0
257	N'Abbey	Rathcoole	Green Walk	2007/08		LTBT	21	0
256	N'Abbey	Rathcoole	Rush Park, Beechwood Ave	2008/09		LTBT	16	0
	N'Abbey	Rathcoole	Un-programmed Need	N/A		LTBA	13	13
10	N'Abbey	Bawnmore Hightown	Ben Madigan Bawnmore	2006/07	50	LTBA	31	31*
9	N'Abbey	Bawnmore Hightown	Longlands	2006/07		LTBA	50	50*
185	N'Abbey	Bawnmore Hightown	Feldon	2005/06		LTBA	30	30*
	N'Abbey	Bawnmore	Un-programmed Need	N/A		LTBA	10	10
	N'Abbey	Whiteabbey	Un-programmed Need	N/A	50	LTBA	50	50
251	N'Abbey	Glengormley	Hill View, Glengormley	2004/05	50	LTBA	10	10
	N'Abbey	Glengormley	Un-programmed Need	N/A		LTBA	40	40
5	N'Abbey	N'abbey Nth Ballyduff	Carn Way, New Mossley	2004/05	25	LTBT	5	0
	N'Abbey	N'abbey Nth Ballyduff	Un-programmed Need	N/A		LTBA	20	20
	N'Abbey	Ballyclare	Un-programmed Need	N/A	10	LTBA	10	10
	N'Abbey	Doagh	Un-programmed Need	N/A	8	LTBA	8	8
	N'Abbey	Ballynure	Un-programmed Need	N/A	3	LTBA	3	3
Reconciliation of projected housing need against land availability for Newtownabbey					276		347	275

* Excess supply at Bawnmore / Hightown will act as overspill for North Belfast.

North Down

ID No	District/ Borough	Local Housing Area	Scheme Name	Start Date	Proj. Soc. Hsg. Need 2003 -2010	Land Status	No of Units	Shortfall of land committed for housing against projected need
12	N Down	Bangor Urban	Ballymaconnell Rurals, Bangor	2004/05	396	HALO	9	0
263	N Down	Bangor Urban	30-40 Silverstream Rd	2005/06		LTBA	10	10
262	N Down	Bangor Urban	58 Newtownards Rd,	2005/06		LTBA	10	10
267	N Down	Bangor Urban	Clandeboye Rd, Bangor	2005/06		LTBA	20	20
	N Down	Bangor Urban	Un-programmed Need	N/A		LTBA	347	347
264	N Down	Holywood	Downshire Rd, Holywood	2005/06	239	LTBA	9	9
20	N Down	Holywood	Seahill Road Cottages, Craigavad	2005/06		LTBT	4	0
17	N Down	Holywood	Abbey Place, Holywood (T)	2004/05		LTBT	29	0
	N Down	Holywood	Un-programmed Need	N/A		LTBA	197	197
	N Down	Groomsport	Un-programmed Need	N/A	30	LTBA	30	30
279	N Down	C'fordsburn & Rural	Grays Pk	2008/09	10	LTBT	6	0
	N Down	C'fordsburn & Rural	Un-programmed Need	N/A		LTBA	4	4
Reconciliation of projected housing need against land availability for North Down					675		675	627