
Sligo County
Development Plan
2024-2030

Housing Strategy

2023



Sligo County Council
Comhairle Chontae Shligigh

Sligo.

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Housing Strategy for County Sligo 2024-2030

1. Introduction

The Housing Strategy has been prepared in accordance with Part V of the Planning and Development Act 2000 (as amended) and covers the functional area of Sligo County Council. The Housing Strategy forms part of the Sligo County Development Plan 2024-2030. The primary purpose of the strategy is to ensure that the overall supply of housing is sufficient to meet the needs of the existing and envisaged population of Sligo.

The Housing Strategy must include measures that address the housing needs of the existing and future population of the area covered by the strategy. It should provide for more sustainable patterns of development by ensuring that as far as possible housing development is designed and located so as to make full use of public transport and to give access to education, employment, health and other services.

A comprehensive review of all relevant national, regional and local housing and associated planning legislation, policies and plans has been carried out and discussed herein as they relate to the Housing Strategy.

This housing strategy is informed by a robust evidence base derived from the Housing Need Demand Assessment (HNDA). The requirement for a HNDA is set out in the National Planning Framework (NPF), specifically NPO 37. The HNDA has been prepared in line with Circular 14/2021 HNDA and the 'Guidance on the Preparation of a Housing Need and Demand Assessment'.

The Core Strategy is contained in Volume 1 of the County Development Plan and sets out projected housing supply and population growth target for the county. The Settlement Strategy (Chapter 5 of Volume 1) indicates where housing will be provided in line with the Settlement Hierarchy of the county. This HNDA considers the overall demand for housing (including social and affordable housing demand) in terms of the nature of housing required, and the housing types etc. that will be necessary to provide housing sustainable communities.

The Settlement Strategy sets out where housing will be delivered along with the amount of land required for housing, ensuring phased delivery of services, including water, wastewater and transport in delivering housing on such lands.

The Housing Strategy and HNDA provide an evidence base for the formulation of housing policy and the delivery of housing across all tenures and typologies in accordance with statutory guidelines.

2. Legislative context

Part V of the *Planning and Development Act 2000* (as amended) places an obligation on all planning authorities to prepare a housing strategy which would specify a percentage of land zoned for residential use, or for a mixture of residential and other uses, which shall be reserved for the provision of social and affordable housing. Part V of the Planning Act states that:

The Act requires that a Housing Strategy takes account of the following:

- (a) *the existing need and the likely future need for both social and affordable housing*
- (b) *the need to ensure that housing is available for persons who have different levels of income*
- (c) *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 elderly persons and persons with disabilities, and*
- (d) *the need to counteract undue segregation in housing between persons of different social backgrounds.*

Section 95 of the Act also requires that:

- The development plan ensures that sufficient land is zoned to accommodate the requirements of the housing strategy.
- The planning authority incorporates objectives into the development plan to secure the implementation of the housing strategy, including objectives requiring that a percentage of land zoned for residential use be made available for social and affordable housing.

The Affordable Housing Act 2021 defines new forms of affordable housing, comprising affordable purchase dwellings and Cost Rental housing. It also amends the requirements of Local Authority Housing Strategies (under Part V of the Planning and Development Act 2000) in several ways, including:

- Introducing a requirement that a Housing Strategy makes an estimate of need for affordable purchase and cost rental housing (including through an assessment of rental affordability); and
- Raising/restoring Part V housing requirements for mixed-use schemes greater than 4 units to 20% of land granted residential planning permission, and requiring that a minimum of 10% (i.e. at least half of the increased 20% contribution) of the net monetary value be applied to the provision of social housing.

Where affordable housing is determined as not appropriate (or no affordable housing need is assessed), the full 20% requirement must be applied towards social housing. In line with legislation, it is up to the local authority and developer to make an agreement in accordance with the available options specified in section 96(3) of the Planning and Development Act 2000, as amended, (transfer of houses on the site in question or houses on other sites or the granting of a lease of houses on the site or on other sites) or to go with the default paragraph (a) option of a transfer of 20% of the site, or to agree a combination of the options.

This Housing Strategy and HNDA is required to make an assessment of need for these affordable housing tenures (in addition to social housing), and to determine the breakdown of Part V housing requirements between social and affordable over the period of the development plan.

3. Policy context

3.1 National policy background

The Planning and Development Act 2000 (as amended) requires that the Housing Strategy is consistent with the higher-level strategies such as the National Planning Framework (NPF) and relevant regional economic strategies (RSEs).

National Planning Framework

The NPF is the Government's high-level strategic plan for shaping the future growth and development of the country to the year 2040. It sets out 10 National Strategic Outcomes and 75 National Policy Objectives (NPOs). The purpose of the Framework is to enable all parts of Ireland, whether rural or urban, to successfully accommodate growth and change, by facilitating a shift towards Ireland's regions and cities other than Dublin, while also recognising Dublin's key role. The NPF is implemented at a regional level through the Regional Spatial Economic Strategies (RSES) and at county level through County Development plans.

The NPF requires each local authority to develop a Housing Need Demand Assessment (HNDA) which must underpin and support the preparation of housing strategies and housing policy.

The National Planning Framework recognises Sligo as a Regional Centre highlighting the town as being a growth driver to a greater extent than any other towns in the North-West.

Implementation Roadmap for the National Planning Framework (2018)

The Roadmap sets out the way forward by addressing a number of implementation matters following the publication of the NPF. It also sets out transitional regional and county populations projections to 2031. County Sligo is provided with a range of 71,500-72,500 up to 2026, and 74,000-75,500 to 2031.

National Development Plan 2021-2030 (NDP)

The National Development Plan and the National Planning Framework combine to form Project Ireland 2040. The National Planning Framework (NPF) sets the vision and strategy for the development of the country to 2040 and the National Development Plan (NDP) provides enabling investment to implement the strategy.

The National Development Plan 2021-2030 indicates that there is a need to accommodate around 600,000 new households by 2040, with the Department of Housing planning to deliver an average of 33,000 homes per annum to 2030. Data from the HNDA provides detailed information on households who will require social housing supports and households who face an affordability constraint to secure their own.

This evidence has supported the development of strategy and targets to deliver the necessary housing solutions. Details of these measures are set out in the Government's Housing Strategy, Housing for All, published in September 2021.

This will be achieved through direct Local Authority build, acquisitions, rejuvenation of formerly empty homes and provision by housing bodies, to reduce social housing waiting lists and ensure a sustainable supply of social housing through future appropriate investment in line with projected demand.

Capital envelopes have been set for the period 2022- 2025 and will deliver an increasing number of new build homes each year for this period.

Housing Need and Demand Assessment

The Housing Need and Demand Assessment (HNDA) comprises a standardised methodology that can quantify the current and projected housing needs of a particular local authority area including in relation to requirements for different tenures.

The purpose of the HNDA tool is to:

- Assist local authorities to formulate develop long-term strategic plans for housing need;
- Provide a robust evidence base to support decisions about new housing supply, specialist housing, wider investment and housing related services;
- Inform policies regarding the proportion of social and affordable housing required, including the need for different types and sizes;

HNDA Guidance and Toolkit, April 2021

This guidance document was published in April 2021 and is intended to be the first iteration of the DHLGH's HNDA Tool for use by local authorities in the preparation of housing strategies and development plans.

The HNDA Tool produces an estimate of total future housing need in a local authority over the period 2020-2040 and an estimate of this need broken down into four tenure types: Owner-occupation, Private rented, Social rented, Affordability constraint.

The HNDA Toolkit may be amended in a number of ways to reflect custom scenarios and updated assumptions.

Housing Supply Target Methodology for Development Planning (2020)

Published in December 2020, these guidelines are intended to assist planning authorities in integrating the national and regional population parameters into their statutory planning processes, such as the preparation of their county development plan and the preparation of their Housing Strategy, informed by the Housing Need and Demand Assessment (HNDA) process.

The Economic and Social Research Institute (ESRI) has developed a demographic projection model further to work previously undertaken for the NPF. This model serves as a "nationally integrated and standardised evidence base for local authorities to estimate overall housing demand".

The ESRI model provides projections for structural housing demand for each county, utilising housing completion data which is now published by the Central Statistics Office on a quarterly basis. It is emphasised that county development plans must plan to provide housing to the extent identified by the NPF Roadmap population projections for each local authority. This must be reflected in the core strategy, settlement strategy and zoning.

Section 4 of the Guidelines includes a methodology for determining the total housing demand in a county during the six-year life of the development plan.

Housing for All (2021)

As part of the Programme for Government – Our Shared Future, 'Housing for All - a New Housing Plan for Ireland' is the government's housing policy to 2030. It is a multi-annual, multi-billion-euro plan which aims to improve Ireland's housing system and deliver more homes of all types for people with different housing needs.

The government's vision for the housing system over the longer term is to achieve a steady supply of housing in the right locations with economic, social and environmental sustainability built into the system, with a target to increase new housing supply to an average of at least 33,000 new units per year over the next decade.

To achieve these targets and objectives, the policy has four pathways to achieving housing for all:

- Supporting home ownership and increasing affordability
- Eradicating homelessness, increasing social housing delivery and supporting social inclusion
- Increasing new housing supply
- Addressing vacancy and efficient use of existing stock.

The pathways contain actions to be taken by government departments, local authorities, State agencies and others. Housing for All contains 213 actions which will deliver range of housing options for individuals, couples and families to enable a sustainable housing system.

Housing Options for Our Aging Population (2019)

A joint policy statement “Housing Options for our Ageing Population” was launched in February 2019. The purpose of the Statement is to provide a policy framework to support an ageing population in a way that will increase the accommodation options available and give meaningful choice in how and where people choose to live as they age.

It identifies a programme of 40 strategic actions to further progress housing options for older people and notes that Local Authority Development Plans must provide for sustainable housing to meet the needs of all citizens.

Sustainable Urban Housing: Design Standards for New Apartments (2018)

The ‘Sustainable Urban Housing: Design Standards for New Apartments’ guidelines state that County Development Plans must appropriately consider the need to both sustainably increase housing supply and to ensure that a greater proportion of housing development takes place within its existing built-up areas.

Quality Housing for Sustainable Communities: Best practice guidelines (2007)

The ‘Quality Housing for Sustainable Communities’ guidelines aim to assist in delivering homes, in sustainable communities that are socially inclusive. The guidelines set out best practice in site selection, scheme design and urban design for new housing developments. These are based on several essential requirements for new homes including that housing be socially, environmentally and architecturally appropriate; safe, secure and healthy; accessible and adaptable; affordable; durable; and resource efficient.

Town Centre First Policy

The Town Centre First (TCF) Policy, launched in February 2022, builds on NPF priorities in relation to the regeneration of settlements across Ireland. It contains a range of policy measures aimed at creating city and town centres that function as viable, vibrant and attractive locations. The policy recognises that there are high levels of vacancy and dereliction in many centres and the need for a coordinated response to ensure that cities and towns reach their potential. The actions focus on establishing Town Centre Regeneration Teams and Town Centre Plans that will support a plan-led approach to regeneration. 9 There is a focus on enhancing centres, addressing vacancy and incentivising the refurbishment and regeneration of underused buildings and sites

Sustainable Residential Developments in Urban Areas: Guidelines for Planning Authorities (2009)

The ‘Sustainable Residential Developments in Urban Areas’ guidelines set out best practice criteria on planning for sustainable neighbourhoods under the four themes of provision of community facilities, efficient use of resources, amenity or quality of life issues and conservation of the built

and natural environment. The guidelines set out planning and urban design principles for cities, towns and villages, including appropriate levels of density and community services for new homes.

The National Housing Strategy for Persons with a Disability 2022-2027

The National Housing Strategy for Disabled People 2022–2027 sets out the Government’s vision for delivering housing and related supports for disabled people and has been developed by the Department of Housing, Local Government and Heritage, Department of Health, Department of Children, Equality, Disability, Integration and Youth.

The second National Strategy to 2027 will build on the considerable achievements of the 2011 Strategy and places a particular emphasis on disabled people having choice and control over their living arrangements.

Youth Homelessness Strategy 2023-2025

The Youth Homelessness Strategy is a 3-year strategy working towards ending homelessness for young people aged 18-24 through prevention and exits and improving the experience of young people accessing emergency accommodation.

This Strategy adopts a whole-of-Government approach to tackling youth homelessness and has three main strategic aims:

- To prevent young people from entering homelessness
- To improve the experiences of young people accessing emergency accommodation
- To assist young people exiting homelessness.

Climate Action Plan 2023

The Climate Action Plan 2023 (CAP23) is the second annual update of Ireland’s Climate Action Plan 2019. This plan is the first to be prepared under the Climate Action and Low Carbon Development (Amendment) Act 2021, and following the introduction, in 2022, of economy-wide carbon budgets and sectoral emissions ceilings. The plan was launched on 21 December 2022 with the Annex of Actions published in March 2023.

Climate Action Plan 2023 sets out how Ireland can accelerate the actions that are required to respond to the climate crisis, putting climate solutions at the centre of Ireland’s social and economic development.

It implements the carbon budgets and sectoral emissions ceilings and sets out a roadmap for taking decisive action to halve emissions by 2030 and reach net zero no later than 2050, as committed to in the Programme for Government.

Vacant Homes Action Plan 2023-2026

The Vacant Homes Action Plan outlines progress in implementing actions relating to vacancy and efficient use of existing stock contained in Housing for All, the Government’s housing plan to 2030. It also identifies the actions to be pursued in order to continue to return as many recoverable vacant properties back to viable use as possible, increase the supply of housing available, whilst also revitalising the vibrancy of local communities.

3.2 Regional policy background

Regional Spatial and Economic Strategy (RSES)

The Regional Spatial and Economic Strategy 2020 - 2032 (RSES) adopted by the Northern and Western Regional Assembly is structured around five “Growth Ambitions”, seeking to promote a Region that is “Vibrant, Connected, Natural, Smart and a Great Place to Live”.

The RSES provides a spatial planning framework for the region focussed on compact growth and placemaking, with more sustainable growth focussed on existing cities, towns and villages instead of uncoordinated sprawl or excessive one-off housing. More co-ordinated and concentrated development aims to deliver greater quality of life and more attractive centres for investment and economic growth.

It identifies Sligo Town as a Regional Growth Centre, with a population growth target of at least 40% between 2016 and 2040. It sets out a Strategic Plan for Sligo with the aim of creating “an enterprising, inclusive, resilient and environmentally sustainable place, which values and celebrates its unique landscape and rich culture and heritage, and where the wellbeing of future generations is central to everything we do.”

It sets goals for compact growth of the town (including development of new housing and improved transport infrastructure); economic, heritage and cultural development (through supporting new enterprise zones, the new Technological University for the West and North-West, and investment in smart city infrastructure); and a liveable Sligo with public realm and active travel improvements as well as enhancements to key urban places.

North West Homeless Action Plan 2023-2028

The *Homeless Action Plan for the North-West Region 2023-2028* was developed by the North-West Joint Homelessness Forum and Management Groups. Sligo County Council is lead authority for the North-West, comprising Leitrim, Sligo and Donegal County Councils.

The Plan aims to prevent homelessness where possible, protect those who are homeless, support the movement to stable accommodation, and ensure stringent governance of provision. The Planning Authority will support the implementation of this Strategy in County Sligo.

3.3 Local policy background

Sligo 2030 – One Voice, One Vision

Sligo County Council, working in partnership with the Local Community Development Committee, the Strategic Policy Committee for Planning Community & Economic Development and the Sligo Economic Forum, has developed an overarching Strategic Framework to guide the development of County Sligo over the next 8 to 10 years. **Sligo 2030 - One Voice One Vision** (Sligo 2030) is a multi-sectoral Local Economic & Community Plan’, integrating Economic, Social, Community with an ambition for a smart and green Sligo.

The supply of housing in Sligo has been identified as a key factor to address. Objective 1.1 ‘Increase the Housing Supply across Sligo’ notes:

‘A critical need identified from the socio-economic analysis and consultation, addressing the housing supply issue in Sligo is a key community and economic development objective. It will contribute to Sligo’s ability to attract investment, grow its population and provide for its existing community. The objective seeks to find innovative solutions to stimulate housing supply through collaborative working with key stakeholders and the community, and to ensure existing mechanisms to address vacancy and dereliction are properly utilised.’

Sligo Strategic Plan for Housing People with a Disability 2021- 2025

The Strategic Plan for Housing People with a Disability (2021-2025) is intended to facilitate access to the appropriate range of housing and related support services, delivered in an integrated and sustainable manner, which promotes equality of opportunity, individual choice and independent living for people with a disability.

The Strategy envisions that this should be achieved within the mainstream housing environment, while acknowledging the challenges. The core goal of the 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.

Homeless Action Plan – North West Region 2023-2028

The preparation of Homelessness Action Plans is provided for under the Housing (Miscellaneous Provision) Act 2009 and requires local authorities to adopt a strategic approach for dealing with homelessness in their areas.

The Homelessness Action Plan 2023- 2028 has four Strategic Aims:

- to prevent homelessness – early intervention to people at risk of homelessness;
- to protect those experiencing homelessness through emergency accommodation and targeted support;
- progression – to identify pathways to long-term housing solutions;
- ensure proper governance, financial oversight and funding to deliver homeless services.

This Homelessness Action Plan was developed as a result of a detailed consultative process comprising submissions from agencies and groups, workshops held with frontline service providers, stakeholders and advocacy groups in the region.

The Plan will reflect the policy positions and actions contained in the *Housing for All* Policy.

Traveller Accommodation Programme 2019–2024

The Housing (Traveller Accommodation) Act, 1998 requires Sligo County Council to prepare and adopt a 5-year Traveller Accommodation Programme, to meet the existing and projected accommodation needs of members of the Traveller Community within its administrative area.

This Programme sets out the actions that Sligo County Council will implement to meet the current and future accommodation needs of Traveller families within the County over the five-year period.

Sligo County Council's Housing Delivery Action Plan 2022-2026

DHLGH Circular 32/2021- *Housing for All: Housing Delivery Action Plans* states that the Housing Delivery Action Plan should set out how it aligns with the National Planning Framework, in particular the compact growth objectives.

The Government has issued social housing targets for the term of the strategy to each Local Authority. Sligo County Council has been given a target of 517 dwellings.

Local authorities have been requested to submit a Housing Delivery Action Plan (HDAP) for the period 2022-2026, setting out details on the delivery of housing over five years, including locations and types of housing, in addition to information on delivery. The SCC HDAP outlines a proposed delivery of 621 dwellings, acknowledging the risks associated with various forms of delivery.

4. Housing market drivers

This section addresses Section 1 of the analysis in line with the *Guidance on the Preparation of a Housing Demand and Needs Assessment* (DHLGH, 2021), and relates to the identification of key demographics and economic trends expected over the period of the HNDA that will impact on the local housing market, including the following:

- demographic analysis;
- housing affordability, including incomes, house prices, rent levels;
- key drivers of the local and national economy.

4.1 Population trends

For the first time since 1850, the Irish population has surpassed five million, with the preliminary Census 2022 results putting the total figure at 5.12 million. The results, released in June 2022, also show that the housing stock increased by 6.0% since the previous Census in 2016, and reported the total number of permanent dwellings in the country at 2,124,590.

Future housing demand will be influenced by changes in population numbers, household formation rates and household size.

- According to preliminary Census 2022 data, the population of County Sligo in 2022 was 69,319 up 5.7% from the 2016 figure of 65,535. The growth in the previous intercensal period 2011-2016 was 0.2% recorded and was the slowest growth since the 1991 census (the population of Sligo town decreased by 0.4% during the same period).
- Given a household size in 2016 of 2.56, this amounts to approximately 1,687 additional households.
- Within this period, housing stock increased by 4%. This suggests a shortfall in housing stock to meet the increase in population.
- 16% of County Sligo’s population are over the age of 65, which is higher than the state average of 13%. Similarly, people aged 70-79 increased by 18% at County level between 2011-2016.
- Approximately 9% of the County’s population were foreign nationals, with nationals from the United Kingdom and Poland accounting for the largest proportion of this group.
- At time of writing (2023), County Sligo was accommodating 1,947 Ukrainian refugees, many of whom are residing in temporary accommodation and are in need of suitable housing.

4.2 Population and housing projections set at national level

Population

Appendix 2 of the NPF Implementation Roadmap includes transition regional and county population projections to 2031. Figures for County Sligo are specified in the context of the North-West subregion of the NWRA.

Table 1 NPF population projections for County Sligo

Population	Census 2016	Census 2022	Projection 2026	Projection 2031
County Sligo	65,500	70,200	71,500–72,500	74,000–75,500

Source: NPF (extract from Appendix 2, p.14 of the NPF Implementation Roadmap), CSO 2022

Having regard to the County population figure recorded in Census 2022, the number of new residents to be accommodated during the Plan period would be circa 4,700.

Housing

Based on the population projections scenarios prepared by the ESRI, the DHLGH issued Housing Supply Target Methodology Guidelines (HSTM Guidelines) in 2020 under Section 28 of the Planning and Development Act 2000 (as amended). The Excel database accompanying the Guidelines provides projected annual figures for new household demand in each local authority area up to the year 2031. For County Sligo, the total adjusted demand corresponding to the Plan period is approximately 3,892 units.

4.3 Housing affordability

In recent years Ireland has experienced a sustained period of price inflation in the housing market due to high demand, low supply and higher construction costs. The average house prices rose in all 26 counties over the 12 months to end of 2022.

In 2019, Sligo was ranked as the third most affordable county in Ireland for first-time buyers in a report by the North West Regional Assembly. However, In Q2 2022, the highest percentage increases in average house price were found in Offaly (+22.2%), Longford (+20.6%) and Sligo (+19.9%).

An analysis of the quarterly reports published by Daft.ie indicates that the average asking price for residential property in County Sligo continues to rise. Between 2016 and 2022, house prices in County Sligo have been steadily increasing, with significant house price inflation coinciding with a marked reduction in housing supply compared to previous years.

4.4 Household composition

Table 2 shows Census information on the composition of the households in the County from 2006 to 2016. It shows a significant proportion of one-person households in the county. This proportion has seen a notable increase since 2006.

Table 2: Private Household Composition 2006 - 2016

Household composition	2006	2011	2016
Husband and wife with children	32.4%	29.8%	28.9%
One person	25.5%	27.6%	28.2%
Husband and wife	15.1%	15.7%	16.9%
Lone mother with children	8.4%	8.6%	9.07%
Households w. unrelated persons only	4.0%	4.2%	3.2%
Cohabiting couple	3.4%	3.5%	3.4%
Cohabiting couple with children	2.3%	2.9%	3.5%
Non-family households and relations	2.6%	2.3%	1.9%

Couple, children and others	1.8%	1.3%	1.0%
Lone father with children	1.4%	1.4%	1.5%
Other	3.1%	2.7%	2%

Source: CSO

4.5 Household size

According to the 2016 Census, the average household size in the County is 2.56 persons. As shown in Table 3, the average household size has fallen significantly since 2002, both nationally and in County Sligo, reflecting changes in household composition particularly the increasing numbers of one-person households. Nationally, the average household size increased between 2011 and 2016, from 2.73 to 2.75 persons, reversing a long-term trend of declining household size. In Sligo the average household size has been declining from 2.83 in 2002 to 2.56 in 2016.

Table 3: Trends in household size in County Sligo 2002-2022

Average household size (persons per household)					
	2002	2006	2011	2016	2022
Co. Sligo	2.83	2.71	2.60	2.56	n/a
State	3.04	2.89	2.73	2.75	2.74

Source: CSO

The 2016 Census indicates that 1-2 person households now comprise more than 50% of households, and this trend is set to continue. Analysis of urban housing need indicates that into the future a majority of households will comprise 1-2 persons, and approximately half of the remainder will be three-person households. Only about 25% of households will comprise 4 or more persons, though some individual locations may differ. The need for single-bedroom social housing is corroborated by the Housing Agency’s 2022 Housing Needs Assessment, which reported that 56% of applicants on housing waiting lists were one-adult households compared to 47.5% of all applicants identified in the 2019 report.

Table 4: Average asking price for a 3-bed semi-detached house in County Sligo 2017-2022

2017	2018	2019	2020	2021	2022
133,887	141,891	145,835	149,430	163,608	188,527
+13.8%	+6%	+2.8%	+4.2%	+14.5%	+14.5%

Source: Daft.ie Q2 reports 2017-2022

High prices can ensure some housing projects remain viable. If values plateau or fall during a period of high construction inflation, many projects may stall or not commence, further constraining supply. As houses become more affordable, demand will increase, putting further strain on the supply of housing.

The Society of Chartered Surveyors Ireland, in its Annual Residential Property Review and Outlook (SCSI, 2023), reports that while house prices have increased significantly in the past number of years with year-on-year house price inflation running at 10% nationally, house price inflation is likely to fall in 2023. According to the My Home.ie Q4 2022 report, house price inflation for 2023 will reduce to 4% due in part to rising interest rates.

4.6 Key drivers of the housing market

The most significant factors affecting housing market in Ireland today is the continued undersupply of new housing to the market coupled with growing demand as a result of strong employment in the technology, pharma, and finance sectors. The recent interest rate increases and rising cost of living will impact house prices in the short to medium term. Lack of supply in the rental market is also a major contributing factor to the strong demand, along with lack of supply of social and affordable housing.

This, coupled with complex rent pressure zones and rental legislation in the marketplace, has led to more landlords exiting the market, putting further pressure on the rental market.

The cost of construction is also a particular concern in relation to the supply of new homes. The challenges facing the development sector include increased inflation, shortages in labour, and the onerous nature of Ireland's public procurement processes.

5. Housing stock and housing need

This section addresses Section 2 of the analysis in line with the *Guidance on the Preparation of a Housing Demand and Needs Assessment* (DHLGH, 2021). Key outputs from this stage include an analysis of the entire housing stock including accommodation count and type, housing type delivery, household tenure, vacancy rates, unfinished housing estates, demand for rural houses, an analysis of the private rented sector and social housing.

5.1 Existing housing stock and composition

5.1.1 Accommodation count and type

In 2016 there were 24,760 dwellings in County Sligo of the following types: 57% detached houses, 24.3% semi-detached units, 11% terraced houses and 6.3% apartments. In other words, 92.6% of the households lived in houses/bungalows compared to the state average of 86%. Only 6.3% of accommodation in the County comprised apartments, compared to the state average of 12%.

The high proportion of detached houses is indicative of a pattern of development which is low in density and may comprise mainly of one-off dwellings in the countryside.

5.1.2 Household tenure

Tenure, or the arrangement under which a household occupies all or part of a housing unit, is an important consideration for the delivery of housing. Section 6.6 of the NPF identifies the need to estimate the demand for different tenure types. Nationally, renting was the tenure status for almost 30% of all occupied dwellings in 2016, with renting from the local authority up by 11%. Generally, throughout the County, home ownership rates have been declining since 2002.

Table 5 Permanent private households by type of occupancy in County Sligo

	2002		2006		2011		2016		2022	
Owner occupied	14,772	75.7%	16,053	75%	17,171	72%	17,151	71%	17,971	67%
Private rental	2032	10.4%	1,815	8.5%	4,061	17%	3,959	16%	4,428	16.5%
Social rental	1799	9.2%	2616	12.2%	2,204	9%	2,557	10%	2,750	10.2%
Other	905	4.6%	868	4%	992	4%	1,094	5%	1,652	6%
TOTAL	19,508		21,352		24,428		24,761		26,801	

Source: CSO SAP2011T6T3CTY/ Census 2022

According to Census 2022, approximately 16% of the total number of private households within the County live in private rented accommodation, rising to 27% including social rental. This compares with national figure of 28% of the population renting.

According to preliminary figures released by Census 2022, the number of households classed as ‘Owner Occupied’ in County Sligo represents 67% of the total households, slightly above the national average of 66%. The percentage of persons who rent from the Local Authority or from an approved housing body increased by almost 25% between 2011 and 2022.

5.1.3 Vacancy

According to the preliminary Census 2022 figures, Sligo had the fifth highest rate of vacant homes at 11.8% (Census 2022), down from 20.1% in 2016. Abandoned farmhouses accounted for 16% of Sligo’s vacant homes. This is significantly higher than the national average of 7.8%.

Table 6 Housing stock and vacancy in County Sligo

Census year	2002	2006	2011	2016
Total housing stock	23,464	28,751	33,044	32,764
Vacant housing units	3,246	6,648	7,328	6,571
Vacancy rate	13.8%	23.1%	22.2%	20.1%

Source: CSO

However, it is generally accepted that the Geodirectory quarterly estimates of vacancy are more accurate than Census figures. According to Geo directory, the residential vacancy rate was 8.9% in Q2 2022. This remains significantly higher than the average vacancy from Geodirectory across the state of 4.2% in the same period.

It is likely that this vacant stock will accommodate some of the additional housing units estimated to be required over the period of the plan.

5.2 Housing supply

5.2.1 House completions

House completions in Sligo reached a peak of 2,164 dwellings at the end of 2006 before decreasing rapidly year-on-year to just 40 dwellings by the end of 2014, a fall of 98%. In this year, individual houses accounted for 98% of all houses built. Since then, house completions have slowly increased to a peak of 211 in 2022 where one-off dwellings accounted for 47% of all houses built.

The number of individual houses built in the last 5 years (the vast majority of which are presumed to be outside zoned settlements) has varied but they have represented roughly 50% of total housing built in the County. This proportion has been declining slowly as the total number of houses built have increased. The large number of apartments built in 2019 and 2020 can be attributed to the completion of several Local Authority apartment developments completed in those years.

Table 7 Yearly house completions

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Single houses	113 78%	85 50%	82 91%	59 98%	58 78%	67 76%	87 69%	96 58%	64 54%	80 46%	70 49%	99 47%

Scheme houses	22 158%	52 30%	2 2%	0	11 15%	9 1%	36 28%	60 36%	13 11%	39 36 28%	71 49%	105 50%
Apartments	10 7%	32 19%	6 6%	1 2%	5 7%	12 14%	3 2%	10 6%	21 18%	56 32%	3 2%	7 3%
TOTAL	145	169	90	60	74	88	126	166	118	175	144	211

Source: CSO NDQ06

Nationally new housing completions are expected to be at their highest levels in approximately a decade according to Society of Chartered Surveyors Ireland in its Annual Residential Property Review and Outlook (SCSI, 2023). However, the report notes a fall in commencements and planning permission numbers nationally, and this will have a direct impact on the number of completions into 2023 and possibly 2024.

5.2.2 House commencements

Residential commencement notices provide a useful leading indicator of future housebuilding activity. According to BCMS commencement notice data, Sligo had 165 commencement notices in 2022, the 6th lowest in the country. In the preceding 4 years, Sligo was amongst the bottom 5 counties in Ireland in terms of commencement notices. However, Sligo was one of the counties with the highest increases in commencements in the 12 months to May 2022 (+46.5%) albeit from a low base.

Analysis of data shows that in 2022 a total of 165 new dwellings commenced construction, compared to 2021 in the preceding 12 months. This gives a total of 385 units commenced since 2020.

5.2.3 Unfinished housing estates

Sligo has three remaining unfinished housing estates comprising 36 houses and 73 apartments. Of these, 28 houses are expected to be completed within the next 24 months. The remaining units are awaiting sale or legal resolution.

5.3 Private rented sector

Private rental accommodation has grown in importance in recent years due to the instability in the housing market and in the economy. The private rental sector serves several important functions:

- offers new households, or immigrants, time to acclimatise to the housing market;
- provides time for individuals to bridge the gap of affordability to home ownership;
- facilitates those seeking location-specific accommodation on a temporary basis;
- offers choice of accommodation for those who have a preference for rented accommodation.

The Private Residential Tenancies Board (PRTB) deals with disputes between tenants and landlords, but also operates as a national tenancy registration system providing information and policy advice on the private rented sector. According to the PRTB register, there were 5,092 private rental properties in County Sligo on 14 May 2016 and 4,372 properties registered in Q4 2022. This is estimated to account for approximately 18% of the total number of private households.

Anecdotal evidence and a review of the online rental websites would indicate that the supply of rental properties in County Sligo in 2023 is very limited.

5.4 Social housing supply and demand

5.4.1 Social housing provision

Local authorities are the main providers of social housing support for people who cannot afford to buy their own houses. This support is provided by way of traditional local authority-built housing and also now includes other support via the Rental Accommodation Scheme (RAS), Housing Assistance Payment (HAP) and leasing under Social Housing Current Expenditure Programme (SHCEP). Approved housing bodies also provide social housing for people who are unable to provide housing from their own resources.

The options available to a local authority in delivering social housing supports are:

- construction of dwellings
- acquisition of dwellings
- Part V agreements
- Leasing - Social Housing Current Expenditure Programme (SHCEP)
- Rental Accommodation Scheme (RAS),
- Housing Assistance Payments (HAP)

The focus of the *Housing for All* strategy is the delivery of social homes through build programmes, led by Local Authorities (LA) and supported by Approved Housing Bodies (AHBs). Broadly, this will be based on a 60% LA, and 40% AHB delivery, nationally.

Table 8: Sligo’s social housing output 2016–2022

Year	New Build	Part V	Acquisitions	Voluntary	Total
2016	1	9	23	0	33
2017	8	2	32	6	48
2018	16	3	13	9	41
2019	35	7	13	5	60
2020	28	0	4	10	42
2021	0	1	2	10	13
2022	6	1	4	6	17

Source: Sligo County Council Housing Section

Sligo County Council’s Housing Delivery Action Plan 2022-2026 (HDAP) sets out housing targets and the methods of delivery for both social and affordable housing.

Table 9: Summary of planned delivery of social housing under the HDAP 2022-2026

Settlement	Total number of units proposed under the HDAP 2022-2026	Number of units proposed on brownfield sites	Number of units proposed on infill sites	Proportion of dwellings on brownfield and infill sites
Sligo Town	402	112 (28%)	290 (72%)	100%
Ballymote	30	0	30	100%
Tobercurry	29	15	14	100%
Strandhill	42	0	42	100%
Collooney	20	0	20	100%
Small villages and rural areas	98	22	n/a	20%
Total	621	149	396	

5.4.2 Voluntary housing sector

Approved housing bodies are independent, non-profit making organisations formed for the purpose of relieving housing needs and the provision and management of social housing. They seek to achieve a balance in social housing provision by widening the range of housing options to meet different and changing needs. They are mainly concerned with accommodating persons or families who are in need of housing and who do not have the resources to provide any accommodation of their own.

5.4.3 Existing social housing stock

Sligo County Council's housing stock in March 2023 was 2,298 dwellings (compared to 2,179 in 2015). Approximately 67% of these units are located in housing estates that are managed by the Local Authority, i.e. the housing development was originally built or purchased in its entirety by the Local Authority.

The vacancy rate for Sligo's social housing stock is estimated at c.1.5%. Houses are vacant only during periods of refurbishment, which arises when houses are returned to the Council for reletting and also where works are being carried out as part of the Cranmore Regeneration Programme. It will be an important component of the housing strategy that the utilisation of the existing stock is maximised over the period of the Plan and the number of vacant properties is kept to a minimum.

5.4.4 Social housing need

All Local Authorities are required by the Department of Housing, Planning and Local Government to complete this assessment for all persons who have applied for social housing support. The Social Housing Assessment Regulations 2011, as amended, sets out the procedure for assessing

households who are seeking social housing support. This assessment determines if the household is eligible and in need of social housing support.

Table 10: Breakdown of Gross Housing Need SCC, October 2021 and April 2023

Category	Housing Delivery Action Plan (HDAP) 5 October 2021	Updated figures from the HDAP 11 April 2023
No. of households availing of HAP and approved for Transfer	775	728
No. of Council/RAS/AHB tenants approved for transfer	215	219
No. of households availing of HAP and not approved for transfer	1	0
No. of remaining households i.e. Net Housing Need	582	732
Gross Housing Need (households)	1573	1679

Source: Sligo County Council - Housing Delivery Action Plan 2022-2026

The 2021 Housing Need Assessment indicated that 1573 households were eligible and in need of social housing support with the net housing need being 582 households. By April 2023, this had increased to 1679 households with the net housing need being 732, an increase of 25% in 18 months, highlighting the increasing number of households requiring housing assistance. The assessment of households eligible and in need of social housing support at these two points in time over the last 2 years in Table 10 above.

Applying an average household size of 2.56 (Census 2016), the number of persons seeking social housing in 2023 is therefore estimated as 4298 persons. For the purpose of this housing strategy, it is assumed that the number of persons requiring social housing will grow at the same rate as the general population grew in the period 2016-2022, i.e. at a rate of 1.3% per year. Accordingly, it is estimated that the number of persons requiring social housing by 2030 will be 4702 (which equates to 1836 households if the 2016 average household size of 2.56 is applied).

The 2016 Census counted 32,324 households in the County. If the gross estimated housing need is 1679, then this would indicate that the social housing need in the County is equivalent to almost 5.2% of the housing stock. This decreases to 2.2% if the net housing need of 732 households is considered.

Table 12 illustrates social housing applicants by household type in 2023 and shows that a significant proportion (49%) of those seeking social housing are one-person households (a reduction of 8% compared to 2015 – 57%). This highlights the importance of continuing to provide a mix of house types to meet the specific housing needs in the County.

Table 11: Breakdown of Housing Need Assessment 2023

Grounds of households' social housing need	Total
Dependent on rent supplement	1113
Institution, emergency, homeless	32
Disability - physical	161

Disability - sensory	18
Disability – mental health	72
Disability – intellectual	102
Overcrowded accommodation	50
Unfit accommodation	4
Unsustainable mortgage	21
Involuntarily sharing	106

Source: Sligo County Council Housing Section

Table 12: Social housing need by household type 2023

	One adult	One adult with children	Two adults or more with children	Two adults with no children	Total
Sligo County	832	457	280	110	1679
	49.5%	27.2%	16.6%	6.5%	

Source: Sligo County Council Housing Section

6. Housing need and demand assessment

This section summarises the findings of the HDNA under the key headings as outlined in the *Guidance on the Preparation of a Housing Need and Demand Assessment* (DHLGH, April 2021).

6.1 Introduction

The requirement for a Housing Need and Demand Assessment (HNDA) is set out within the National Planning Framework at National Planning Objective (NPO) 37. The purpose of the HNDA, which is outlined within the *Guidance on the Preparation of a Housing Need and Demand Assessment* (DHLGH, 2021) 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;
- Provide evidence to inform policies related to the provision of specialist housing and housing related guidance.

The HNDA will support the preparation of the Housing Strategy which, in turn, will influence the amount of land to be zoned for housing purposes within the County Development Plan as well as relevant objectives and policies.

The HNDA has been prepared in line with the Department’s HNDA Guidance document and has utilised the ‘HNDA Tool’ development by DHLGH. The ‘Sligo HNDA Data Repository’, which is a compendium of relevant data sources will be included as an appendix to this document. The data is derived from the Department’s HNDA Data repository supplemented by locally sourced data.

The HNDA Tool produces an estimate of total future housing need in a local authority over the period 2020-2040 and an estimate of this need broken down into four tenure types:

- Owner-occupation
- Private rented
- Social rented
- Affordability constraint (i.e. households that are above the eligibility threshold for social
 - housing but cannot afford to buy or rent privately and may require a form of affordable
 - housing such as affordable purchase or cost rental.

6.2 Stage 1: Future need for additional housing units

The HNDA Tool can be customised to one of five pre-populated scenarios as well as using the users’ own projections. The advice contained in the guidance is to use the ‘Convergence’ scenario as the ‘default’. The Convergence scenario is based upon the ‘50:50 City’ scenario, which closely follows the NPF growth strategy, but is adjusted to account for any under-supply of housing within the period 2017-2019.

This scenario therefore closely follows the section 28 Planning Guidelines ‘Housing Supply Target Methodology for Development Planning’ (DHLGH) (2020)). The HSTM however only covers the six-year CDP period and uses details of known or estimated housing completions up to the start of the CDP period.

HNDA Table 1: ‘Convergence’ (Default) scenario - HNDA tool [scenario 1]

	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	Total
Total	459	471	463	459	448	464	482	478	478	461	4662
Social Rent	127	130	128	127	124	133	138	137	134	129	1306
Affordability Constraint	0	0	0	0	0	5	10	10	15	18	58
Private Rented Sector	100	102	100	100	97	99	103	102	103	99	1005
Buyers	232	239	235	232	227	232	241	239	241	233	2351

As per the HNDA Tool Instructions the Convergence ‘default’ scenario (Scenario 1) (Table 3.1) will be taken forward into Stage 2.

6.3 Stage 2: Existing Need for Additional Housing Units

The toolkit includes data on existing unmet housing need including homelessness and overcrowding cases. Based on the 2016 census and department calculations there was evidence of:

- 40 homeless in Sligo in base year of 2019 (see Table A.6 of Sligo HNDA Data Repository).
- Nine cases of overcrowding/LWO in Sligo (see Table C.7 of Sligo HNDA Data Repository).

The default setting in the toolkit is that it would take 10 years to clear this existing need and as this is equivalent to one and a half CDP plan periods. The toolkit can be modified so this existing need is assigned to social rented housing (default) or across all tenures.

Given that:

- the latest local homeless numbers are similar to those in the existing data used in the Toolkit;
- there is no updated census data on overcrowding/LWO since 2016 and no other records available;
- the default 10-year period to clear existing need is in line with the selected period for the HNDA (also 10 years); and,
- there is no indication that existing need should not be allocated to social housing;

it is considered appropriate to continue the default assumptions for Stage 2. As such, the Convergence ‘default’ scenario (Scenario 1) detailed in Stage 1 (Table 3.1) will be taken forward into Stage 3.

6.4 Stage 3: Income Growth and Distribution

There are three pre-programme models of income growth scenarios ranging from modest growth to no growth relative to inflation and nominal growth below inflation. The mid-range scenario - 'No real term growth' is the default scenario for the HNDA Toolkit.

HNDA Table 2: Income Growth & Distribution - Summary of Worst Case, Convergence (Default) and Best-Case scenarios 2022 to 2031

Scenario	Annual Average (% of total)		
	Worst-Case <i>Below real term growth + Greater inequality</i>	Convergence <i>No real term growth + no change</i>	Best-Case <i>Modest rear term growth + Greater equality</i>
Total	466	466	466
Social Rent	152 (33.3)	131 (28.1)	91 (19.5)
Affordability Constraint	5 (1.0)	6 (1.2)	7 (1.5)
Private Rented Sector	93 (20.0)	101 (21.7)	111 (23.8)
Buyers	217 (46.6)	235 (50.4)	258 (55.3)

The above shows that the different ratio split between 'social rent' requirement under the worst-case scenario would be approximately third and in the best-case scenario would be approximately a fifth of the total requirement. There is little difference between the worst-case and best-case scenarios in terms of 'affordability constraint'.

6.5 Stage 4: House Prices

The HNDA tool is pre-programmed with five house price scenarios, and which reflect what may happen to average house prices in the local area in future years ranging from strong growth to flat growth. The HNDA Tool Instructions note that this approximates what happened to house prices between 2005 and 2019. The 'default scenario' is based on the ESRI's model and assumes a 2.25% increase in prices. House price growth nationally and in Sligo has been significant in recent years and is not recognised in any of the above pre-programmed scenarios. However, as per the fall in average house prices noted between 2007 and 2012, a lower level of growth or decline in houses prices is likely over the 10-year HNDA period of 2022 to 2031. Taken all this into account it would be appropriate to use the 'Strong Growth' scenario (as a comparison to the 'default') and as this would in some way account for the significant growth in house prices over 2019 to 2021 and then recognise that this may be more modest over the remainder of the HNDA period.

HNDA Table 3 House Price Growth- Strong Growth (6%) [scenario 4]

	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	Total	Annual Average (% of total)
Total	459	471	463	459	448	464	482	478	478	461	4662	466
Social Rent	140	144	137	131	128	128	128	127	119	111	1293	129 (27.7)
Affordability Constraint	5	5	9	14	18	23	29	29	39	41	212	21 (4.5)
Private Rented Sector	94	100	105	110	106	117	128	130	133	135	1158	116 (24.9)
Buyers	220	222	212	204	196	196	197	192	187	174	2000	200 (42.9)

Compared to the convergence (default) scenario (see Table 3.1) 'strong growth' in house prices over the HNDA period results in a slight increase in the requirement for Social Rent. In terms of the private market, this would be reduced overall, and there would be a notable increase in the amount within private rented sector as opposed to buyers. In terms of potential households which would be classed as 'affordability constraint' this has increased significantly (from annual average of 1.2% in the default model to 4.5%). More notably, and as highlighted in table 3.6 from 2028 onwards this would total more than 5% of the overall housing requirement and by 2031 this would be 9%.

6.6 Stage 5: Rental Prices

The default within the HNDA Tool is that, of those who can afford mortgage repayments, only 70% will also have a deposit (10%) available to actually buy. As with house price growth there are the same five pre-programme scenarios, and default is based ESRI Forecast assumption of 2.25% increase in prices. The HNDA guidance notes that the ‘Strong Growth’ of 6% of per annum was experienced consistently from mid-2014 to end of 2019. Evidence available is of continued growth well above 6%. Therefore, it is considered reasonable to use the ‘Strong Growth’ scenario (as a comparison to the ‘default’) and as this would in some way account for the significant growth in house prices over 2019 to 2021 and then recognise that this may be more modest over the remainder of the HNDA period. This would be in addition to the ‘Strong Growth’ in house prices.

HNDA Table 4 Rental Price Growth - Strong Growth (6%) [scenario 5] (in addition to Strong House Price Growth (6%))

	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	Total	Annual Average (% of total)
Total	459	471	463	459	448	464	482	478	478	461	4662	466
Social Rent	140	144	137	131	128	128	128	127	119	111	1293	129 (27.7)
Affordability Constraint	5	10	23	37	40	55	72	76	91	101	510	51 (10.9)
Private Rented Sector	94	96	91	87	84	85	85	83	80	75	859	86 (18.4)
Buyers	220	222	212	204	196	196	197	192	187	174	2000	200 (42.9)

This scenario results in a further reduction in the private market, and in particular a notable reduction in the private sector market (compared to scenario 5 (Table 3.6)). There would also be further increase in households classed as ‘affordability constraint’ – this would be an annual average increase up to 10.9% and as highlighted in table 3.7 from 2025 onwards this would total more than 5% of the overall housing requirement.

6.7 HNDA Outputs

6.7.1 Total forecast housing need

The overall housing need between 2023 and 2031 is likely to be around 4,650 units (on average 465 per annum) and with a potential range of between 4,350 and 5,300. For the next CDP period (2024 to 2030) the likely housing need will be around 2,790 units. This will differ from the requirement identified within the HTSM which will also account for any undersupply in the preceding years.

6.7.2 Housing need by tenure

Under the default scenario the split between Social Rent and Private Market is likely to be around 28% and 72% over the period 2023 and 2031. There would be negligible requirement for Affordable Housing. For the next CDP period this would mean making provision for about 760 social rented houses and 2,005 private market houses.

However, under a scenario which seeks to account for the significant growth in house and rent prices over the last few years (2019 to 2022) there is likely to be a notable requirement for Affordable Housing units and with a tenure split of 11% affordable, 28% social rent and 61% private market for the period to 2031.

The requirement for Affordable Housing units, at a level of more than 5% of total annual housing need, will be from 2025 and therefore would be a relevant consideration for the objectives of and allocation of land within the next CDP. Further analysis would be required to determine if a shared equity products that are used to support home ownership are required.

Under this scenario, and over the next CDP period this would mean making provision for about 780 social rented houses, 300 affordable housing units and 1710 private market houses.

6.7.3 Housing land supply

The total adjusted demand for new housing in County Sligo during the Plan period was calculated in accordance with the HSTM Guidelines and is detailed in Section 5.2.1 of Chapter 5 (Settlement Strategy) of the Draft CDP 2024-2030. It was determined that circa 3,892 new dwellings would be required by 2030.

The Core Strategy Table (refer to Section 3.3 in Chapter 3 Core Strategy Statement) indicates that this Development Plan zones the equivalent of approximately 133 ha for residential and mixed uses (including residential), which represents sufficient provision to accommodate the calculated housing demand while allowing for a degree of location choice.

Zoning for new residential development is set out for Sligo Town, Support Towns and Satellite Villages. Where land is zoned for development, it is on the basis of a detailed Infrastructural Assessment (IA) and Settlement Capacity Audit to support its suitability for development during the Plan lifetime in terms of servicing and potential housing yield.

6.8 Rural houses

National Policy Objective 20 of the NPF requires Local Authorities to ‘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.’

There are many drivers of rural one-off housing. Trends cannot be considered in isolation from what is happening in the wider housing market in terms of supply, demand and affordability, or the state of the wider economy. Affordability is a key consideration, with large average floor areas generally reflecting low land costs for households. Increases in remote working and rural broadband improvements may encourage people to choose to build more rural one-off homes.

Self-build opportunities in the countryside can often function as a release valve when there are constraints on the housing market within the settlement network. This is reflected in the fact that one-off housing delivery was proportionally very high during recession years when overall housing delivery was low.

Exact data on the number of houses granted planning permission or constructed in the open countryside is not available for Sligo. Data is available from the CSO on ‘one off houses’ granted planning permission and ‘new dwelling completions’ (single houses), but this data may include a portion (albeit very small) of individual houses permitted or constructed within designated settlement boundaries.

Analysis of planning permission data from 2011 to 2022, in terms of total units permitted (Table 12) and completed (Table WW) in County Sligo, has been undertaken to assist in projecting the need for single housing in the countryside during the County Development Plan period 2024-2030. The data shows the yearly number of one-off houses being permitted in the county and the proportion of overall residential permissions they comprise.

Nationally, stand-alone homes accounted for 39% of all houses approved in 2022 compared to 28% in County Sligo. In 2018, 2019 and 2020 the proportion of houses permitted that were one-offs in Ireland was 27%, 29% and 30% respectively. This increased to 45% in 2021. In County Sligo, the proportions of houses permitted in the same period that were one-offs were as follows: 66% (2018), 40% (2019), 56% (2020) and 46% (2021) respectively, considerably higher than the national average.

On average, since 2011, one-off houses have represented 56% of all houses permitted in County Sligo. The percentage of one-off dwellings permitted relative to total units permitted has remained above 40% in the last 10 years, reaching peaks of 93% in 2012 and 2013 and 98% in 2015.

Table 13: Percentage of one-off dwellings permitted in County Sligo 2011-2022

Year	No. of one-off houses permitted in Co. Sligo	Total no. of residential units permitted in County Sligo	One-off houses as a % of all dwellings permitted in County Sligo
2011	92	160	58%
2012	75	81	93%
2013	62	67	93%
2014	53	60	88%
2015	54	55	98%
2016	74	117	63%

2017	84	122	69%
2018	96	145	66%
2019	87	215	40%
2020	66	118	56%
2021	100	217	46%
2022	79	282	28%
	Average annual ratio 2011 – 2022		66%
	Average annual amount 2011-2022		82 houses
	Average annual ratio 2018 – 2022		47%

Source: CSO BHQ02

On average since 2011, 56% of homes permitted by Sligo County Council comprised one-off houses. However, in the same period, one-off houses accounted for 62% of all house completions.

In 2022 one-off dwellings accounted for 28% of all houses built, the lowest percentage in over ten years (refer to Table 7). The proportion of single rural houses built in County Sligo relative to the total number of all new homes in recent years has been declining as the delivery of housing schemes in urban areas increase.

Since 2011, 922 one-off houses have been permitted by Sligo County Council and 978 one-off houses were actually built (representing on average 82 single rural houses built per year).

This analysis demonstrates that one-off dwellings are a significant part of the housing market in County Sligo, albeit with some variation reflecting unstable market conditions. It would appear that most of the permissions for one-off houses materialise into built homes.

On the basis of the data discussed above, it considered reasonable to assume a potential demand for approximately 80 individual housing units in the countryside annually over the period 2024-2030 equating to 480 houses.

7. Specialist provision

This section addresses Section 4 of the analysis in line with the *Guidance on the Preparation of a Housing Need and Demand Assessment* (DHLGH, 2021), in terms of the assessment of need for specialist provision for households requiring a specific housing solution suited to their needs

Specialist provision refers to three broad categories, which in turn cover six types of housing related provision aimed at supporting independent living and allowing people to live well and with dignity.

The number of households with a housing requirement should be identified for the following categories of specialist need:

- Older people
- People with a disability
- Homeless
- Travellers
- International protection applicants
- Third Level Students

7.1 Housing for older persons

The 'Housing Options for Our Ageing Population Policy Statement', jointly published in 2020 by the Department of Housing Planning and Local Government and the Department of Health, recognises the need to plan ahead to meet the accommodation needs of an ageing Ireland. The aging profile of the population has considerable implications for public policy areas such as housing, health, urban and rural planning, transport, policing, the workplace and the business environment.

The Policy Statement refers to a 2016 Housing Agency report, 'Housing for Older People – Thinking Ahead', which estimates that 15% of those aged 65+ would be willing to move to a different home in their community and that a further 15% would choose to move to age-friendly accommodation, if it were available. A further 4% of older people would live in nursing homes. It was further estimated that 66% of those over 65 would prefer to stay in mainstream housing.

According to Census 2016, and as shown in Table X below, there were 10,624 people over 65 living in Sligo in 2016, representing 16% of the county's population, a 29% increase in that cohort of the population from the 2006 census.

The HNSA Data Source provides a projection per annum to 2040 for the population over the age of 65 years for each local authority. The projection is based on the NPF 50:50 City population growth scenario and is as per the ESRI population projections reported in the ESRI December 2020 publication 'Regional demographics and structural housing demand at a county level'48.

Table 14 shows the actual figures from Census 2006, 2011 and 2016 followed by the projected growth figures for 2026, 2030 and 2040. The table suggests that by 2030, 20.8% of the population of County Sligo will be over the age of 65 years, with this rate increasing to 22.3% by 2040.

Table 14: Population projections for County Sligo (high migration scenario)

	Census 2006	Census 2011	Census 2016	Census 2022	Projected 2026	Projected 2030	Projected 2040
Total population	60,894	65,393	65,535	70,309	71,767	74,505	81,764
Population over 65	8,211	9,043	10,624	n/a	14,119	15,514	18,267
% of total	13.4%	13.8%	16%	n/a	19.6%	20.8%	22.3%

Source: CSO CDR04 CO203 and ESRI

Sligo County Council is committed to promoting ‘Age Friendly Housing’ in partnership with the Private Sector and ensuring that there are a range of options for our ageing population to ‘right size’. Regard will be had to the age profile within the social housing needs assessment. This will be incorporated into the briefing and housing typologies for individual sites within the delivery streams.

7.2 Accommodation for people with a disability

The County Sligo Strategic Plan for Housing People with a Disability (2021-2025) aims to facilitate access to a range of housing and related support services for people with a disability.

The core goal of the 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.

Almost 21% of households (353 no.) identified by the Social Housing Need Assessment as being eligible for social housing supports claim a disability. This is significantly higher than the state average of 8.2% in 2020. In that year, the proportion of households with a disability need in County Sligo was 23.4%, the highest in the country (Housing Agency 2021).

The Housing Section recommend that 15% of all units in Local Authority schemes over ten units are designed specifically for people with a disability. The need for wheelchair accessible/universal design housing should be a consideration in all housing developments in County Sligo.

7.3 Accommodation for the homeless

The number of families at risk of homelessness is increasing in Sligo due to the acute shortage of private rented accommodation, the increase in rents and the disparity between HAP rates and rents being charged.

In 2014, there were 2,858 homeless people in the country, the majority of whom were male (65%), and under 45 years of age (75%). In the following eight years, the numbers have trended upwards, and while the proportion of homeless males has held relatively steady, 2022 data shows that the profile of homeless people is becoming younger.

In the same period (2014-2022) the number of homeless adults in the North-West Region increased from 31 to 79, the number of homeless families has risen from one to 11, and the number of homeless dependent children has gone from one to 19 children. In September 2022,

81 people presented as homeless including 18 children. This represented the largest amount of people presenting themselves as homeless in the preceding 8 months.

The duration spent in homeless accommodation is also increasing in Sligo, with 24% of single adults being more than 2 years in the homeless hostels in 2022.

There is no family hub in the North-West, there are only 2 units of Supported Temporary Accommodation (STA) in Sligo Town. The placement of refugees in urban hotels and the acute shortage of available rental properties means that temporary emergency accommodation is extremely limited.

Sligo County Council will continue to support the implementation of the North West Homeless Action Plan 2023-2028 (NWHAP) to prevent homelessness where possible, support the movement to stable accommodation, and ensure stringent governance of the provision of homeless services, all through a caring, compassionate and proactive approach.

7.4 Accommodation for Travellers

The Housing (Traveller Accommodation) Act 1998 requires all local authorities to prepare, in consultation with Travellers and the general public, a five-year Traveller accommodation programme to meet the existing and projected needs of Travellers in their area.

The 2018 Census of Travellers accounted for 136 Traveller families living in various forms of accommodation within the County of Sligo. The Traveller Accommodation Plan 2019–2024, adopted by Sligo County Council in July 2019, estimates the number of units of accommodation required to meet the needs of the Travellers Community over this period.

It is estimated that 66 families will need to be accommodated over the lifetime of the plan. This figure is based on the number of families currently sharing accommodation, potential new family formations, and families living in below standard private rented accommodation as well as the number of families in unauthorised sites and transient sites awaiting more permanent accommodation.

Table 15: Accommodation type and overall targets to meet identified need of Traveller households 2019-2024

Type of accommodation	Target	Current provision
Group housing/halting site	10	7
Specific purchase	5	1
Upgrade of existing facilities	9	11
Council tenancy	23	15
RAS/HAP	17	5
Voluntary housing	2	11
Total	66	50

Source: Sligo County Council Housing Section

Sligo County Council recognises the distinct culture and lifestyle of the Traveller Community and will endeavour to provide suitable accommodation for Travellers who are indigenous to the area, using the full range of housing options available, such as standard lettings in local authority estates, HAP, lettings in voluntary housing schemes, group housing schemes, halting sites and single/stand-alone housing where required.

7.5 Housing for international protection applicants

People who may have cultural, language and other support needs are at increased risk of homelessness and in need of social housing supports. Sligo County Council works with clients who are still living in direct provision (despite having achieved residency) due to housing shortages. Clients are often supported to access social housing supports as part of an inter-agency response.

Housing for refugees and migrants is an evolving need, that will continue to be monitored over the lifetime of the CDP.

At time of writing (May 2023), there were 1,947 Ukrainian refugees in County Sligo fleeing war in Ukraine. Of these 1,732 are in state provided temporary accommodation at various locations throughout the county. Sligo County Council will continue to support the appropriate accommodation of these people in a compassionate and timely manner.

7.6 Housing for students

In April 2022, IT Sligo, GMIT and Letterkenny IT merged to form the Atlantic Technological University (ATU). ATU Sligo comprises St Angela's College and the former IT Sligo. Cumulatively, the two colleges had a combined enrolment for the academic year 2022/23 of 10,200 students (8,600 and 1,600 respectively).

There are seven purpose-built student villages serving these students, all are within one to twelve minutes' walking distance of the colleges, with over 2,000 bed spaces available. While many students commute to college from beyond Sligo town and even county, demand for accommodation in the private rented sector is strong. Given future growth in student numbers in Sligo, ATU Sligo will continue to constitute a significant part of the demand for private rented accommodation in the town.

Sligo County Council will support the provision of on or near-campus student accommodation in the forthcoming County Development Plan.

8. Delivering the Housing Strategy

8.1 Summary of key outcomes

The following key conclusions in terms of estimating future Housing Need will inform the County Housing Strategy:

- The estimated total number of new households that will be accommodated over the life time of the County Development Plan (2024 to 2030) is 2790 units. This will differ from the requirement identified within the HTSM which will also account for any undersupply in the preceding years.
- Of these, 28% will require social housing with a negligible requirement for Affordable Housing.
- This equates to making provision for about 760 social rented houses and 2005 private market houses for the period 2024 to 2030.
- However, under a scenario which seeks to account for the significant growth in house and rent prices over the last few years (2019 to 2023) there is likely to be a notable requirement for Affordable Housing units and with a tenure split of 11% affordable, 28% social rent and 61% private market for the period 2024 and 2030.
- The requirement for Affordable Housing units, at a level of more than 5% of total annual housing need, will be from 2025 and therefore would be a relevant consideration for the objectives of and allocation of land within the next CDP.
- Under this scenario, and over the next CDP period this would mean making provision for about 780 social rented houses, 300 affordable housing units and 1710 private market houses.
- This Housing Strategy identifies a growing need for a range of house types and sizes to facilitate the changing demographic structure and in particular the increasing trend towards smaller household sizes.
- Delivery of one-off rural houses will be controlled by planning policy in accordance with the NPF and the need to deliver compact growth and sustainable development.

Meeting the assessed forecast need in addition to any outstanding existing need will be achieved by a combination of delivery methods as set out in this section. Sligo County Council will support the delivery of new social and affordable homes, both directly and through Approved Housing Bodies in Sligo. New social and affordable homes will be delivered through direct builds, through acquisition arrangements, and through leasing arrangements. Housing needs will also be met through the provision of HAP and RAS tenancies, enabling households in need to access accommodation in the private rental sector at a rent they can afford.

8.2 Policy recommendations for the draft County Sligo Development Plan

The County Sligo Housing Strategy and Housing Need Demand Assessment has reviewed existing and future housing needs in County Sligo and has set out the evidence base underpinning the future estimated needs for the County.

This final section of the document sets out recommended policies for inclusion in the draft County Development Plan. These are informed by the analysis of the housing context in Sligo as well as by the legislative context and national guidance set out in Section 2.

The core principles behind the strategy include the goals of delivering sustainable development and compact growth, providing high-quality new homes in appropriate places to meet the diverse needs of the people of County Sligo and promoting strong, vibrant, and inclusive communities.

The following policy objectives have been drafted in accordance with these principles to guide and support sustainable housing delivery through effective spatial planning:

Strategic housing policies

1. Encourage a balanced supply of private housing in the county, in a manner that is consistent with the Core Strategy and the settlement hierarchy, and which will support the creation of sustainable communities through the provision of an appropriate range of housing types and high-quality residential environments.
2. Reserve 20% of eligible sites which are subject to new residential development (or a mix of uses including residential) for the development of social/affordable housing units, in accordance with the Housing Strategy and the requirements of Part V of the Planning and Development Act 2000 (as amended).
3. Monitor residential development and manage the supply of new housing to ensure that it is consistent with the requirements of the Core Strategy and the infrastructural capacity of each settlement.
4. Ensure that the needs of older people, people with disabilities and other special-needs persons and households are adequately catered for in new residential developments.
5. To plan for the provision of sustainable rural housing in the countryside through the Core Strategy, having regard for potential need for such housing as set out in the HNDA, the viability of smaller towns and rural settlements as well as existing and forthcoming national policy and guidance.

General housing policies

1. Ensure the provision of a suitable range of house types and sizes to facilitate the changing demographic structure and in particular the increasing trend towards smaller household sizes. In private housing schemes, the following mix of house types should generally apply:

House type	Proportion in the scheme
1 bedroom	minimum 10% of total no. of houses in schemes of 10 or more units
2 bedrooms	minimum 20% of total no. of houses
3 bedrooms	minimum 30% of total no. of houses
4+ bedrooms	maximum 20% of total no. of houses

Ensure that the supply of housing units under the Housing Strategy reflects the current and anticipated demographic characteristics and household sizes.

Where a particular need is identified, provide housing schemes designed for the needs of older people and/or those with special needs. Otherwise, housing schemes shall be designed with a suitable mix of house types and designs which can be easily adapted to accommodate special housing needs.

2. To support and promote the use of Universal Design principles and Lifetime Homes in new housing developments to meet the needs of diverse groups and an aging population
3. To support the provision of purpose-built student accommodation in appropriate locations and of appropriate design (including adequate communal facilities and external communal space) as set out in the County Development Plan, to meet demand for student housing.
4. Require that new residential developments of up to 10 houses provide a minimum of one unit designed in accordance with the specifications of *Universal Design Guidelines for homes in Ireland* (National Disability Centre for excellence in Universal Design). Schemes of 11 houses and over should have a minimum of 15% of units designed and built to this standard.
5. To support the implementation of the Sligo Age Friendly County Strategy (and any subsequent strategy), promoting the delivery of Lifetime Homes and the provision of housing that is adaptable for an ageing population.
6. To support and promote the delivery of specialist accommodation appropriate to the needs of older people in co-operation with the voluntary sector, AHBs, the HSE, and other relevant bodies.

Social housing policies

1. Utilise all of the social housing support models including leasing, HAP, building, acquisition and RAS to address the demand for additional social housing supports over the period of the plan.
2. Promote social inclusion by ensuring that social housing support is well distributed throughout all residential areas rather than concentrated in a few locations and supports the principles of compact growth and the Town Centre First policy approach.
3. Ensure that development in areas subject to an agreement under Part V of the Planning and Development Act 2000 (as amended) is integrated into the housing scheme in a manner which avoids undue physical and social segregation.
4. Provide for the accommodation needs of Travellers, as far as is reasonable and practicable, using the full range of housing options available to the Local Authorities and having regard to the policies outlined in the *Traveller Accommodation Plan 2019–2024* and any subsequent programme.
5. Encourage linkages between existing public and private housing areas through the provision of shared facilities, services and pedestrian, cycle and vehicular connections, as appropriate, between these areas.
6. Assist approved housing bodies in the provision of housing and encourage a more active involvement of these sectors in the housing market.
7. Continue to support independent living for older people and the provision of specific, purpose-built accommodation.
8. Continue to meet the housing needs of persons with special needs both by direct provision of accommodation and by facilitating the provision of housing by the voluntary sector. Facilitate the provision of suitable accommodation for the homeless and for those in need of emergency accommodation.

9. Assist in the implementation of the provisions of *North West Regional Homelessness Action Plan 2023 – 2028* and successor documents.
10. To work with Central Government, relevant State Agencies, AHBs, and other bodies to support the provision of appropriate housing for asylum seekers and refugees in County Clare in accordance with identified requirements, and to support the phasing out and replacement of the Direct Provision system in accordance with national policy and requirements.

8.3 Monitoring and implementation

The Planning and Development Act 2000, (as amended), provides for the monitoring of the implementation of the County Housing Strategy as part of the Report of the Chief Executive under Section 15(2). In this respect, Sligo County Council will undertake the following:

- Review the progress achieved in implementing this Strategy in consultation with the appropriate bodies;
- Promote the implementation of the Housing Strategy in a rational and sequential manner as well as ensuring that essential facilities, such as roads infrastructure, water and sewerage, are secured and provided in conjunction with proposed developments and in line with the legislation and best practice;
- As far as practicable, the Council will implement a monitoring programme for the HNDA and Housing Strategy as part of the w

A review of the Housing Strategy, within two years after the making of the Development Plan, is required to ensure its successful implementation. The Chief Executive will give a report to the members of Sligo County Council on the progress achieved in implementing the Housing Strategy and the Development Plan objectives.

The Housing Strategy may be amended, and the Development Plan varied accordingly, if the report prepared by the Chief Executive identifies new or revised housing needs within the functional area of the Local Authority.