



Appendices

Appendix 11

South Dublin Housing Strategy and Interim HNDA



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1 Executive Summary

- This document was written before the publication of the Housing Needs and Demand Assessment (HNDA) Guidelines on the 14 April 2021. The housing targets within the report relate to ESRI 50:50 Scenario published by the Department in December 2020, which is linked back to Chapter 2: Core Strategy and Settlement Strategy.
- This Housing Strategy and Interim HNDA informs the County Development Plan and must comply with a range of provisions under the Planning and Development Act, as amended and be consistent, in as far as practical, with the provisions of the National and Regional Planning policy context.
- The National Planning Framework and Regional Spatial Economic Strategy set the context for this Housing Strategy and Interim HNDA. The Strategy has been guided by demographic, economic and housing data which forms trends that, in combination with available population projections, set out the Housing Need for the County factoring in affordability for the Development Plan period.
- The projected growth in the 65 and over age group forms the largest change up to 2031. For South Dublin, 65 years and over is projected to increase by 56.4% (17,447 persons) by 2031. This is a continuation of the trend from previous years where the cohort increased by 33% (23,053 to 30,925) between 2011 and 2016 which is an increased rate from the 29% (17,861 to 23,053 persons) between 2006 and 2011 Census. In total, representing a 73% growth over the 10-year period of 2006 - 2016.
- The main informative piece for new development arising from the Housing Strategy and Interim HNDA is for a 30% benchmark on housing tenure type and a minimum of 30% 3-bed unit mix for the Development Plan period. This range is a benchmark as the Housing Strategy and Interim HNDA demonstrates that each part of the County has different needs and that deviation from the benchmark must be justified. Schemes which take people off the SDCC housing list are exempt.
- The affordability¹ piece follows the Louth Model with an analysis of South Dublin's rental market set out under Section 10 of this document. The conclusion is that during the lifetime of the Plan, the lower deciles will increasingly be unable to afford the lower bracket house price. Meaning an average of approximately 26% of all new households over the plan period will need State support to pay for house price / rent which is within their means.
- This Housing Strategy and Interim HNDA anticipates that 8,415 households will require support from the State up to 2028 which includes households currently on the housing list. It is anticipated that these households will be accommodated through the various Social Housing Supports (e.g. New Build programme, Part 5, Leasing, HAP/RAS) during the plan period.
- This Housing Strategy and Interim HNDA have demonstrated that at least 26% of all new households over the plan period will need State support to pay for house price / rent which is within their means. The 10% requirement under Part V alone is not sufficient to achieve the needs and will be supported by other housing support mechanisms. The findings of the Housing Strategy and Interim HNDA would support an increase in Part V provision, should it be forthcoming in any future legislation.

¹ For the purposes of Affordability, it was determined that 35% of net income can be attributed to a mortgage or rent.



2 Introduction

This Draft Housing Strategy and Interim Housing Needs Demand Assessment (HNDA) has been prepared by the Land Use, Planning and Transportation Department (Forward Planning Section) and Housing Department of South Dublin County Council to meet the statutory requirements set out under Section 94 of the Planning and Development Act 2000 (as amended).

Under Part V of the Act, each Planning Authority must prepare a Housing Strategy and Interim HNDA which will cover the lifetime of the Development Plan. In the case of South Dublin County Council, this strategy relates to the period: 2022 - 2028.

This Draft Housing Strategy and Interim HNDA is prepared based on available information, guidance, legislation, and best practice. It is noted that the Department of Housing, Local Government and Heritage published HNDA guidance and tools on 14th April 2020. Circular Letter Housing 14/2021 from the Department indicated that HNDA process will be integrated where a planning authority had commenced its development plan under section 11 after the circular. Therefore, as South Dublin has already commenced the process under section 11 of the Planning and Development Acts, it is not required to integrate the HNDA at this time. The Development Plan may be varied, should it be appropriate, once adopted.

2.1 Background and Scope of the Housing Strategy and Interim HNDA

A Housing Strategy and Interim HNDA must have regard to the proper planning and sustainable development of its administrative area and must address the overall supply of housing within the population context set at National and Regional level. The key purpose of the Housing Strategy element is to:

- To identify the existing and likely future need for housing in the area of the Development Plan.
- To ensure that sufficient zoned and serviced land is provided to meet the different needs of different categories of households within South Dublin County.
- To ensure that South Dublin County provides for the development of sufficient housing to meet its obligations as set out in the Eastern Midlands Regional Spatial Economic Strategy.
- To counteract undue segregation between persons of different social backgrounds.

The Housing Strategy forms an integral part of the County Development Plan by incorporating national and regional housing policies and housing demand and supply requirements at a local level. Following the publication of National and Regional level Planning policy, the Housing Strategy is now supported by an evidence-based interim HNDA.

The Housing Strategy in combination with the Interim HNDA then informs the housing policies and objectives of the Development Plan and provides detail in relation to housing provision, location, requirements for different house types, sizes and tenures and the requirements of zoned land which cater for housing for future populations.

The purpose of this Housing Strategy and Interim HNDA is to address the requirements under Section 94 of the Planning and Development Act, 2000 as amended, while also having regard to National, Regional and prevailing statutory and non-statutory planning policy for housing and planning.



2.2 Housing Strategy and Interim HNDA Structure

The structure of this Strategy is set out as follows:

- Housing Strategy Context
- Baseline Demographics
- Baseline Housing
- Housing Needs Demand Assessment
- Meeting Social Housing Demand
- Conclusion
- Housing Strategy and Interim HNDA Policies and Objectives
- Affordability Assessment

2.3 Housing Strategy and HNDA - Guiding Principles

As outlined above, this Housing Strategy and Interim HNDA has been commenced as part of the Development Plan process, prior to the publication of the Department's HNDA guidance and associated tools. Under Circular letter housing 14/2021 the Development Plan is not expected to integrate the tool into this Housing Strategy.

In the absence of the guidance and tools in time for the preparation of this Strategy, an interim HNDA was undertaken using the best information available. The overarching aim of this Housing Strategy and Interim HNDA is to ensure the Housing Needs of all current and future citizens in South Dublin are facilitated in so far as practicable. This key focus is supported by a number of guiding principles, set at a National and Regional planning level, which have informed the preparation of the strategy and thus the policies of the Housing Chapter of the Development Plan, which include, but are not limited to:

1. Ensuring a high quality of life based on housing for people living in the County,
2. Every household having access to secure, good quality housing suited to their needs at affordable prices in a sustainable community,
3. Addressing the long-term spatial distribution of housing,
4. Building Resilience - Re-use, adaptability and accessibility in our housing stock, ensuring integration to deliver vibrant sustainable communities,
5. Addressing Need and Demand Profile - Charting County and Local housing pressures to 2031,
6. Reconciling Future Housing Requirements Effectively - Establishment of a comprehensive evidence base to support and inform housing policies and implementation measures (and having regard to SPPR1 Design Standards for New Apartments Guidelines 2020).

The Housing Strategy and Interim HNDA sets out the measures and options available to South Dublin County Council to deliver social housing over the lifetime of this and subsequent Development Plans. These options include:



- The construction of new dwellings (including regeneration schemes, renovation and renewal of unoccupied or vacant public housing stock),
- The provision of new dwellings for social housing under Part V arrangements,
- The purchase, acquisition and leasing of new or second-hand dwellings,
- Casual vacancies from within South Dublin social housing stock,
- The Rental Accommodation Scheme (RAS),
- The Housing Assistance Payment Scheme (HAP), and





3 Housing Strategy Context

3.1 Legislative Context

The Housing Strategy is a requirement under Section 94 of the Planning and Development Act 2000, as amended. The general requirements of the Act are as follows:

- Have regard to the most recent summary of social housing assessments prepared under section 21(a) of the Housing (Miscellaneous Provisions) Act 2009 that relate to the area of the Development Plan,
- Consult with any body standing approved of for the purposes of section 6 of the Housing (Miscellaneous Provisions) Act 1992 in its functional area, and
- Have regard to relevant policies or objectives for the time being of the Government or any Minister of the Government that relate to housing and, in particular, social integration in the provision of housing services.

The Housing Strategy also is required to take into account:

- The existing need and the likely future need, alongside the estimated amount of housing:
 - for the purposes of the provision of social housing support within the meaning of the Housing (Miscellaneous Provisions) Act 2009, and
 - housing which is deemed to be affordable housing,
- the need to ensure that housing is available for persons who have different levels of income,
- the need to ensure that a mixture of house types and sizes is developed to reasonably match the requirements of the different categories of households, as may be determined by the Planning Authority, and including the special requirements of older persons and persons with disabilities, and
- the need to counteract undue segregation in housing between persons of different social backgrounds.
- Required in the area of the Development Plan during the period of the Development Plan and the estimate may state the different requirements for different areas within the area of the Development Plan.
- For the purpose of making an estimate, the Planning Authority may exclude eligible persons who own or have previously owned a house.
- A housing strategy shall provide that as a general policy a specified percentage, not being more than 10 per cent, of the land zoned for residential use, or for a mixture of residential and other uses, shall be reserved under Part V of the Acts for the provision of housing .
- General policy shall not operate to prevent any person (including a local authority) from using more than 10 per cent of land zoned for residential use, or for a mixture of residential and other uses, for the provision of housing.

When making an estimate of the existing need and the likely future need, alongside the estimated amount of housing, the Planning Authority shall have regard to the following:

- the supply of and demand for houses generally, or houses of a particular class or classes, in the whole or part of the area of the Development Plan;



- the price of houses generally, or houses of a particular class or classes, in the whole or part of the area of the Development Plan;
- the income of persons generally or of a particular class or classes of person who require houses in the area of the Development Plan;
- the rates of interest on mortgages for house purchase;
- the relationship between the price of housing under subparagraph (ii), incomes under subparagraph (iii) and rates of interest under subparagraph (iv) for the purpose of establishing the affordability of houses in the area of the Development Plan;
- such other matters as the Planning Authority considers appropriate or as may be prescribed for the purposes of this subsection.
- Affordability of the Rental Market for South Dublin.



3.2 National Level Policy

3.2.1 Project Ireland, 2040 – The National Development Plan and National Planning Framework

Project Ireland 2040 is the Government’s overarching long-term policy initiative to make Ireland a better country for all citizens. It comprises the National Development Plan (NDP) and the National Planning Framework (NPF).

The NPF is currently implemented at a regional level through the Regional Spatial Economic Strategies (RSEs) and at county level through County Development Plans. It is also implemented through other plans and programmes at national and regional level such as the National Climate Change Strategy, the National Development Plan and the Transport Strategy for the Greater Dublin Area 2016-2035.

The strategy set out in the NPF focuses on building ‘centres of scale’ requiring twin elements to address issues of scale and peripherality which both have significant influence on a wider geographic area of Ireland. The key issue addressed in this Framework is where best to plan for our growing population and economy which NSO 1 ‘Compact growth’ aims to achieve.

In this context, the NPF sets priority and principles in the housing sector 2040, as follows:

Location of Homes - Addressing the long-term spatial distribution of housing.

Building Resilience - Re-use, adaptability and accessibility in our housing stock, ensuring integration to deliver vibrant sustainable communities.

Need and Demand Profile - Charting national housing pressures to 2040.

Reconciling Future Housing Requirements Effectively - Establishment of a comprehensive evidence base to support and inform housing policies and implementation measures.

The NPF anticipates the Eastern Midlands Region to grow as follows:

Table 1: NPF Targeted pattern of Population and housing growth to 2040

National Policy Objective	Eastern and Midlands
1. Growing Our Regions	+490,000 – 540,000 people (2.85m in total)
2. Building Stronger Regions: Accessible Centres of Scale(A)	Dublin City and Suburbs (+235,000 – 293,000 people) with a minimum target population of 1,408,000 by 2040. Regional Spatial and Economic Strategy to set out a strategic development framework for the Region, leading with the key role of Athlone in the Midlands and the Drogheda-Dundalk Newry cross-border network.
3. Compact, Smart, Sustainable Growth	50% of new city housing within existing Dublin City and suburbs footprint. 30% all new housing elsewhere, within existing urban footprints.

Following the publication of the National Planning Framework, the Government issued an Implementation Roadmap for the NPF.



3.2.2 Implementation Roadmap for the National Planning Framework (July 2018)²

Published in July 2018, following the adoption of the National Planning Framework, the Implementation Roadmap (IR) addresses a number of important issues as part of the implementation for the Regional Spatial and Economic Strategy (RSES) and the operation of our planning process more generally. The document outlines Transitional Regional and County Population Projections to 2031 under Appendix 2 which sets projections for Dublin (comprising the four Local Authorities) up to 2031. The document recognises that the targets beyond 2031 will be informed by Census data in the mid-2020’s. For Dublin as a whole, comprising the four Local Authorities, Table 2 shows Dublin’s population projections for 2026 and 2031 from a 2016 baseline.

Table 2: Transitional Population Projections for County Dublin 2016 - 2031

Dublin (comprising the four Local Authorities)	2016	2026	2031
	1,347,500	1,489,000 - 1,517,500	1,549,000 - 1,590,000
Change Nos. from 2016	-	+141,500 - 170,000	+ 201,500 - 242,500
Change (%) from 2016	-	+10.5% - +12.6%	+15% - 18%

The figures outlined under Table 2 above, are divided amongst the four Local Authorities under the Regional Spatial Economic Strategy. This is discussed in detail under Chapter 2: Core Strategy and Settlement Strategy of the Development Plan, figures of which inform the preparation of this Housing Strategy and Interim HNDA.

3.2.3 Housing Need Demand Assessment

In order to ensure that the plan-making system is supported by a robust methodology to inform policies and funding initiatives around housing and associated land requirements, the NPF requires each Local Authority to prepare a Housing Need Demand Assessment (HNDA). This assessment will support the preparation of Housing Strategies, Local Area Plans and Traveller accommodation plans, etc.

There are two national planning objectives relating to the HNDA under the NPF (No. 20) and (No. 37) The principal objective in relation to the HNDA is NPO 37 which states:

A ‘Housing Need Demand Assessment’ (HNDA) is to be undertaken for each Local Authority Area in order to correlate and accurately align future housing requirements. The HNDA is:

- *to be undertaken by Local Authorities with coordination assistance to be provided by the Regional Assemblies, and also at a Metropolitan scale, particularly where inter-county and inter-regional settlement interactions are to be planned for and managed;*
- *to be undertaken by Local Authorities with coordination assistance to be provided by the Regional Assemblies, and also at a Metropolitan scale, particularly where inter-county and inter-regional settlement interactions are to be planned for and managed;*
- *to primarily inform housing policies, housing strategies and associated land use zoning policies as well as assisting in determining where new policy areas or investment programmes are to be developed; and*
- *to be supported, through the establishment of a coordination and monitoring unit to assist Local Authorities and Regional Assemblies in the development of the HNDA (DHPLG, Regional Assemblies and*

² Source: <http://npf.ie/wp-content/uploads/NPF-Implementation-Roadmap.pdf>



the Local Authorities). This will involve developing and coordinating a centralised spatial database for Local Authority Housing data that supports the HNDA being undertaken by Local Authorities.

The NPF outlines that the purpose of the HNDA tool is to:

- Assist local authorities to develop long-term strategic views of housing need across all tenures.
- Provide a robust evidence base to support decisions about new housing supply, wider investment and housing related services that inform an overall national housing profile.
- Inform policies about the proportion of social and affordable housing required, including the need for different types and sizes of provision.
- Provide evidence to inform policies related to the provision of specialist housing and housing related services.

It is understood that Local Authorities by using the HDNA database can run a number of different scenarios to inform key decisions on housing need and supply. HNDAs are designed to give broad, long run estimates of what future housing need might be, rather than precision estimates. There are a number of key evidence inputs which inform and drive the HNDA model, as follows:

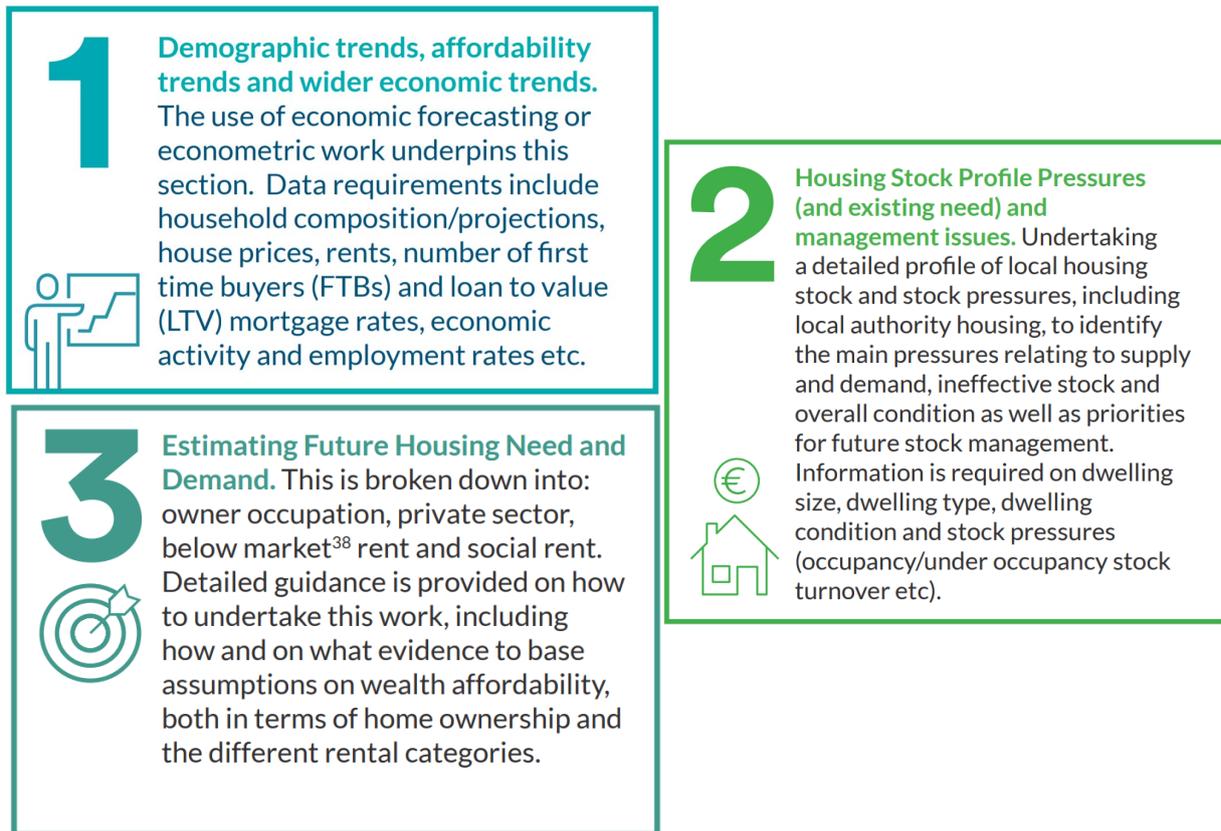


Figure 1: Three Steps to the Housing Needs Demand Assessment, Source: NPF

As part of the HNDA, the NPF seeks to distinguish between the urban and rural demands for Housing. In this context, the need for single housing on an evidence basis will assist in supporting the preparation of a comprehensive housing strategy and associated land use policies. To support this point, the NPF sets out NPO 20 which states:

“Project the need for single housing in the countryside through the local authority’s overall Housing Need Demand Assessment (HNDA) tool and county Development Plan core strategy processes.”



The NPF also seeks to ensure that careful planning is required to manage demand in our most accessible countryside around cities and towns, focusing on the elements required to support the sustainable growth of rural economies and rural communities.

As such, the difference between rural areas located within the commuter catchment of the five cities and our largest towns and centres of employment and, on the other hand, rural areas located outside these catchments.

The South Dublin Rural Housing Strategy is guided by the information contained within this Housing Strategy and Interim HNDA and is set out in Chapter 6: Housing of the written statement of the Development Plan.

Guidance in relation to the preparation of the HNDA was published by the Department of Housing in April 2020 and due to the commencement of the Development Plan in July 2019 cannot be integrated at this time. Therefore, this Housing Strategy is supported by an Interim HNDA.

3.2.4 Ministerial Guidelines – Housing Supply Guidelines

The Ministerial Guidelines, published in late December 2020, were issued following the publication of the ESRI research undertaken by the Economic and Social Research Institute – ‘Regional Demographics and Structural Housing Demand at a County Level’, Research Series, Number 111, ESRI, December 2020.

The Guidelines allocate Housing Unit Targets for each Local Authority following a National level methodology to ensure the aims and objective of the NPF are achieved. South Dublin’s unit allocation up to 2031 is shown under Table 3 below.

Table 3: South Dublin figures from Housing Supply Guidelines, 2020

Table 4: South Dublin County Council		Annual Average	Total Households
A	ESRI NPF scenario projected new household demand 2017 to 2031	1,697	25,459
B	Actual new housing supply 2017-19	1,439	4,318
C	Homeless households, and estimated unmet demand as at Census 2016	N/A	2,050
D	Housing Demand 2020-31 = Total (A-B+C)/12	1,932	23,191

The changes which can arise to the figure under table 3 are the housing output and figures for Homeless households and estimated unmet demand as at the time of the recent census (2016). Table 3 above, in line with the Methodology for Supply set under the Guidelines has informed the preparation of the Core Strategy. Appendix 2B to the Core Strategy sets out the methodology undertaken to inform the quantum of units over the lifetime of the Development Plan up to and including 2028. This Housing Strategy and Interim HNDA aligns with such figures.

3.2.5 Rebuilding Ireland, An Action Plan for Housing and Homelessness (2016)³

The overarching aim of Rebuilding Ireland Action Plan is to ramp up delivery of housing from its current under-supply across all tenures to help individuals and families meet their housing needs, and to help those who are currently housed to remain in their homes or be provided with appropriate options of alternative accommodation, especially those families in emergency accommodation.

³ Source: <https://rebuildingireland.ie/>



One of the core objectives of the Action Plan is maturing the rental sector so that tenants see it as one that offers security, quality and choice of tenure in the right locations and providers see it as one they can invest in with certainty;

Key Actions to be delivered under the Action Plan include (inter alia) the following;

- 47,000 social housing units delivered by 2021, supported by investment of €5.35 billion.
- Accelerated Housing Assistance Payment (HAP) delivery
- NTMA/Private Sector Housing Fund to deliver increased housing supply
- Mixed-tenure developments on State lands and other lands
- Housing for specific groups: meeting the needs of the vulnerable

The Action Plan identifies that the structure of the housing sector in terms of tenure is also changing. Key trends include:

- Declining levels of home ownership to just under 70% in 2014.
- A corresponding increase in the numbers of renting households. As of Q1 2016, the Residential Tenancies Board registered 323,758 tenancies.
- Concentration of the rental sector in urban areas and a high proportion of renting households dependent on social housing supports.
- Falling household sizes means the average size had reduced to 2.7 people in 2015.
- An ageing population, which will represent a very significant demographic and societal challenge and which has implications for the design, modification and location of housing.

With regards the rental sector, the Action Plan recognises that falling home ownership levels and increasing demand for rental accommodation on a long-term basis raises another key housing challenge - that of changing attitudes such that the advantages of rental as a form of tenure are more widely recognised. A strong rental sector should support a mobile labour market that is better able to adapt to new job opportunities and changing household circumstances. The rental sector must also cater for a diverse range of households, including students, low-income households and mobile professionals. The appeal of the rental sector as a tenure type of choice must be developed, which means increasing standards, security of tenure and altering some of the norms and expectations which characterise the sector.

The Action Plan proposed the introduction of an affordable rental programme to provide long term affordable residential accommodation for low to moderate income key-worker households in urban areas of high demand, in a mixed tenure context, promoting stability, while also reducing pressures on social housing lists

With regards mixed tenure development, the Action Plan states that the active pursuit of housing development on State lands, including local authority lands, will form a major part of the new approach to housing provision. In actively targeting State sites in prime residential locations and investing in infrastructure and State-supported housing, this should encourage and incentivise housing on adjacent lands owned privately.

The Action Plan recognises the role of the Part 8 Process in the provision of mixed tenure housing development projects in joint ventures with approved housing bodies.

The Action Plan identifies that student accommodation complexes of 100 or more units will benefit from the fast-track SHD application process directly to An Bord Pleanála.



3.2.6 Construction 2020 – A Strategy for a Renewed Construction Sector and Social Housing Strategy 2020

This Strategy addresses the Private Rented Sector and raises the following issues;

- While home ownership remains for many the preferred choice for housing, the private rented sector almost doubled in size between 2006 and 2011 and approximately 1 in 5 households in the country are now renting privately. This is likely to remain a significant part of the housing landscape into the future.
- Rents in the large urban areas are increasing and this is leading to acute affordability issues for some tenants. The Housing Agency advises that there is a serious and increasing shortage of rental accommodation in Dublin city. A shortage of rental accommodation has both social and economic impacts. Affordability issues cause financial hardship for families and a lack of availability at a reasonable price can become a major barrier to employment creation and impact on our competitiveness and attractiveness for foreign investment.
- People who rent their homes are just as entitled to high standards as those who buy.
- It is clear that the make-up of Ireland's housing market, including the share of different tenures, will continue to change over time, with the private rented sector playing an important role in housing those who cannot afford to buy their own homes as well as those who prefer not to. Construction seeks to ensure that renting is a secure, stable, and viable option for those who choose it.
- A range of accommodation types are required to meet market demands, and there are economic opportunities, for example, for the supply and provision of purpose-built student accommodation and accommodation suitable for older people.

3.2.7 National Vacant Housing Reuse Strategy 2018 - 2021

Prepared by the Department of Housing, Planning and Local Government in 2018⁴, this document was prepared as an action under Pillar 5 of Rebuilding Ireland. This Pillar, along with other measures, went about setting measures to ensure Ireland's existing housing stock is used to the greatest extent possible. Therefore, the Strategy aims to provide a targeted, effective and co-ordinated approach to identifying and tackling vacancy across Ireland. The Strategy (pg.15) notes:

“that a vacancy rate of between 2.5% and 6% is considered normal in a properly functioning housing market. This vacancy rate allows for dwellings under renovations, in between tenancies (in both public and private housing stock) and those dwellings left vacant while being sold.”

The CSO provides further clarity and insight in the reasons for household vacancy⁵. The CSO noted that between 2011 and 2016 the state figure for vacancy decreased by 46,744 units (20%) from 230,056 to 183,312. Within this figure, the CSO outline that:

“many of the homes recorded as vacant were for sale, rental properties, had a deceased owner or were being renovated. Many of these may well have been occupied again a few weeks after the Census was completed. CSO is planning on producing more complete information of this nature on vacant homes for Census 2021.”

The CSO highlight that at a state level that only 65,039 of the homes recorded vacant in 2011 were still vacant in 2016 (35.5%). Similarly, there were over 105,000 homes that were vacant in 2011 but occupied in 2016.

⁴ [External Link] The document is available here:

https://www.housing.gov.ie/sites/default/files/publications/files/national_vacant_housing_reuse_strategy_0.pdf

⁵ <https://www.cso.ie/en/census/census2016reports/census2016vacanthousingstatisticsfaqs/>



3.2.8 The National Housing Strategy for People with a Disability 2011 - 2016

Published in 2011, the National Housing Strategy sets out a framework of initiatives to provide for the housing needs of vulnerable and disadvantaged households. The strategy has nine strategic aims:

1. To promote and mainstream equality of access for people with a disability to the full range of housing options available suited to individual and household need;
2. To develop national protocols and frameworks for effective interagency cooperation, which will facilitate person-centred delivery of housing and relevant support services;
3. To support people with a disability to live independently in their own homes and communities, where appropriate;
4. To address the specific housing needs of people with an intellectual and/or physical disability, moving from congregated settings in line with good practice, including through the development of frameworks to facilitate housing in the community,
5. To address the specific housing needs of people with a mental health disability, including through the development of frameworks to facilitate housing in the community, for people with low and medium support needs moving from mental health facilities, in line with good practice;
6. To consider good practice in the design, coordination and delivery of housing and related supports;
7. To facilitate people with a disability to access appropriate advice and information in respect of their housing needs;
8. To improve the collection and use of data/information regarding the nature and extent of the housing needs of people with a disability;
9. To provide a framework to support the delivery, monitoring and review of agreed actions.

3.2.9 Resolving Unfinished Housing Developments – 2017 Annual Report (2018)

The Department of Housing established an Advisory Group in 2010 to tackle the issue of circa 3,000 developments which were unfinished ‘ghost’ estates. Nationally, this number has reduced by 91% from 2010 to the end of 2017.

According to the 2018 report, South Dublin was the first local authority area where all developments had either reactivated or been substantially completed to warrant removal from the ‘unfinished’ list.



3.3 Regional Level Policy

3.3.1 Eastern Midlands Regional Spatial and Economic Strategy 2019 - 2031

The Eastern Midlands Regional Spatial and Economic Strategy 2019 – 2031 (EMRSES) is a strategic plan and investment framework to shape the future growth and to better manage regional planning and economic development throughout the Region. Published in June 2019, the document identifies regional assets, opportunities and pressures and provides appropriate policy responses in the form of Regional Policy Objectives.

It is the primary strategy which will provide regional level strategic planning and economic policy in support of the implementation of the NPF by providing a greater level of focus around the NPOs and NSOs of the NPF.

The three key principles of the EMRA RSES are:

1. Healthy Placemaking
2. Climate Action
3. Economic Opportunity

From this, the Strategy sets out 16 Regional Strategic Outcomes (RSOs) which are aligned with UN/ international, EU and national policy and which in turn set the framework for city and county Development Plans. Thus, the RSES can assist local authorities in aligning with EU priorities to leverage funding and partnership opportunities.

Housing and Regeneration is examined under Section 9.3 of the EMRA which outlines a move away from the traditional approach of developer led greenfield sites far from urban settlements to a plan led strategy of consolidation with the provision of the majority of housing in cities and other defined settlements.

In terms of the housing strategy, the EMRSES aligns with National Planning policy context by reiterating NPO 37. The Authority recognises that the HNDA will inform policy responses about the future location, typology and tenure of housing needs, including affordable housing and single houses in the countryside, which in turn will inform the provision of a sufficient land supply in the right locations to deliver future additional housing.

This analysis is carried out through an evidence base which includes a range of housing data, along with wider economic, demographic and affordability trends, to understand key housing market drivers and give a statistical estimate of all current and future housing needs, by tenure.



3.4 South Dublin County Level Policy

3.4.1 South Dublin County Development Plan 2016 - 2022

Housing is dealt with under Chapter 2 of the South Dublin County Development Plan 2016 – 2022 while population is addressed in the Core Strategy in terms of projections and allocations by Regional and National planning policy documents. The Housing Strategy is attached to the Development Plan as an Appendix to the written document. The structure of the Housing Chapter under the 2016 Development Plan and the various sections examined are as follows:

Housing Strategy - Supply of Housing, Housing for Older People, Student Accommodation and Traveller Accommodation.

Sustainable Neighbourhoods - Urban Design in Residential Developments, Residential Densities, Residential Building Height, and Mix of dwelling types.

Quality of Residential Development - Residential Design and Layout, Public Open Space, Private and Semi-Private Open Space, Internal Residential Accommodation, Privacy and Security and Steep or varying topography sites.

Residential Consolidation - Infill, Backland, Subdivision and Corner Sites, Residential Extensions, and Family flats.

Rural Housing – Introduction, Rural Housing Policies and Local Need criteria, Rural Housing in RU zone, Rural Housing in HA – Dublin Mountains Zone, Rural Housing in HA – Liffey Valley and H0A – Dodder Valley, replacement rural dwellings, rural dwelling occupancy, rural house and extension design.

3.4.2 South Dublin County Council Interim Housing Strategy 2016 - 2022

Prepared as part of the South Dublin Development Plan 2016 – 2022 (HS 2016-2022) under Section 94 of the Planning and Development Act, the Housing Strategy 2016 – 2022 set a range of measures for delivering on the housing requirements which, at the time was an interim strategy. The requirements from the Strategy (Schedule 3 of the Development Plan) under Table 17: Projected Requirement of the 2016 – 2022 Plan, which is set out, for convenience, as follows:

Table 4: Projected Housing Requirement 2016 - 2022

Description of Delivery	Quantum of Units and notes
Council Stock Turnover (200 a year)	1,200 units
Build Programme (Infill and PPP)	800 units
RAS/Leasing/HAP	4,003 units
Capital Assistance Scheme	300 units
Part 5 (10%)	2,000 units
Private Housing	24,346 units
Total	32,649 units



3.4.3 Traveller Accommodation Programme 2019 – 2024⁶

In accordance with the Housing (Traveller Accommodation) Act, 1998 South Dublin County Council prepared a 5-year Traveller Accommodation Programme (TAP) to meet the existing and projected accommodation needs of members of the indigenous Travelling Community.

The number of Travellers in the 2016 Census in South Dublin was 2,208 persons. This represents a slight decrease (8 persons, 0.36%) from the 2011 Census of 2,216 persons. But above the 2006 figure of 1,761 persons.

In terms of comparison, South Dublin has the highest Traveller population in the Dublin Region and second highest in the state below Galway City and County.

The preparation of the Housing Strategy and Interim HNDA will incorporate the provisions and support the implementation of the TAP 2019 – 2024. This will form part of the Objectives of the Development Plan.

⁶ Available at: <https://www.sdcc.ie/en/services/housing/finding-a-home/traveller-accommodation/traveller-accommodation-programme-2019-2024.pdf>



4 Baseline - Demographics

This section provides an overview of the existing population, incomes, and housing profiles in South Dublin to inform the Housing Strategy and Interim HNDA. Most of the demographic information outlined is sourced from the Central Statistics Office (CSO) unless otherwise referenced.

4.1 South Dublin Context

In 2016, South Dublin County Council (SDCC) had a population of 278,767 persons, of which 136,277 (48%) were male and 142,490 (51%) were female.

This figure represents 20.6% of the Dublin Region of 1,347,500 persons made up of 4 Dublin Councils: Dublin City, Dun Laoghaire Rathdown, Fingal and South Dublin. In 2016, South Dublin represented 12% of the total Eastern and Midlands region of 2,329,000 persons and 5.85% of the State of 4,761,865.

The County experienced a population growth of 13,562 people since 2011 (+5.11%). This represented a slowdown in population growth from the previous inter censal period (2006 - 2011) which saw growth of 7.40% - the largest growth in the County of the 21st Century so far.

At a national level, the population grew by 173,613 (+3.8%). South Dublin accounted for 7.8% of this population growth. The Dublin Region grew by 74,431 persons (+5.84%). South Dublin, for the 2011 – 2016 period, experienced growth above the national and regional level average. The above is shown under tables 5 and 6.

Table 5: Population Growth for South Dublin (1981 – 2016)

Year	Population	Increase (No.)	Increase (%)
1981	165,264	-	-
1986	199,546	+34,282	+20.74%
1991	208,739	+9,193	+4.61%
1996	218,728	+9,989	+4.78%
2002	238,835	+20,107	+9.19%
2006	246,935	+8,100	+3.39%
2011	265,205	+18,270	+7.39%
2016	278,767	+13,562	+5.11%
1996 - 2016	20 years	+60,039	+27.45%
2006 - 2016	10 years	+31,832	+12.89%

Table 6: Population Growth in SDCC, Dublin, EMRA, State (2006 - 2016)

	2006	2011	2016	Change (No.) (11 - 16)	Change (%) (11-16)
State	4,239,848	4,588,252	4,761,865	+522,017	+12.31%
Eastern and Midlands SPA	2,025,467	2,209,463	2,329,000	+303,533	+14.98%
Dublin Region	1,187,176	1,273,069	1,347,500	74,290	+5.84%
South Dublin	246,935	265,205	278,767	+31,832	+12.89%



4.2 South Dublin - Settlement Figures

The CSO provide different figures according to whether the population is Urban or Rural. The term Urban area or Town area relates to settlements with a minimum of 1,500 population. Rural on the other hands refers to a population outside Town areas and includes population of less than 1,500 persons. The population of Urban/Town and Rural area for South Dublin is shown under the Table 7:

Table 7: Urban/Town and Rural Area in South Dublin 2011 - 2016

Area	2011(No. Persons)	% of County Population	2016 (No. Persons)	% of County Population	Change (No.)	Change (%)
Urban / Town	259,729	97.94%	273,215	98.01%	+13,486	+5.19%
Rural	5,476	2.06%	5,552	1.99%	+76	+1.39%

Urban/Town Area = towns with a total population of 1,500 + persons

Rural = population outside Town Areas and population of towns with a population less than 1,500 persons.

Under the CSO settlement categorisation, there are a total of three urban settlements which are within the administrative boundary of South Dublin County Council. Dublin City and Suburbs which is located within the County also includes areas of the other three Dublin Local Authorities and represents 94% of South Dublin’s population in 2016, as shown in Table 9 below. The settlements wholly within South Dublin are set out under Table 8. These settlements are categorised as Urban/Town within the meaning of the CSO definition.

Table 8: SDCC Lower Tier Settlements 2011 - 2016

Settlement Name	2011 Population (CSO)	2016 Population (CSO)	Change 2011 – 2016 (Nos.)	Change 2011 – 2016 (%)	% of overall population in 2016
Saggart	2,144	3,133	+989	+46.13%	1.12%
Rathcoole	3,421	4,351	+930	+27.18%	1.56%
Newcastle	2,659	3,093	+434	+16.32%	1.10%
Total	8,224	10,577	2,353	+28.61%	3.78%

There is no specific South Dublin population figure for Dublin City and Suburbs (DCS). However, by using the total figure for town areas less the other smaller scale urban areas for South Dublin (Table 8), an estimate of the population living within the DCS can be calculated. Table 9 outlines the result of this process. However, as the Dublin City and Suburbs boundary changed between 2011 and 2016, a direct comparison cannot be made but has been provided for context purposes.



Table 9: Dublin City and Suburbs Population for South Dublin 2011 - 2016

Settlement Name	2011 Population (CSO)	2016 Population (CSO)	Change 2011 - 2016 (Nos.)	Change 2011 - 2016 (%)	% of overall population in 2016
Dublin City and Suburbs (Four Dublin Councils)	1,110,627	1,173,179	+62,552	+5.63%	100%
Dublin City and Suburbs (South Dublin Co. Co.)	251,505	262,638	+11,133	+4.43%	+22.38%

Both tables 9 and 10 combined illustrate how South Dublin’s population is pre-dominantly Urban (circa. 98%) with the 94% of people living within the DCS boundary.

Table 10: Rural Population in South Dublin 2011 - 2016

Settlement Name	2011 Population (CSO)	2016 Population (CSO)	Change 2011 - 2016 (Nos.)	Change 2011 - 2016 (%)	% of overall population in 2016
Rural Aggregate (including Brittas)	5,476	5,552	+76	+1.39%	1.99%

4.3 South Dublin - Population in Electoral Divisions

There are a total of 49 Electoral Divisions (EDs) within South Dublin Figure 2 below outlines these areas and the change in population between 2006 and 2016. The overall growth, for the County was an increase of 31,832 or 12.89% between 2006 – 2016.

There were four EDs which broadly matched this level of growth with increases and decreases evident. The ED with the largest percentage increase was 027 Saggart with a 129.70% increase in persons whereas 015 Lucan-Esker had the largest no. of persons (6,408) over 10 years. In terms of decrease in population, 034 Tallaght-Kilnamanagh had the largest percentage and number of people decrease by 2006 – 2016 of 11.30% and minus 559 people.

The general trend as shown below is that increases in population growth occurred along the periphery of the County with stagnant / decrease of population within the M50 and established urban areas.

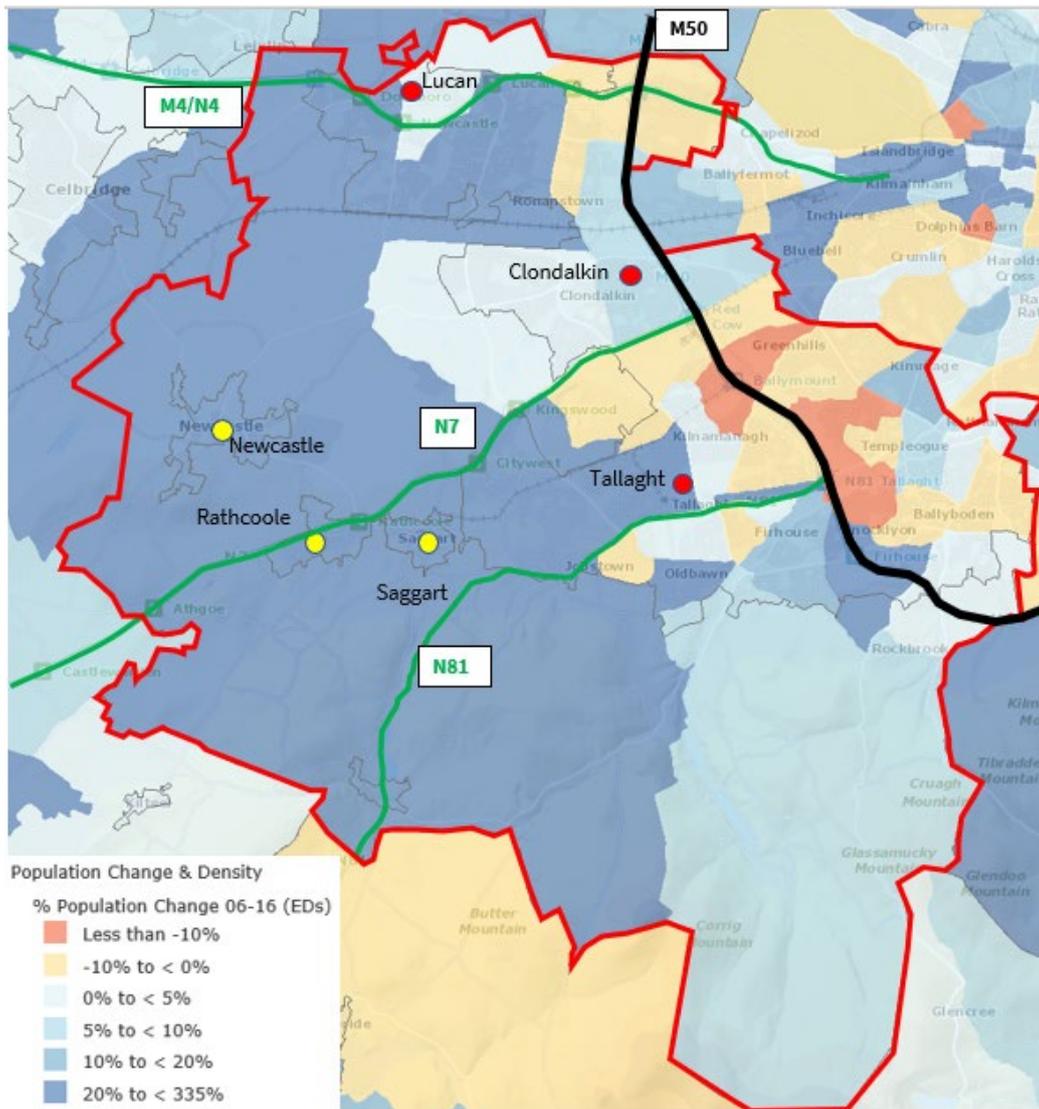


Figure 2: Population Change 06 – 16 per Electoral Division, Source: <http://airomaps.nuim.ie/id/Census2016/>

4.4 Components of Population Growth

During the period 2006 – 2011, South Dublin was the only County in the GDA to have experienced net out-migration in the intercensal period 2006–211. Although the population in South Dublin rose by 18,270 persons, natural increase accounted for 19,080 persons, resulting in net out-migration of 810 persons. As table 11 below illustrates, this continues to be the case during 2011 – 2016 albeit to a larger extent.

Table 11: Components of Population Change South Dublin 2002 – 2016 [EP005, C0402, CD104]

	Births	Deaths	Natural Increase	Net Migration	Population Increase 2011 - 2016
2002 – 2006	+17,444	3,648	+13,796	-5,696	+8,100
2006 - 2011	+23,550	4,470	+19,080	-810	+18,270
2011 - 2016	+23,257	5,496	+17,761	-4,199	+13,562

For the past 14 years, South Dublin has continued to have a net out migration. As shown under Table 12 below, this is not characteristic of the wider Dublin Area.



Table 12: Components of Population Change South Dublin, Dublin, EMRA State 2011 – 2016

	Births	Deaths	Natural Increase	Net Migration	Population Increase 2011 - 2016
State	+345,706	+147,424	+198,282	-24,669	+173,613
EMRA	+177,351	+63,952	+113,399	+5,655	+119,043
Dublin Region	+102,696	+38,344	+64,352	+9,938	+74,290
DCC	+39,071	+20,775	+18,296	+8,646	+26,942
DLRCC	+14,055	+7,108	+6,947	+4,810	+11,757
FCC	+26,313	+4,965	+21,348	+681	+22,029
South Dublin	+23,257	+5,496	+17,761	-4,199	+13,562

Table 11 and 12 compare the components of population change in South Dublin to the other Dublin Local Authorities, County Dublin, the EMRA area and the State for 2011-2016.

These tables, especially Table 12, show how South Dublin is the only Local Authority in Dublin with a net out migration pattern between 2011 and 2016. This figure is also true when compared against the Eastern Midland Region figure but is better than the state figure. Notwithstanding, South Dublin has the second highest births and second lowest deaths per 1,000 as shown under Table 13 below.

Table 13: Average Annual Rates per 1,000 for Births, Deaths, Natural Increase and Estimated Net Migration, South Dublin, Dublin and State, 2016

	Births per 1,000	Deaths per 1,000	Natural Increase per 1,000	Est. Net Migration per 1,000
State	14.8	6.3	8.5	-1.1
DCC	14.4	7.7	6.8	+3.2
DLRCC	13.3	6.7	6.5	+4.5
FCC	18.5	3.5	15	+0.5
South Dublin	17.1	4	13.1	-3.1

Table 14: Percentage of Population Born Outside County of Enumeration by Birthplace in Dublin SPA, EMRA, and State, 2016

	Ireland - Born in the County	Ireland - Born outside the County	Born outside the State	Total
State	2,886,921 (60.6%)	1,005,721 (21.1%)	869,223 (18.3%)	4,761,865 (100%)
EMRA	1,319,737 (56.7%)	549,642 (23.6%)	459,138 (19.7%)	2,328,517 (100%)
Dublin SPA	881,776 (65.4%)	167,351 (12.4%)	298,232 (22.1%)	1,347,359 (100%)

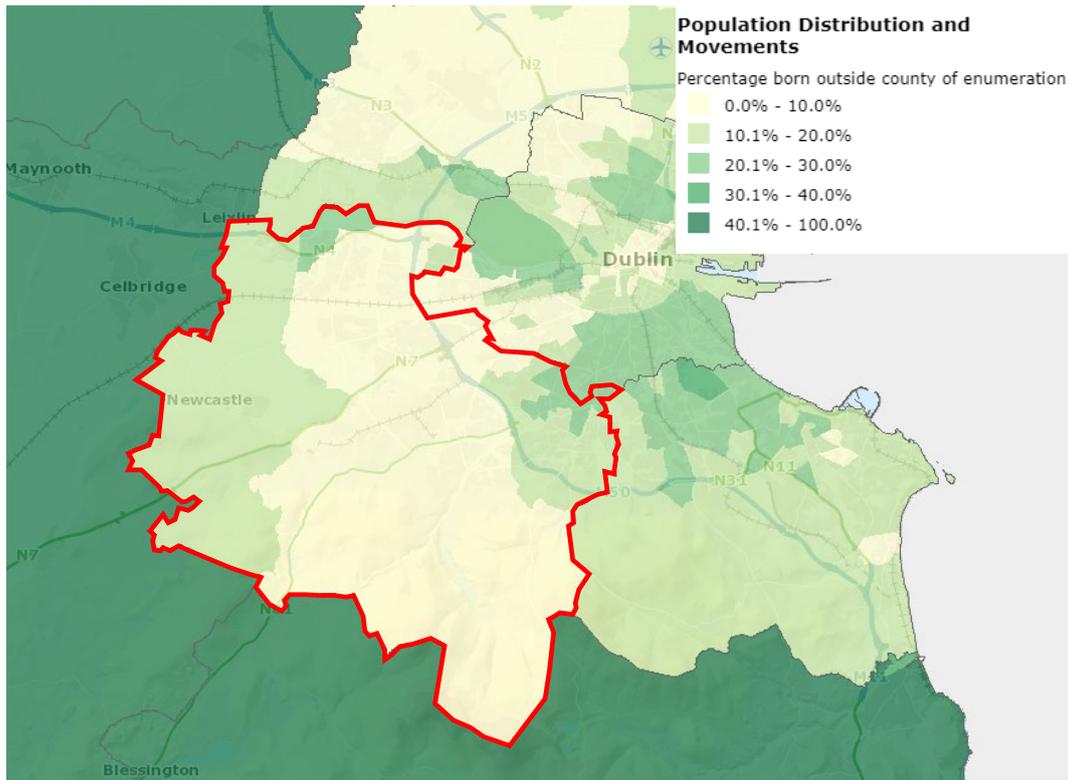


Figure 3: Percentage of Persons Born outside the County and within the State

Figures 3 and 4 of this Report illustrate the data for South Dublin at ED level on the origins of birth. These maps show the characteristics of the County and comparatively with the other four Dublin Local Authorities and Kildare.

Figure 3 shows the percentage of people born outside the county living in South Dublin. Apart from sections at Lucan, Templeogue / Rathfarnham and towns and settlements to the west of the County (Newcastle, Rathcoole, Saggart and Adamstown), the County has a low percentage of persons outside the County within the State coming to live in South Dublin.

Figure 4 illustrates people born outside the State living in South Dublin. The largest percentages in the County are found at: Clondalkin, Lucan, Adamstown, Tallaght, Fortunestown, and Saggart. These areas correlate to the new developments completed generally between 2011 – 2016.

Comparing these two data maps (Figure 3 and Figure 4), South Dublin is more attractive to international people than people born outside the County within the State.

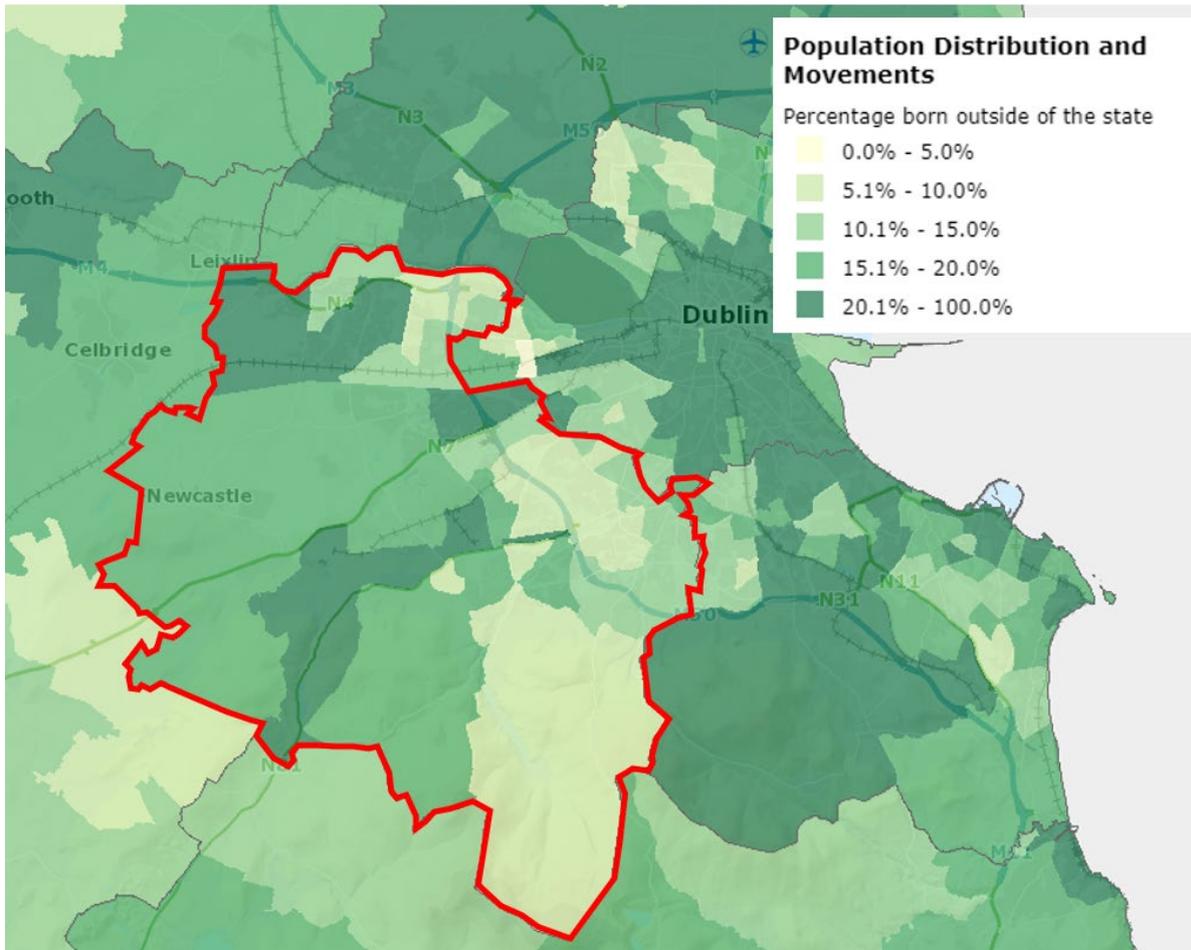


Figure 4: Percentage Born Outside the State, 2016



4.5 South Dublin - Age Profile

In terms of age profile, South Dublin County has a relatively young population (35% of the population below 24 in 2016) that is aging, in line with the national trend. In 2006, the under 24 age group represented 38% of the population reducing to 36% in 2011.

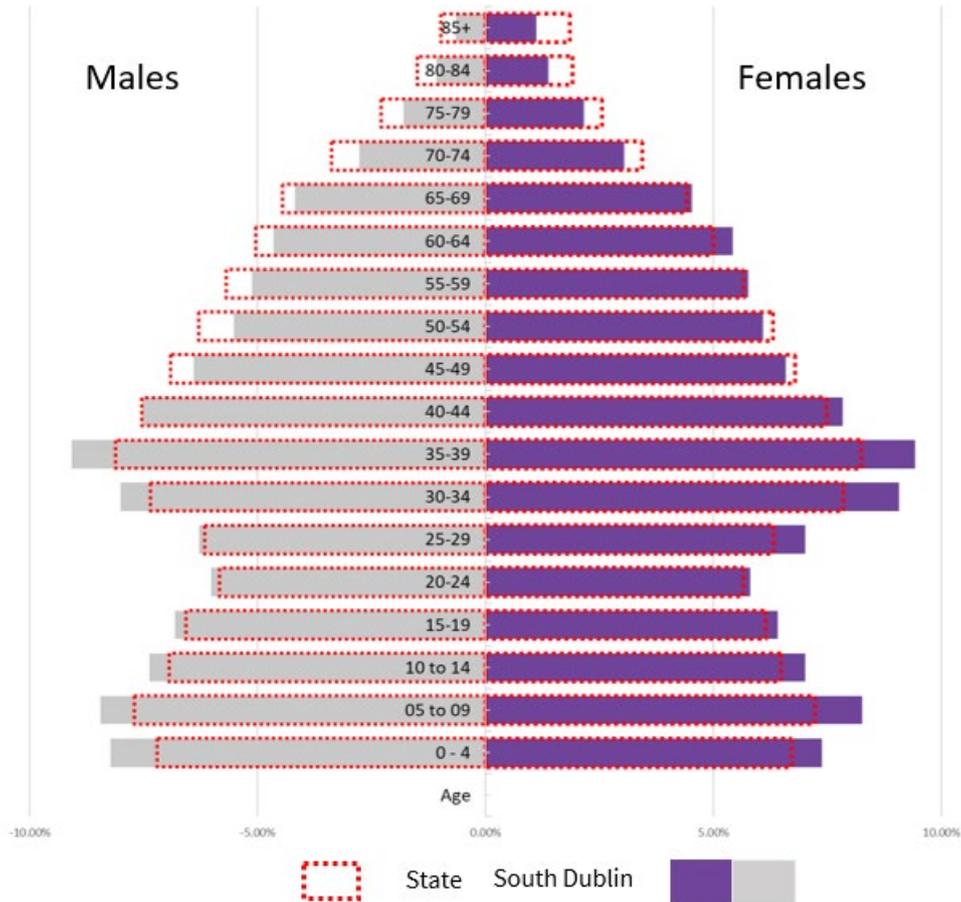


Figure 5: Population Pyramid comparison between State and South Dublin, 2016

In 2016 the 0 - 14 age group accounted for 23.1% (no change in 2011, a slight increase from 22% in 2006) of South Dublin’s population. The 15 - 24 age group accounted for 12% in 2016, a slight reduction from 2011 figure of 13% and drop from the 2006 figure of 16%.

The 25 - 44 age group accounted for 32% in 2016, a slight reduction from 33% in 2011 and consistent with the 2006 figure of 33%). The 45 - 64 age group accounted for 22% (no change from 2011 or 2006 figures.)

The 65 plus age group accounted for 11%, an increase from 2011 figure of 9% and 2006 figure of 7% of the population. On this basis, the population of the County is aging with a reduction in young population. 2016 - 30,925 persons. (11.09% of the County). 2011 - 2016 increase of 7,872 persons (plus 25.45%). Figure 6 illustrates these facts and general trends over the past three census periods (2006 – 2016).

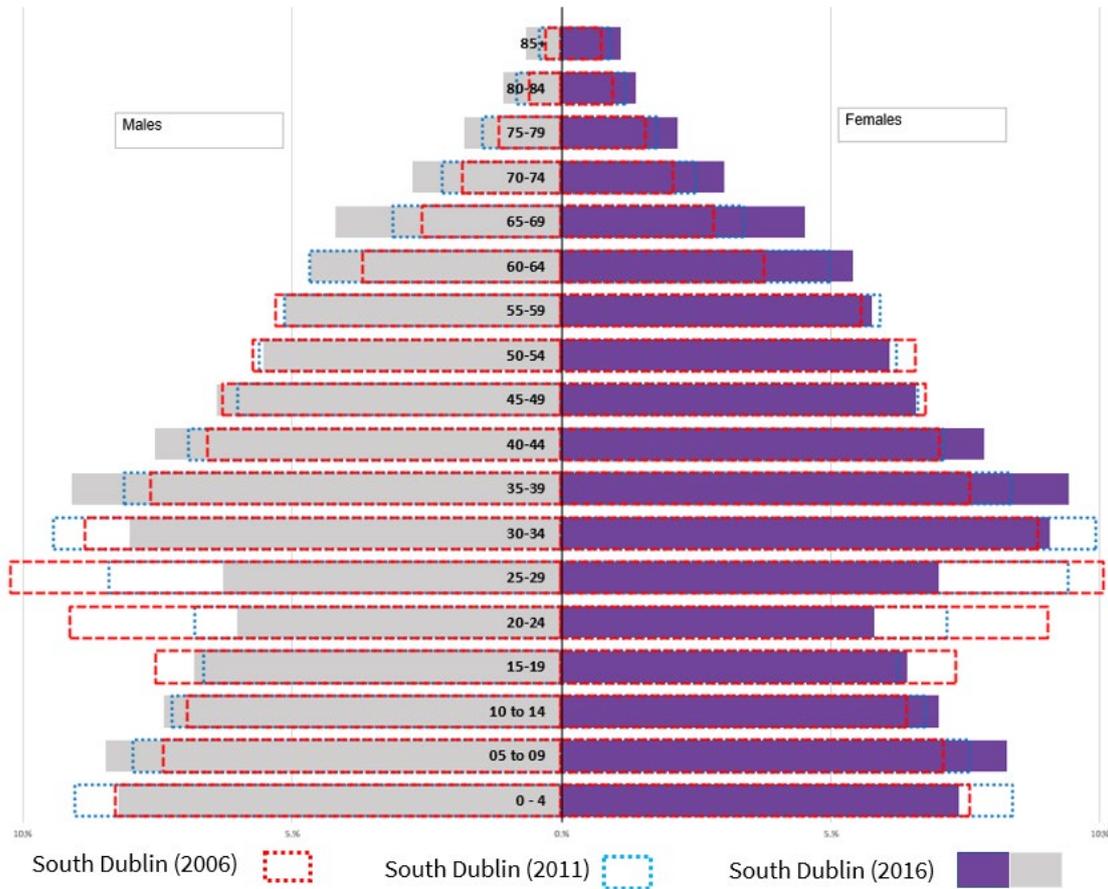


Figure 6: Population Pyramid comparison in South Dublin for 2006 - 2016

4.5.1 65 Years and over Population

In 2016, 63.95% of the total population are between the ages of 65 – 74 (19,777 persons). 81.40% of this group is below the current average life expectancy in Ireland of 83.6.

Between the 2011 – 2016, 58.04% of the overall county growth were 65 years and over. This age cohort has the third highest share of the adult population in the County and is the most rapidly growing in terms of numbers and share.

Table 15: 65+ Population (2006 - 2016)

Year	Persons	% of County Population	Change (figures)	Change (%)
2006	17,861	7.23%	-	-
2011	23,053	8.69%	+5,192	+29.07%
2016	30,925	11.09%	+7,872	+25.45%
2006 - 2016	-	-	+13,064	+73.14%

4.6 South Dublin - Dependency

There are four factors considered as part of the analysis of the population structure of South Dublin County, as follows:

- Young dependency (0 - 14 years of age)
- Old dependency (65 years of age and over)



- The working/independent population (15 - 64 age cohort)
- The mortgage age cohorts (25 - 44 cohort)

Understanding the composition and changes in these groups are indicators which give insight into the high-level formation of the population and contributors to the County.

By understanding the ratio, additional services can be catered for different dependencies. If the proportion of individuals in the old dependency population increases there is potentially more pressure required for healthcare services, either privately or publicly provided.

Likewise, for an increase in the younger population, additional pressures arise on the working group to fund childcare, education or healthcare services, either privately or publicly provided.

Therefore, the aim is to ensure there is a sustainable balance between the dependent and working groups by further enhancing the attractiveness of the County to live in the County. Potential difficulties could arise from a financial perspective as the ratio of dependency increases.

4.6.1 Young Age Dependency (0 - 14 years of age)

This group includes the youngest of the County from 0-14 as a percentage of the working cohort (15 – 64). As the name indicates, this cohort of population is ‘dependent’ on the working / independent population for support and services.

At a national level, the young dependency has increased from 31.90% in 2011 to 32.30% in 2016. For 2016, the Eastern and Midlands had a figure was 31.6%. For the Dublin Region, the figure was 28.2%.

The South Dublin ratio⁷ in 2016 stood at 34.9% [64,088 persons] which is above the State figure and is a slight rise from the 2011 figure of 33.9%. It is the second highest of all the four Local Authorities in Dublin, behind Fingal of 37.0%. Dublin City and Dun Laoghaire-Rathdown for 2016 were 20.9% and 27.9% respectively.

4.6.2 Old Age Dependency (65 years of age and over)

This group includes the oldest persons in the County from 65+yrs as a percentage of the working cohort (15 – 64). Aged Dependency Ratio – the ratio of ageing population (65+) to that of the working age population (15-64). Old dependency in 2016 at State level stood at 20.4% for the State, compared to 17.4% in 2011. This cohort of population is ‘dependent’ on the working / independent population for support and services.

In 2016, the Eastern and Midlands rate for 2016 was 18.0% and 17.9% in the Dublin SPA. For South Dublin, the age dependency ratio jumped from 12.7% in 2011 up to 16.8% in 2016 and is the third highest in the Region behind Dublin City (18.1%) and Dun Laoghaire-Rathdown (24.2%).

4.6.3 The Working/Independent Population (15 – 64 years)

This group includes the 15 – 64 cohort and are more likely to seek employment and form new households. Numbers in the 15-64 working age cohort in South Dublin increased by 8.1% between 2006 and 2011 (135,107 to 146,092 persons), relative to a 9.6% increase nationally. As a proportion of the County’s population this age cohort increased from a share of 54% in 2006 to 55% in 2011. Between 2011 and 2016, this share increased to

⁷ <https://statbank.cso.ie/px/pxeirestat/Statire/SelectVarVal/Define.asp?maintable=E3013andPLanguage=0>



66% (183,754 persons) representing an increase of 26% but it is noted that a significant increase was in the 60-64 age group.

Nationally, the share of this group for 2016 was 65.5%, a reduction from 2011 figure of 66.9%.

4.7 Family Profile

Table 16 outlines the South Dublin data relating to family cycle in South Dublin, Dublin Region, EMRA and state for 2016 based on the following CSO classifications⁸ for family units:

- Pre-family: Family nucleus of married or cohabiting couple without children where female is under 45 years;
- Empty-nest: Family nucleus of married or cohabiting couple without children where female is aged between 45 and 64 years;
- Retired: Family nucleus of married or cohabiting couple without children where female is aged 65 years and over;
- Pre-school: Family nucleus where oldest child is aged 0-4 years;
- Early-school: Family nucleus where oldest child is aged 5-9 years;
- Pre-adolescent: Family nucleus where oldest child is aged 10-14 years;
- Adolescent: Family nucleus where oldest child is aged 15-19 years;
- Adult: Family nucleus where oldest child is aged 20 years and over

Table 16: Families by Family Cycle, South Dublin, Dublin, EMRA State, 2016

Area	Pre-Family	Empty Nest	Retired	Pre-school	Early-School	Pre-Adolescent	Adolescent	Adult
South Dublin	6,018	6,290	6,721	7,963	9,417	8,674	8,907	14,809
	8.1%	8.5%	9.1%	10.7%	12.7%	11.7%	12%	26.5%
Dublin Region	43,144	27,104	31,525	5,775	39,251	34,502	35,678	84,809
	13%	8.1%	9.5%	11%	11.8%	10.4%	10.7%	25.5%
EMRA	63,235	52,641	54,412	63,268	72,770	67,113	69,675	148,351
	10.7%	8.9%	9.2%	10.7%	12.3%	11.3%	11.8%	25.1%
State	111,525	121,720	122,404	122,285	144,861	139,045	150,353	306,177
	9.2%	10%	10%	10%	11.9%	11.4%	12.3%	25.1%

⁸ CSO Family Classification source: <https://www.cso.ie/en/releasesandpublications/ep/p-cp4hf/cp4hf/bgn/>



For South Dublin, pre-family percentage for SDCC was below the Dublin, EMRA and state figure. For 2016, early school and pre-adolescent percentage in South Dublin was higher than Dublin, EMRA and State. The retired family percentage is below the Dublin, EMRA and State figures, but isolated EDs within South Dublin can be greater than all these averages.

The maps⁹ below illustrate the anticipated areas of internal County demand for Housing arising from the Pre-Adolescent and Adult families and potential supply from Retired and empty nest family Groups.

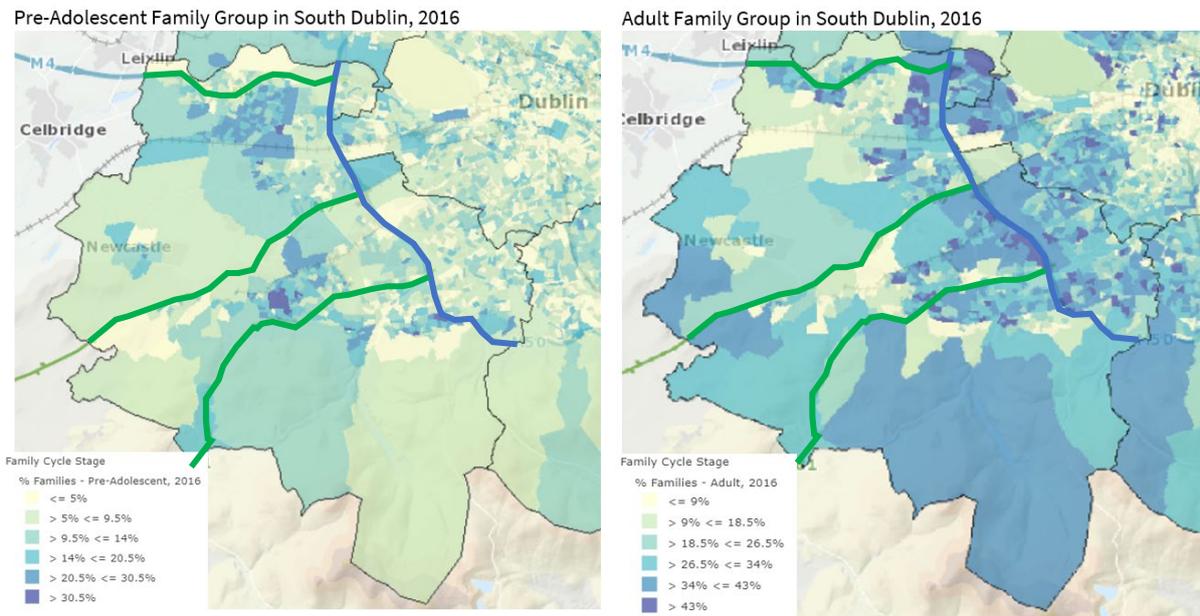


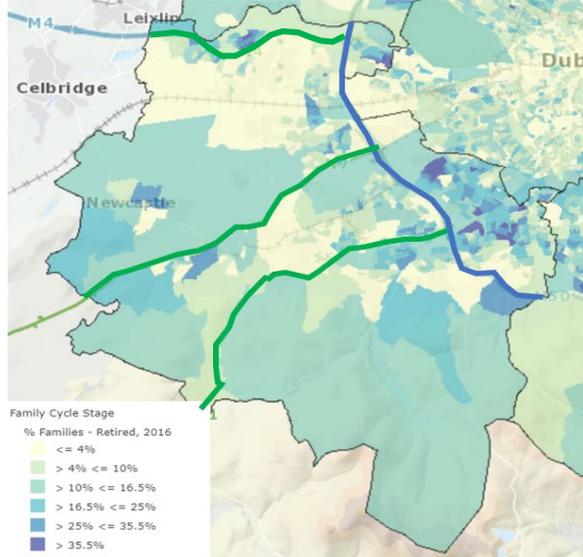
Figure 7: Pre-Adolescent and Adult Family Group, 2016 (M50 – blue line. N4, N7 and N81 – green lines)

The general location of retired family groups are within the M50, the Clondalkin area, south Tallaght, Lucan, Rathcoole and Saggart. Empty Nest family groups follow a similar pattern with additions along the rural/urban fringes of the County and parts of Adamstown.

⁹ Dublin Housing Observatory Online Mapping Tool, available: <https://airomaps.geohive.ie/dho/>



Retired Family Group in South Dublin, 2016



Empty Nest Family Group in South Dublin, 2016

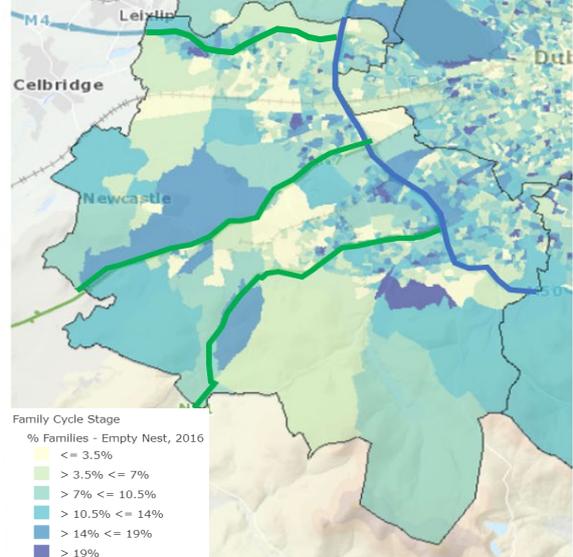
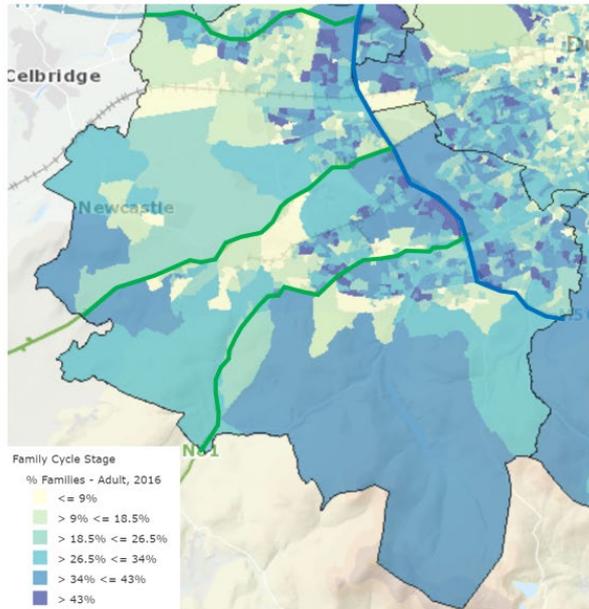


Figure 8: Retired and Empty Nest Family Group, 2016 (M50 – blue line. N4, N7 and N81 – green lines)

Adult Family Group in South Dublin, 2016



Pre-Family Group in South Dublin, 2016

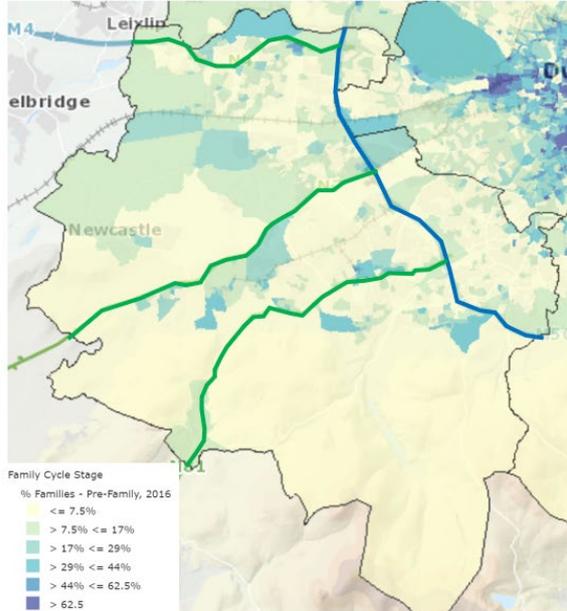


Figure 9: Adult and Pre-Family Group, 2016 (M50 – blue line. N4, N7 and N81 – green lines)

Family size (Theme 4: Families, 1: measured in average number of children per family) has been falling across the State in recent years. In 1991 there were 2.0 children on average in each family. This had fallen to 1.8 children in 1996, 1.6 children in 2002 and 1.4 by 2006. In 2011 the average number of children across the State fell to just below 1.4 children per family, representing a slowdown in the rate of decrease in family size.

Table 17: CSO Composition of Family sizes in South Dublin (2006 - 2016)

Year	Number of Families	Change to No. of Family Changes (No. + %)	Number of children in families	No. of Children Changes	Average No. of Child per Family
2006	64,255	-	95,199	-	1.48



2011	71,380	+7,125 (+11.08%)	101,437 (+6.55%)	+6,238 (+6.55%)	1.42
2016	74,141	+2,761 (+3.86%)	107,140 (+5.62%)	+5,703 (+5.62%)	1.44
2006 - 2016	-	+9,886 (+15.38%)	-	11,941 (+12.54%)	-

Table 17 illustrates the trend of family sizes from 2006 to 2016 in South Dublin. While there has been a downward trend of family size up to 2011, this figure increased in 2016 to an average of 1.44 children per family from 1.42.

The percentage increase in families has decreased from 11% between 2006 to 2011 to 3.86% between 2011 - 2016. By contrast however, the number of children in families, while fallen slightly, has not experienced the same decline.

This is equal to the national figure but was the highest recorded in the Dublin Region, highlighting the need for high quality services, accommodation and schools for young families and children in the County.

4.8 Socio-Economic Profile

Table 18 shows the composition of social class for South Dublin, Dublin, EMRA and State in 2016. When compared with other areas, it can be seen that South Dublin has more people in ‘Non-Manual’ and ‘skilled manual’ than the average for Dublin, EMRA and State but slightly less in ‘Professional’ and ‘Managerial’.

Table 18: Social Class in South Dublin, Dublin, EMRA and State, 2016

County	Professional Worker	Managerial and technical	Non-manual	Skilled manual	Semi-skilled	Unskilled	Unknown	Total
State	386,648	1,336,896	837,145	671,890	501,103	170,391	857,792	4,761,865
%	8%	28%	18%	14%	11%	4%	18%	100%
EMRA	207,157	692,827	409,302	308,148	216,683	77,880	416,520	2,328,517
%	9%	30%	18%	13%	9%	3%	18%	100%
Dublin	135,773	410,180	233,853	159,209	122,171	41,317	254,856	1,347,359
%	10%	30%	17%	12%	8%	3%	19%	100%
South Dublin	20,429	79,021	53,954	41,548	26,184	8,892	48,739	278,767
%	7%	28%	19%	15%	9%	3%	17%	100%

Table 19 shows the unemployment percentage for all four Dublin Local Authorities and the States on the days of the Census in 2011 and 2016. South Dublin’s unemployment rate was higher than the surrounding Dublin Local Authorities at, 19.6% in 2011 and 13.3% in 2016 and slightly higher but more aligned to the State figures.



Table 19: Unemployment Rate in South Dublin, Dublin Local Authorities, and State¹⁰

County	2011	2016
State	19.0%	12.9%
Dublin City	18.5%	12.9%
Fingal	16.0%	10.3%
Dun Laoghaire	11.2%	7.4%
South Dublin	19.6%	13.3%

4.8.1 Household Incomes

The following section looks at the gross and disposable incomes. Both aspects of incomes provide relevant information in terms of rent burden or an ability to qualify for a mortgage. The definition of both types of incomes are taken from the CSO¹¹.

In terms of gross household income, South Dublin had a figure of €52,759 median gross household income for 2016. In comparison, it is above the State median figure with just DCC below it of the four Dublin Local Authorities. Table 20 below shows the comparison.

Table 20: Comparison of Household median gross income (2016)

County	Household median gross income (2016) ¹²
State	€45,256
DCC	€47,294
DLRCC	€66,203
FCC	€58,795
SDCC	€52,759
Dublin City and Suburbs	€52,853

4.8.2 Renting

In terms of renting, the average rent as a % of household disposable income (%) for South Dublin was 33.3% in 2016. The CSO confirms that South Dublin is the highest proportion in the Country and is above the State average of 29.0% for 2016. Table 21 below shows the comparison.

Table 21: Comparison of Renting as a % of household disposable income

County	Household disposable Incomes ¹³
State	29.0%
DCC	32.0%
DLRCC	32.0%
FCC	31.6%
SDCC	33.3%

¹⁰ Available at: <https://www.cso.ie/en/releasesandpublications/ep/p-cp11eoi/cp11eoi/pec/>

¹¹ <https://www.cso.ie/en/releasesandpublications/ep/p-gpii/geographicalprofilesincomeireland2016/backgroundandmethodology/>

¹² Central Statistics Office – Geographical Profiles of Incomes in Ireland 2016, available here:

<https://www.cso.ie/en/releasesandpublications/ep/p-gpii/geographicalprofilesincomeireland2016/incomeireland/> and https://statbank.cso.ie/px/pxeirestat/Database/eirestat/Geographical%20Profiles%20of%20Income%20in%20Ireland/G%20eographical%20Profiles%20of%20Income%20in%20Ireland_statbank.asp?SP=Geographical%20Profiles%20of%20Income%20in%20IrelandandPlanguage=0

¹³ Central Statistics Office – Geographical Profiles of Incomes in Ireland 2016, available here:

https://statbank.cso.ie/px/pxeirestat/Database/eirestat/Geographical%20Profiles%20of%20Income%20in%20Ireland/G%20eographical%20Profiles%20of%20Income%20in%20Ireland_statbank.asp?SP=Geographical%20Profiles%20of%20Income%20in%20IrelandandPlanguage=0



4.8.3 Economic Outlook

The national, regional and local economy is a fundamental driver in the housing market. Providing access to jobs enables people to purchase or rent housing. Depending on the type of jobs and stage of family cycle / age profile, various income ranges can put pressure on specific housing types creating varying needs for different types of housing. Without the corresponding supply which meets this need, the housing price increases.

In this context, understanding the longer-term economic outlook for South Dublin, particularly in the context of household incomes, forecasted growth rates to Gross Domestic Product (GDP) has been examined. To build this picture, this Housing Strategy and Interim HNDA has examined a range of national and regional level economic reports. It is prefaced that the majority of these economic reporting pre-date the economic impacts of COVID-19 which is a fact that sets the framework for potential economic growth, especially in the short to medium term. The data and information set out under this Housing Strategy and Interim HNDA, derived from the below, is taken from a point in time and information produced in this Strategy is based on these documents.

These documents are outlined as follows:

- Economic Quarterly published by the Economic Social and Research Institute (ESRI) in December 2019¹⁴;
- Winter 2019 Economic Forecast published by the European Union in February 2020¹⁵;
- Q1 2020 Bulletin published by the Central Bank of Ireland in February 2020¹⁶;
- Monthly Economic Bulletin for February published by the Department of Finance in March 2020¹⁷;
- Economic Quarterly published by the ESRI in March 2020¹⁸;
- Q2 2020 Bulletin from the Central Bank of Ireland published in April 2020¹⁹;
- Stability Programme Update published by the Department of Finance in April 2020²⁰;
- Spring 2020 Economic Forecast published by the European Union in May 2020²¹;
- Economic Research paper published by Davys in May 2020²²; and
- Economic Quarterly published by the ESRI in May 2020²³

The distribution of household disposable incomes for 2016 from the CSO's Household Budget Survey have been used as the baseline and adjusted going forward. The GDP growth rates outlined in each of the documents above are set out under Table 22.

¹⁴Available at: <https://www.esri.ie/publications/quarterly-economic-commentary-winter-2019>

¹⁵ Available at: https://ec.europa.eu/info/business-economy-euro/economic-performance-and-forecasts/economic-forecasts/winter-2020-economic-forecast-offsetting-forces-confirm-subdued-growth_en

¹⁶ Available at: <https://www.centralbank.ie/publication/quarterly-bulletins/quarterly-bulletin-q1-2020>

¹⁷ Available at: <https://www.gov.ie/en/publication/414a9b-monthly-economic-bulletin-february-2020/>

¹⁸ Available at: <https://www.esri.ie/publications/quarterly-economic-commentary-spring-2020>

¹⁹ Available at: <https://www.centralbank.ie/publication/quarterly-bulletins/quarterly-bulletin-q2-2020>

²⁰ Available at: <https://www.gov.ie/en/publication/43a6dd-stability-programme-update-2020/>

²¹ Available at: https://ec.europa.eu/info/business-economy-euro/economic-performance-and-forecasts/economic-forecasts/spring-2020-economic-forecast-deep-and-uneven-recession-uncertain-recovery_en

²² Available at: <https://www.rte.ie/documents/news/2020/05/new-econ-forecast-may-27th.pdf>

²³ Available at: <https://www.esri.ie/publications/quarterly-economic-commentary-summer-2020>



Table 22: GDP data and forecasting up to 2028

Year	GDP	Source
2017	+8.1%	Economic & Social Research Institute and the European Union Commission;
2018	+8.2%	Economic & Social Research Institute and the Central Bank of Ireland
2019	+5.8%	Economic & Social Research Institute, Central Bank of Ireland, European Union and Department of Finance
2020	-9.4%	Economic & Social Research Institute, Central Bank, Department of Finance and European Union that reflect the ongoing COVID-19 pandemic,
2021	+6.4%	Department of Finance and European Union forecasts
2022	+2.8%	Department of Finance forecast.
2023	+2.7%	Department of Finance forecast.
2024	+2.7%	Department of Finance forecast.
2025	+2.5%	Department of Finance forecast.
2026	+2.5%	Department of Finance forecast.*
2027	+2.5%	Department of Finance forecast.*
2028	+2.5%	Department of Finance forecast.*

* Assumes the Department of Finance forecast for 2025 continues to the end of the Development Plan period.



5 Baseline - Housing

5.1 Housing Stock and Vacancy

The housing stock of South Dublin County Council has increased at a steady pace in recent census periods. In 2016, the total housing stock was 98,387 units of which there were 3,495 units vacant (3.55% of the stock). The total active units is 94,892 units for 2016. Table 23 below outlines the total housing stock for the County from 2002 - 2016. Note: vacancy figures exclude holiday homes.

Table 23: South Dublin County Council Housing Stock (2002 – 2016, CSO)

Year	Housing Stock	Change in Total Stock	Vacancy	Change in Vacancy	Active Housing Stock (Total minus vacancy)
2002	76,666	-	2,146 (2.8%)	-	74,520
2006	87,484	+10,818 (14.1%)	5,424 (6.2%)	+3,278 (+153%)	84,206
2011	97,298	+9,814 (11.22%)	5,249 (5.4%)	- 175 (-3.22%)	92,049
2016	98,387	+1,089 (1.12%)	3,495 (3.55%)	- 1,754 (-33.41%)	94,892

In 2016, 98.3% of the housing units (93,270 units) for South Dublin are within ‘Aggregate Town Area’ while the remaining 1.7% (1,590 units) are located within the ‘Aggregate Rural Area’.

By comparison, the ‘Aggregate Town Area’ increased by 2,787 from 90,483 units, while the ‘Aggregate Rural Area’ increased by 28 units to 1,618 units. It is noted, that the increase in units for the rural area was brought about by reducing vacancy, resulting in a 21% reduction in vacancy between 2011 and 2016.

This is in line with a prevailing state-wide trend of urbanisation. While parts of the County have rural characteristics, the County is pre-dominantly Urban based on the categorisation of the Central Statistics Office. This indicates that vacant stock has absorbed much of the growing need for housing in the county in combination with the new stock.

Table 24 below shows how South Dublin’s housing vacancy was the lowest percentage when compared to Dublin, EMRA and the State in 2016.

Table 24: Housing Stock and Vacancy in South Dublin, Dublin EMRA and State, 2016

Year	Housing Stock	Vacancy (No.)	Vacancy (%)
SDCC	98,387	3,495	3.55%
Dublin	553,204	31,459	5.9%
EMRA	912,484	60,224	6.6%
State	2,014,417	183,312	9.1%

5.2 Planning Permissions

5.2.1 Planning and Construction Activity

The monitoring of construction and planning activity is an invaluable tool to ensure a clear understanding of housing delivery and the type of planning permission and commencements at different locations across the County. There are a number of data sources in relation to housing activity available, principal sources used



are; SDCC figures supplied to the Housing Supply Coordination Taskforce (HTF), BCMS commencements and the Central Statistics Office (CSO).

The Housing Taskforce (HTF) tracks the quantum of residential development for 10 or more units in the four Dublin Local Authorities on a quarterly basis, since 2016. It provides detailed insight into planning and construction activity in the residential sector and the inter-relationship between same.

The Central Statistics Office (CSO) quarterly reports monitor housing completions. The information is also broken up into Eircode for spatial locations and for each Local Authority. As required under the Housing Supply Guidelines discussed below, the CSO data forms the benchmark for constructed units and guides the formation of the Core Strategy. Figure 10 illustrates how completed units have increased between 2017 – 2020 with 5,914 units constructed in South Dublin over that period. Between 2017-2020 inclusive, as construction activity recovered after the economic crash, an average of 1,644 units were completed a year.

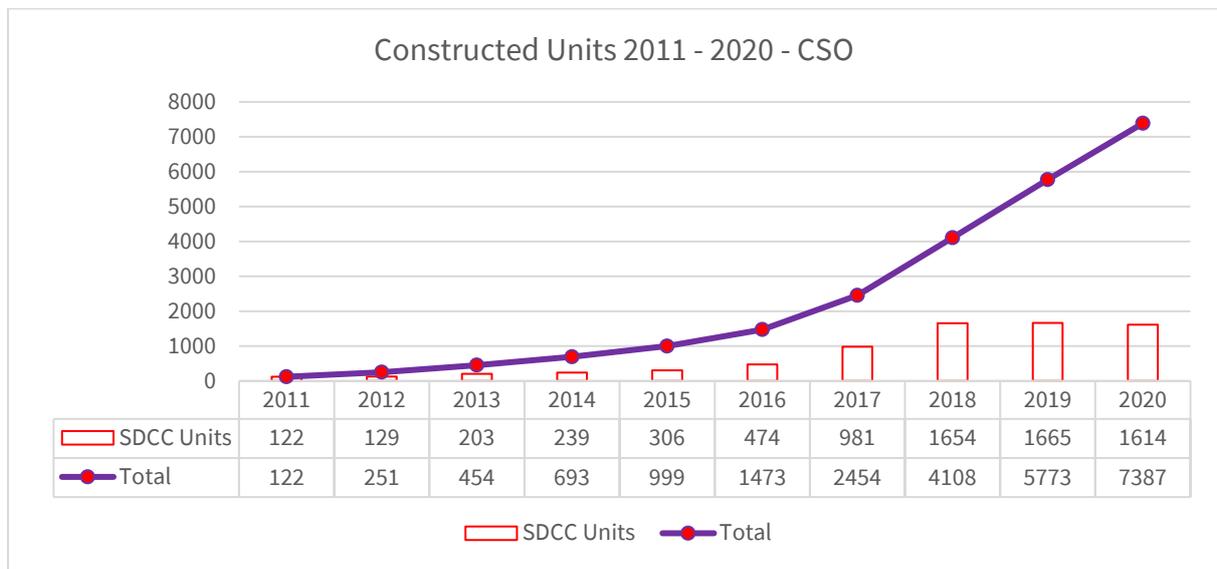


Figure 10: Constructed Units in SDCC and Cumulative Total 2011 – 2020, Source: CSO, NDQ06

In Quarter 3 of 2020, planning permission existed in SDCC for 11,448 units which were either under construction or permitted and not commenced across normal (99 units and less) and Strategic Housing Development applications (more than 99 units).

Strategic Housing Developments (SHDs) comprise a total of 54% of the total units granted with a significant quantum granted since Q4 2019 with on-going pre-planning for further units.

In terms of deliverability, between commencement of the SHD process in 2017 and Q3 2020 11% of the permitted SHD units have either commenced construction or have been built. Delivery of these 100 plus unit developments in South Dublin has generally occurred along the periphery of the County (Citywest/Fortunestown) and established areas (Rathfarnham) but not in the regeneration lands which account for 30% of all SHDs permitted in the County. The deliverability of SHDs, especially within key growth areas, will form part of the Core Strategy monitoring process. Figure 11 below illustrates the historical trend of planning permissions since 2016 up to Q3 2020. The graph shows how SHDs have increased the total quantum of planning permissions within the County.

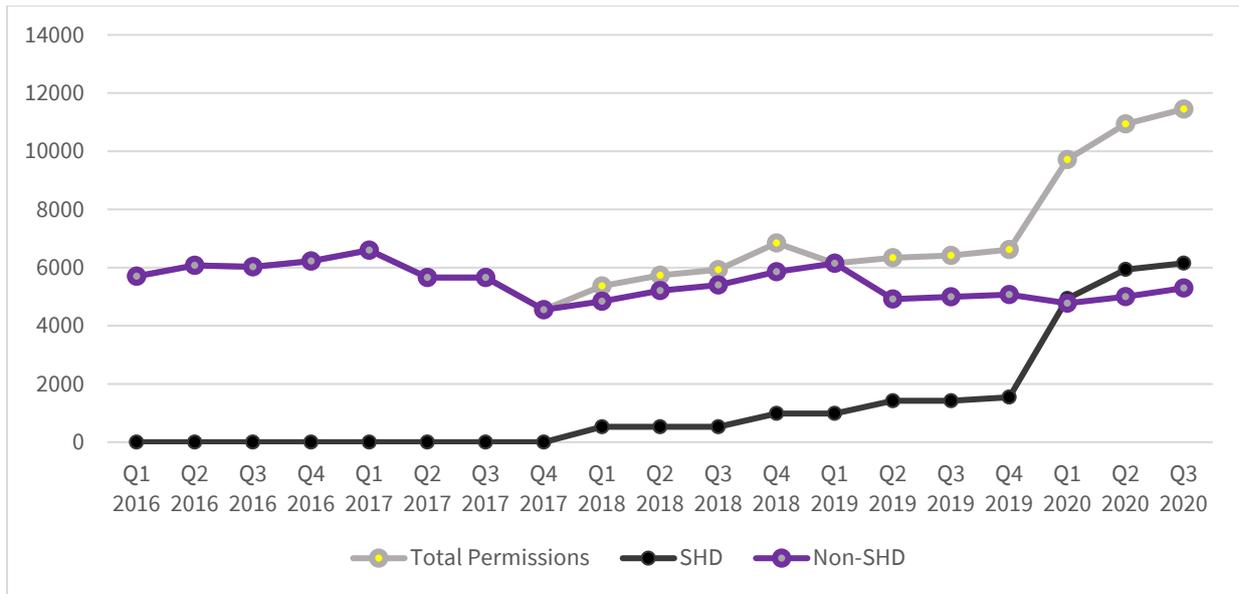


Figure 11: Quantum of Planning Permissions within South Dublin (Source: HTF Series 2016 - 2020)

Figure 12 below illustrates the number of sites with extant planning permission and of these, the quantum that were under construction per quarter since 2016 in South Dublin. The average trend indicates that half of sites (51%) with planning have not commenced at any given time. There are a range of factors which could reflect this, amongst other things: market forces, permission sought to increase land value for re-sale, sourcing the appropriate level of funding to commence construction, capacity of construction industry etc. While COVID-19 has influenced this gap in terms of commencements, the trend of planning permissions (linear line) relative to active sites was continuing to diverge by the end of 2020.

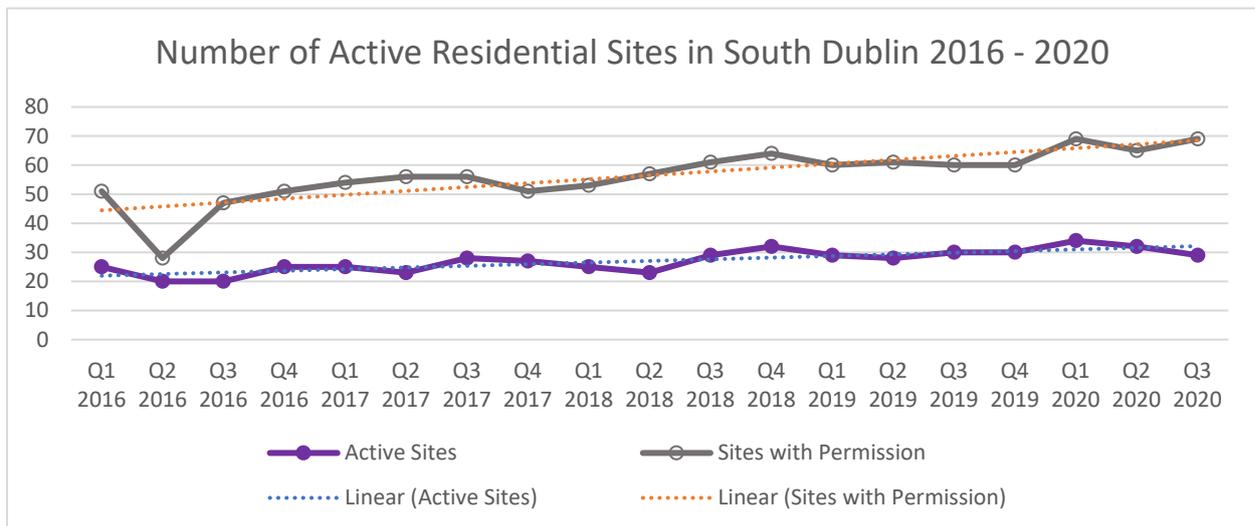


Figure 12: Construction Activity of Residential Sites in South Dublin (Source: HTF Series 2016 - 2020)

Based on these trends, it can be assumed that South Dublin will have, on an ongoing basis, a quantum of sites that are suitable for residential development and have the benefit of planning permission, which may not be brought forward for development within the lifetime of the Plan, or which may not come forward for planning at all.



The CSO provides data on planning permissions. Analysis of historic information on granted planning applications in the County has been undertaken to understand the demand and proportion of housing units for each section of the environment. Since 2011 up to the end of 2020, planning permission has been granted for 19,311 units of which 383 units were classified as ‘One-Off Houses’.

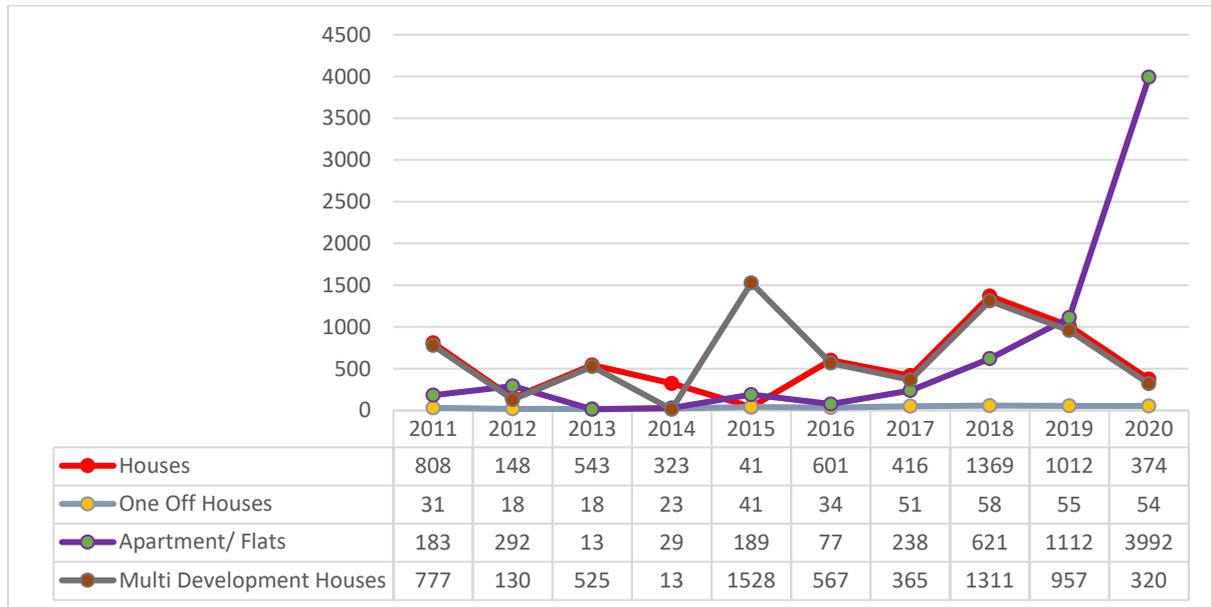


Figure 13: Planning Permissions Granted of Units per Housing category (2011 – 2020), South Dublin

Figure 13 shows the trends of permitted units within South Dublin. It is noted that the rate of ‘Houses’ and ‘Multi-Development Houses’ (schemes of two or more houses) permitted has been decreasing since 2018 with the opposite trend for Apartments/Flats. This is particularly noted in 2020, where apartments / flats comprised 83% of permitted units. Of these permitted apartments, housing taskforce data indicated 80% of the apartment mix comprises 1 and 2-bedrooms. This is particularly noted in the regeneration lands in Tallaght.

In terms of single rural dwellings, analysis of historic information (i.e. during 2011 – 2020) on granted planning applications (by number of units) in South Dublin County has been undertaken to understand the proportion of housing units that are single rural dwellings that have been approved during that period. For the purposes of this assessment, the characteristics and definitions of rural and one-off housing as set out by the CSO have been applied.

Further to Figure 14, Table 25 sets out the percentage of rural one-off housing granted compared to the total permissions in the County since 2011.

Table 25: Percentage of One-off Houses compared to overall permission (2011 – 2020) (CSO: BHQ12)

Year	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
One off houses (Nos.)	31	18	18	23	41	34	51	58	55	54
One off houses (%)	1.7%	3%	1.6%	5.9%	2.3%	2.7%	4.8%	1.7%	1.7%	1.1%

Based on the Figure 14 and Table 25, 131 units were granted between 2011 and 2016. However, as illustrated under Table 26, new housing stock in rural areas between the same period only increased by 28 units, or 21% of permitted units.

Table 26: Percentage of One-off Houses in Rural Areas 2011 to 2016 in South Dublin (CSO: E1063)



Year	2011	2016	Difference No.	Difference (%)
Total permanent units	1,538	1,566	28	1.82%
One off houses	1,103	1,132	28	2.63%

Based on these trends and the policies and objectives of the Development Plan through the implementation of the Rural Hosing Strategy, it is anticipated that a similar level of new development may occur during the lifetime of the Development Plan period. This provision is anticipated to be delivered through efficient use of existing housing stock (extensions, replacement units etc.), and a further reduction in rural housing vacancy.

5.3 Household size

Table 27 presents Census data from 2016 and 2011 relating to the number of private households, the number of persons in private households and the average persons per private households in South Dublin in addition to Dublin County, regional and national level.

Table 27: Private Household Sizes, State, EMRA, Dublin, South Dublin 2011 - 2016

Area	2011			2016		
	Private Households	Persons in private households	Average persons per household	Private Households	Persons in private households	Average persons per household
State	1,654,208	4,510,409	2.73	1,702,289	4,676,648	2.75
EMRA	791,688	2,168,270	2.74	815,557	2,282,857	2.80
Dublin	466,992	1,237,934	2.65	479,683	1,308,854	2.73
South Dublin	90,019	263,723	2.93	92,523	277,168	2.99

According to the CSO a ‘private household’ comprises either one person living alone or a group of people (not necessarily related) living at the same address with common housekeeping arrangements - that is, sharing at least one meal a day or sharing a living room or sitting room.

The table indicates that contrary to longstanding trends towards smaller household sizes, the average number of persons in private households in South Dublin, but also across the region and in the State as a whole, increased slightly between 2011 to 2016.

It is possible that this slight increase reflects the difficulties people faced in forming new households in the aftermath of the last economic crisis as both income levels and construction activity entered a period of significant decline.

Despite this, it is assumed that in the medium to long term, the average number of persons in private households will once again decline due to wider demographic trends associated with lower fertility rates and an aging population. As a result, it is expected that the average number of persons in private households in South Dublin will progress towards the 2.75 level seen in the Dublin City Council area by 2028 and as provided for in the NPF.

5.4 Housing Completions

The Central Statistics Office provide detailed information on housing completions data from Quarter 1 2011 and is updated each quarter. The latest publication is Quarter 4 2020.



From Quarter 1, 2016 up to the end of 2020, 5,914 residential units were constructed in South Dublin County Council. More than 70% of these units were constructed during 2018, 2019 and 2020. Whereby approximately 1,600 units were built each year.

COVID-19 has impacted on the delivery of units, with the impact of site closures becoming clear after each quarter is recorded. Notwithstanding, Q4 2020 represented the largest quarterly output in the last 5 years.

On average across the past 5 years up to the end of 2020, 1,278 residential units a year were built. Figure 14 illustrates the year-on-year increase in constructed residential units within South Dublin.

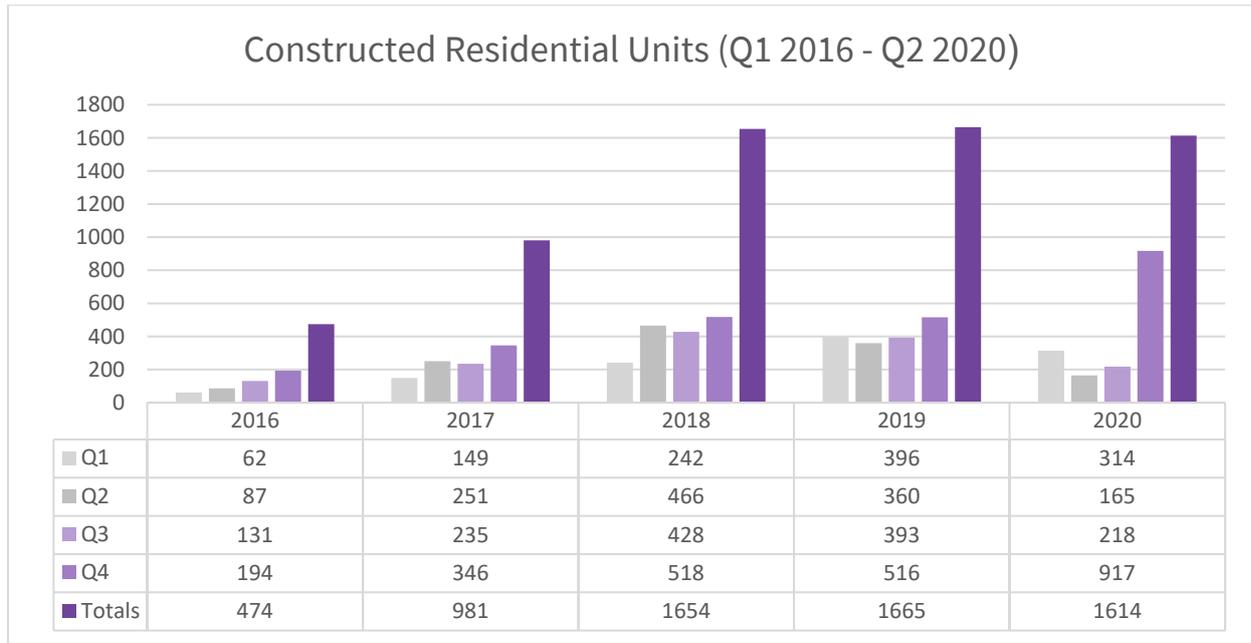


Figure 14: Constructed Residential Units in South Dublin from Q1 2016 – Q4 2020

The location of new dwellings within South Dublin is broadly shown under Figure 15. The map presents data from the Property Price Register since 2016 up to Q2 2020 on all sales on new dwellings (houses/apartments). It is noted on this map, that with the exception of a small number of large infills, the majority of new dwellings are being built along the periphery of the County.

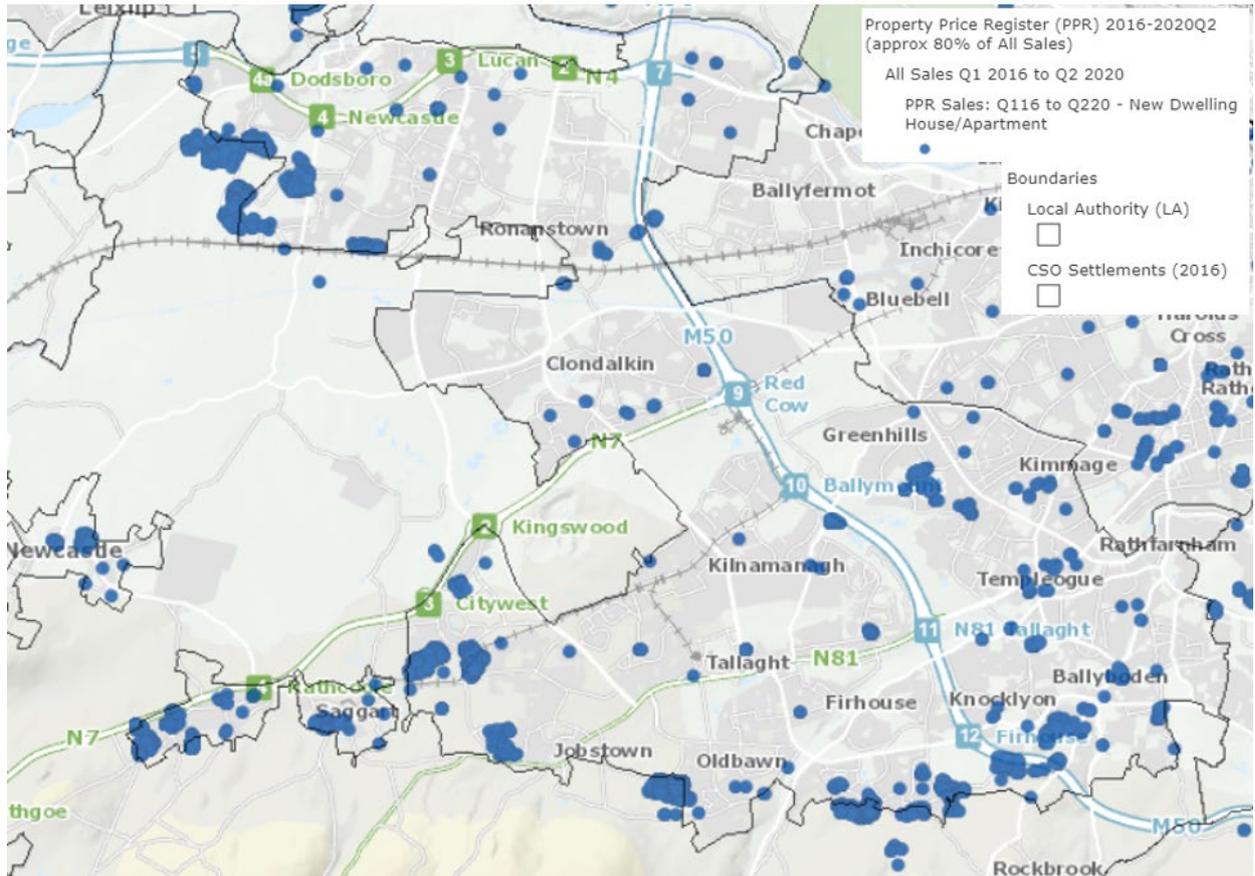


Figure 15: Location of New Dwellings Purchased 2016 - 2020, South Dublin

5.5 Housing Stock Type

Table 28 shows the general composition of South Dublin’s housing type from 2006 to 2016. Since 2006, the share of apartments has increased from 7.8% to 13.8% with a resulting reduction in share of houses from 89.3% to 84.5%.

Table 28: Housing Type - South Dublin 2006 - 2016

	House / Bungalow	Flat / Apartment	Other
2006	89.3%	7.8%	2.9%
2011	85.6%	12.3%	2.1%
2006 - 2011	-3.7%	+4.5%	-0.8%
2016	84.5%	13.8%	1.7%
2011 - 2016	-1.1%	+1.5%	-0.4%

Table 29 shows a comparison between South Dublin, the Dublin Local Authorities, EMRA and the State. South Dublin’s share of Flats/apartments stands at 13.8%, while increasing, remains below the Dublin and overall region figures, but is above the National figure. In terms of housing, 50% of South Dublin house stock is semi-detached but has the lowest percentage of detached housing, 10.46% when compared against Dublin, EMRA



and the State. While the South Dublin figure applies to the County as a whole, different parts of the County have varying ranges of stock which provide for different Housing Needs.

Table 29: Private Households by Type of Private Accommodation in South Dublin, Dublin, EMRA and State 2016

	Detached	Semi-Detached	Terraced house	Flat / Apartment	Other	All private homes Total
South Dublin	9,674	46,387	22,171	12,729	1,562	92,523
	10.46%	50.14%	23.96%	13.8%	1.69%	100%
Dublin	55,149	167,090	128,609	119,499	9,336	479,683
	11.5%	34.83%	26.81%	24.91%	1.95%	100%
EMRA	216,787	268,783	170,959	143,950	15,078	815,557
	26.58%	32.96%	20.96%	17.65%	1.85%	100%
State	715,133	471,948	284,569	200,879	29,760	1,702,289
	42.01%	27.72%	16.72%	11.8%	1.75%	100%

5.6 Household Composition

The Household size cohort represents the number of people living in a household²⁴. The average household size for South Dublin, along with the national household size was decreasing but for the first time in over a decade increased in 2016. The South Dublin trend is shown in table 14 below across 14 years, the household size reduced from 3.25 to 2.99.

Table 30: Historical pattern of Household size for Dublin [CSO E4003]

Year	2002	2006	2011	2016
South Dublin	3.25	3.03	2.93	2.99
Dublin	2.86	2.73	2.65	2.72
Dublin City	2.59	2.50	2.40	2.48
DLRCC	2.90	2.77	2.67	2.71
Fingal	3.18	2.95	2.92	3.02

²⁴ A private household comprises either one person living alone or a group of people (not necessarily related) living at the same address with common housekeeping arrangements - that is, sharing at least one meal a day or sharing a living room or sitting room.



5.6.1 Persons per room

The CSO measures persons per room ratio to measure the level of crowding within households. Overcrowding is defined as more than one person-per-room. In 2011, South Dublin had an average figure of 0.57 persons per room in private housing. This has remained constant since 2002. By comparison, the State provides for a figure of 0.51 persons per household in 2011, 0.52 in 2006 and 0.54 in 2002.

At State level, the overcrowding group represented 10% of the population. This group grew by 28% between 2011 – 2016 which is a strong contrast to the 2006 – 2011 which only saw a 5.56% increase. On the other side of the spectrum, there were 729,012 homes where there were at least 2 rooms for every person, representing over 40% of all households.

Table 31: Private Households in Permanent Housing Units 2016 South Dublin

Nature of Occupancy	Less than 0.5 Persons per Room	0.5 - 1 person per Room	1 and more persons per Room	Sub-Totals	% of total Stock
Mortgage (with or without)	28,671 (31%)	28,470 (30.8%)	6,154 (6.66%)	63,295	68.50%
Private Renting	1853 (2%)	5883 (6.36%)	6857 (7.42%)	14,593	15.79%
Local Authority Renting or Voluntary	210 (2%)	3945 (4.2%)	4,279 (4.63%)	10,333	11.8%

As shown under Table 32, 44% of households in South Dublin comprised just one or two persons living in a household. This is followed by 19.77% and 20.29% for 3 persons and 4 person households respectively. 5 and 6+ persons comprise 16% of the South Dublin households.

Table 32: Household Size Cohort (2016) for South Dublin

Persons per Household	Households	Households %	Persons	Persons%
1-person household	15,575	16.83%	15,575	5.62%
2-person household	25,161	27.13%	50,322	18.16%
3-person household	18,294	19.77%	54,882	19.80%
4-person household	18,770	20.29%	75,080	27.09%
5-person household	9,666	10.45%	48,330	17.44%
6+ person household	5,057	5.47%	32,979	11.90%
Total	92,523	100%	277,168	100%

The rate of change of household composition within South Dublin from 2006 - 2016 is illustrated under Table 33. The largest changes in households between this period were 2-person households increasing by 29%. This is followed by the 1-person and 4-person household growth of 23%. The growth in the 4-person households represented 33% of the increase in persons in private household followed by 2-persons at 21%.



While the rate of change for 1-person and 2-person households is consistent with National and Regional trends, the large increase in 4-person household is a trend which should be incorporated into policy to ensure the needs of such households are facilitated.

Table 33: Change in Household Size Cohort (2006 - 2016) for South Dublin

Persons per Household	Change in Households (No.)	change in Households (%)	Change in Persons (No.)	Change in Persons (%)
1-person household	+2,719	+23%	+2,719	+8.31%
2-person household	+3,420	+29%	+6,840	+21%
3-person household	+1,734	+15%	+5,202	+16%
4-person household	+2,716	+23%	+10,864	+33%
5-person household	+974	+8%	+4,870	+15%
6+ person household	+329	+3%	+2,211	+7%
Total	+11,892	+15%	+32,706	+13%

5.6.2 Number of Rooms and Bedrooms per Dwelling

The CSO includes data relating to the number of rooms per dwelling by a private household. A comparison for South Dublin in 2016 is set out under Table 34. To date, the Census have not included a specific question relating to the number of bedrooms per dwellings. A 2018 pilot survey conducted by the CSO²⁵, put the question of the number of bedrooms to a sample area. The outcome of the survey means a similar question will form part of the next Census in 2022.

The CSO outline that the number of rooms per dwelling is the total number of rooms used by the household comprising: Kitchens, living rooms, bedrooms, conservatories that can be sat in and studies. The rooms excluded are bathrooms, toilets, kitchenettes, utility rooms consulting rooms, offices, shops, halls, landings and rooms that can only be used for storage such as cupboards.

Assuming a typical dwelling layout, 1-2 rooms would represent a 1-bed apartment / studio whereas 3 rooms amounts to 2-bed unit and so on.

Table 34: Number of Rooms per Dwelling, SDCC, Dublin, EMRA, State 2016

Area	1-2 rooms	3-4 rooms	5-6 rooms	7-8 rooms	9 or more	Not Stated	All
South Dublin	5,408	19,199	44,150	15,884	2,633	5,119	92,393
	5.9%	20.8%	47.8%	17.2%	2.8%	5.5%	100%

²⁵External Link to CSO Survey:

https://www.cso.ie/en/media/csoie/census/census2021/Census_Pilot_Survey_Report_2018_V1.pdf



Dublin SPA	55,091	122,512	176,831	76,367	17,301	31,057	479,159
	11.5%	25.6%	36.9%	15.9%	3.6%	6.5%	100%
EMRA	70,699	186,259	314,805	153,541	40,561	47,829	813,694
	8.7%	22.9%	38.7%	18.9%	5.0%	5.9%	100%
State	112,471	352,728	678,062	360,212	100,139	94,053	1,697,665
	6.6%	20.8%	39.9%	21.2%	5.9%	5.5%	100%

Based on the assumption of a typical dwelling, South Dublin has the highest amount of 3 - 4-bedroom dwellings (5-6 rooms at 47.8%) compared to the Dublin (36.9%), Region (38.7%) and State (39.9%) averages and the lowest studio-1-bed / 2 bed (1-2 rooms and 3-4 rooms) in the Dublin, Region and States averages.

It is noted that the 3-4 bedroom mix figures apply to the entire County of South Dublin. While it is recognised that the figure is high by comparison to the Region, new development and planning permissions granted are likely to increase the smaller unit sizes with heavy concentrations of unit types within the regeneration lands and along the Luas lines.

5.6.3 Adult Children at Home

The number of adult children living at home is a measurement to understand the movement and pressures within existing households with children forming part of the Adult Family nucleus. To determine the percentage of adult children at home, the number of children aged 17 and under was deducted from the total children figure in private households. Dividing this by the total population in the county provided the percentage of adult children living at home.

Table 35 illustrates the percentage of adult children, i.e 18 years and older, living at home from 2006 – 2016. While 2006 – 2011 decreased in percentage the figure has stalled in 2016. There is a potential correlation between this reduction, the financial crisis in 2008 resulting in migration patterns and as evident in the age profile under section 4.5, a gap in 20-29 age profile in 2016. This figure will be closely monitored as part of the forthcoming Census 2022, as these figures could indicate a ‘hidden’ household as children stay home longer to afford homeownership.

Table 35: Adult Children living at home, South Dublin 2006 - 2016

Year	Total Children (0 – 20 years and over)	0 - 17	Adult Children at home	Total Population	% of Adult Children at home
2006	95,199	64,189	31,010	246,935	12.56%
2011	101,437	71,208	30,229	265,205	11.40%
2016	107,140	75,106	32,034	278,767	11.49%

5.6.4 Nature of Occupancy per Age Group in Households

Table 36 outlines the change in tenure per household living in South Dublin between 2011 – 2016 which shows the movement between tenures. This information provides the baseline for assessing tenure trends for the County. There are two notable changes between 2011 – 2016 across four age categories as follows; A +3.6%



increase in persons aged 65yrs and over living without a loan or mortgage, increase of 20 – 39 years renting with a large reduction for this group in being an owner occupied with loan or mortgage. Furthermore, it is noted that the under 29 years age groups have reduced in renting privately which may correlate with children staying longer at parents homes, increasing household size, but delaying their own household formation.

Table 36: Change in the nature of Tenure per age group in South Dublin, 2011 - 2016

Age Groups	Owner occupied without loan or mortgage	Owner occupied with loan or mortgage	Rented from private landlord	Rented from a Local Authority	Rented from a Voluntary Body	Occupied free of rent
Under 25 years	+0.00%	-0.14%	-1.16%	-0.08%	-0.01%	0.00%
25 - 29 years	+0.01%	-1.93%	-1.39%	-0.40%	-0.09%	0.01%
30 - 34 years	+0.13%	-2.64%	+0.05%	-0.27%	+0.01%	0.01%
35 - 39 years	+0.13%	-0.51%	+0.90%	+0.13%	+0.06%	0.02%
40 - 44 years	-0.16%	+0.19%	+0.52%	+0.28%	+0.07%	0.02%
45 - 49 years	-0.29%	+0.03%	+0.36%	+0.06%	+0.02%	-0.01%
50 - 54 years	-0.17%	-0.25%	+0.08%	+0.00%	+0.02%	0.02%
55 - 59 years	-0.22%	+0.12%	+0.08%	-0.05%	+0.01%	0.01%
60 - 64 years	-0.28%	+0.22%	+0.05%	+0.16%	+0.01%	-0.01%
65 years and over	+3.64%	+0.38%	+0.04%	+0.46%	+0.02%	0.00%

5.6.5 Mortgage per household

The CSO holds data on the age group who obtain a mortgage. Between 2011 and 2016, there has been an 8.4% decline in mortgaged based households in South Dublin. While the data shows there has been an increase; for example, in the 65yrs and over, it is the 18 - 34yrs age group which has experienced a sharp decline of 37% - 68%. This potentially shows the impact from the Central Bank income rules on mortgages and shortfall in housing supply in the early part of 2011 – 2016. These trends show that the age of mortgage based households is increasing, which shows renting is becoming a main tenure option between 18 - 30s but perhaps not a choice. Contrary to the trend of mortgage for over 40 years, the 50-54 years group saw a reduction of 2.17% which may reflect divorce/separations. This data is illustrated under Table 37 below. The affordability of a Mortgage over the lifetime of the plan in the County is investigated further in this Strategy.

Table 37: Mortgaged Private Household by Age 2011 – 2016 in South Dublin

Age Groups	2011	2016	Diff No.	Diff %
Under 25 years	216	90	-126	-58.33%
25 - 29 years	2,518	806	-1,712	-67.99%
30 - 34 years	6,093	3,822	-2,271	-37.27%
35 - 39 years	6,703	6,423	-280	-4.18%
40 - 44 years	6,142	6,488	346	+5.63%
45 - 49 years	5,418	5,601	183	+3.38%
50 - 54 years	4,602	4,502	-100	-2.17%
55 - 59 years	3,117	3,313	196	+6.29%
60 - 64 years	1,619	1,864	245	+15.13%
65 years and over	977	1,358	381	+39.00%
Total	37,405	34,267	- 3,138	-8.39%



5.6.6 Living Alone for 65yrs+

As set out above, the 65yrs+ increased from 47,766 persons in 2011 to 64,409 persons. An increase of 34% (16,643 persons). Data under Table 38 shows the percentage of persons living alone per age cohort in South Dublin between 2011 - 2016. Information on people living along indicates that as the population ages, the percentage of females living alone almost doubles. For example, the male to female ratio at ages 65-70 in 2016 is 14:27. However for the 85 yrs+ this increases to 29:49 in favour of females.

Table 38: Percentage of persons living alone 2011 -2016 South Dublin

	2011	2016
65 years and over	22%	21%
70 years and over	26%	25%
75 years and over	31%	30%
80 years and over	37%	36%
85 years and over	44%	41%

5.6.7 Household Tenure

Homeownership is the most dominant form of tenure in South Dublin at 68% of households in 2016. The private rented sector in South Dublin accounts for 16.4% of households in the County. Approximately 11.8% of permanent private household are social housing. The information for the County in comparison to the wider Dublin, Region and State is shown under Table 39.

Table 39: Number of Rooms per Dwelling, SDCC, Dublin, EMRA, State 2016, CSO 2016

	Owner Occupied	Rented Private landlord	Rented LA / AHB	Free of Rent / Not Stated	All Households
South Dublin	62,860	15,133	10,921	3,479	92,393
	68%	16.4%	11.8%	3.8%	100%
Dublin	287,769	114,462	50,674	26,254	479,159
	60.1%	23.9%	10.6%	5.5%	100%
EMRA	528,051	166,863	79,201	39,579	813,694
	64.9%	20.5%	9.7%	4.9%	100%
State	1,147,552	309,728	159,943	80,442	1,697,665
	67.6%	18.2%	9.4%	4.7%	100%

Table 40 shows the internal changes between households and persons based on tenure from 2006 – 2016. Renting within the County over this ten-year period has experienced rapid growth of 151% in the case of private landlords. In terms of mortgages, the general reduction in the trend of persons and households in mortgages is evident with 30% more persons owning their home without a mortgage than ten years ago.

Table 40: Household Tenure type (2006 - 2016) for South Dublin (Households and Persons)

No. People per Household	Difference Households	% Share of change	Difference Persons	% Share of change
Owner occupied with mortgage	- 6,543	- 16.00%	- 15,574	- 12.00%
Owner occupied no mortgage	+ 8,115	+ 39.60%	+ 15,634	+ 30.00%
Rented from Private Landlord	+ 8,983	+ 146.10%	+ 29,582	+ 151.00%
Rented from Local Authority	+ 2,257	+ 30.20%	+ 6,675	+ 26.20%
Rented from Voluntary Body	- 1,063	- 47.10%	- 3,334	- 47.90%



Occupied free of rent	+ 160	+ 31.00%	+ 348	+ 31.70%
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5.7 Tenure by Housing Typology

Table 42 Table 41 shows information relating to renting from a private landlord broken down into houses and apartments/flats. While SDCC was below renting in apartments, the rate of growth of approximately 6% over a 5-year period is highest growth rate in comparison to other areas.

Table 41: All Households Rented from Private Landlord in South Dublin, Dublin, EMRA, State 2011 -2016

	Flat, Apartment and Bedsit		Semi-Detached and Terraced		Detached House		All Households Rented from Private Landlord	
	2011	2016	2011	2016	2011	2016	2011	2016
South Dublin	5,011	5,909	8,353	7,728	1,399	1,240	15,141	15,133
	33.1%	39%	55.2%	51.1%	9.2%	8.2%	100%	100%
Dublin	63,120	64,844	43,605	41,535	8,017	6,751	116,935	114,462
	54%	56.7%	37.3%	36.3%	6.9%	5.9%	100%	100%
EMRA	76,201	79,031	67,821	66,926	76,201	79,031	166,375	166,863
	45.8%	47.4%	40.8%	40.1%	11.6%	11.3%	100%	100%
State	110,519	114,085	134,600	134,685	54,970	57,159	305,377	309,728
	36.2%	36.8%	44.1%	43.5%	18%	18.5%	100%	100%

5.8 Social Housing Provision

Social Housing is provided in South Dublin County through the social housing direct build programme and acquisitions, Rental Accommodation Scheme (RAS), the Social Housing Leasing Initiative (SHLI), Applicant Sourced Homes (ASH) and the Housing Assistance Payment (HAP). The statutory basis for the Social Housing Leasing Initiative and RAS is provided for within the Housing (Miscellaneous Provisions) Act, 2009. The statutory provision for HAP is provided for within the Housing (Miscellaneous Provisions) Act, 2014.

In accordance with Section 9 of the Housing Act 1988, housing authorities are required to undertake an assessment of housing need in their administrative area. This Assessment is discussed further under Section 5.10 below.

5.8.1 Quantum of Social Housing Provision

In terms of the type and quantum of social housing provision which addresses the current need of citizens under of South Dublin County Council, the following is a breakdown:

- 9,696 units directly owned by the Council,
- 1,317 units on leasing program,
- 1,139 units on RAS program,
- 2,884 units on HAP program,

Note: The above figures do not include units owned by Approved Housing Bodies which the Council would have access should the units become vacant.



5.9 Social Housing List

In accordance with Section 9 of the Housing Act 1988, housing authorities are required to undertake an assessment of housing need in their administrative area. There are 6,714 included on the Social Housing list at the start of January 2021. South Dublin divided its social housing list into two areas, north and south of the Naas Road. The list is broken-down as follows:

Table 42: South Dublin County Council - Social Housing List 2021

	North of Naas Road	South of Naas Road
1-Bed units	1,649	1,584
2-bed units	1,347	954
3-bed units	620	439
4-bed units	79	44
Total	3,695	3,019

In relation to the above figures, it is noted that 4,552 are regular live HAP tenancies and there are 1,331 Live Homeless HAP tenancies for South Dublin by the end of December 2020.

5.10 Summary Social Housing Assessment

The Summary of Social Housing Assessment (SSHA), prepared annually by the Housing Agency, brings together information provided by local authorities on households that are qualified for social housing support but whose social housing need is not currently being met. The SSHA is intended as a point-in-time assessment of the identified need for social housing support within the county. The most recent document was published in March 2021 which represents data counted in November 2020²⁶.

For South Dublin, there was 4,764 households who qualified for Social Housing Support as a November 2020. Table 43 shows the year-on-year change and the 2016 figure represents a downward trend in households qualified since 2013 for social housing support but whose social housing need is not currently being met. This reduction comprises 1,453 households (23%).

Table 43: Summary of Households seeking social support in South Dublin (2013, 2016 - 2020)

Year	Total Households	Change (No.)	Change (%)
2013	6,217	-	-
2016	5,562	-655	-10.5%
2017	5,869	+307	+5.5%
2018	4,846	-1,023	-17.4%
2019	4,938	+92	+1.9%
2020	4,764	-174	-3.5%

It should be noted that the key figure reported in the SSHA is referred to as 'net need' which is the total number of households qualified for social housing support whose need for support is not being met.

This total *excludes* those already in receipt of social housing support, for example: households currently living in local authority rented accommodation; voluntary/co-operative accommodation; accommodation provided under the HAP scheme; accommodation provided under the RAS; or accommodation provided under the Social Housing Current Expenditure Programme (SHCEP) schemes. It also excludes those who have a primary application with another Local Authority.

²⁶ Available at: <https://www.gov.ie/en/publication/970ea-summary-of-social-housing-assessments-2020-key-findings/>



6 Housing Needs Demand Assessment

6.1 Introduction

This Section of the Housing Strategy and Interim HNDA looks at the Housing Needs and Demand arising from the population growth expected over the lifetime of the Development Plan. This involves the examination of various demographic information and market factors which interact to determine an estimated and type of housing demand.

6.2 Future Population

The Development Plan is bound by the requirements to comply with National and Regional population targets. Future population projections from the CSO is set out below as they apply to National and Regional population targets. Using the CSO projections 2017 – 2031 published in 2019 and applying South Dublin’s 2016 percentage share up to 2031, Figure 16 below shows how South Dublin could potentially growth under different scenarios. Based on the requirement to comply with the population targets under Appendix B of the NPF, the CSO projection ‘M3F2 (Dublin Inflow)’ was selected to inform potential future age profiles.

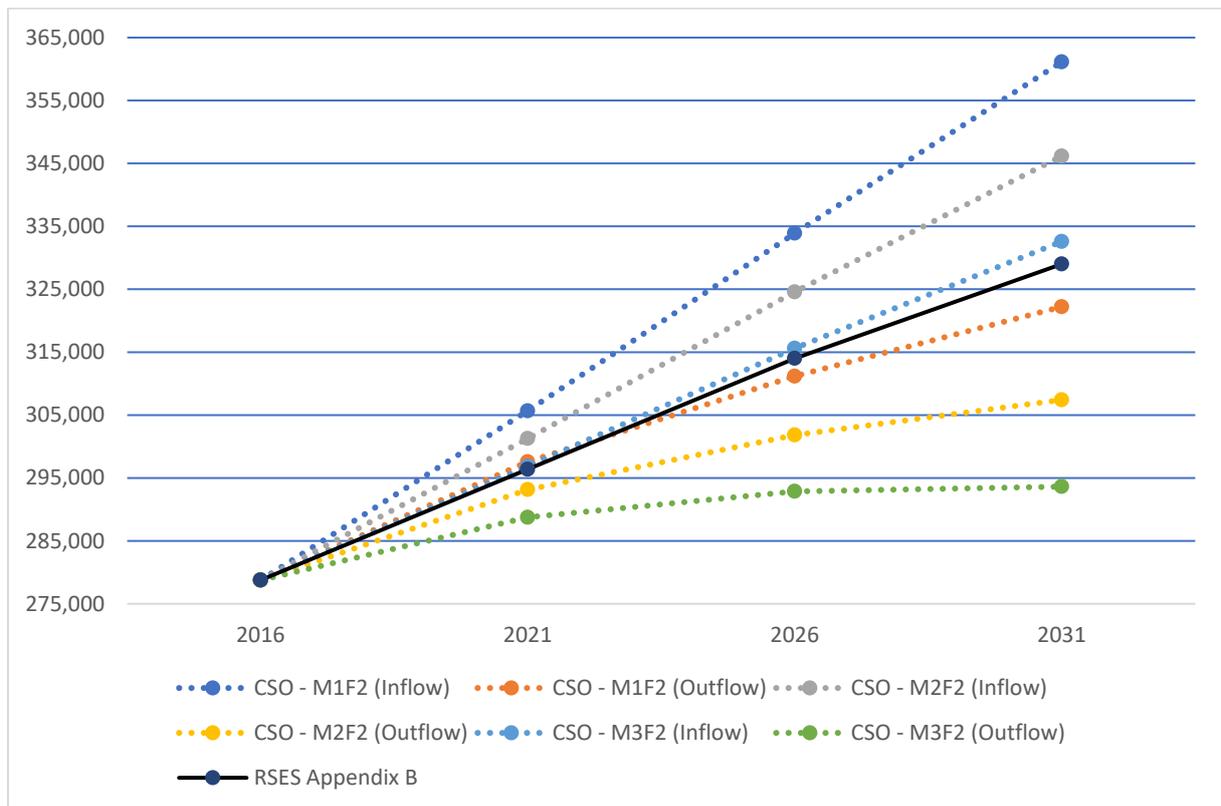


Figure 16: CSO Projections 2017 - 2031 adapted to SDCC

The South Dublin Development Plan population figures are guided by the National and Regional policy documents. Accordingly, the Development Plan must align with the prevailing policy documents or any subsequent amending figures. In this context, the projected population growth over the plan period is outlined as:



Table 44: Projected Population Growth

Year	Population	Percentage increase	Annual Population increase During Year	Total population increase 2022 - 2028	Total Population Increase from 2016
2002	238,835	0	0		
2006	246,935	0	0		
2011	265,205	0	0		
2016	278,767	0	0		
2017	282,644	1.39%	3,877		
2018	286,520	1.37%	3,877		
2019	290,397	1.35%	3,877		
2020	294,273	1.33%	3,877		
2021	298,150	1.32%	3,877		
2022	302,026	1.30%	3,877	-	23,259
2023	305,903	1.28%	3,877		
2024	309,779	1.27%	3,877		
2025	313,656	1.25%	3,877		
2026	317,532	1.24%	3,877		
2027	321,409	1.22%	3,877		
2028	325,285	1.21%	3,877	27,136	46,518
2029	326,523	0.38%	1,238		
2030	327,762	0.38%	1,238		
2031	329,000	0.38%	1,238		50,233

Between 2016 and 2031, the Regional Plans which implement National Planning policy, anticipates an additional 50,000 persons living in South Dublin or on average growth of 3,333 persons per year (1.19%).

6.3 Future Household Size

The National Planning Framework states that average household size is anticipated to decline to approximately 2.5 by 2040 with comments that urban areas tend to have smaller households than rural parts of the Country. Analysis of historic information (i.e. during the 2006, 2011 and 2016 Census) in relation to the composition of households has been undertaken to estimate how they may change over time.

The Census 2016 results specify South Dublin’s average household size to be 2.99. This is higher than the state figure of 2.75. The previous Regional Planning Guidelines, 2010, suggest that by 2022, average household size would be 2.24 providing a 2016 figure of 2.49 for South Dublin. This household formation has not taken place.

The Department of Housing and Local Government and Heritage (DHLGH) published the ‘*Housing Supply Target Methodology for Development Planning*’, December 2020 (Supply Guidelines) accompanied with a housing figure for each Local Authority up to 2031. Under the Guidelines, South Dublin County needs to deliver 25,459 homes by 2031. In light of the 2016 housing stock and future population set under RSES (see section 5.2 above) this results in a household size of 2.74 by 2028.

Following this downward trend in household size and considering in 2016 that 98% of South Dublin’s population is urban where household sizes are generally smaller, a downward trend in household size is considered appropriate.

Figure 17 below illustrates the comparative projected housing sizes for South Dublin up to 2040 under different scenarios. For the purposes of the Core Strategy and Housing Strategy and Interim HNDA, an average household size of 2.74, in line with the Supply Guidelines has been adopted.

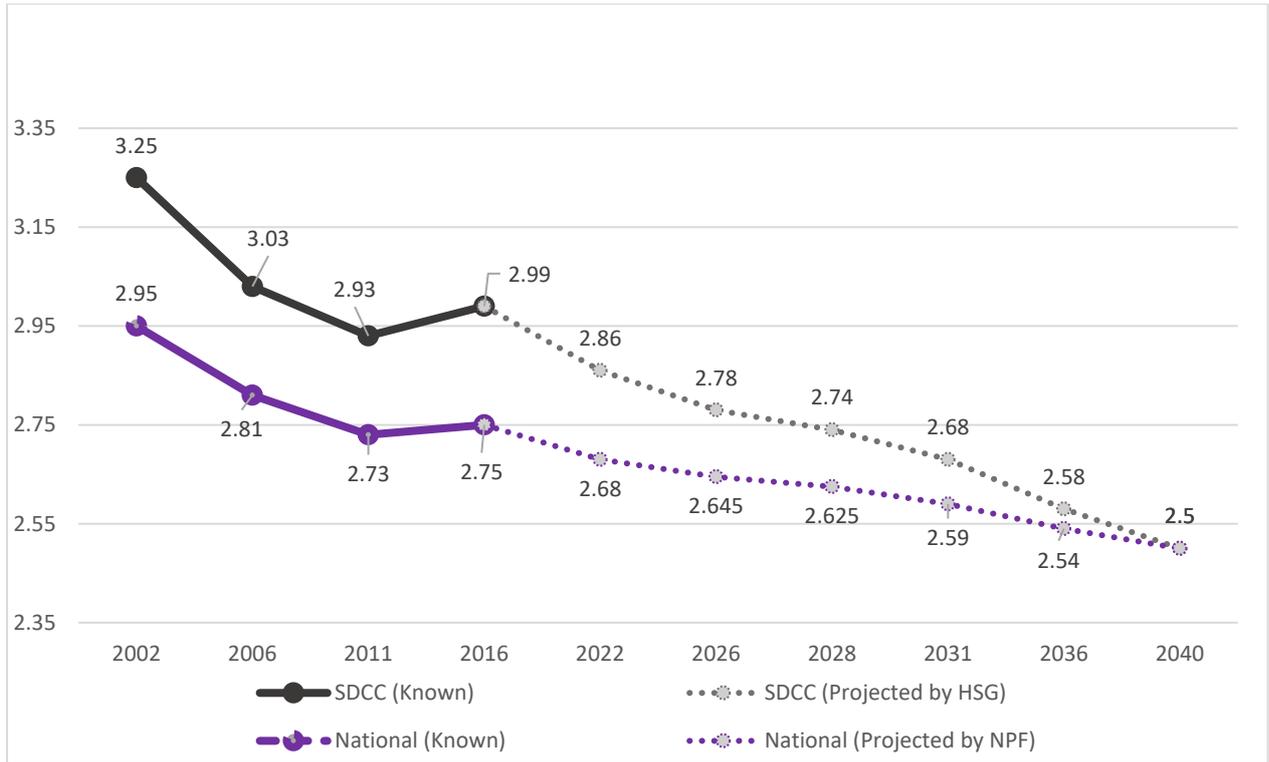


Figure 17: Average persons per household projections



6.4 Future Number of Households

As mentioned above under 3.2.4, South Dublin is required to facilitate growth to accommodate 25,459 units to meet the needs of its population between 2017 and 2031. Taking an average year on year, in the context of the requirements under the Housing Supply Guidelines, there is a need for 23,731 units from 2017 – 2028. The breakdown of this figure per annum is illustrated under Table 44 below.

Table 45: Projected Housing Requirements

Year	Estimated Population	Number of Households	Average Household Size	Number of Houses per Annum over 12 years	Total Housing Need 2022 - 2028	Average Anticipated Houses per Annum between 2022 - 2028
2016 - 2021	278,767	94,892	2.99	1,977	-	-
2022	302,026	106,754	2.83	1,977	-	-
2023	305,903	108,731	2.81	1,977		
2024	309,779	110,708	2.8	1,977		
2025	313,656	112,685	2.79	1,977		
2026	317,532	114,662	2.78	1,977	-	-
2027	321,409	116,639	2.76	1,977		
2028	325,285	118,501	2.75	1,483	12,989	2,165
Difference between 2016 – 2028 (12yrs) = 23,731 units or 1,977 units per annum						

The above table does not factor in households built since 2017 up to the end of 2020 which amounted to 5,916 units. Under the projections outlined under the RSES and the figure contained within the Housing Supply Guidelines, 8,852 units should have been built by the end of 2020.

SDCC has not yet achieved the year-on-year average envisaged and there is a shortfall in required units in order to catch-up to households targets set by the Housing Supply Guidelines. This catch-up does not form part of the above figures because the existing figures for households that are qualified for social housing support but whose social housing need is not currently being met represents the existing figures, which do not need further assessment and therefore the Assessment for Affordability is focussed on the Plan Period 2022 – 2028.

It should be noted that this does not alter the calculations and/or requirements under the Core Strategy to deliver 17,817 units from 2021 up to 2028, or 2,299 units a year.

Consideration of the future population and housing growth for the Rural Aggregate Area, which is all categorised as ‘under strong urban pressure’ is based on:

- Rural Settlement Strategy polices to manage the spread of one-off housing;
- National and Regional policies to encourage the densification of existing built-up areas of Dublin City and Suburbs, Saggart, Newcastle, and Rathcoole in order to optimise infrastructural investment,
- The management of vacant buildings throughout the rural aggregate area,
- Facilitate the provision of single housing in the countryside based on the core consideration of demonstrable economic or social need to live in a rural area and siting and design criteria for rural housing in statutory guidelines and plans, having regard to the viability of smaller towns and rural settlements
- Based on past planning permissions granted using SDCC planning register, notwithstanding the data from the CSO, - four applications have been granted permission since 2016.



The above considerations have informed the population growth as set out under the Core Strategy.

6.5 Future - Age Profile

Figure 16 of this Strategy demonstrates that the CSO projection ‘M3F2 (Dublin Inflow)’ follows a similar trend in terms of overall population growth to RSES Appendix and NPF Roadmap. On this basis, it is used for future age group demographic considerations.

The ‘M3F2 (Dublin Inflow)’ provides age cohort data projections up to 2031 based on Dublin County. To project the change in age profile from 2016 up to 2031, Table 46 sets out the 2016 South Dublin age profile in 2016 as it relates to the overall Dublin figure. As such, South Dublin represented 20.61% of all 15 – 24 ages in the Dublin area in 2016. Under this projection, this share remains constant up to 2031.

Table 46: South Dublin Age Profile as a percentage of Dublin 2016

Age Group	0 - 14	15 - 24	25 - 44	45 - 64	65+	Total
South Dublin (2016)	64,088	34,147	87,539	62,068	30,925	278,767
Dublin (2016)	259,900	165,700	455,000	292,400	162,900	1,335,900
% for SDCC	24.66%	20.61%	19.24%	21.23%	18.98%	20.87%

By carrying forward South Dublin’s percentage share of each age group in Dublin, Table 47 sets out the changes in each growth up to 2031 within the County.

Table 47: South Dublin Age Profile up to 2031 under M3F2 (Dublin Inflow)

Age Group	0 - 14	15 - 24	25 - 44	45 - 64	65+	Total
2016 (No.)	64,088	34,147	87,539	62,068	30,925	278,767
2016 (% share)	23%	12%	31%	22%	11%	100%
2021 (No.)	67,071	36,556	87,923	69,264	36,051	296,838
2026 (No.)	65,469	41,584	86,539	79,135	42,012	315,620
2031 (No.)	62,954	44,451	86,962	88,284	48,372	332,583
2031 (% share)	18.9%	13.3%	27%	26.5%	14.5%	100%
2016 - 2031 (Change Nos.)	-1,134	+10,304	-577	+26,216	+17,447	53,816
2016 – 2031 (% Change)	-1.77%	+30.18%	-0.66%	+42.24%	+56.42%	19.31%

It is noted that the data goes up to 2031, as there is no specific projection data for the Development Plan period. For the purposes of the Plan, the estimates for 2028 are reflective of the 2031 figure to capture the specific trends. This can be updated and refined as further Census data is published.

These indicative projections illustrate how the age cohort, and their demand for different needs for services, is planned for and will evolve over the lifetime of the Development Plan period and beyond. The projections indicate that the 0-14 and 25-44 age groups will reduce slightly but remain relatively constant as the population generally ages.

The projected growth in the 65 and over age group forms the largest change up to 2031. For South Dublin, 65 years and over is projected to increase by 56.4% (17,447 persons) by 2031. This is a continuation of the trend from previous years where the cohort increased by 33% (23,053 to 30,925) between 2011 and 2016 which is an increased rate from the 29% (17,861 to 23,053 persons) between 2006 and 2011 Census. In total, a 73% growth over the 10-year period of 2006 - 2016.



By 2031, the over 65yrs cohort will account for 15% of the total population. What is also notable is the increase in the 45 - 64 age cohort which together with the 65-age group represents 81% of the growth in South Dublin over the next 15 years.

As evident in the Housing Strategy and Interim HNDA, the age group 50 years and over account for 32% of the private mortgaged households in the County. These homeowners generally have strong ties to their own community and it is likely that they will wish to remain there for as long as they are able.

6.6 Future Household Tenure

The analysis of historic information (i.e. from 2006 to 2016 Census) in relation to the household tenure has been undertaken to understand these dynamics and estimate how they may change over time, shown under Table 48. The intercensal average has been used to determine a trended annual average change in household tenure.

Table 48: Forecasted Tenure Type (Households) for South Dublin – year on year change

Tenure Type	2006	2016	Difference	Average year on year change
Owner Occupier with or without Mortgage	76.27%	68.04%	- 8.23%	- 0.823%
Private Rented	7.65%	16.39%	+ 8.74%	+ 0.874%
Other Rented	12.11%	11.82%	- 0.29%	- 0.029%

By carrying forward the average year on year change of household tenure in the County, Table 49 sets out the baseline 2016 figure and future tenure type for South Dublin in 2028.

Table 49: Household Tenure (Households) in South Dublin 2028

Tenure Type	2016	2028
Owner Occupier with or without Mortgage	68.04%	58.2%
Private Rented	16.39%	26.9%
Other Rented	11.82%	11.5%



6.7 Future Household Composition

An Analysis was carried out to project the future household composition and thus potential household type requirement up to 2028. This examined the historic census information (i.e 2006 to 2016 Census) alongside housing formation. Intercensal averages over a ten-year annual change from 2006 - 2016 have been used to create an annual average change in household composition. This trend was prepared alongside demographic information recognised under the National Planning Framework, Regional Spatial Economic Strategy as discussed under Section 2 of this Strategy.

Table 50 outlines the difference between the known household composition in South Dublin for 2016 and the potential 2028 figure.

Table 50: Household Size Cohort Forecast in South Dublin (2016 – 2028)

Persons per Household	2016	2028
1-person household	16.83%	17.68%
2-person household	27.13%	27.38%
3-person household	19.77%	19.88%
4-person household	20.29%	19.75%
5-person+ household	15.91%	15.85%

The analysis shows that one- and two-persons households increase their percentage share from 44% to 45% by 2028. In combination with the 3-person household, these three groups make up 65% of the household size formation, the largest cohort by the end of the plan period.

It is noted that the 4-person and 5-person+ household will only reduce from 36.2% to 35%. It can be assumed that a small proportion of the 4 person households would typically give rise to a need for some 2-bedroom units and that a larger proportion would require 3-bedroom units.

In considering this evidence base and to meet the housing mix need within the County over the life of the plan 30% of all new housing stock should facilitate 3-bedrooms+ unless sufficient justification is provided to demonstrate the contrary.



6.8 Future Development

6.8.1 Affordability

Appendix A of this Report looks at the Affordability of housing for the anticipated population over the course of the Development Plan period. As outlined in the previous sections, it is anticipated that 46,518 persons and 23,731 residential units will be required up to 2028 from 2016.

The methodology used is from the Louth Model under the 2000 Guidelines prepared by the Department of Environment and Planning. The figures used within this assessment comprise the average new units across the Development Plan period (2022 – 2028) and not the total Core Strategy figures. As outlined under Section 6.3, existing households requiring Social Housing are captured within Social Housing List (Section 5.10) and Summary of Social Housing Assessment (5.11) of this report are then added to the projections carried out in this Strategy.

It has been determined that for the average number of units anticipated to be delivered during the plan period that: 3,651 (26.4%) households will not qualify for a mortgage and do not meet the affordability criteria for private rental. This is summarised under Table 51 below:

Table 51: Identified Housing Shortfall over the plan period

	2022	2023	2024	2025	2026	2027	2028
No. of Additional Anticipated Households	1,977	1,977	1,977	1,977	1,977	1,977	1,977
No. of additional households that do not qualify for a mortgage	403	403	403	610	610	610	610
Do not qualify for a mortgage and cannot afford Private Rental	403	403	403	610	610	610	610
Social Requirements as a % of total additional anticipated households	20%	20%	20%	31%	31%	31%	31%

Note: Figures displayed are rounded to the nearest whole number.

In combination with the existing households that are qualified for social housing support but whose social housing need is not currently being met (4,764 households) and the projected requirement (3,651 households) totals 8,415 housing units which require social housing support up to 2028.

It should be noted that this analysis is taken at a point in time. It is therefore considered, based on the information set out in the assessment that the information contained within Table 51 represents a conservative estimate.

Reducing the burden of payment towards household rent / mortgage is essential for good quality of life benefits. This translates into available spending in other areas (Healthcare, School, and extra-curricular activities) to contribute to the wider economy. This is a critical aspect to accommodating current and future citizens.

In this context, residential proposals which address the needs of those who have registered with South Dublin County Council’s housing list or where it can be justified that proposed rents are affordable as defined by the Council will be promoted and encouraged during the lifetime of the Plan.



6.8.2 Housing Tenure, Type and Mix

The findings of the Housing Strategy and Interim HNDA inform Development Plan policy in ensuring that the household needs of current and future populations are accommodated whilst seeking to ensure high quality, inclusive housing for the needs of all citizens. Appropriate housing provision is central to the creation of vibrant and inter-generational sustainable communities.

To this end and in promoting compact urban growth, the needs of all current and future citizens must be factored in to developing our urban areas. It is important that in developing areas, as well as in the existing communities, places are created to attract a diverse range of people including those who want to live, work and raise a family within the immediate area of their home, providing for the achievement of the 10-minute neighbourhood.

As outlined under Section 3, South Dublin's population has grown at a steady pace over the past 15 years resulting in a number of housing and demographic changes. Going forward, the projected population will increase the 2016 population of 278,767 persons by a further 50,000 persons by 2031. By 2028, this equates to 46,518 persons or an average of 3,876 persons a year.

For South Dublin in 2016, the pre-family group was below the Dublin, EMRA and State figure. However, early school and pre-adolescent percentage in South Dublin were higher than Dublin, EMRA and State. The retired family category at 25%, is below the Dublin, EMRA and State figures. However, isolated EDs within South Dublin, for example Tallaght, has 75% of family groups at pre-family to early family stage - far greater than the Dublin, Region and State figures.

In this context, the 15-24 age group is anticipated to increase by 30% over the Plan period and it will be important to facilitate the needs of this age group to create attractive places for people to live and work not just for the short-term but to invest in fostering a healthy community over the long term.

It is important that young people who live and work in the area also have the opportunity to raise their family in the area. It is evident that SDCC has a long-standing outward migration of persons since 2002 and due to the economic crash of 2008, has reduced the quantum of people in the 20-29 age group between 2006 and 2016. Furthermore, a large portion of South Dublin's population between 2011 and 2016 were born outside the State signifying the attractiveness of the County to people abroad. Equally, the 55 years and over group is set to increase by 70%+ up to 2031 and the needs arising from this group need to be considered.

These demographic characteristics vary across the County presenting area specific housing needs. For example, there is a greater concentration of retired family groups within the M50 making up 50% of the family group in certain small areas around Walkinstown and Templeogue. Equally, Empty Nest Family groups are located within the M50 but also in part of Clondalkin, Kilnamanagh and South-west Ballycullen making up 20% of the groups in certain small areas. What is noteworthy is that the location of Pre-Family groups correlate with new homes constructed and first-time buyers which has occurred along the periphery. Contrary to this observation is the Tallaght area, which recognises under the adopted Local Area Plan (2020) the need to facilitate more 3 bedroom units due to the housing needs arising from the large Pre-Family groups in the area. In delivering future communities, consideration needs to be made to a diverse mix of family groups to create resilient and sustainable communities.



6.8.3 Housing Type and Mix

Recent planning permission monitoring has indicated permitted apartment units have exceeded housing within the County. Of permissions granted in 2020, 83% were apartment/flats largely comprising 1-bed and 2-bed units (Section 5.2). While it is acknowledged that smaller housing units are increasingly important to meet housing needs, an appropriate level of family type units must be achieved if we are to deliver sustainable communities with a diverse, multi-generational mix.

By 2031, household composition for the County is anticipated to be made up of 1, 2 and 3 person households totalling 65%. Four persons+ households will make up the remaining 35%, some of which will have a need for two bed units. In recognising that each Neighbourhood in the County has different needs but considering the share of 35% 4-person households requiring larger units, there is a need to address this requirement by accommodating a similar percentage of 3-bedrooms+ in new developments (Section 6.7). Where there may be justification for not conforming to this general requirement, this should be catered for by allowing for flexibility in circumstances where a reduced level of three beds may be appropriate. Such consideration may typically arise in infill development in established urban areas where there is a preponderance of three beds and greater within a short walking distance of any proposed development.

It is also noted that the County has had a sustained net out migration, especially in the early formative household years (Section 4.4). To encourage and provide for this demographic group to return and/or remain in the County, it is important to provide a mix of housing type to encourage them to stay and to provide the necessary housing mix as they progress to the family formation stage.

In relation to the section 28 Guidelines 'Sustainable Urban Housing; Design Standards for Apartments' 2020, the evidence above is put forward to overcome restrictions on 3 bed units under SPPR1.

6.8.4 Housing Tenure

The analysis above has shown that South Dublin County has a high although declining share of owner-occupied housing. Tables 46 and 47 indicate an owner occupancy rate of 68% in 2016, decreasing by 8% since 2011. Should that trend continue, owner occupancy would decrease to 58% by 2028. In contrast, private rented increased from 7.6% in 2006 to 16% in 2016. Following this trend, it would increase to 27% in 2028. The category of 'other rented' is shown to remain relatively consistent on past trends at approximately 11%. These figures would not suggest that there is any need for a county wide intervention in housing tenure.

However, a preponderance of renting in key urban centres and recent high level of single tenure permissions (apartments for the purposes of rental) within the regeneration areas of the County has been identified, in particular in the Tallaght LAP lands but also in the Naas Road area where a Framework Plan is being prepared.

It is considered appropriate, for these particular areas, to provide for policy which will ensure that a balanced approach is taken to residential development and tenure type. This is considered critical to providing for sustainable communities in these newly developing and higher density regeneration areas. Literature would suggest that benefits attributed to mixed tenure communities include better neighbourhood educational outcomes, reduced instances of crime and anti-social behaviour, better access to quality services and amenities and more sustainable communities²⁷. Mixed tenure communities are also supported by Rebuilding Ireland and government policy. To ensure this balance approach is taken to development in the regeneration areas, the Housing Strategy provides for policy as outlined in Section 9 below.

²⁷ Kearns, A. and Mason, P. (2007) Mixed tenure communities and neighbourhood quality. *Housing Studies*, 22(5): 661-691



7 Meeting Social Housing Demand

7.1 Introduction

South Dublin County Council will continue to meet their identified social housing provision requirements via a combination of existing delivery schemes. Social housing support in South Dublin is administered by the Housing Department and there are mechanisms in the social housing system to meet the demand and deliver social housing as summarised below and described in further detail thereafter:

- A social rented tenancy in a property owned and managed by the Local Authority.
- A tenancy in a property the local authority is renting or has leased from a private owner.
- A social rented tenancy in property owned and managed by an approved housing body (AHB).
- South Dublin County Council provides accommodation specifically for Travellers and for people with specific housing needs such as older persons, people with disabilities and the homeless etc.
- A tenancy where the local authority arranges short or long-term leases with private landlords for particular properties (i.e. people that are in receipt of rent supplement for 18 months or longer are eligible to apply for this type of accommodation).

7.2 Social Rental Tenancy via the Local Authority

This relates to a social rented tenancy in any property that is owned and managed by South Dublin County Council (SDCC) or alternatively, this may relate to any tenancy in a property that SDCC is managing or has leased from a private property owner. These can include:

- Construction Projects: This is housing specifically constructed by SDCC.
- Portfolio Acquisitions: Suitable portfolios of vacant properties can be acquired by SDCC from financial institutions and investors.
- Turn-keys: SDCC buy a new house/houses from a developer, ready for a tenant to move into.
- Tenant Purchase Scheme: In January 2016, a new scheme for the purchase of existing local authority houses came into effect – The Tenant (Incremental) Purchase Scheme 2016.
- Acquisitions: This is the purchase by SDCC of a second-hand house on the open market.
- Buy and Renew: Under this scheme SDCC can buy sub-standard properties, which have been vacant for over a year, refurbish them and bring them back into use through the Council's housing stock. The purchase cost plus the cost of refurbishment cannot exceed what a comparable property would attain on the private market. This initiative, which complements the Repair and Leasing Scheme (which is aimed at private owners of vacant properties), is designed to assist local authorities and AHBs (Approved Housing Bodies) to harness the accommodation potential that exists in certain vacant properties for social housing use.
- Provision of Social Housing under Part V of the Planning and Development Acts 2000 (as amended) While the provision of social housing via traditional Part V mechanism will continue to play a role in the delivery of social housing in SDCC, other delivery channels for social housing are likely to be more significant in terms of their potential to contribute to the social housing targets set out. The statutory context for the provision of social and affordable housing has changed under the Urban Regeneration and Housing Act 2015. The amendments include that there will be a requirement for up to 10% social housing in developments that are in excess of nine units. The use of cash payments in lieu of social housing provision is no longer allowed. Provision is made for the transfer of completed units on other land not subject to the planning permission to be provided.



- Provision is also made for the Part V obligation to be fulfilled by developers through long term leasing of properties and rental accommodation availability agreements, however it is recognised this section of the Act has not yet commenced.

7.3 Social Rental Tenancy from Approved Housing Bodies

This relates to a social rented tenancy in any property that is owned and managed by an AHB. AHBs have been formed for the purpose of relieving housing need and the provision and management of social housing. They are established by a voluntary management board to benefit the community in which they are based and are approved and funded by the Department of the Housing, Planning and Local Government.

Such housing cooperatives (i.e. the AHBs) can provide both social rented housing. AHBs are self-help and jointly owned member/user housing associations or societies. Projects undertaken by any AHB may be in response to the needs of older persons, people with disabilities, homeless persons or families and single people on low incomes.

Specifically, some AHBs have been formed to specialise in meeting a particular housing need, whilst others develop with broader aims in relation to the provision of social housing. The specific housing services offered by the AHB can depend on the aims or concerns of the members, the needs of tenants as well as the financial and other resources available for both capital costs and ongoing management running costs.

7.4 Specialist Provision Support from South Dublin County Council

SDCC provides accommodation specifically for individual groups such as Travellers and for people with specific housing needs such as people with disabilities, homeless and Older Persons. As per the Department of Housing’s annual summary of Social Housing Assessments²⁸, Table 52 shows the breakdown of specific need in South Dublin between 2016 - 2020.

Table 52: Totals Breakdown of Specialist Needs, South Dublin 2016 – 2020 (Source: The Housing Agency)

	2016	2017	2018	2019	2020
Enduring physical, sensory, mental health or intellectual Issues	324	375	417	447	394
Homeless	381	360	608	578	607
Traveller	24	32	38	37	43
Aged 65 years or more	39	67	60	47	42

7.4.1 Traveller Accommodation

Under the provisions of the Housing Traveller Accommodation Act 1998, all local authorities are required to prepare, adopt and implement a Traveller Accommodation Programme (TAP) to meet the accommodation needs of the county’s Traveller community. The current Traveller Accommodation Programme for South Dublin²⁹ sets out the strategy for providing accommodation and support services over a five-year period from 2019-2024. The strategy estimates a demand for 108 Traveller Families to be accommodated over the period

²⁸ Available at: <https://www.gov.ie/en/publication/970ea-summary-of-social-housing-assessments-2020-key-findings/>

²⁹ Available at: <https://www.sdcc.ie/en/services/housing/finding-a-home/traveller-accommodation/traveller-accommodation-programme-2019-2024.pdf>



with potential for an additional 41 Traveller Accommodation Units during the term of the programme for future family formations for persons who will reach 18 years of age by 2024.

The targets below have been set subject to funding from the Department of Housing, Planning and Local Government, Planning Approval and Casual Vacancies which will arise during the term of the programme.

Table 53: Targets under the Traveller Accommodation Programme 2019 - 2024

Type	Standard Housing	Group Housing	Bays
No. of	53	30	25

7.4.2 Homeless Persons

According to the latest summary of Social Housing Assessments (2020) 6,500 persons were recorded as being homeless in the state, an increase from 6,277 in 2019. Of the 2020 figure, 65% (4,2328) of these people were located with the Four Dublin Local Authorities, of which 607 (9.9%) in South Dublin.

In parallel with the Rebuilding Ireland programme, the government implemented a range of measures taken to secure a ring-fenced supply of accommodation for homeless households and to mobilise the necessary supports. These measures have been identified in the government's Implementation Plan on the State's Response to Homelessness (May 2014) and in the Action Plan to Address Homelessness (December 2014).

South Dublin is committed to addressing the issue of homelessness in its functional area and has signed up to the Homelessness Action Plan Framework for Dublin, 2019–2021 which was prepared in conjunction with the four other Dublin Local Authorities in accordance with Section 37 of the Housing (Miscellaneous Provisions) Act, 2009.

7.4.3 Disabled Persons

The government’s National Housing Strategy for People with a Disability 2011-2016³⁰ and the associated National Implementation Framework were developed in order to support people with disabilities in community-based living in order to provide them with maximum independence and choice.

A core goal of this national strategy is to meet the identified housing needs of people with disabilities locally whether they are currently living in the community and or in a congregated setting. To facilitate this, the strategy calls on housing authorities to develop their own specific strategies to meet the identified housing needs of people with physical, intellectual, mental health and sensory disabilities locally. The strategy goes on to specify that in line with the development of specific disability housing strategies, housing authorities will consider reserving certain proportions of units to meet specific identified need within each disability strategy.

³⁰ Available at: <https://www.housing.gov.ie/sites/default/files/migrated-files/en/Publications/DevelopmentandHousing/Housing/FileDownload%2C30737%2Cen.pdf>



7.4.4 Older Persons

Housing for older people is becoming an increasingly significant issue, with the most recent Census data indicating that the over-65 age category has increased by 19.1% in the State as a whole since 2011.

By 2036 the CSO estimates 20% of the population will be over 65 (1,160,000 people). Consequently, the number of people over 65 will double in 25 years.

As set out under the Programme for Government (2020), it is recognised that a choice of living in appropriate housing, where possible, enables older people to remain in close proximity to their families and community while accessing health.

As part of the SDCC Corporate Plan, High level themes, objectives and strategies relating to older persons, include:

- Continue to examine and progress social housing construction opportunities to deliver older people's accommodation in the most suitable locations,
- To operate a research and evidence based rightsizing strategy for older people in underoccupied housing in conjunction with a revised housing-transfer policy

County Age Friendly Strategy 2020-2024 recognises the need to provide appropriate housing options to meet the needs of our ageing population

South Dublin's analysis showed that approximately 12% of current tenancies are comprised solely of households of one or two persons, all aged 55 or older, and with no other declared occupants, living in three or four-bedroom homes. This breaks down into approximately 700 homes with single occupancy by an older person and almost 500 additional homes occupied by two older persons.

South Dublin Housing Department has set out policy, titled '*Policy for rightsizing and allocation of Age Friendly Accommodation*' in relation is currently proactively promoting downsizing where appropriate, also referred to as 'Rightsizing at the Right Time' as part of its ongoing efforts to ensure the best use of the Council's social housing stock.

7.5 Local Authority Support for Leases with Private Landlords

This relates to a tenancy where the local authority arranges short or long-term leases with private landlords for particular properties. Specifically, this applies to people that have been in receipt of rent supplement for 18 months or longer who are deemed eligible to apply for this type of accommodation from South Dublin County Council. They can receive this support by way of either the Housing Assistance Payment (HAP), the Rental Accommodation Scheme (RAS) or Repair and Lease.

HAP is a scheme under the Housing Miscellaneous Provisions Act 2014 for people who have a long-term housing need and who qualify for social housing support. It is administered by housing authorities and will eventually replace long-term rent supplement (i.e. RAS). The HAP scheme aims to allow all social housing supports to be accessed via South Dublin County Council (in this instance) to enable people to take up full-time employment whilst keeping their housing support. Under the HAP scheme, the housing applicant finds appropriate private rented accommodation (within specific caps) and South Dublin County Council then pays the landlord directly as the tenant pays rent to the local authority based on the differential rent scheme.

The RAS is an initiative to cater for the accommodation needs of certain persons in receipt of rent supplement, normally for more than 18 months. These individuals have been assessed as having a long-term housing need, therefore South Dublin County Council pays rent directly to the accommodation providers on behalf of the



tenant (which is a maximum of 92% of the market rent). South Dublin County Council therefore makes use of the private and voluntary sector and engages in a contractual arrangement with the provider to secure medium-long term rented accommodation on behalf of the applicant/tenant.

Local Authorities can enter into a lease arrangement with a property owner for periods of up to a maximum of 25 years. The increase in social leasing units reflects government policy aimed at facilitating local authorities to deliver social housing by leasing houses and apartments from private owners and allocating them to tenants from their social housing lists. The Rebuilding Ireland Action Plan for Housing and Homelessness introduced a new scheme, the Vacant Housing Repair and Leasing Initiative (i.e. Repair and Lease). This scheme specifically targets the delivery of social housing and seeks to ensure that existing housing stock is used to the maximum degree possible. The basis of the Repair and Lease scheme is that repair and improvement works to suitable vacant properties are funded in order to bring them up to the standard for rented accommodation and the cost of the works is then deducted from lease payments over an agreed lease term.

7.6 Delivery and Targets

It is anticipated that South Dublin County Council will continue to meet their identified social housing provision via a combination of the existing delivery schemes and through other either existing or recently established schemes and mechanisms that have been implemented. The different Social Housing delivery channels available in County South Dublin and their progress to date in achieving the recent targets (i.e. set out in the Rebuilding Ireland: Action Plan for Housing and Homelessness which was published in July 2016) has been examined.

Rebuilding Ireland recognises issues around supply and affordability in Ireland’s housing sector and provides a multi-stranded approach to achieve key housing objectives up to 2021 and commits to the national delivery of 138,000 additional social housing during 2016-2021 including 83,760 HAP homes, 3,800 RAS homes and over 50,000 new homes (broken down into 33,617 builds, 6,830 acquisitions and 10,036 leases).

Within South Dublin County Council over the period 2018 - 2021, a target of delivering 2,758 units via build, acquisition and leasing has been set out by Rebuilding Ireland³¹. Additionally, a target of delivering 1,704 additional units across all social housing delivery streams was set for 2019 as set out below:

Table 54: Social Housing Targets for 2018 - 2021 and Targets for 2019

Targets for 2018 – 2021			Targets for 2019						
Build, Acquisition and Leasing	Build	Acquisition	Build	Acquisition	Leasing	Sub-total	HAP and RAS	All social housing streams	
2,758	435	76	140	651	1,053	1,704			

Progress on the delivery of social housing units is regularly monitored and documented as part of quarterly updates from the Department of Housing, Planning and Local Government.

The most recently available progress update relates to the end of 2019. This shows that the total output during 2019 was 596 units³² comprising a mix of new Builds, Acquisitions and Leasing, representing 92% of the South

³¹ Available at: <https://rebuildingireland.ie/news/social-housing-targets-2019/>

³² Available at: <https://www.gov.ie/en/publication/ac0c28-social-housing-build-acquisition-and-leasing-delivery-by-local->



Dublin target of 651 for 2019. This milestone follows on from exceeding the targets set in 2018 by c.115% and therefore on balance, South Dublin is achieving the targets. On this basis, South Dublin is progressing towards reaching and exceeding targets set by rebuilding Ireland before the commencement of the Plan period.

Based on the 4,764 households outlined in the Department of Housing’s Annual Housing Assessment currently in need of housing and the 3,652 households identified as requiring social housing support over the lifetime of the plan, there is a requirement to facilitate the needs of 8,415 households up to 2028. It is noted that the identified households over the plan period is a conservative figure based on the application of the Louth Model.

Unlike the previous Development Plan, the Council has a significant pipeline of projects on Council owned land to deliver homes over the plan period in combination with Council Stock turnover and Capital Assistance Scheme. Part V requirements of the Planning and Development Acts, at 10%, form a key part of the social housing delivery in combination with RAS/Leasing/HAP which all form part of providing accommodation to households.

Based on the above, and the remaining allocation set out under the Core Strategy of 17,817 units up to 2028, the following table sets out a breakdown of delivery to provide on the existing and projected housing needs of 8,415 units.

The estimated breakdown on how the social housing requirement will be met by this Housing Strategy and Interim HNDA is set out under Table 55. The figures set out are taken at a point in time during the preparation of the Strategy and have potential to change as needs arise and changes within Government Housing policy. As such, the figures listed in the table below may be subject to change as part of the mandatory two-year review process.

Table 55: Projected Housing Requirement 2022 - 2028

Description	Households
Total Social Household Need – 2021 - 2028	8,415
Council Stock Turnover	900
Build programme delivering social units	3,300
RAS/Leasing/HAP	3,155 – 5,000
Capital Assistance Scheme	120
Part 5 (10% of Private Housing)	940
Private Housing	9,402
Total	17,817

http://www.housing.gov.ie/sites/default/files/publications/files/social_housing_build_acquisition_and_leasing_delivery_by_local_authority_2019.xlsx



8 Conclusion

This strategy has been prepared in line with Part V of the Planning and Development Act 2000 (as amended) taking account of National and Regional Planning policy, demographic and housing data, specific needs of certain groups and projections for South Dublin up to 2028.

Prepared in the absence of National Guidance on a Housing Needs Demand Assessment tool³³, this strategy applies the high-level principles set by the National Planning Objectives of the NPF and RSES on housing for current and future citizens of South Dublin.

This section of the Strategy seeks to bring all the information together and outline the key issues facing South Dublin County during the Development Plan period to form evidence-based policies and objectives in relation to current and future housing demand for the 2022-2028 Development Plan period. The specific details and associated conclusions are based on the available countywide information.

8.1 Affordability

This Housing Strategy and Interim HNDA carried out an analysis on potential affordability issues arising from the additional units forecasted during the lifetime of the Development Plan. It has been determined that 3,651 (26.4%) of the additional anticipated households will not qualify for a mortgage during the plan period and do not meet the affordability criteria for private rental. This can be summarised under table 56 below:

Table 56: Identified Housing Shortfall over the plan period.

	2022	2023	2024	2025	2026	2027	2028
No. of Additional Anticipated Households	1,977	1,977	1,977	1,977	1,977	1,977	1,977
No. of additional households that do not qualify for a mortgage	403	403	403	610	610	610	610
Do not qualify for a mortgage and cannot afford Private Rental	403	403	403	610	610	610	610
Social Requirements as a % of total additional anticipated households	20%	20%	20%	31%	31%	31%	31%

Note: Figures displayed are rounded to the nearest whole number.

8.1.1 Housing Need

This Housing Strategy and Interim HNDA has demonstrated that at least 26% of all new households over the plan period will need State support to pay for house price / rent which is within their means. The 10% requirement under Part V alone is not sufficient to achieve the needs and will be supported by other housing support mechanisms. The findings of the Housing Strategy and Interim HNDA would support an increase in Part V provision, should it be forthcoming in any future legislation.

³³ A HNDA tool and guidance was published by the Department of Housing, Local Government and Heritage on 14th April 2021 under Circular 14/2021. The Circular makes clear that where a Development Plan process has commenced it is not required to integrate the HNDA tool.



8.2 Implementation of the Housing Strategy and Interim HNDA

The Housing Supply aspect of the Housing Strategy and Interim HNDA proposes a series of policy measures aimed at addressing the requirements under Social Housing and ensuring that new development provide the mix and tenure options for current and future populations.

A ten per cent social housing requirement will be applied in relation residential development or proposals where a mixed-use development, including residential is proposed on any zoning in the County. The Planning Authority will review the Part V requirements contained in this Plan if the legislation underpinning this requirement is amended.

It is worth noting that Minister for Housing, Local Government and Heritage published the Affordable Housing Bill in January 2021 which provides for the introduction of three new schemes delivering on the Programme for Government commitment to put affordability at the heart of the housing system and prioritise the increased supply of affordable homes. These schemes will see:

- Local authorities deliver affordable homes for purchase on their lands for the first time in more than a decade.
- A new Affordable Purchase Shared Equity scheme where the State would provide equity support to households seeking to purchase homes in the private market but unable to secure the full mortgage to do so.
- The introduction of a new form of tenure in 'Cost Rental'. This legislation will provide the basis for the first 400 Cost Rental homes in the State which will be delivered in 2021 with many more in the pipeline in the years thereafter.

Following the publication and enactment of the above into law, the Council shall review this Housing Strategy and Interim HNDA and update, as deemed appropriate.

Section 7 of this Housing Strategy and Interim HNDA sets out how the Council will meet the Social Housing Demand for the Plan period through:

- A social rented tenancy in a property owned and managed by the Local Authority.
- A tenancy in a property the local authority is renting or has leased from a private owner.
- A social rented tenancy in property owned and managed by an approved housing body (AHB).
- South Dublin County Council provided accommodation specifically for Travellers and for people with specific housing needs such as older persons, people with disabilities and the homeless etc.
- A tenancy where the local authority arranges short or long-term leases with private landlords for particular properties (i.e. people that are in receipt of rent supplement for 18 months or longer are eligible to apply for this type of accommodation)

8.2.1 Circumstances where a 'Reduced Element' may be Acceptable

This may be considered acceptable by South Dublin County Council in the following limited cases:

- where it is proposed that a site or a portion of a site is to be developed for supported housing for older persons,



- semi-independent or supported living accommodation for people with intellectual and/ or physical disabilities; and
- Housing for Older People (55 years+).

Where it is proposed that the site or portion of a site be developed for older persons/assisted living accommodation, the portion of the site to be used for older/assisted living accommodation will generate a reduced percentage in respect of social housing. This is to encourage the development of these types of units. It may also result in older persons vacating larger units for units more appropriate to their current needs and in turn returning family sized accommodation to the market.

8.3 Housing Mix and Tenure

Section 6 of this Strategy examines housing mix and tenure in detail and is summarised below. Noting the bedroom requirements set out under SPPR1 of the Section 28 Guidelines ‘Sustainable Urban Housing; Design Standards for Apartments’ 2020, and the requirement to have an evidence base to overcome these restrictions, it is considered appropriate that a policy framework on mix and tenure is set out in the Development Plan. This consideration is based on the analysis in this Housing Strategy and Interim HNDA, which has shown:

- The County has a net out migration, especially in the early formative household years (Section 4.4)
- By 2031, household composition for the County is anticipated to be made up of 1, 2 and 3 person households totalling 65% and will largely require 1 and 2 bed units. The 4 persons+ will make up the remaining 35%. A small proportion of these 4 person+ homes will need 2 bed units, with a larger proportion requiring 3 bed + units. In recognising that each Neighbourhood in the County has different needs but considering the share of 35% 4-person households, there is a need to facilitate this requirement by accommodating a similar percentage of 3-bedrooms+ in new developments. (Section 6.7)
- The proliferation of one and two-bedroom unit in apartments and associated rented tenure (representing approximately 83% of permissions granted in 2020, see Section 5.2) concentrated in new development and regeneration areas with the potential to detract from the formation of diverse, vibrant, inter-generational communities.

These issues bring about challenges for South Dublin as they will necessitate the provision of additional housing for a greater number of smaller households, while also catering for a range of age groups and families and their needs for an appropriate mix of house type and tenure. This is all in the context of increased house prices and delivering viable homes for the future population.

8.3.1 Housing Mix

Based on the analysis set out in section 6.8 above and the supporting data, development comprising residential use will be required to provide a minimum of 30% 3-bedroom units as part of the proposed scheme. In recognition that each area has specific socio-economic differences and thus different housing demands, development proposals may justify any deviation from the minimum 3-bedroom mix, based on the socio economic and demographic context within a 10-minute walking distance from the site.

8.3.2 Housing Tenure

Recognising that South Dublin County has a high although declining share of owner-occupied housing, there will be no general requirement for a percentage of units to be owner occupied. However, a preponderance of



single tenure permissions has been identified within the regeneration areas of the County, in particular in the Tallaght LAP lands but also in the Naas Road area where a Framework Plan is being prepared. It is considered appropriate, for these areas, to provide for policy which will ensure that a balanced approach is taken to residential development and tenure type to promote life-long homes to cater for all family cycles. This would facilitate more sustainable communities in these newly developing areas with the multiple benefits identified in literature (Sections 4 and 5) and outlined in section 6.8 above.





9 Housing Strategy and Interim HNDA Policy Objectives

The following sets out the Housing Strategy and Interim HNDA Policy Objectives which are incorporated into the Development Plan.

Housing Strategy and Interim HNDA (HS) Policy 1: Overarching Policies and Objectives
Implement the South Dublin County Council Housing Strategy and Interim HNDA Strategy 2022 – 2028.
HS1: Objective 1: To ensure adequate and appropriate land is zoned to facilitate and implement the aims of the Core Strategy, to deliver sustainable development, and to meet likely future housing need in the County as identified by the Housing Strategy and Interim HNDA.
HS1: Objective 2: To Require that 10% of lands zoned for residential use, or for a mixture of residential and other uses for development of 9 or more units or development of units on land more than 0.1 hectares (or relevant figure as may be revised by legislation) be reserved for social housing in accordance with the Urban Regeneration and Housing Act 2015 and the Planning and Development Act 2000 (as amended).
HS1: Objective 3: To ensure that housing is available to meet the needs of people of all incomes and needs including older persons, people with disabilities, and the homeless, through an appropriate mix of unit types and tenures provided in appropriate locations.
HS1: Objective 4: To support the provision of a mix of tenure types across the County in creating suitable accommodation for all and discourage undue segregation and over proliferation of a single tenure within any local area (within a 10-minute walking distance) in line with the provision of the Housing Strategy and Interim HNDA or any subsequent future Regional based HNDA.
HS1: Objective 5: To provide for social and affordable housing accommodation through a range of delivery mechanisms including new builds, acquisitions, renovations and acquisitions of vacant homes, leasing, and housing supports including RAS and HAP or any other mechanism promoted under Government Housing Policy.
HS1: Objective 6: To encourage the development of older persons/assisted living accommodation, where it is proposed that a site or a portion of a site is to be developed for older/assisted living accommodation a reduced percentage requirement in respect of social housing may be considered.
HS1: Objective 7: To ensure the selection of land or housing units to purchase or lease by the Council, including Part V, counteracts undue segregation by persons of different social backgrounds.
HS1: Objective 8: To provide social and affordable housing over the Plan period to meet forecast future housing need as identified in the interim HNDA.
HS1: Objective 9: To ensure population growth and increased housing densities take place within and contiguous to Dublin City and Suburbs and the County’s town boundaries, suited to their strategic regional role and subject to good design and development management standards being met.
HS1: Objective 10: To promote lifetime housing standards in new homes built in the County in accordance with best practice.



HS1: Objective 11: To promote the re-use of and reactivation of vacant units within our Urban Areas and pursue through the application of the vacant site levy in accordance with the Urban Regeneration and Housing Act 2015, and through the implementation of the South Dublin Vacant Homes Strategy and Action Plan 2018-2021. The Council shall review and update this programme as deemed necessary.

HS1: Objective 12: To implement the policies, objectives and unit target set out under the South Dublin Traveller Accommodation Programme (TAP) 2019-2024 and review the programme as required.

HS1: Objective 13: To work with Central Government and relevant State Agencies Office in responding to requirements to support those in need of refuge.

HS1: Objective 14: To Examine the need to vary the Development Plan, following the publication of the guidance on HNDA methodology issued by the Department of Housing, Local Government and Heritage in April 2020.

HS1: Objective 15: To Ensure that proposals for residential development provide a minimum of 30% 3-bedroom units unless it can be demonstrated that:

- there are unique site constraints that would mitigate against such provision or
- that the proposed housing mix meets the specific demand required in an area, having regard to the prevailing housing type within a ten-minute walk of the site and to the socio-economic, population and housing data set out in the Housing Strategy and Interim HNDA.

HS1: Objective 16: To ensure that a balanced mix of tenure is provided for in the areas zoned for Regeneration in the Tallaght LAP lands and the Naas Road Framework Plan area. Such a mix shall take account of the existing or permitted tenure within a ten-minute walking distance of any proposed development and applicants for planning permission shall demonstrate, to the satisfaction of the planning authority, that there is no saturation of a single tenure within the defined area.

HS1: Objective 17: To commence a review of the Rural Housing Policy and Local Need Criteria.



10 Affordability Assessment

10.1 Introduction

This Section of the Report looks at the Affordability of accommodation for the anticipated population over the course of the Development Plan period. The County is targeted to grow by 46,518 persons providing for an additional 23,609 units from 2016 to 2028. The methodology used is from the Louth Model as set out under the 2000 Guidelines prepared by the Department of Environment and Planning.

A period of time has lapsed since the publication of the 2000 Guidelines, certain aspects relating to affordability and mortgage approval were introduced by the Central Bank. Where such rules have influenced the methodology, this assessment will state this fact.

10.1.1 Estimated Distribution of Household disposable incomes for each decile (2016)

The basis of this affordability is the available spending and saving for a household i.e. the ability of a household to purchase their own home. This calculation has been based on the weekly and annualised disposable incomes at national level from the Central Statistics Office's (CSO) Household Budget Survey (From 2015 – 2016)³⁴ and adjusted to county level based on application of an inflator rate.

The data produced by the CSO does not divide Dublin County into the Four Local Authorities. In the absence of such information and acknowledging that incomes are typically higher in Dublin compared to the State, the Dublin inflator rate of 1.1838 has been applied to the South Dublin figures, as set out under Table 57.

³⁴ Available at: <https://www.cso.ie/en/releasesandpublications/ep/p-hbs/hbs20152016/hinc/>





Table 57: Calculation of Distribution of Weekly and Annual Household Disposable Incomes

Income Range	Average weekly Disposable Income (State) (€) (2009 - 2010)	Average weekly Disposable Income (State) (€) (2015 - 2016) - CSO HS039	Percentage Changes from 2009 - 2010 to 2015 - 2016	Assumed Annual Percentage Income increase from 2010 to 2016	Adjusted Average Weekly Disposable Income (State)(€2017)	Percentage of Households in Each Category (State) - CSO HS029	Average Annual Disposable Income (State) (€)(2017)	South Dublin County Inflator (Dublin Figure)	South Dublin Average Disposable Income (€) (2017)	Number of households in South Dublin (2016)
1st Decile	188.91	197.40	4.5%	0.90%	199.17	9.83%	10,357.06	1.1838	12,260.69	9,327.88
2nd Decile	300.98	324.40	7.8%	1.56%	329.45	10.57%	17,131.32	1.1838	20,280.06	10,030.08
3rd Decile	431.28	465.86	8%	1.60%	473.33	10.47%	24,613.19	1.1838	29,137.09	9,935.19
4th Decile	549.20	593.56	8.1%	1.62%	603.15	10.44%	31,363.73	1.1838	37,128.38	9,906.72
5th Decile	669.46	725.85	8.4%	1.68%	738.08	10.25%	38,380.05	1.1838	45,434.31	9,726.43
6th Decile	802.56	865.88	7.9%	1.58%	879.54	9.94%	45,736.24	1.1838	54,142.57	9,432.26
7th Decile	972.03	1,026.46	5.6%	1.12%	1,037.96	9.62%	53,973.69	1.1838	63,894.05	9,128.61
8th Decile	1,183.82	1,215.55	2.7%	0.54%	1,222.07	9.65%	63,547.44	1.1838	75,227.46	9,157.08
9th Decile	1,472.66	1,473.25	0.04%	0.01%	1,473.37	9.61%	76,615.14	1.1838	90,697.00	9,119.12
10th Decile	2,289.38	2,229.05	-2.6%	-0.53%	2,217.30	9.62%	115,299.70	1.1838	136,491.79	9,128.61
Total or Average	885.72	911.55	2.9%	1.01%	920.73	-	47,878.10	1.1838	56,678.10	94,892





10.1.2 Estimated Distribution of Annual household disposable incomes during the Plan period

To project future affordability in South Dublin, the baseline figures under Table 57 are inflated annually using forecasted growth rates based on Gross Domestic Product (GDP). Section 4.8.3 above outlines the various economic forecasting figures which are shown below along the top row. Notwithstanding the current economic slow-down as a result of COVID-19, the prevailing documents outline a return to growth. Based on these documents, GDP growth applied and set out under Table 58.

Table 58: Calculation of Average Annual Household Disposable Incomes Distribution (€)

Income Range	2022	2023	2024	2025	2026	2027	2028
% of GDP Growth	2.8%	2.7%	2.7%	2.5%	2.5%	2.5%	2.5%
1st Decile	13,909	14,284	14,670	15,037	15,413	15,798	16,193
2nd Decile	23,006	23,627	24,265	24,872	25,494	26,131	26,784
3rd Decile	33,054	33,946	34,863	35,734	36,628	37,543	38,482
4th Decile	42,119	43,257	44,425	45,535	46,674	47,840	49,036
5th Decile	51,542	52,933	54,363	55,722	57,115	58,543	60,006
6th Decile	61,421	63,079	64,782	66,402	68,062	69,763	71,507
7th Decile	72,483	74,440	76,450	78,361	80,320	82,328	84,386
8th Decile	85,340	87,644	90,010	92,261	94,567	96,931	99,355
9th Decile	102,889	105,667	108,520	111,233	114,014	116,864	119,786
10th Decile	154,840	159,020	163,314	167,397	171,582	175,871	180,268

Note: Figures displayed are rounded to the nearest whole number.



10.1.3 Calculation of Average Monthly Household Disposable Income Distribution

This section takes the average annual household incomes during the plan period from Table 58, and calculates the monthly estimates of disposable income distribution for each decile. This enables to establish the range of available incomes over the Plan period to gauge the affordability of private rent. The result of this exercise, results in Table 59.

Table 59: Calculation of Average Monthly Household Disposable Income Distribution (€)

Income Range	Percentage of Households	2022	2023	2024	2025	2026	2027	2028
1st Decile	9.83%	1,159	1,190	1,223	1,253	1,284	1,317	1,349
2nd Decile	10.57%	1,917	1,969	2,022	2,073	2,124	2,178	2,232
3rd Decile	10.47%	2,754	2,829	2,905	2,978	3,052	3,129	3,207
4th Decile	10.44%	3,510	3,605	3,702	3,795	3,889	3,987	4,086
5th Decile	10.25%	4,295	4,411	4,530	4,643	4,760	4,879	5,001
6th Decile	9.94%	5,118	5,257	5,399	5,533	5,672	5,814	5,959
7th Decile	9.62%	6,040	6,203	6,371	6,530	6,693	6,861	7,032
8th Decile	9.65%	7,112	7,304	7,501	7,688	7,881	8,078	8,280
9th Decile	9.61%	8,574	8,806	9,043	9,269	9,501	9,739	9,982
10th Decile	9.62%	12,903	13,252	13,609	13,950	14,298	14,656	15,022

Note: Figures displayed are rounded to the nearest whole number.

10.1.4 Determination of Distribution of Total Households during Plan Period

The next step is to calculate the estimated distribution of total households throughout the plan period taking into account the projected homes for the County outlined under Section 6.4 of this Strategy. Table 60 outlines the distribution of total households across each of the ten incomes deciles during the plan period.

Table 60: Distribution of total households per decile (Units)

Income Range	Percentage of Households	2022	2023	2024	2025	2026	2027	2028
1st Decile	9.83%	10,494	10,688	10,883	11,077	11,271	11,466	11,661
2nd Decile	10.57%	11,284	11,493	11,702	11,911	12,120	12,329	12,538
3rd Decile	10.47%	11,177	11,384	11,591	11,798	12,005	12,212	12,420
4th Decile	10.44%	11,145	11,352	11,558	11,764	11,971	12,177	12,384
5th Decile	10.25%	10,942	11,145	11,348	11,550	11,753	11,955	12,159
6th Decile	9.94%	10,611	10,808	11,004	11,201	11,397	11,594	11,791
7th Decile	9.62%	10,270	10,460	10,650	10,840	11,030	11,221	11,412
8th Decile	9.65%	10,302	10,493	10,683	10,874	11,065	11,256	11,447
9th Decile	9.61%	10,259	10,449	10,639	10,829	11,019	11,209	11,400
10th Decile	9.62%	10,270	10,460	10,650	10,840	11,030	11,221	11,412
Total	100%	106,754	108,731	110,708	112,685	114,662	116,639	118,623



10.1.5 Determination of Distribution of Additional Households during Plan Period

The next step is the calculation of the estimated distribution of additional projected households throughout the plan period for each decile. This exercise is carried out under Table 61.

Table 61: Distribution of Additional Households per decile

Income Range	Percentage of Households	2022	2023	2024	2025	2026	2027	2028
1st Decile	9.83%	194	194	194	194	194	194	194
2nd Decile	10.57%	209	209	209	209	209	209	209
3rd Decile	10.47%	207	207	207	207	207	207	207
4th Decile	10.44%	206	206	206	206	206	206	206
5th Decile	10.25%	203	203	203	203	203	203	203
6th Decile	9.94%	197	197	197	197	197	197	197
7th Decile	9.62%	190	190	190	190	190	190	190
8th Decile	9.65%	191	191	191	191	191	191	191
9th Decile	9.61%	190	190	190	190	190	190	190
10th Decile	9.62%	190	190	190	190	190	190	190
Total		1,977						

10.1.6 Calculation of Projected House Price Bands

This section sets out the background information on house price trends in the current market. To ensure the most up to date market context, 2020 was selected as the baseline year and property transactions during the year, up to the end of 2020, are considered representative to understand house prices and the distribution of housing units per price band. Table 62 shows the breakdown of approximately 2,966 transactions within South Dublin during 2020:

Table 62: Breakdown of House Sales in South Dublin

Band No.	Value Distribution (2020)	Number of Transactions	% of Total
1	0-100,000	17	0.5%
2	100,000 - 150,000	51	1.7%
3	150,000 - 200,000	169	5.7%
4	200,000 - 250,000	314	10.59%
5	250,000 - 300,000	810	27.31%
6	300,000 - 350,000	750	25.29%
7	350,000 - 400,000	380	12.81%
8	400,000+	475	16.01%
Total	Total	2,966	100.00%

As part of the price assessment and projection for affordability in South Dublin over the plan period, the house price sales and fluctuation will influence the price of future house prices. For this reason, historic prices have been examined through analysis of the Residential Property Prices Register, Central Statistics Office and Daft.ie Data in order to contextualise general trends. However, it should be noted that a lot of South Dublin's data is incorporated into the overall Dublin Area and therefore every effort has been made to extract the data relating to addresses within South Dublin. The output of this analysis is illustrated under Table 63.



Table 63: Historic year-on-year change in house price metrics in South Dublin

Year	Annual change in average house sales price (RPPR)	Annual change in average house sales prices (CSO)	Annual change in median house sale price (CSO)
2014	20.35%	17.42%	3.98%
2015	17.35%	4.31%	13.05%
2016	11.95%	11.25%	7.64%
2017	5.55%	7.06%	8.01%
2018	5.80%	3.80%	2.61%
2019	2.74%	-0.34%	2.61%
2020	2.67%	0.62%	n/a

Given the context of improving economic conditions, notwithstanding the implications of COVID-19, it is anticipated that the distribution per price will continue to increase, during the plan period.

In terms of general affordability, the median gross income for households in South Dublin was €52,759 in 2016 or €54,720 in 2020 using GDP growth. Using the Central Bank restrictions of 3.5 times the gross income with an assumption of this being a first-time buyer, a person on this income has potential to purchase a home valued at €212,800 (Band 4 of Table 62) CSO sheds further light on the scope of First-time buyer transactions. Table 64 shows transaction within the Dublin Region and the median prices paid.

Table 64: First Time Buyer Transactions [CSO HPM02]

Year	Median Price (Existing)	Median Price (New)	Difference No. (Existing vs New)	Difference % (Existing vs New)
2016	€262,995	€342,054	€79,058	30%
2020	€322,917	€395,128	€72,211	23%
Difference (Nos)	+ €59,922	+ €53,075	-	-
Difference (%)	+ 23%	+15%	-	-

Based on the information available regarding incomes within the County and the data from Table 64, median gross income for South Dublin cannot avail of a mortgage to purchase a house without a significant savings to support the purchase. This assessment provides for an assumption that the purchaser only has savings to cover 10% mandatory requirement.



This information has supported the calculation of projected house price bands on the percentage split of the 8 prices as outlined under Table 65. This reflects markets changes to the end of the plan period including:

- Changing distribution of housing units per price band (as outlined in Table 65); and
- Annual increase in average house prices of between 3 - 7% with 5% from 2022 to 2028,

Table 65: Projected Distribution of Houses by Price Bands

Price Band	Annual % Change	2020	2022	2024	2026	2028
0-100,000	-0.05%	0.52%	0.42%	0.32%	0.22%	0.12%
100,000 - 150,000	-0.05%	1.67%	1.57%	1.47%	1.37%	1.27%
150,000 - 200,000	0.04%	5.74%	5.82%	5.90%	5.98%	6.06%
200,000 - 250,000	0.04%	10.63%	10.71%	10.79%	10.87%	10.95%
250,000 - 300,000	0.04%	27.35%	27.43%	27.51%	27.59%	27.67%
300,000 - 350,000	0.04%	25.33%	25.41%	25.49%	25.57%	25.65%
350,000 - 400,000	0.04%	12.85%	12.93%	13.01%	13.09%	13.17%
400,000+	0.04%	16.05%	16.13%	16.21%	16.29%	16.37%



Table 66: Calculation of Projected House Price Band ranges

Year	Average Price Increase	1st Band	2nd Band	3rd Band	4th Band	5th Band	6th Band	7th Band	8th Band above						
2022	5%	120,215	120,216	180,322	180,323	240,429	240,430	300,536	300,537	360,644	360,645	420,751	420,752	480,858	480,859
2023	5%	126,225	126,226	189,338	189,339	252,450	252,452	315,563	315,564	378,676	378,677	441,788	441,790	504,901	504,902
2024	5%	132,536	132,538	198,805	198,806	265,073	265,074	331,341	331,343	397,609	397,611	463,878	463,879	530,146	530,147
2025	5%	139,163	139,165	208,745	208,746	278,327	278,328	347,908	347,910	417,490	417,491	487,072	487,073	556,653	556,655
2026	5%	146,121	146,123	219,182	219,184	292,243	292,244	365,304	365,305	438,364	438,366	511,425	511,427	584,486	584,487
2027	5%	153,428	153,429	230,141	230,143	306,855	306,857	383,569	383,570	460,283	460,284	536,996	536,998	613,710	613,712
2028	5%	161,099	161,101	241,648	241,650	322,198	322,199	402,747	402,749	483,297	483,298	563,846	563,848	644,396	644,397





10.1.7 Calculation of Mortgage Capacity of Households

The Central Bank of Ireland have set in place rules which limits the price of mortgages that people can borrow. The first measure is the loan-to-value (LTV), which requires a minimum deposit of 10% on any property for first-time buyers and 20% for everyone else. The other measure is the loan-to-income (LTI) which restricts the value of the mortgage to a maximum of 3.5 times your gross income (i.e before tax). For example, a first-time buyer earning €30,000 a year would have a LTI of €105,000. As this figure typically amounts to 90% due to LTV requirements, this individual will be able to afford a residential property €116,666.

This approach is therefore used in this assessment to determine whether a household could potentially qualify for a mortgage that would allow them to buy a residential property in the lowest price band under these rules. This model does not account for a range of considerations which a person factors in when buying a property, obtaining a larger deposit or for individuals to combine their income to increase their LTV. It assumes that a person within a Decile is or is not able to afford a property at the lowest property in a given year.

The key variables in calculating future household capacity to purchase a home is the LTV ratio of 0.90, LTI of 3.5 and for this exercise the upper value of the first house prices band for that year. This calculation is outlined under Table 67 which has determined that during the plan period.

In summary, the first two deciles up to 2024 and the first three deciles for the remainder up to 2028 do not satisfy the requirements of the Central Bank for a mortgage. These households will then be considered for private rental, discussed further on in the assessment. Households which qualify for a mortgage under this assessment progress to the Needs Assessment for ownership (Annuity Formula).





Table 67: Determination of Mortgage Qualification for Households

Year	Income Range	Additional Anticipated Households [Table 61]	Upper Value of Cheapest House Price (band 1) [Table 66]	Maximum LTV (90% of Price)	Maximum LTI (Loan-to-Income) (3.5 times)	Mortgage Qualification [Does Income exceed price]	Additional Anticipated Households that Qualify for a Mortgage for cheapest house	Additional Anticipated Households That do not Qualify for a Mortgage
2022	1st Decile	194.34	120,215	108,193	48,680.94	NO	0	194.34
	2nd Decile	208.97	120,215	108,193	80,521.73	NO	0	208.97
	3rd Decile	206.99	120,215	108,193	115,688.48	YES	206.99	
	4th Decile	206.40	120,215	108,193	147,417.80	YES	206.40	
	5th Decile	202.64	120,215	108,193	180,396.39	YES	202.64	
	6th Decile	196.51	120,215	108,193	214,972.42	YES	196.51	
	7th Decile	190.19	120,215	108,193	253,690.59	YES	190.19	
	8th Decile	190.78	120,215	108,193	298,689.73	YES	190.78	
	9th Decile	189.99	120,215	108,193	360,111.37	YES	189.99	
	10th Decile	190.19	120,215	108,193	541,939.04	YES	190.19	
	Total Units	1,977.00					1574	403
Percentages						79.60%	20.40%	
2023	1st Decile	194.34	126,225	113,603	49,995.32	NO	0	194.34
	2nd Decile	208.97	126,225	113,603	82,695.82	NO	0	208.97
	3rd Decile	206.99	126,225	113,603	118,812.07	YES	206.99	
	4th Decile	206.40	126,225	113,603	151,398.08	YES	206.40	
	5th Decile	202.64	126,225	113,603	185,267.09	YES	202.64	
	6th Decile	196.51	126,225	113,603	220,776.68	YES	196.51	
	7th Decile	190.19	126,225	113,603	260,540.24	YES	190.19	
	8th Decile	190.78	126,225	113,603	306,754.35	YES	190.78	
	9th Decile	189.99	126,225	113,603	369,834.38	YES	189.99	
	10th Decile	190.19	126,225	113,603	556,571.39	YES	190.19	
	Total Units	1,977.00					1574	403
Percentages						79.60%	20.40%	
2024	1st Decile	194.34	132,536	119,283	51,345.19	NO	0	194.34
	2nd Decile	208.97	132,536	119,283	84,928.60	NO	0	208.97





Year	Income Range	Additional Anticipated Households [Table 61]	Upper Value of Cheapest House Price (band 1) [Table 66]	Maximum LTV (90% of Price)	Maximum LTI (Loan-to-Income) (3.5 times)	Mortgage Qualification [Does Income exceed price]	Additional Anticipated Households that Qualify for a Mortgage for cheapest house	Additional Anticipated Households That do not Qualify for a Mortgage
2024	3rd Decile	206.99	132,536	119,283	122,019.99	YES	206.99	
	4th Decile	206.40	132,536	119,283	155,485.83	YES	206.40	
	5th Decile	202.64	132,536	119,283	190,269.30	YES	202.64	
	6th Decile	196.51	132,536	119,283	226,737.65	YES	196.51	
	7th Decile	190.19	132,536	119,283	267,574.82	YES	190.19	
	8th Decile	190.78	132,536	119,283	315,036.72	YES	190.78	
	9th Decile	189.99	132,536	119,283	379,819.91	YES	189.99	
	10th Decile	190.19	132,536	119,283	571,598.82	YES	190.19	
	Total Units	1,977.00					1574	403
Percentages						79.60%	20.40%	
2025	1st Decile	194.34	139,163	125,247	52,628.82	NO	0	194.34
	2nd Decile	208.97	139,163	125,247	87,051.82	NO	0	208.97
	3rd Decile	206.99	139,163	125,247	125,070.49	NO	0	206.99
	4th Decile	206.40	139,163	125,247	159,372.97	YES	206.40	
	5th Decile	202.64	139,163	125,247	195,026.03	YES	202.64	
	6th Decile	196.51	139,163	125,247	232,406.09	YES	196.51	
	7th Decile	190.19	139,163	125,247	274,264.19	YES	190.19	
	8th Decile	190.78	139,163	125,247	322,912.64	YES	190.78	
	9th Decile	189.99	139,163	125,247	389,315.41	YES	189.99	
	10th Decile	190.19	139,163	125,247	585,888.79	YES	190.19	
	Total Units	1,977.00					1367	610
Percentages						69.13%	30.87%	
2026	1st Decile	194.34	146,121	131,509	53,944.55	NO	0	194.34
	2nd Decile	208.97	146,121	131,509	89,228.11	NO	0	208.97





Year	Income Range	Additional Anticipated Households [Table 61]	Upper Value of Cheapest House Price (band 1) [Table 66]	Maximum LTV (90% of Price)	Maximum LTI (Loan-to-Income) (3.5 times)	Mortgage Qualification [Does Income exceed price]	Additional Anticipated Households that Qualify for a Mortgage for cheapest house	Additional Anticipated Households That do not Qualify for a Mortgage
2026	3rd Decile	206.99	146,121	131,509	128,197.25	NO	0	206.99
	4th Decile	206.40	146,121	131,509	163,357.30	YES	206.40	
	5th Decile	202.64	146,121	131,509	199,901.68	YES	202.64	
	6th Decile	196.51	146,121	131,509	238,216.24	YES	196.51	
	7th Decile	190.19	146,121	131,509	281,120.80	YES	190.19	
	8th Decile	190.78	146,121	131,509	330,985.45	YES	190.78	
	9th Decile	189.99	146,121	131,509	399,048.29	YES	189.99	
	10th Decile	190.19	146,121	131,509	600,536.01	YES	190.19	
	Total Units	1,977.00					1367	610
Percentages						69.13%	30.87%	
2027	1st Decile	194.34	153,428	138,085	55,293.16	NO	0	194.34
	2nd Decile	208.97	153,428	138,085	91,458.82	NO	0	208.97
	3rd Decile	206.99	153,428	138,085	131,402.19	NO	0	206.99
	4th Decile	206.40	153,428	138,085	167,441.23	YES	206.40	
	5th Decile	202.64	153,428	138,085	204,899.23	YES	202.64	
	6th Decile	196.51	153,428	138,085	244,171.65	YES	196.51	
	7th Decile	190.19	153,428	138,085	288,148.82	YES	190.19	
	8th Decile	190.78	153,428	138,085	339,260.09	YES	190.78	
	9th Decile	189.99	153,428	138,085	409,024.50	YES	189.99	
	10th Decile	190.19	153,428	138,085	615,549.41	YES	190.19	
	Total Units	1,977.00					1367	610
Percentages						69.13%	30.87%	
2028	1st Decile	194.34	161,099	144,989	56,675.49	NO	0	194.34
	2nd Decile	208.97	161,099	144,989	93,745.29	NO	0	208.97





Year	Income Range	Additional Anticipated Households [Table 61]	Upper Value of Cheapest House Price (band 1) [Table 66]	Maximum LTV (90% of Price)	Maximum LTI (Loan-to-Income) (3.5 times)	Mortgage Qualification [Does Income exceed price]	Additional Anticipated Households that Qualify for a Mortgage for cheapest house	Additional Anticipated Households That do not Qualify for a Mortgage
	3rd Decile	206.99	161,099	144,989	134,687.24	NO	0	206.99
	4th Decile	206.40	161,099	144,989	171,627.26	YES	206.40	0
	5th Decile	202.64	161,099	144,989	210,021.71	YES	202.64	0
	6th Decile	196.51	161,099	144,989	250,275.94	YES	196.51	0
	7th Decile	190.19	161,099	144,989	295,352.54	YES	190.19	0
	8th Decile	190.78	161,099	144,989	347,741.59	YES	190.78	0
	9th Decile	189.99	161,099	144,989	419,250.11	YES	189.99	0
	10th Decile	190.19	161,099	144,989	630,938.14	YES	190.19	0
	Total Units	1,977.00	0	0	0	0	0	1367
Percentages	0	0	0	0	0	0	69.13%	30.87%





10.1.8 Calculation of Projected Needs of Ownership

Application and Variables of the Annuity Formula

This step calculates the approximate affordable house price for each of the ten deciles per year during the plan period based on the application of the annuity formula set out under the Department of Environment, Community and Local Government Model Housing Strategy. The formula determines the maximum affordable house price for each of the ten income deciles using key variables.

The key variable used in the annuity formula are as follows:

35% expenditure of household income on mortgage costs,

- A loan to value ratio of 0.90,
- An average interest rate on all new mortgages agreed in Ireland in December 2019 of 2.88 per cent³⁵,
- The Average loan term for all primary dwelling houses is 27 years³⁶

While some of the lower deciles have a maximum affordable house price that is higher than the lowest price band for that year, as outlined under Table 68, such household would not qualify for a mortgage due to the current Central Bank rule. In this context, the annuity formula has been prepared in line with the Model Housing Strategy.

Table 68: Calculation of Housing Affordability

Income Range	% Households	2022	2023	2024	2025	2026	2027	2028
1st Decile	9.83%	101,529	104,271	107,086	109,763	112,507	115,320	118,203
2nd Decile	10.57%	167,937	172,471	177,128	181,556	186,095	190,747	195,516
3rd Decile	10.47%	241,281	247,795	254,486	260,848	267,369	349,217	280,905
4th Decile	10.44%	307,456	315,757	324,283	332,390	340,699	397,164	357,947
5th Decile	10.25%	376,236	386,395	396,827	406,748	416,917	427,339	438,023
6th Decile	9.94%	488,348	460,454	472,886	484,708	496,826	509,246	521,978
7th Decile	9.62%	529,099	543,385	558,056	572,008	586,308	600,965	615,990
8th Decile	9.65%	622,950	639,770	657,043	673,469	690,306	707,564	725,252
9th Decile	9.61%	751,051	771,330	792,155	811,959	932,258	853,065	874,391
10th Decile	9.62%	1,130,272	1,160,790	1,192,131	1,221,934	1,252,483	1,283,795	1,315,889

³⁵ Available at: <https://www.centralbank.ie/statistics/data-and-analysis/credit-and-banking-statistics/retail-interest-rates>

³⁶ Available at: <https://www.centralbank.ie/publication/household-credit-market-report>



Calculation of Projected Needs for Home Ownership

This section calculates the household surplus and/or deficit per price band with respect to the number of households that can qualify for mortgage.

The calculation is based on the determination of additional households required, the projected house price bands, the determination of households that can qualify for a mortgage and the calculation of housing affordability, the housing surplus/deficit per price band has been determined. This is set out below under Table 69.

A surplus in a given price bracket has been identified where the number of housing units anticipated is greater than the number of households that qualify for a mortgage and have the ability to purchase a home at the upper value of that house price band. A deficit has been identified in a given price band where there is fewer housing units available to purchase at the upper value of that house price band compared to the number of households that could qualify for a mortgage for such a value.

Throughout the plan period, there is generally a housing surplus in the mid property prices bands with housing deficit in the higher and lower price bands set out below. Additionally, the bottom three deciles will not qualify for a mortgage from 2025 onwards, therefore there will be enough houses to those households that qualify for a mortgage and have the ability to purchase a home at the upper value of that house price band.



Table 69: Calculation of Surplus / Deficit in Demand Housing Available to Additional Households That Qualify for a Mortgage

Year	Income Range	Additional Anticipated Households That Qualify for a Mortgage [Table 58]	Cumulative Total	Affordability by each Decile (Table 55)	Household Price Band(s)	House price – Upper Value of Price Band [Table 63]	Households that qualify for a Mortgage able to purchase at Upper Value	% of Housing units anticipated per Price Band [Table 59]	Housing Units Anticipated per Price Band	Housing Surplus (+) or Deficit(-) per Price Band
2022	1st Decile	-	-	101,529	1st Band	120,215	0	0%	7	7
	2nd Decile	-	-	167,937	2nd Band	180,322	0	2%	25	25
	3rd Decile	207	207	241,281	3rd Band	240,429	207	6%	92	-115
	4th Decile	206	413	307,456	4th Band	300,536	206	11%	168	-38
	5th Decile	203	616	376,236	5th Band	360,644	203	27%	432	229
	6th Decile	197	813	488,348	6th Band	420,751	197	25%	400	203
	7th Decile	190	1,003	529,099	7th Band	480,858	190	13%	204	13
	8 - 10th Decile	571	1,574	622,950	8th Band	480,858	571	16%	254	-317
	Totals	1,574					1,574		1,574	+7
2023	1st Decile	-	-	104,271	1st Band	126,225	0	0%	6	6
	2nd Decile	-	-	172,471	2nd Band	189,338	0	2%	24	24
	3rd Decile	207	207	247,795	3rd Band	252,450	0	6%	92	-92
	4th Decile	206	413	315,757	4th Band	315,563	206	11%	169	-37
	5th Decile	203	616	386,395	5th Band	378,676	203	27%	432	230
	6th Decile	197	813	460,454	6th Band	441,788	197	25%	400	204
	7th Decile	190	1,003	543,385	7th Band	504,901	190	13%	204	14
	8 - 10th Decile	571	1,574	639,770	8th Band	504,901	571	16%	255	-316
	Totals	1,574					1,367		1,574	+216
2024	1st Decile	-	-	107,086	1st Band	132,536	0	0%	5	5
	2nd Decile	-	-	177,128	2nd Band	198,805	0	1%	23	23
	3rd Decile	207	207	254,486	3rd Band	265,073	0	6%	93	-114
	4th Decile	206	413	324,283	4th Band	331,341	0	11%	170	-37
	5th Decile	203	616	396,827	5th Band	397,609	0	28%	433	230
	6th Decile	197	813	472,886	6th Band	463,878	197	25%	401	205
	7th Decile	190	1,003	558,056	7th Band	530,146	190	13%	205	15
	8 - 10th Decile	571	1,574	657,043	8th Band	530,146	571	16%	255	255
	Totals	1,574					958		1,574	+627





Year	Income Range	Additional Anticipated Households That Qualify for a Mortgage [Table 58]	Cumulative Total	Affordability by each Decile (Table 55)	Household Price Band(s)	House price – Upper Value of Price Band [Table 63]	Households that qualify for a Mortgage able to purchase at Upper Value	% of Housing units anticipated per Price Band [Table 59]	Housing Units Anticipated per Price Band	Housing Surplus (+) or Deficit(-) per Price Band
2025	1st Decile	-	-	109,763	1st Band	139,163	0	0%	4	4
	2nd Decile	-	-	181,556	2nd Band	208,745	0	1%	19	19
	3rd Decile	-	-	260,848	3rd Band	278,327	0	6%	81	81
	4th Decile	206	206	332,390	4th Band	347,908	0	11%	148	148
	5th Decile	203	409	406,748	5th Band	417,490	0	28%	377	377
	6th Decile	197	606	484,708	6th Band	487,072	0	26%	349	349
	7th Decile	190	796	572,008	7th Band	556,653	190	13%	178	-12
	8 - 10th Decile	571	1,367	673,469	8th Band	556,653	571	16%	222	-349
	Totals	1,367					761		1,367	617
2026	1st Decile	-	-	112,507	1st Band	146,121	0	0%	3	3
	2nd Decile	-	-	186,095	2nd Band	219,182	0	1%	19	19
	3rd Decile	-	-	267,369	3rd Band	292,243	0	6%	82	82
	4th Decile	206	206	340,699	4th Band	365,304	0	11%	149	149
	5th Decile	203	409	416,917	5th Band	438,364	0	28%	377	377
	6th Decile	197	606	496,826	6th Band	511,425	0	26%	349	349
	7th Decile	190	796	586,308	7th Band	584,486	190	13%	179	-11
	8 – 10th Decile	571	1,367	690,306	8th Band	584,486	571	16%	223	-348
	Totals	1,367					761		1,367	+619
2027	1st Decile	-	-	115,320	1st Band	153,428	0	0%	2	2
	2nd Decile	-	-	190,747	2nd Band	230,141	0	1%	18	18
	3rd Decile	-	-	349,217	3rd Band	306,855	0	6%	82	82
	4th Decile	206	206	397,164	4th Band	383,569	0	11%	149	149
	5th Decile	203	409	427,339	5th Band	460,283	0	28%	378	378
	6th Decile	197	606	509,246	6th Band	536,996	0	26%	350	350
	7th Decile	190	796	600,965	7th Band	613,710	0	13%	179	179
	8 – 10th Decile	571	1,367	707,564	8th Band	613,710	571		223	-348
	Totals	1,367					571		1,367	811





Year	Income Range	Additional Anticipated Households That Qualify for a Mortgage [Table 58]	Cumulative Total	Affordability by each Decile (Table 55)	Household Price Band(s)	House price – Upper Value of Price Band [Table 63]	Households that qualify for a Mortgage able to purchase at Upper Value	% of Housing units anticipated per Price Band [Table 59]	Housing Units Anticipated per Price Band	Housing Surplus (+) or Deficit(-) per Price Band
2028	1st Decile	-	-	118,203	1st Band	161,099	0	0%	2	2
	2nd Decile	-	-	195,516	2nd Band	241,648	0	1%	17	17
	3rd Decile	-	-	280,905	3rd Band	322,198	0	6%	83	83
	4th Decile	206	206	357,947	4th Band	402,747	0	11%	150	-57
	5th Decile	203	409	438,023	5th Band	483,297	0	28%	378	176
	6th Decile	197	606	521,978	6th Band	563,846	0	26%	351	154
	7th Decile	190	796	615,990	7th Band	644,396	0	13%	180	-10
	8 – 10th Decile	571	1,367	725,252	8th Band	644,396	571	16%	224	-347
	Totals	1,367							1,367	+813





10.1.9 Calculation of Projected Needs for Private Rental

The previous section examined the affordability of persons in relation to homeownership. Rental tenure forms another critical part of housing supply. This section assesses whether people who are unable to qualify for affordable homeownership have the ability to rent at affordable prices.

In the absence of specific guidance, likely to be contained within a HNDA for the wider Dublin Region, this Housing Strategy and Interim HNDA will only provide an outline review of the current state of the private rental market in South Dublin. The review is carried out using quarterly data provided by the Residential Tenancies Board³⁷ (RTB).

According to the most RTB report (Q4 2020)³⁸, rental price inflation in the private residential sector in Ireland has accelerated rapidly in recent years as a consequence of a confluence of factors which have led to an undersupply of both rental and owner-occupier housing. The report notes that the impact COVID-19 still remains, leading to a relatively static rent figure while in the context of a significant upward trend in rental inflation relative to previous years.

In an attempt to limit the rate of rent inflation, price controls were enacted in December 2016, which limited the rate of increase in rents to 4 per cent per annum in areas designated as Rent Pressure Zones (RPZs). South Dublin, along with the other three Dublin Local Authorities were designated as Rent Pressure Zones (RPZs) in December 2016.

The main findings, as they relate to Dublin in the Quarter 4 2020 report are:

- As of Q4 2020, standardised average rent in Dublin was substantially higher than those outside Dublin (Non-Dublin) at €1,745 per month as compared to €955 per month. The standardised average rent in the Greater Dublin Area excluding Dublin (GDA) stood at €1,307 as of Q4 2020 while it was €904 outside the GDA,
- Year-on-year price inflation stood at 2.1 per cent in the Dublin area and 3.7 per cent outside Dublin. Price inflation was higher in the GDA at 5.0 per cent year-on-year.
- Taking a typical two-bedroom house, the standardised average rent in Dublin stood at €1,684 per month in Q4 2020. This is nearly twice the level for a two-bedroom house outside Dublin for which the most recent standardised average rent was €878 per month. The difference in the level of rents between Dublin and elsewhere is noticeable as the rent
- for a one-bedroom house in Dublin (€1,313 per month) costs just under €230 per month more than a house with four or more bedrooms outside Dublin (€1,086 per month).

The RTB Rent Report also provides information on developments in Local Electoral Areas (LEA), of which there are five in South Dublin. Figure 18 demonstrates that rent levels in South Dublin's LEAs are significantly higher than both the Dublin and national levels.

³⁷ The RTB are a public body set up to the rental sector, provided information and research to inform policy and to maintain a national register of tenancies.

³⁸ Available at: https://www.rtb.ie/images/uploads/general/RTB_Rent_Index_Report_Q4_2020_3.pdf

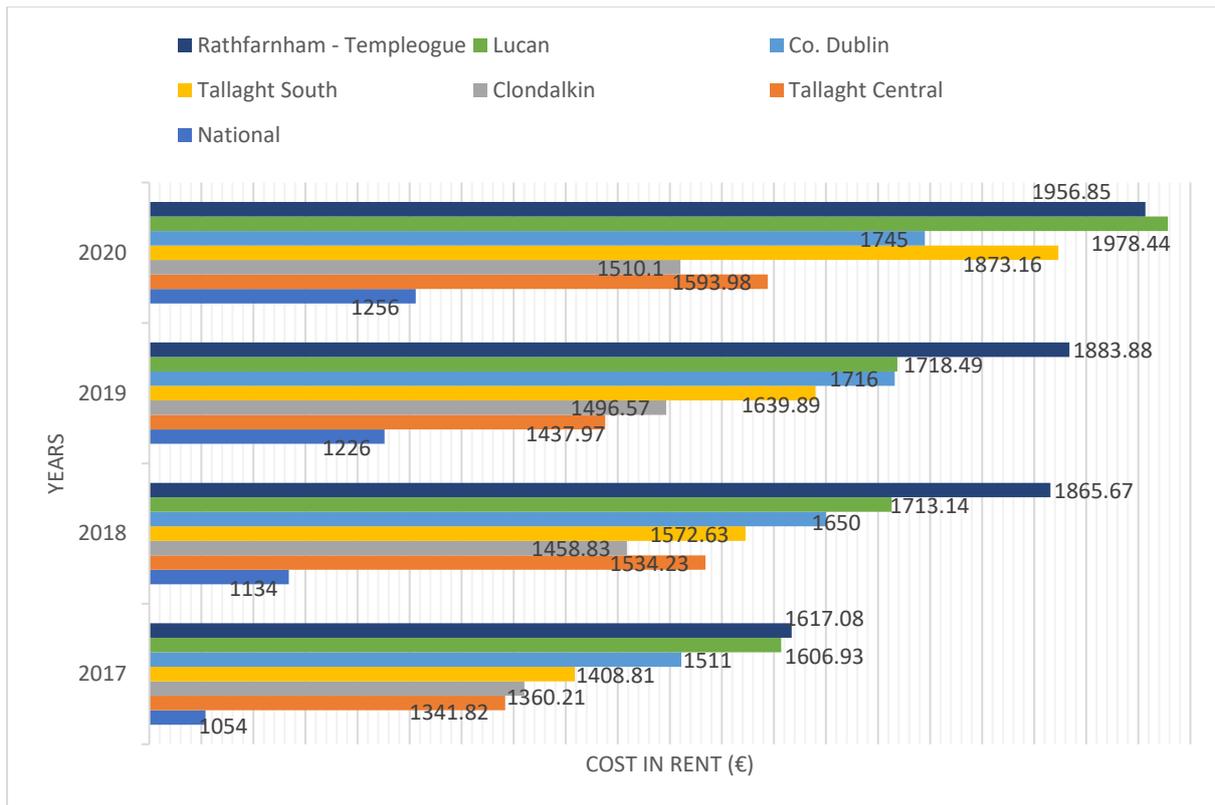


Figure 18: Standardised Rent in South Dublin LEAs, Dublin and National, Q4 2020

When the rental information shown above is considered against those who cannot qualify for a mortgage, the average rent figures as they stand means 3,651 additional households are not likely to be in a position to rent in the private market, requiring assistance under HAP or RAS to support people in renting.

In terms of the threshold of affordability, this is based on 35 per cent of that person's annual income net of income tax and pay related social insurance. This threshold forms a part of the Department of Housing's Housing Strategy model and previously formed part of the Planning and Development Act. Furthermore, recent housing papers and Irish policy document³⁹ make use of the 35 per cent affordability threshold.

When an affordability threshold of 35 per cent was applied to these average rents, Table 70 shows the average net monthly income which make these rents affordable.

Table 70: Affordability of Average Rents per LEA

Local Electoral Area	Average Monthly Rent	Average Net Income Required
Lucan	1,978	5,651
Tallaght Central	1,594	4,554
Rathfarnham - Templeogue	1,957	5,591
Tallaght South	1,873	5,351
Clondalkin	1,510	4,314
Average South Dublin	1,782	5,093

³⁹ Corrigan, E. et al (2019) Exploring Affordability in the Irish Housing Market. *The Economic and Social Review*, Vol. 50(1), pp. 119-157, available at: <https://www.esri.ie/publications/exploring-affordability-in-the-irish-housing-market-0>



10.1.10 Summary of Projected Social Housing Needs

This section summarises the anticipated social housing need for South Dublin County Council as set out in the preceding steps and reflects assessments for both mortgage qualification and private rental affordability. This strategy has demonstrated that affordability of 35% for households means that there is an affordability issues which will continue to be a problem over the course of the Development Plan, especially towards the later years.

For the purposes of this Housing Strategy and Interim HNDA conclusion, the information set out under ‘Table 67: Determination of Mortgage Qualification for Households’ has formed a conservative projection of housing need for the County over the Plan period.

It has been determined that 3,651 (26.4%) of the additional anticipated households will not qualify for a mortgage during the plan period and do not meet the affordability criteria for private rental. This can be summarised under Table 71 below:

Table 71: Identified Housing Shortfall over the plan period.

	2022	2023	2024	2025	2026	2027	2028
No. of Additional Anticipated Households	1,977	1,977	1,977	1,977	1,977	1,977	1,977
No. of additional households that do not qualify for a mortgage	403	403	403	610	610	610	610
Do not qualify for a mortgage and cannot afford Private Rental	403	403	403	610	610	610	610
Social Requirements as a % of total additional anticipated households	20%	20%	20%	31%	31%	31%	31%

Note: Figures displayed are rounded to the nearest whole number.