



COUNTY LAOIS HOUSING STRATEGY and HOUSING NEED DEMAND ASSESSMENT

For the preparation of the Laois County
Development Plan 2021-2027

November 2020



Laois County Council

Áras an Chontae, Portlaoise, Co. Laois



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EXECUTIVE SUMMARY

The Laois County Council Housing Need and Demand Assessment (HNDA) is an important step in providing a robust, shared and agreed evidence base on housing need and demand to support the Laois County Development Plan 2021-2027 and the pertaining Housing Strategy. It will help inform the Development Plan to consider the scale of house building and to plan for the quantum of land required to deliver this. It will also inform the Laois County Housing Strategy, providing direction to tackle housing need and demand in accordance with strategic priorities for housing and related services.

The preparation of the HNDA has been undertaken by Downey Planning supported by the Housing Department of Laois County Council and other research experts.

The HNDA estimates the future numbers of additional homes to meet existing and future demand. The HNDA is intended to produce broad, long-run estimates of what future housing need might be, rather than precision estimates. The scale of need and demand for housing in different scenarios are based on a series of variables including household change, changes to income and income distribution and changes in rental and purchase prices for housing amongst other things. This HNDA has investigated a series of different scenarios to gain some insight into both the outputs and the key factors which drive these.

Section 1 provides a brief introduction into the Strategy, its core outputs, methodology and data sources used to produce the HNDA. It also discusses quality assurance and equality considerations and presents a short review of the previous Housing Strategy to inform the report. The relevant legislation and policy framework supporting the different aspects of the Strategy are presented within Section 2. Section 3 provides an analysis and trends of the Housing Market Drivers, including demographic trends, population projection and distribution, housing prices and economic trends. A Housing Stock Profile is contained within Section 4, demonstrating both housing and land supply within the County. The determination of housing need and supply over the operational period of the development plan is analysed and discussed in Section 5, projecting and determining the future housing requirements to cover the period between 2021-2027. An analysis of the housing requirements is discussed within Section 6. Having regard to the projected housing requirements and current trends, as well as relevant legislation and policy, Section 7 sets out a number of housing objectives to inform the housing strategy. The document is then concluded in Section 8.

It is important to note that the figures presented in the HNDA might require a future revision given the unprecedented circumstances for housing and employment brought forward by the COVID-19 pandemic, which continues to have a significant impact on individuals, society, businesses and the wider economy across the globe. Particular notice should be given to the COVID-19 related impacts, however as the broader economy recovers and responds to the pandemic, the overall economic and demographic climate will face a number of challenges but also see many new opportunities in the medium to long term.

While it is too early to assess the full implications of the above circumstances on the housing and economic trends, this HNDA has taken cognisance of previous trends and sudden fluctuations which have affected County Laois throughout a number of Census years and proposes a Housing Strategy which would enable the Council to plan accordingly. It is considered that current circumstances could lead County Laois to experience a fast growth like those experienced in the past.

01

INTRODUCTION

INTRODUCTION

1.1 Statutory Background

Under Section 94(1)(a) of the Planning and Development Act 2000 (as amended), each Planning Authority “shall include in any development plan a strategy for the purpose of ensuring that proper planning and sustainable development of the area of the development plan provides for the housing of the existing and future population of the area in the manner set out in the strategy.”

This must consider:

- The existing need and the likely future need for 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 elderly persons and persons with disabilities, and;
- The need to counteract undue segregation in housing between persons of different social backgrounds.

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 National Planning Framework (NPF) has introduced a new requirement for each Local Authority to develop a Housing Need Demand Assessment (HNDA). The HNDA will support the preparation of housing strategies and all related housing policy outputs, e.g. city and county development plans, local area plans, traveller accommodation plans, etc.

As outlined in the NPF, the purpose of the HNDA 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.

The NPF notes that 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:

- 01** **Demographic trends, affordability trends and wider economic trends.** The use of economic forecasting or econometric work underpins this section. Data requirements include household composition/projections, house prices, rents, number of first-time buyers (FTBs) and loan to value (LTV) mortgage rates, economic activity and employment rates etc.
- 02** **Housing Stock Profile Pressures (and existing need) and management issues.** Undertaking a detailed profile of housing stock and stock pressures, including Local Authority housing, to identify the main pressures relating to supply and demand, ineffective stock, vacancy and overall condition as well as priorities for future stock management. Information is required on dwelling size, dwelling type, dwelling condition, and stock pressures (occupancy/under occupancy stock turnover etc.).
- 03** **Estimating Future Housing Need and Demand.** This is broken down into: owner occupation, private sector, below market rent and social rent. Detailed guidance is provided on how to undertake this work, including how and on what evidence to base assumptions on wealth affordability, both in terms of home ownership and the different rental categories.

Therefore, the NPF places a responsibility on Local Authorities to prepare a housing strategy supported by an assessment of housing need and demand. An HNDA provides that assessment.

The HNDA will underpin the following key areas of housing policy and planning:

Housing Supply Target - to inform the setting of a Housing Supply Target for use in the Laois County Housing Strategy and Development Plan. The Housing Supply Target sets out the amount and type of housing to be delivered over the plan period from 2021 to 2027,

Stock Management - to assist understanding of the current and future demand for housing by size, type, tenure and location in order to optimise the provision, management and use of stock. This in turn feeds into policy and planning decisions about future stock in the Laois County Housing Strategy,

Specific Housing Provision - to inform the provision and use of specific housing needs, social and affordable housing, and housing-related services to enable independent living for all, as expressed in policy in the Laois County Housing Strategy and to inform planning decisions, i.e. land for travellers, care for the disabled and the elderly, etc,

This HNDA provides estimates of future housing need and demand in County Laois over the six-year Development Plan time period from 2021 to 2027.

1.2 Core Outputs

There are four Core Outputs which can be identified across the HNDA which need to be completed in order to achieve a robust and credible assessment. Details of the five outputs and their location within the HNDA are summarised as per the table below:

Core Outputs	Section
<p>01 Housing Targets</p> <p>Reviews the policy documents in the hierarchy of National, Regional, and Local to establish a comprehensive vision of the housing target for County Laois.</p>	<p>Section 2: Planning Context</p>
<p>02 Key Housing Market Drivers</p> <p>Identifies the key factors driving the local housing market. This should consider household formation, population and migration, housing affordability including income, house prices, rent levels, and key drivers of the local and national economy.</p>	<p>Section 3: Housing Market Drivers</p>
<p>03 An Assessment of the Current Stock and Supply</p> <p>Studies the profile of existing housing stock with a focus on different characteristics of the stock, including its composition, tenure, social housing, and housing typology. A further aspect of this part is the supply and the profile of housing pipeline. The assessment also stretches towards the existing resources for providing housing, which in this case includes the land availability</p>	<p>Section 4: Housing Stock Profile</p>
<p>04 Estimate of Additional Housing Units</p> <p>Estimates the additional number of housing units which should be delivered within the time period of the Plan in order to meet the housing needs of the local population.</p>	<p>Section 5: Estimating Housing Need and Demand</p>
<p>05 Requirement of the Anticipated Housing Market</p> <p>Applies the identified trends in population and housing stock from the previous sections to illustrate an indication of the anticipated housing market within the County.</p>	<p>Section 6: Analysis of Housing Requirements</p>

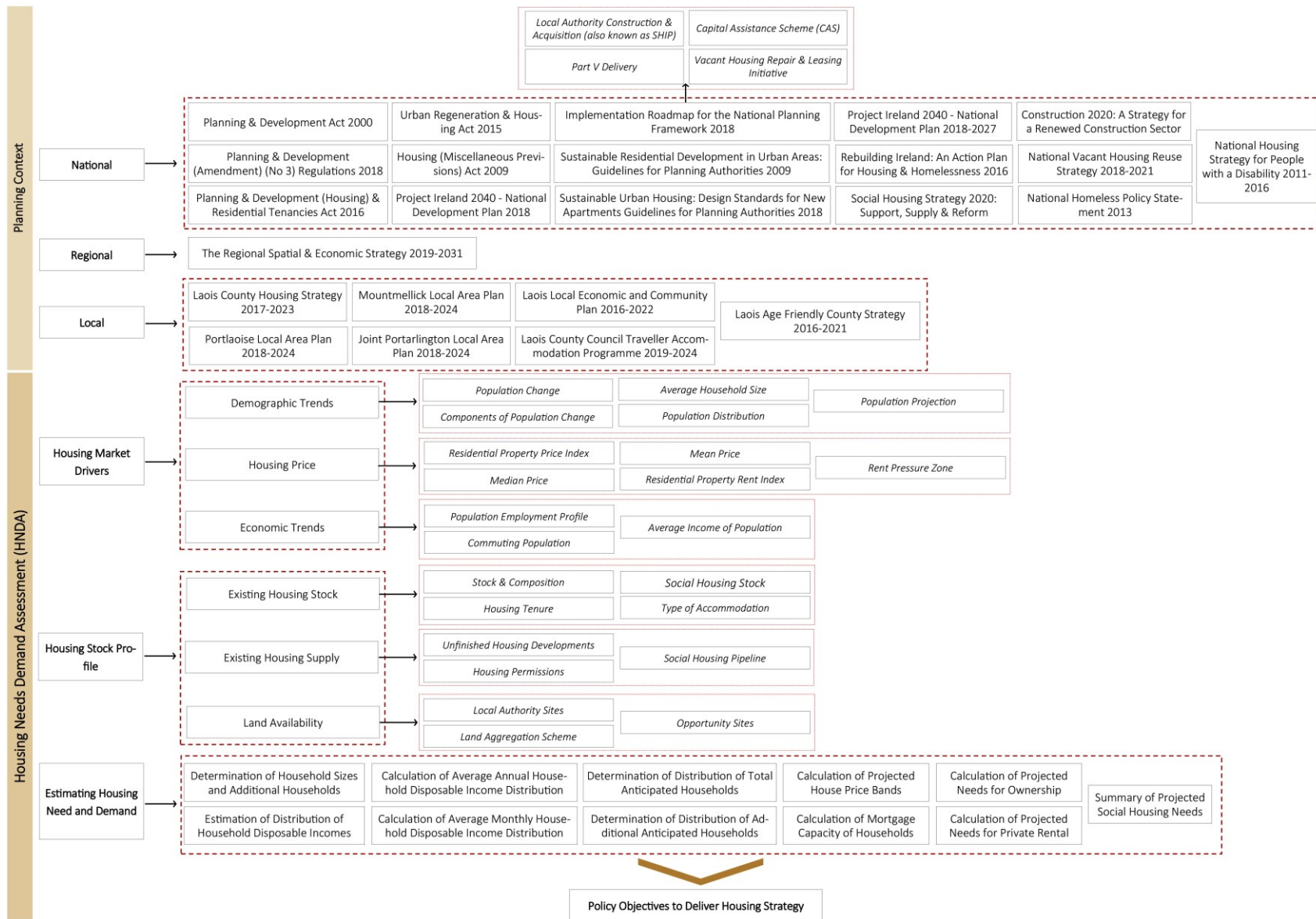


Figure 1. The Structure of the Housing Strategy

1.3 Governance and Consultation

The National Planning Framework (NPF) sets out a national vision for Ireland for 2040 and provides the framework and principles to manage future population and economic growth over the next 20 years, including the need for an additional 550,000 homes to cater for an extra 1 million people. In this regard, National Policy Objective (NPO) 37 of the NPF requires each Local Authority to carry out a HNDA in order to correlate and accurately align overall future housing requirements, as an evolution of their existing Housing Strategy requirements under Part V of the Planning and Development Act 2000 (as amended). 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. This HNDA has been prepared by Downey Planning on the behalf of Laois County Council to meet the statutory requirements set out under Section 94 of Planning and Development Act 2000 (as amended).

1.4 Methodology and Data Sources

Downey Planning has aimed to undertake the HNDA and present the findings in a clear and methodical manner. It is agreed in principle that secondary data, including statistically robust and validated national data sets would be the preferred choice of data source subject to triangulation and validation where possible. Primary data from the Council's information systems has also been used. A list of guidelines and data sets used in preparation of the following document is as below:

- The StatBank of CSO Census databases;
- AIRO Mapping Resources, including Census Maps and Housing within the Research Themes in the Regional and Local Authority levels;
- Department of the Environment, Heritage and Local Government, and the "Overall Social Housing Provision" to capture the latest statistics on the social housing delivery within the Local Authorities;
- The Department of the Environment, Heritage and Local Government, and "Unfinished Housing Developments - Summary Reports for 2017" & "Resolving Unfinished Housing Developments - 2017 Annual Progress Report on Actions to Address Unfinished Housing Developments";
- The Department of the Environment, Heritage and Local Government, and "Rent Pressure Zones - Ireland";
- The Housing Agency and the "Summary of Social Housing Assessments - 2019";
- The "Residential Property Price Index - May 2020" in the CSO Census databases;
- Myhome.ie portal and "Myhome.ie Q2 2020 Property Report in association with Davy";

- Daft.ie portal and “The Daft.ie Housing Market Report; An Analysis of Recent Trends in the Irish Estate Market for June 2020”;
- Property Services Regulatory Authority and the search portal for “Residential Property Price Register”;
- Residential Tenancies Board and report on “Rent Index Q1 2020”;
- Department of Housing, Planning & Local Government and the “Homelessness Reports January to May 2020”;
- The Department of Housing, Planning and Local Government, and the ‘Homelessness Report May 2020’;
- ESRI’s ‘Irish house price sustainability: a county-level analysis’ and ‘Budget Perspectives 2018: Paper 2’.

1.5 Quality Assurance

The HNDA has been developed in consultation with Laois County Council’s Housing Department, where primary data from the Council’s information systems has also been used. In developing methodologies, e.g. deciding on the scenarios for the HNDA estimates, Downey Planning devised different options and then consulted with experts in data management and analysis for the final decision. This approach creates a robust document with clear and evidence-based guidelines. Section 2.0 of this document comprises a brief assessment of the pertaining existing policy and legislation, thus building the statutory background of the Housing Strategy and HNDA for County Laois. Sections 3.0, 4.0, and 5.0 of the HNDA utilises information from national secondary data sources such as the CSO statistics, population projections, and other government statistical information such as homelessness statistics and social care survey information. These data sources have assurance guaranteed and are consistent across Councils. Within Sections 3.0, 4.0 and 5.0 primary data is also used. This includes information from the Council’s housing management system which provides waiting list, homelessness and letting information. This information was extracted from the system into excel, with relevant data cleansing to ensure data protection. Section 5.0 provides information on the number of future additional housing units needed broken down by tenure. Full details of the scenarios and the reasons why they were chosen are provided in this section.

1.6 Equality Considerations

In preparing this HNDA consideration has been given to the requirements of the Equal Status Acts 2000-2018, particularly around evidence on the Specific Housing Provision requirements of local populations which is described in more detail in Section 6.5 of this document. During the course of drafting the HNDA, age, disability, race and sex have been considered as these are the main protected characteristics which have an impact on housing need and demand in relation to Specific Housing Provision.

1.7 Review of the Previous Housing Strategy

To meet the statutory requirements set out under the Planning and Development Acts 2000-2015, in particular, Part V of the mentioned Act, and to address relevant provisions contained within the Housing (Miscellaneous Provision) Act 2009, and also the Urban Regeneration and Housing Act 2015, Laois County Housing Strategy 2017-2023 was prepared by Future Analytics Consulting on behalf of Laois County Council. This previous housing strategy provides a market assessment of housing in the County, based upon population and housing growth over the period of 2002-2011 in a background of demographic and housing trends within the broader context of the State and the Midlands region. In terms of data and sources, the previous housing strategy compiles a set of key research information provided by the Department of the Environment, Communities and Local Government (DoECLG), the Central Statistics Office (CSO), and the Economic and Social Research Institute (ESRI), to reflect the latest position with respect to the housing market and the documented outputs are the product of considered scenarios testing. As illustrated below, this housing strategy comprises of a six-step process to determine the housing demand for County Laois up to and including the plan period of 2017 to 2023.

Step 01 A detailed assessment of the Laois County population projections for the period 2017-2023 based on the revised Population forecasts.

Step 02 Calculation of average household size and additional households required to cater for the projected additional population from 2017-2023, including implied assumptions on average household size over that period.

Step 03 Estimate distribution of household disposable incomes for 2011 for the 10 household deciles based on the weekly and annualised disposable incomes at national level and the adjusted to county level based on application of a “deflator” rate (0.912, where 1.0 is state).

Step 04 Calculation of household disposable income distribution from 2012-2025 based on the ESRI Medium Term Review 2013-2020 (July 2013).

Step 05 Calculation of estimated distribution of household disposable incomes for 2012-2025 for the 10 household deciles based on the calculation of the average annual household disposable incomes 2012-2025

Step 06 Determination of annual income distribution of total household disposable incomes between the 10 household deciles for 2012-2025.

The basis underpinning the projection of population in the Laois County Housing Strategy 2017-2023 rests in the application of the Cohort Component Method (CCM), which provides a flexible and powerful approach to population projection. The population projection in this strategy has been undertaken on the basis of a ‘high scenario’ [M2F1 Recent] that has been

adopted as a result of the RPG population targets for the County being exceeded and the significant increases in population recorded in the period 2002-2011 (37.07%). In accordance with the M2F1 population projection scenario, the population of the County is projected to increase by 9,231 persons between 2011-2023, which reflects a 11.5% approximate increase over that period.

The Census 2011 results indicate that Laois has a population to household ratio of 2.87. Accordingly, the number of households in County Laois is expected to increase from 28,057 in 2011 to 31,272 in 2023, an increase of 3,215 houses, or the equivalent of a per annum average of 268 units. A total of 2,136 additional houses will be required within the life of the plan, or the equivalent of a per annum average of 305 units, over the 7-year period.

In terms of land supply, the study shows that County Laois in 2011 has approximately 335.9 hectares of zoned land purely for residential development which had not yet been built out when the study was done. This comprised of approximately 125.9 hectares in Portlaoise alone. Based on the applicable densities contained in the residential zonings (as contained in the Residential Land Availability Survey 2014), the existing zoned land was estimated to be capable of providing 5,162 units. Translating this into population capacity, these residential lands could potentially cater for approximately 14,815 persons, based on an estimated average household size of 2.87. As set out, the revised housing target for Laois is 2,138 units throughout the life of the plan. In summary, under the current Development Plan there is a sufficient quantum of residential zoned land available to accommodate the future projected population growth.

The affordability analysis of the study indicates that there is a requirement to deliver 549 social housing units up to and including the end of the plan period in 2023, which equates to an average shortfall of 16.83%. Noted that within the plan period itself, 380 social units are required that equates to an average shortfall of 17.79%.

Upon the outputs drawn from the above stages, it outlines a number of key principles that inform the overall approach to the housing strategy in the County and formalises these aspects through several recommended housing objectives. The key principles are as follows:

- To work to deliver the revised population targets (stemming from the M2F1 population projection scenario), having regard to the County's established settlement hierarchy as set out in the Laois County Development Plan;
- To promote socially balanced and inclusive communities in all housing areas across Laois;
- To provide for varying identified needs in the County with respect to housing typology, size and mix;
- To monitor the housing strategy, allowing for adequate consultation with those who are central to the implementation of the policies in the strategy.

02

PLANNING CONTEXT

2.0 PLANNING CONTEXT

2.1 National Legislation and Policy

2.1.1 Planning and Development Act 2000

Part V of the Planning and Development Act 2000 (as amended) contains requirements for all Planning Authorities to ensure that their Development Plans are consistent with high-level strategic policies and population projections for the country. Planning Authorities are required to prepare and incorporate a Core Strategy that shows that the Development Plan is consistent with national and regional objectives under the National Planning Framework and the relevant Regional Spatial and Economic Strategy. Planning Authorities are also required to prepare and incorporate a Housing Strategy into their Development Plan.

The purpose of the Housing Strategy is to ensure that development provides for the housing needs of the existing and future population of the county/Development Plan area. It is stated that:

“...each housing strategy should have regard to the proper planning and sustainable development of an area and should be concerned with the overall supply of housing within the Planning Authority.”

In particular, the Act specifies that the Housing Strategy shall take into account:

- The existing and likely future need for social housing.
- The need to ensure that housing is available for people of different incomes.
- The need to ensure the availability of a mixture of house types and sizes to cater for the requirements of different categories of households, including the special requirements of elderly persons and persons with disabilities.
- The need to counteract segregation in housing between persons of different social backgrounds.

It is required that each Housing Strategy be consistent with high level strategic plans such as the National Planning Framework and the Rebuilding Ireland: Action Plan for Housing and Homelessness. Planning Authorities are also required to demonstrate how the Housing Strategy aligns with the population projects contained in the Core Strategy and the Regional Spatial and Economic Strategy for the Region.

2.1.2 Planning and Development (Amendment) (No. 3) Regulations 2018

A relevant legislative update with respect to housing is the Planning and Development (Amendment) (No. 3) Regulations 2018. The Amendment provides that the temporary change of use of certain vacant commercial premises to residential use is exempt from the need to

obtain planning permission. The change of use and any related works must occur between 8 February 2018 (when the Regulations came into operation) and 31 December 2021.

There is a requirement for the existing structure or part of the structure, which is subject to the change of use, to be vacant for a period of two years prior to when the development takes place. Other conditions and limitations apply, these include:

- There shall be no more than 9 individual residential units within a building, therefore staying below the Part V social housing threshold.
- No works permitted to protected structures unless a S.57 declaration has issued to indicate the works will not affect the character or elements of the structure which has been identified for protection.
- Works to the ground floor of any structure shall not conflict with an objective in a development plan for the structure to remain in retail use, with the exception of works solely for the provision of on-street access to upper floors.
- The exemption applies to existing buildings that have a current commercial use (with reference to Class 1, 2, 3, and 6 of Part 4 to Schedule 2 of the Planning Regulations).

2.1.3 Planning and Development (Housing) and Residential Tenancies Act 2016

The Planning and Development (Housing) and Residential Tenancies Act 2016 provides a legislative basis for measures introduced under the Rebuilding Ireland - An Action Plan for Housing and Homelessness in order to streamline the planning process and accelerate the delivery of new large-scale residential developments and student accommodation units. In so doing, these proposed development avail of a fast-track application process, whereby applications are submitted directly to An Board Pleanála.

Under Part 2(3) of the Act the types of developments qualifying as strategic housing developments are listed as follows:

- a) development of 100 or more houses on land zoned for residential use or for a mixture of residential and other uses,
- b) development of student accommodation units which, when combined, contain 200 or more bed spaces, on land the zoning of which facilitates the provision of student accommodation or a mixture of student accommodation and other uses,
- c) development consisting of shared accommodation units that when combined contain 200 or more bed spaces on land the zoning of which facilitates the provision of shared accommodation or a mixture of shared accommodation and other uses,
- d) development containing a mixture of houses, student accommodation or shared living units,

- e) alteration of an existing planning permission granted under S.34 (other than under subsection (3A) where the proposed alteration relates to development specified in paragraph (a), (b), or (c)).

As part of the application process, the applicant engages with the relevant Local Authority and the Board in a Pre-Application Consultation to discuss the proposed development and any issues which may arise. An Bord Pleanála are to issue a decision within a sixteen-week period after receipt of the application. There is no provision for further information requests once the application has been submitted, as well as no provisions for appeals. The Board's decision can thus only be disputed by way of a Judiciary Review.

2.1.4 Urban Regeneration and Housing Act 2015

Under Part V Section 94(4)(c) of the Planning and Development Act 2000 there is a social housing requirement of up to 10% which planning authorities must apply to planning permission for housing on lands zoned for residential use, or for a mixture of residential and other uses, where there is an excess of 9 units on the lands as part of the proposed development. The statutory context for the provision of social and affordable housing has changed under the Urban Regeneration and Housing Act 2015 which amended the Planning and Development Act 2000. The amendments include an adjustment in the threshold for the social housing requirement and ways of meeting this obligation where social housing is not provided on site.

As it stands, the delivery options for Part V include:

- Transfer of ownership of lands which are subject to the application for permission to a Local Authority for the provision of social housing.
- Transfer of ownership to the Local Authority, or persons nominated, of completed social housing units on the land which is subject to the application for permission.
- Transfer of ownership to the Local Authority, or person nominated, of completed social housing units on other land within the functional area of the Local Authority, not subject to the application for permission, which the developer can acquire for this purpose.
- A grant to the Local Authority of a lease of houses on the land subject to the application for permission or any other land within the functional are of the Local Authority; and,
- A combination of the Part V options outlined above.

The Urban Regeneration and Housing Act 2015 also introduced a vacant site levy, providing local authorities the power to apply levies to property owners who do not take steps to develop vacant and under-utilised premises in areas identified for priority development under the local Development Plan, i.e. residential or regeneration lands.

2.1.5 Housing (Miscellaneous Provisions) Act 2009

The Housing (Miscellaneous Provisions) Act 2009 amends and extends the Housing Acts 1966 to 2004 to provide local authorities with a framework for a more strategic approach to the delivery and management of housing services. This framework provides for the adoption of housing services plans, homelessness action plans and anti-social behaviour strategies; for new, more objective methods of assessing need and allocating housing; and for a more effective management and control regime covering tenancies, rents, etc. The framework also comprises a more developed legislative basis for the provision of rented social housing by means of leasing or contract arrangements with private accommodation providers, as well as expanded opportunities for home ownership by lower-income households through an incremental purchase scheme and a tenant purchase scheme for apartments. This is to be provided by the Local Authority on lands within the functional area of that Local Authority.

2.1.6 Project Ireland 2040 - National Planning Framework 2018

The National Planning Framework (NPF) is a high-level strategy that will shape growth and development in Ireland out to the year 2040. The NPF draws upon lessons learned from the National Spatial Strategy 2002-2022 and provides a framework for the sustainable development of Ireland's existing settlements, as an alternative to an uncoordinated "business as usual" approach to development.

The NPF contains a number of National Policy Objectives that support the delivery of residential development at a suitable location and scale to achieve an overall target of 550,000 additional households nationwide by 2040.

The achievement of National Policy Objectives at a County level will be underpinned by the development of a Housing Need Demand Assessment (HDNA) by each Local Authority. A HDNA is defined as a "database which allows local authorities to run a number of different scenarios to inform key decisions on housing need and supply". They will provide long-term estimates of future housing needs to support the preparation of Housing Strategies and inform housing policy outputs. The NPF lists a number of key evidence inputs that will inform and drive the HDNA model, based around:

- Demographic trends, affordability trends and wider economic trends.
- Housing Stock Profile Pressures, existing need and management issues.
- Estimate future housing need and demand.

A number of objectives set out in the NPF are relevant, including:

National Policy Objective 32: To target the delivery of 550,000 additional households to 2040.

National Policy Objective 33: *Prioritise the provision of new homes at locations that can support sustainable development and at an appropriate scale of provision relative to location.*

National Policy Objective 35: *Increase residential density in settlements, through a range of measures including reductions in vacancy, re-use of existing buildings, infill development schemes, area or site-based regeneration and increased building heights.*

National Policy Objective 37: *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 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 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.*

2.1.7 Implementation Roadmap for the National Planning Framework (July 2018)

The Implementation Roadmap for the National Planning Framework (July 2018) highlights the Government's focus on achieving alignment between national, regional and local planning policy and practice. It addresses issues around the legal status of the NPF and provides transitional population projections for the period up to 2031 (as set out in Chapter 2 Core Strategy). It also sets out mechanisms to ensure that Development Plans will broadly align with the NPF and RSES's to address the six-year period up to 2026/2027.

Considering this, 2026-2027 will allow the assessment of the first full round of Development Plans prepared in accordance with the NPF and the RSES. This assessment will coincide with several other key dates, with 2026 being a Census year and 2027 will see the review of the ten-year National Development Plan. It is further noted that Development Plans approved in 2020/21 will commence reviews in 2025/2026 and so require demographic data for the six-year period beyond to 2031.

The Roadmap provides transitional population projections for these milestones at a regional and County scale, in order to inform Development Plans for the period 2026 and 2031. The transitional population projections for the Eastern and Midland Region are listed in Table 2.1 below. For the purposes of this Development Plan (2021-2027), figures up to 2027 are also considered in subsequent sections.

Table 1. Transitional Regional and County Population Projections to 2031 for the Eastern and Midland Regional Assembly

Regions & Counties	2016	2026	2031
Mid-East			
Kildare	222,500	249,000-254,000	259,000-266,500
Meath	195,000	216,000-221,000	225,500-231,500
Wicklow	142,500	155,000-157,000	160,500-164,000
Louth	129,000	139,000-144,500	144,000-151,500
Subtotal	689,000	759,000-777,000	789,000-813,500
Mid-lands			
Westmeath	89,000	96,500-98,500	100,000-102,500
Laois	84,500	92,500-94,000	95,500-97,500
Offaly	78,000	85,000-86,500	88,000-90,000
Longford	41,000	44,500-45,500	46,000-47,000
Subtotal	292,500	318,500-324,500	329,500-337,000
Dublin			
Dublin	1,347,500	1,489,000	1,549,500-1,590,000
Total	2,329,000	2,566,500-2,619,000	2,668,000-2,740,500

2.1.8 Project Ireland 2040 - National Development Plan 2018-2027

The National Development Plan proposes the creation of a new land-management agency. This 'National Regeneration and Development Agency' will be established to work with local authorities, public bodies and the business community, harnessing public lands as catalysts to stimulate regeneration and wider investment.

In terms of social housing, the National Development Plan will, through a planned capital investment of over €4.2 billion, support the delivery of some 40,000 new social housing homes by 2021. Direct Local Authority build, acquisitions, rejuvenation of formerly empty homes and provision by housing bodies are identified as the chief delivery mechanisms. By 2021, 12,000 social housing homes will be made available annually by Local Authorities and approved housing bodies for social housing. This level of provision is to be maintained over the remainder of the period of the National Development Plan, resulting in 112,000 households having their housing needs met in a social housing home by 2027. The NPF warns against the intensification of social housing properties in areas that are already dense with social housing and advocates the development of diverse neighbourhoods with a healthy balance of public and private housing.

2.1.9 Sustainable Urban Housing: Design Standards for New Apartments Guidelines for Planning Authorities (2018)

The Sustainable Urban Housing: Design Standards for New Apartments build on the content of the 2015 apartment guidance, much of which remains valid, particularly with regard to design quality safeguards such as internal space standards for apartments, internal storage and amenity space. The main difference relates to the need to move towards higher density and more sustainable forms of living within Ireland's urban areas, to which apartment living is deemed essential as it is *"critical to ensure that apartment living is an increasingly attractive and desirable housing option for a range of household types and tenures"*. The Guidelines also recognise the importance of the challenge in meeting the housing needs of a growing population in Ireland's key cities, thus following the direction of travel outlined in the National Planning Framework.

As stated in the Guidelines, *"aspects of previous apartment guidance have been amended and new areas addressed in order to:*

- *enable a mix of apartment types that better reflects contemporary household formation and housing demand patterns and trends, particularly in urban areas;*
- *make better provision for building refurbishment and small-scale urban infill schemes;*
- *address the emerging 'build to rent' and 'shared accommodation' sectors; and,*
- *remove requirements for car-parking in certain circumstances where there are better mobility solutions and to reduces costs."*

The Guidelines also state that Development Plans must consider the need to increase housing supply in a sustainable manner and to ensure that a greater proportion of housing development takes place within its existing built-up areas. The need for consistency and flexibility between statutory plans and using different forms of housing is supported by strong evidence of the need to facilitate a mix of apartment types that better reflects household formation and housing demand. This is particularly relevant where a comprehensive HNDA has not been undertaken. In this regard, the following Specific Planning Policy forms part of the guidelines:

Specific Planning Policy Requirement 1 - *"Apartment developments may include up to 50% one-bedroom or studio type units (with no more than 20-25% of the total proposed development as studios) and there shall be no minimum requirement for apartments with three or more bedrooms. Statutory development plans may specify a mix for apartment and other housing developments, but only further to an evidence based Housing Need and Demand Assessment (HNDA), that has been agreed on an area, county, city or*

metropolitan area basis and incorporated into the relevant development plan(s)."

The production of an HNDA provides local authorities with an updated and evidenced base, which allows the Local Authority to appropriately determine and plan for the relevant housing needs (including household compositions) within their administrative area for the period of the pertaining Development Plan.

2.1.10 Sustainable Residential Development in Urban Areas - Guidelines for Planning Authorities (2009)

The Sustainable Residential Development in Urban Areas - Guidelines for Planning Authorities reviews and updates the Residential Density Guidelines (1999), and its aim is to assist both planning authorities and developers in meeting certain standards in the design of residential development. The main objective of these Guidelines is to produce high-quality sustainable developments through providing:

- Quality homes and neighbourhoods;
- Places where people actually want to live, to work and to raise families; and,
- Places that work - and will continue to work - and just for us, but for our children and for our children's children.

The Guidelines state that sustainability is about the integration of schools, community facilities, employment, transport and amenities with the housing development process in a timely, cost-effective way.

The aim of the Guidelines is to set out the key planning principles which should be reflected in development plans and local area plans and which should guide the preparation and assessment of planning applications for residential developments in urban areas. These planning principles relate to: Settlement Hierarchy, Urban Form, Anticipating Future Needs, Strengthening Community, and Landscape Character.

2.1.11 Rebuilding Ireland - An Action Plan for Housing and Homelessness (2016)

Rebuilding Ireland - An Action Plan for Housing and Homelessness specifically provides a multi-stranded approach to achieving key housing objectives, including to significantly increase the supply of social housing, to increase the housing build numbers by 2020, to service all tenure types, and to tackle homelessness. The Plan is designed to put in place the necessary financing, regulatory, governance and resource mechanisms and initiatives to accelerate the delivery of all types of housing supply - private, social and rental sector in places of high demand and acute shortage. The plan sets out five pillars for which a series of actions are planned to address the challenges presented by Ireland's disjointed housing sector as follows: 1. Address

homelessness, 2. Accelerate social housing, 3. Build more homes, 4. Improve the rental sector, and 5. Utilise existing housing.

The Plan places focus on the rental sector and the implications this might have for the tenure choices offered in bringing new schemes to the market. A declining rate of home ownership, decreasing household size, a growing population influenced by high inward migration rates, and increasing rates of new household formation are all identified as factors pointing to the growth of the rental sector and the increased role it is likely to play into the future. Importantly, there is also a notable change in terms of the public's attitude to the rental sector with it becoming increasingly recognised as a long-term tenure option. The Action Plan notes that a strong rental sector supports a mobile labour market "*better able to adapt to new job opportunities and changing household circumstances*" and is suited to accommodating a range of households - including mobile professionals, students and indeed lower-income households.

Under the Action Plan, targeted social housing supply was increased to 47,000 units from the provision set out in the Social Housing Strategy 2020 (which set a commitment for 35,600 new units between 2015-2020) over the period 2016 to 2021 (at which stage some 10,000 units will be delivered on an annual basis).

Furthermore, the Action Plan pledged to support the enhanced role of existing initiatives for Social Housing delivery and also introduced a number of new initiatives and schemes, as follows:

Local Authority Construction & Acquisition, also known as the Social Housing Investment Programme (SHIP)

To provide funding to local authorities for the provision of social housing by means of construction and acquisition. It also covers expenditure under the RapidBuild Housing Programme, Part V acquisitions, Land Aggregation Scheme and the Special Resolution Fund for unfinished housing developments.

Capital Assistance Scheme (CAS)

To provide essential funding to Approved Housing Bodies (AHBs) for the provision of accommodation for persons with specific categories of housing need such as Homeless and Older Persons, People with Disabilities, Returning Emigrants and Victims of Domestic Violence.

Vacant Housing Repair and Leasing Initiative

This scheme enables local authorities, having identified appropriate vacant privately-owned properties in their functional areas, to provide upfront financial assistance to meet reasonable

renovation works and to enter into long term lease arrangements with property owners. Renovation costs will be recouped from rent over an agreed period.

Part V Delivery

The Action Plan sets out a commitment to ensure adequate resources are made available to both local authorities and Approved Housing Bodies, to allow them to purchase or lease newly built private dwellings to the fullest extent envisaged by Part V of the Planning and Development Act 2000. In addition, where appropriate, the leasing of additional privately developed dwellings beyond the extent envisaged by Part V is supported. Furthermore, the up-front purchase of the Part V social housing requirement will be facilitated, subject to the introduction of strict controls.

2.1.12 Social Housing Strategy 2020: Support, Supply and Reform

The Social Housing Strategy 2020: Support, Supply and Reform was adopted in November 2014. It sets out plans for the delivery of more social housing and for a range of changes to various aspects of social housing assessment, delivery and financing. As asserted by the Social Housing Strategy, *“every household in Ireland will have access to secure, good quality housing suited to their needs at affordable prices in a sustainable community”*. The national Social Housing Strategy is based on three pillars:

- **Pillar 1:** Provide for 35,000 new social housing units, over a six-year period, to meet the additional social housing supply requirements as determined by the Housing Agency.¹
- **Pillar 2:** Support up to 75,000 households through an enhanced private rental sector; and
- **Pillar 3:** Reform social housing supports to create a more flexible and responsive system.

Phase 1 sets a target of 18,000 additional housing units and 32,000 HAP/RAS units by the end of 2017. Phase 2 sets a target of 17,000 additional housing units and 43,000 HAP/RAS units by end 2020.

The Strategy states that significant exchequer funding will be allocated to ensure that the early phases of the Strategy will deliver on the targets. An enhanced role for the Approved Housing Bodies (AHBs) is also a key component to deliver the vision.

¹ Increased to 47,000 units in *Rebuilding Ireland - Action Plan for Housing and Homelessness, 2016*.

The Strategy also states that a new tenant purchase scheme for existing Local Authority houses will be put in place. The development of an individual housing 'passport' that would facilitate tenant mobility between local authorities will be examined.

Exchequer funding commitment of €5.7bn over the lifetime of the Strategy has been made by Government.

2.1.13 Construction 2020: A Strategy for a Renewed Construction Sector

Published in 2020, the Construction 2020: A Strategy for Renewed Construction Sector sets out a detailed, time-bound set of actions to support the return of Ireland's construction sector to sustainable levels. The vision is that Ireland will have a competitive, innovative, dynamic, safe and sustainable construction sector; one that makes its full and proper contribution to the economy and to job creation, and one that is based on best practice and capable of delivering the economic and social infrastructure we need to build to sustain a prosperous future. Some of the key commitments include:

- Putting in a place a National Framework for Housing Supply and an Annual Statement of Projected Housing Supply and Demand;
- Assessing existing construction and property data sources for appropriateness including identifying any gaps and quality shortcomings;
- Examining the key barriers to housing mobility and make recommendations to Government;
- Developing a national policy towards professionalising the private rental sector;
- Establishing a working group and invite public comment on the feasibility and impact of setting minimum thermal efficiency performance standards in rental properties;
- Publishing a Social Housing Strategy and introducing legislation to regulate the Approved Housing Body sector;
- Review of Part V requirements;
- Publishing of the Homelessness Implementation Plan and implementation of the key recommendations of the Homelessness Oversight Group's First Report in Q2 2016;
- Continuing to implement the Government Action Programme on Unfinished Housing Developments and the Budget 2014 Special Resolution Fund.

2.1.14 National Vacant Housing Reuse Strategy 2018-2021

Published in 2018, the National Vacant Housing Reuse Strategy supports Pillar 5 of the Rebuilding Ireland - Action Plan for Housing and Homelessness, drawing together relevant policy initiatives and actions to reduce vacancy in Ireland's housing stock and bring as many habitable homes back into use as possible. To support this overall Strategic Objective the Strategy sets out five key objectives and relevant key actions to support their accomplishment:

Objective 1: Establish robust, accurate, consistent and up-to-date data sets on vacancy.

Objective 2: Bring forward measures to ensure, to the greatest degree possible, that vacant and underused privately owned properties are brought back to use.

Objective 3: Bring forward measures to minimise vacancy arising in Social Housing Stock.

Objective 4: Continued engagement with and provision of support to key stakeholders to ensure suitable vacant properties held by banks, financial institutions and investors are acquired for social housing use.

Objective 5: Foster and develop cross-sector relationships, collaborating in partnership to tackle vacant housing matters.

2.1.15 National Homeless Policy Statement 2013

The National Homeless Policy Statement focuses on ending long-term homelessness by implementing a housing-led approach. This approach recognises that long-term secure housing is the best outcome for people affected by homelessness, rather than expensive emergency accommodation. The aim is the rapid provision of appropriate accommodation, with support as needed to ensure sustainable tenancies, as the key solution to ending homelessness.

The core of the response to homelessness comprises of preventing homelessness, eliminating the need to sleep rough, eliminating long-term occupation of emergency accommodation, providing long-term housing solutions, ensuring effective services, and better co-ordinated funding arrangements.

2.1.16 National Housing Strategy for People with a Disability 2011-2016

The National Housing Strategy for People with a Disability 2011-2016 sets out a framework of initiatives to provide for the housing needs of vulnerable and disadvantaged households. The strategy has nine strategic aims:

- 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.
- To develop national protocols and frameworks for effective interagency cooperation which will facilitate person-centred delivery of housing and relevant support services.
- To support people with a disability to live independently in their own homes and communities, where appropriate.

- 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.
- 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.
- To consider good practice in the design, coordination and delivery of housing and related supports.
- To facilitate people with a disability to access appropriate advice and information in respect of their housing needs.
- To improve the collection and use of data/information regarding the nature and extent of the housing needs of people with a disability.
- To provide a framework to support the delivery, monitoring and review of agreed actions.

2.1.17 National Adaptation Framework: Planning for a Climate Resilient Ireland

In accordance with the Climate Action and Low Carbon Development Act 2015, this National Adaptation Framework (NAF) specifies the national strategy for the application of adaptation measures in different sectors and by local authorities in their administrative areas in order to reduce the vulnerability of the State to the negative effects of climate change and to avail of any positive effects that may occur. This NAF and its successors will set out the context to ensure local authorities, regions and key sectors can assess the key risks and vulnerabilities of climate change, implement climate resilience actions and ensure climate adaptation considerations are mainstreamed into all local, regional and national policy making.

The 'Built Environment and Spatial Planning' section within this Framework recognises that, *"climate change considerations need to be taken into account as a matter of course in planning-related decision making processes and that the deepening of adaptation considerations in the planning and building standards processes is considered the most appropriate way of increasing the resilience of the built environment"*. Furthermore, *"effective planning reduces vulnerability to the negative effects of climate change by integrating climate considerations into decision making in order to avoid inappropriate forms of development in vulnerable areas and promoting compact development in less vulnerable areas"*. It is important to mention that this Framework envisions 'flood resilience' and 'access to wildlife and green space' as no-regret benefits of effective adaptation which would continue to be worthwhile regardless of future climate scenarios.

2.1.18 Climate Action Plan 2019

Climate disruption is already having diverse and wide-ranging impacts on Ireland's environment, society, economic and natural resources. The Climate Action Plan 2019 sets out an ambitious course of action over the coming years to address this issue. The Plan clearly identifies the nature and scale of the challenge. It outlines the current state of play across key sectors including Electricity, Transport, Built Environment, Industry and Agriculture and charts a course towards ambitious decarbonisation targets. The Plan sets out governance arrangements including carbon-proofing policies, establishment of carbon budgets, a strengthened Climate Change Advisory Council and greater accountability to the Oireachtas.

The Plan clearly recognises that Ireland must significantly step up its commitments to tackle climate disruption. The leadership role both the Government and public bodies can play in taking early action on climate is fundamental to achieving our decarbonisation goals. The Plan notes that the built environment accounted for 12.7% of Ireland's greenhouse gases in 2017. It is important to improve the energy efficiency of our buildings, including our homes, workplaces and schools, by meeting higher energy performance standards and by increasing retrofit activity. This will not only reduce Ireland's dependence on fossil fuels but will also improve our living standards by making our buildings more comfortable, healthier, safer, and less costly to heat.

Our buildings are 70% reliant on fossil fuels, including oil fired boilers; over 80% of our homes and other buildings assessed for their BER have a rating of C or worse; and the current annual retrofit activity for existing stock is far too limited (approximately 23,000 mainly shallow, retrofits). A hierarchy of the most cost-effective investments underpin this, including:

- Improving the fabric of buildings
- District heating in commercial buildings
- Switching from oil burners to heat pumps
- Setting new building standards.

2.2 Regional Policy

2.2.1 Regional Spatial and Economic Strategy (RSES) 2019-2031

Regional Policy Objectives for the region aim to support Local Authorities in completing Housing Need Demand Assessments as required under the NPF and provide for a diverse range of housing types and tenures. The strategy also sets out to *“support local authorities, approved housing bodies and other sectoral agencies in the provision of a greater diversity of housing type and tenure, including social and affordable housing and exploring new models of low-cost rental and affordable homeownership.”*

As referenced in the RSES, County Laois was the fastest growing county with significant growth rate of 26% between 2006 and 2016. The Settlement Strategy for the region designates Portlaoise and Graiguecullen (Carlow) as Key Towns. As such, the following housing policy objective apply:

RPO 4.26: *“Core strategies in local authority development plans shall support objectives to achieve a minimum of 30% of housing in Key Towns by way of compact growth through the identification of key sites for regeneration.”*

In terms of development, the focus lies in consolidating the built footprint through regeneration and accommodating urban development on infill/brownfield sites, including renewal and regeneration of underused, vacant or derelict town centre lands for residential development to facilitate population growth.

The designation of these settlements under the Settlement Strategy for the region and relevant Regional Policy Objectives has informed the Housing Strategy for County Laois.

In relation to the Regional Spatial and Economic Strategy for the Southern Region which comprises County Carlow and Graiguecullen, the strategy contemplates the co-ordination and collaboration across the relevant local authorities and pertaining boundaries for joint planning and infrastructure led forward planning initiatives, such as the Carlow and Graiguecullen Joint Spatial Plan. In this regard, the RSES for the Southern Region sets out the following policy objective:

RPO 14b: *“To support the preparation of a cross-boundary Joint Urban Area Plan (UAP) for Carlow Town by Carlow County Council and Laois County Council having regard to its location within the combined functional area of both local authorities.”*

This coordinated approach is taken to allow the future growth and development of the town and to ensure that it has the capacity to grow sustainably and secure investment for Graiguecullen as a Key Town.

2.3 Local Policy

2.3.1 Laois County Housing Strategy 2017-2023

The Laois County Housing Strategy 2017-2023 provided a comprehensive review of demographics and housing demand within County Laois to inform the Laois County Development Plan 2017-2023. It has projected the need for the planned provision of housing, as well as the demand for social and affordable housing within the County based on data from the 2011 census and regional population targets. Key Principles of the Housing Strategy include:

- To work to deliver the revised county population target of 89,790 by 2023 (stemming from the M2F1 population projection scenario), having regard to the county's established Settlement Hierarchy as set out in the Laois County Development Plan;
- To promote socially balanced and inclusive communities in all housing areas across Laois;
- To provide for varying identified needs in the county with respect to housing typology, size and mix;
- To monitor the housing strategy, allowing for adequate consultation with those who are central to the implementation of the policies in the strategy.

As set out in the Laois County Housing Strategy, there is a requirement to deliver 549 social housing units up to and including the end of the plan period in 2023, which equates to an anticipated average shortfall of 16.83%. Within the plan period itself, 380 housing units are required, which equates to an average shortfall of 17.79%.

- 674 units between 2012 and 2025
- 549 units between 2012 and 2023
- 506 units between 2017 and 2025
- 380 units between 2017 and 2023

Latest two-year County Development Plan 2017-2023 Review (July 2019)

Section 15(2) of the Planning and Development Act 2000 (as amended) states that, *'the manager of a Planning Authority shall, not more than 2 years after the making of a development plan, give a report to the members of the authority on the progress achieved in securing the objectives referred to in subsection (1)'*.

Accordingly, the latest two-year review of the Laois Development Plan 2017-2023 is outlined in 4 thematic sections, excluding the introduction section which provides an overview of the report. These sections include: (a) review of county Development Plan objectives, (b) review of objectives for towns and villages, (b) progress on implementation of the Housing Strategy, and (d) monitoring of environmental indicators. In reviewing the Housing Strategy, it is considered appropriate to review:

- 1) The availability of sufficient zoned land,
- 2) Housing supply,
- 3) The provision of social and affordable housing and housing supports by the Council,
- 4) The Role of the Private Rented Sector in the Provision of Social and Affordable Housing,
- 5) The Housing Needs of Persons with Specific Requirements.

In terms of land availability, as asserted in the report:

'There is a total of 2,052 ha. of land zoned for all uses across these settlements, of which 575.83 ha. are zoned for residential development. This residential zoning can be broken down as follows:

- Residential 1 Established: 389.65 ha.
- Residential 2 Proposed: 90.59 ha.
- Strategic Reserve (2018-2014): 95.59 ha.

there have been no variations to the Laois County Development Plan 2017-2023 since its adoption. Thus, the quantum of land zoned within Volume 2 of the Laois County Development Plan 2017- 2023 remains unchanged'.

However, there was changes to the quantum of zoned lands in each of the four settlements within the County that are having a Local Area Plan, comprising of Graiguecullen [in conjunction with Carlow County Council], Mountmellick, Portlaoise and, Portarlington [in conjunction with Offaly County Council]. Accordingly, the areas of residential zoned land in each of these settlements are as follows:

Table 2. Amendments to the Quantum of Zoned Lands in the Adopted Local Area Plans

	Portlaoise	Mountmellick	Portarlington (Laois)	Graiguecullen (Laois)
Existing	370.718	90.22	99.33	80.33
Proposed	82.156	18.01	32.526	19.33
Strategic Reserve	36.1	0.94	0	30.75
Total	488.974	109.17	131.856	130.41

Source: Two-year County Development Plan Review, July 2019

The below table indicates the level of housing activity within the main settlements and on residential zoned lands. There remains capacity within each of the towns for further development in line with the Housing Strategy and the Core Strategy.

Table 3. Housing Activity within the Zoned Lands of Existing LAP's

Settlement	Area Zoned for Residential Development 2017-2023	Capacity for no. of units	Extant planning permissions (i.e. no. of units granted to date)
Portlaoise	82 ha	2214 (based on average of 27 per hectare)	1458
Portarlington	33 ha	396 (based on average of 12 per hectare)	205
Mountmellick	18 ha	252 (based on average of 14 per hectare)	-
Graiguecullen	19 ha	266 (based on average of 14 per hectare)	77

Source: Two-year County Development Plan Review, July 2019

Regarding the housing supply, the report refers to the Department of the Housing, Planning and Local Government publishes Annual Housing Statistics, which provides the following table setting out annual house commencements in County Laois for the period 2017-2019.

Table 4. Yearly House Commencement in County Laois over 2017-2019

Year	Commencement Notices
2017	177
2018	346
2019 (to date)	112
Total	635

Source: Two-year County Development Plan Review, July 2019

As set out in the report and in terms of provision of social and affordable housing, 'under the Rebuilding Ireland Targets set for 2018, Laois Council exceeded our target of 76 units with a total delivery of 143 units through the various mechanisms of new build, turnkey, acquisitions and leasing'. The report provides a table on the social housing delivery within the County (see Table 5), which indicates that the number of delivered social and affordable housing units doubled from 2017 to 2018. It also shows the construction of 33 units by Laois County Council in 2018, the first social housing project to take place in Laois in over a decade.

Table 5. Social and affordable Housing Delivery in County Laois

Delivery Agency	Delivery Path	2017	2018
Direct (Laois County Council)	Construction	0	33
	Turnkey	0	0
	Laois County Council Acquisition	47	24
	Housing Agency Acquisition	0	0
	Buy & Renew	0	0
	Repair and Lease	0	0
	Urban Regeneration	0	0
	Rural	0	0
	Voids	0	4
	Part V	1	0
Indirect (AHB)	Leasing	24	0
	Capital Assistance Scheme	0	0
	Capital Advance Leasing Facility (AHB) Construction	0	13
	Capital Advance Leasing Facility (AHB) Acquisition	0	5
	Capital Advance Leasing Facility (AHB) Turnkey	0	45
	Capital Advance Leasing Facility (AHB) Part V	0	0
	Capital Advance Leasing Facility (AHB) HAA	0	19
Total	72	143	

Source: Two-year County Development Plan Review, July 2019

According to the report, there were c. 1,700 people on the County Council housing waiting list when the Housing Strategy was finalised in 2017. A total of 397 housing allocations were made

since 2017, while 949 applicants signed up to HAP and 788 of those remain active. There are currently 902 applicants remaining on the social housing waiting list. As outlined in the report, private rented sector continues to play an important role in addressing the Council's housing waiting list figures.

1) The *Housing Assistant Payment (HAP)* commenced in Laois in 2016, which is a form of social housing support for people who have a long-term housing need. In 2017, there was a total of 316 active HAP tenancies. This figure increased to 657 in 2018 and as of 30th June 2019, there are 788 active HAP tenancies.

2) The *Rental Accommodation Scheme (RAS)* is a government initiative to cater for people who qualify for social housing supports and are in receipt of long term rent supplement (state support payment) and living in the private rented sector for 18 months or more. In 2017, there was a total of 225 active tenants. In 2018, there were 221 active tenancies and as of 20th June 2019, there are 214 active RAS tenancies. In addition to the above there is now another form of RAS type agreement called Social Housing Leasing Scheme (SHLS) of which there are currently 32 active tenancies.

In the last section, the report provides an assessment of housing for specific needs in the County. These various groups are summarised as the following.

Travellers: The Housing Strategy states that there were c. 169 Traveller families residing in Laois at that time (2017), which then increased to 196 in 2018.

Homeless Presentations: In 2017, there were 210 homeless presentations, including 263 repeat presentations. In 2018, there were 280 homeless presentations, including 371 repeat presentations. To date in 2019, there have been 195 homeless presentations, including 50 repeat presentations.

People with Disabilities: Laois County Council endeavours to carry out specialist extensions and alterations to Local Authority houses to accommodate the needs of disabled persons. Related Initiatives include the housing adaption grant and mobility aid grant.

Older persons: In order to be considered for Older Persons accommodation, a person must be either, (a) 55 years, (b) 50 or over with Medical or Welfare Priority, or (c) Have a Spouse/Partner who is 50 years or over.

2.3.2 Portlaoise Local Area Plan 2018-2024

The Portlaoise Local Area Plan 2018-2024 (LAP) sets out an overall strategy for the proper planning and sustainable development of Portlaoise, in the context of the Laois County Development Plan 2017- 2023 and the Midland Regional Planning Guidelines 2010-2022.

In relation to future development of the town and pertaining priorities, a sequential approach will be taken with lands closer to the town centre being developed prior to zoned lands on the periphery. This is essential to underpin the sustainable delivery of population, employment development and consolidation of the town centre over the plan period. As well as this, consolidation of the town centre and brownfield/infill development will also be promoted on appropriately zoned land within the plan area in accordance with the pertaining policies and objectives.

As identified in the LAP, approximately 82ha. of undeveloped residentially zoned land are located within and adjacent to established residential areas within the town; an estimated housing capacity for the lands is approximately 2,870 residential units, based on a density of 35 units per hectare. In order to consolidate the built-up area of the town, priority for residential development should be given to the development of these lands.

One of the main aims of the plan seeks the consolidation of the Portlaoise town centre and the Portlaoise Public Realm Strategy will help revitalise the town and provide the framework for channelling development into brownfield sites, which includes residential developments as they contribute to the vitality of the core and to encourage economic development and further retail expansion.

In this regard, the following LAP objectives pertain to housing provision opportunities:

TCR O4: *“Encourage and facilitate the reuse and regeneration of derelict and vacant sites and disused buildings, especially upper floors.”*

TCR P4: *“Promote living over the shop and conversion of town centre buildings into housing units.”*

Furthermore, within the Site Activation Measures, the Vacant Site Levy can bring forward vacant and/or underutilised sites in Portlaoise as housing supply. There is a strong emphasis given to the provision of quality residential development in the existing built envelope of the town, as well as the town centre area where significant housing opportunities are present through the redevelopment of brownfield, infill and backland type developments.

2.3.3 Mountmellick Local Area Plan 2018-2024

The Mountmellick Local Area Plan 2018- 2024 (LAP) sets out an overall strategy for the proper planning and sustainable development of Mountmellick, in the context of the Laois County Development Plan 2017-2023 and the Midland Regional Planning Guidelines 2010-2022. Mountmellick is a service town in the north of County Laois and has a role to play in supporting both the County Towns of Portlaoise and Tullamore. Mountmellick is the largest and most

important service town supporting Portlaoise, as emphasised within the Settlement Hierarchy of the Laois County Development Plan 2017-2023.

Some relevant objectives within the LAP are as follows:

1. *To support and facilitate sustainable intensification and consolidation of the town centre and established residential areas.*

[...]

4. *To focus new residential development primarily into infill and backland sites.*

As stated within the LAP, there are approximately 18ha. Identified as undeveloped residentially zoned land, located within and adjacent to established residential areas within the town. The housing capacity of these lands (excluding infill sites within the built-up area) is estimated to be approximately 252 residential units, based on a density of 14 units per hectare. Similar to Portlaoise and Portarlington, priority for residential development should be given to the development of these lands, infill and backland to consolidate the built-up area of the town.

2.3.4 Joint Portarlington Local Area Plan 2018-2024

The Joint Portarlington Local Area Plan (LAP) has been prepared by Laois County Council and Offaly County Council. The Joint LAP sets out an overall strategy for the proper planning and sustainable development of Portarlington, in the context of the Laois County Development Plan 2017-2023, Offaly County Development Plan 2014-2020 and the Midland Regional Planning Guidelines 2010-2022.

The town of Portarlington is situated on the Laois/Offaly county boundaries equidistant from the county towns of Portlaoise and Tullamore. In terms of Local Government, the town has dual administration by both Laois and Offaly County Councils. The majority of the urban area (approximately 75%) is located within the County of Laois (for CSO data purposes, this area is called Portarlington South) with the remaining portion (Portarlington North) in County Offaly.

Portarlington is designated as a 'Key Service Town' in the Midland Regional Planning Guidelines 2010-2022 and the settlement hierarchies of both Counties Laois and Offaly. The Key Service Town functions as a support to the development of the county towns of Tullamore and Portlaoise, similar to Mountmellick. Key service towns act as important drivers for local economies in areas that are comparatively more remote from the main population centres of the region.

Relevant Joint LAP objectives are as follows:

1. *To support and facilitate sustainable intensification and consolidation of the town centre and in established residential areas.*

[...]

4. *To focus new residential development primarily into brownfield, infill and backland sites.*

In terms of land availability, the Joint LAP identifies approximately 32.5ha. of undeveloped residentially zoned land which is located within and adjacent to established residential areas within the town. These lands and infill sites within the built-up area have a housing capacity of approximately 390 residential units, based on a density of 12 units per hectare. In order to consolidate the built-up area of the town, priority for residential development should be given to the development of these lands. As well as this, residential development is encouraged in the town centre to contribute to the vitality of the core and to encourage economic development and further retail expansion.

2.3.5 Joint Spatial Plan for the Greater Carlow Graiguecullen Urban Area 2012-2018 (extended until 4th November 2022)

The Joint Spatial Plan has been prepared by Laois County Council and Offaly County Council and is concerned with charting the future built, environmental, social and economic development of the Greater Carlow Graiguecullen Urban Area. It provides a detailed framework for the management and regulation of spatial development and use of land with a goal to retain the unique and special character of the Greater Urban Area while also fostering positive change and good development.

The Greater Carlow Graiguecullen Urban Area is an important County Town in the South-East Region and is the principal centre of economic activity in County Carlow. The Greater Carlow Graiguecullen Urban Area extends into Laois and is also located close to the Kildare and Kilkenny county boundaries, as such the functional hinterland of the Greater Urban Area extends into these adjoining counties.

As stated within the Core Strategy of the Joint Spatial Plan for the Greater Carlow Graiguecullen Urban Area, the vision for the area is as follows:

“A high-functioning, inclusive, compact and accessible greater urban area, underpinned by a robust and diverse local economy comprising retail, commercial, industrial, education and tourism uses; with characteristics including a strong sense of place, a vibrant and vital town centre, opportunities for education and cultural experiences for all, a network of linked open spaces, recreational uses and other social infrastructure elements to provide for a good quality of life and increased emphasis on sustainable forms of transport and patterns of development.”

The cross-cutting core objectives set out within the Joint Spatial Plan include:

CO7 Housing for All: *“Provide sufficient numbers and range of house types, sizes and tenures to meet the diverse housing needs of the Greater Urban Area. These homes should optimise access to public transport, jobs and services.”*

The following Thematic Core Aims are relevant to this strategy:

CA 7 Sustainable Communities and Social Inclusion: *“Foster a sense of place, belonging and a good quality of life for all, by promoting social inclusion and community cohesion and ensuring the adequate provision of community facilities that cater to the diverse needs of individuals and the local society as a whole.”*

CA 8 Housing: *“To facilitate the provision of housing in a range of locations to meet the needs of the urban area’s population, with particular emphasis on facilitating access to housing to suit different household and tenure needs in a sustainable manner.”*

In terms of housing land requirement, it is based on a density of 25 dwellings per hectare in Carlow Town and 12 dwellings per hectare in Graiguecullen (County Laois) and Carlow Town Environs. There is 50% headroom in the amount of land zoned for residential use, this is done to ensure multiple options in the market and in the case that some of these zoned lands might not come forward for development.

It is important to note that the Joint Spatial Plan indicates the housing land requirement per each town, with a total of 107ha. for the Greater Carlow Graiguecullen Urban Area, comprising 30ha. for Carlow Town – Residential Zoned Lands, 20ha. for Graiguecullen – County Laois, and 57ha. for Carlow Town Environs.

In relation to social accommodation, the Local Authorities will support and facilitate the expansion of the voluntary sector, including:

- the Voluntary Housing Sector and the Rental subsidy scheme
- the Capital Assistance Scheme
- Rental Accommodation Scheme
- Housing Adaptation Grant
- Mobility Aids Grant
- Housing Aid for Older People Grant

The following are the key objectives pertaining to housing development:

- implement the policies contained in the DECLG document ‘Building Homes, Sustaining Communities’
- provide the necessary infrastructural investment to facilitate the overall level of housing output required to meet the current and anticipated levels of demand.

- zone adequate amounts of land for housing to provide a locational choice and allow for the probability that not all zoned land will be made available for development.
- strive for the highest quality built environment when assessing development proposals.
- encourage economy and efficiency in the use of land and services.
- promote a high standard of architecture in the siting and design of new housing developments.
- encourage a variety of house types, sizes and tenure in individual schemes and to encourage variety, interest and social mix in private and social housing developments.
- ensure that the Council's housing policy and objectives are linked with employment, environmental, and infrastructural policies and objectives with the aim of improving the quality of life and the attractiveness of the Town. Flood assessment, energy efficient houses and adequate green spaces.

2.3.6 Laois Local Economic and Community Plan 2016-2021

The Laois Local Economic and Community Plan 2016-2021 was completed to meet provisions under the Local Government Reform Act 2014, LECP Guidelines and LECP Circulars. As an action-focused plan with a purpose to identify and implement actions to achieve sustainable economic growth and improved social outcomes within the County, the Laois LECP is prepared by Laois County Council and the Laois Local Community Development Committee in consultation with other agencies, organisations and groups.

The descriptive part of the plan highlights the key facts and trends in County Laois and how it is related to nearby counties. It is stated that County Laois has strong economic and institutional relationships with other nearby counties including Kildare, Dublin, Carlow, Kilkenny and Tipperary. County Laois' and in particular Portlaoise's transport connectivity is notable. Portlaoise is the County's Principal Town with one in four Laois residents living in Portlaoise.

In terms of demographic trends, it is asserted that County Laois was the fastest growing county in Ireland between 2006 and 2011. Strong population growth is a longstanding Laois trend; over the last 20 years, its population growth rate has been higher than the wider Midlands or the State. Further significant growth is anticipated. Moreover, Laois has the highest population of 0-18 year olds, as a proportion of its overall population. Nearly 39% of Laois' population is aged under 25, this compares to 36% of the Midlands population and 34% of the State's population. In terms of housing profile, Laois is said to have a balanced rural and urban population with 47% residing in urban areas and 53% in rural settlements. Although, Laois is becoming more urbanised but rural life and the rural economy remain important.

Under Objective 9.B Develop and Promote Ways of Living and Doing Business, it is set out to enhance a more efficient use of the County's existing building stock, and public infrastructure

through acquiring structures and sites within the Derelict Sites Register, which can be refurbished or redeveloped for social housing targets.

2.3.7 Laois County Council Traveller Accommodation Programme 2019-2024

The Laois County Traveller Accommodation Programme 2019-2024 was adopted to meet provisions under the Housing (Traveller Accommodation) Act 1998 by Laois County Council in consultation with other local public authorities, community groups and other bodies, Travellers both directly and via the Local Traveller Accommodation Consultative Committee (LTACC), and Traveller Support Groups in the area. This Programme provides an evaluation of the previous Programmes (2000-2018), asserting that these Programmes mainly included provision of standard social housing.

The current Programme also provides an assessment of the existing travellers' accommodation needs, and a projection of the anticipated needs over the Programme period. It also includes a policy statement regarding Traveller accommodation and strategy for the implementation of the accommodation programme. According to this Programme, 'it is estimated that there is a projected need for 238 households during the duration of the programme. Whilst it has not been possible to establish the accommodation preferences of these 238 individuals, it is envisaged based on the housing applicants' strong preference for standard social housing, that the majority would consider standard accommodation'.

2.3.8 Laois Age Friendly County Strategy 2016-2021

The vision of the Laois Age Friendly Strategy is to provide a place where older people are supported to live independently in safe and secure homes and communities, suitable for their physical and social needs. The Strategy supports actions that enable older people to participate in various aspects of life and continue to grow, develop and contribute to society.

Based on the World Health Organisation framework for Age Friendly Cities, the Plan covers eight specific areas of actions to benefit senior residents in County Laois. With a descriptive approach towards promoting an age-friendly county in relation to housing, the Plan determines the challenges of older people, and it recommends a set of Actions to improve the housing conditions while setting out the agencies that are responsible to implement these actions. Amongst the actions, the following is to be addressed by Laois County Council:

"Ensure effective and efficient use of financial resources in respect of delivery of Local Authority Housing Grant schemes, i.e., Housing Aid for Older People, Mobility Aids and Housing Adaptation Grant for people with a Disability."

03

HOUSING MARKET DRIVERS

3.0 HOUSING MARKET DRIVERS

This section will identify the key factors driving the local housing market in County Laois and will include information on household formation, population and migration, housing affordability including income, house prices, rent levels, and key drivers of the local and national economy. This analysis will help to understand local housing market dynamics and will also help to inform which demographic, economic and affordability trends will determine the scenarios within the HNDA.

3.1 Demographic Trends and Population Projection

3.1.1 Population

Census 2016 results show that Ireland's population stood at 4,761,865 in April 2016, an increase of 173,613 (3.8%) since April 2011. There were 200 urban settlements across the country, which together accommodated 63% of Ireland's population. Beyond the five cities (Dublin, Cork, Limerick, Galway and Waterford) 29% of Ireland's population live in towns and villages with at least 1,500 or more people. The Census data further indicates that smaller towns and villages (1,500-10,000 population) experienced less than half the national average rate of population growth between 2011 and 2016. Those with more than 5,000 people had a combined net loss of population during that time, when the national population grew by almost 4%. Within Laois, the County saw a population increase of 5.1% (+4,138 persons) during this period, as the population increased to 84,697 from 80,559. The level of growth in Laois was significantly above the state average of 3.8% and slightly below the Eastern and Midland Regional Authority (EMRA) of 5.4%.

Table 6. Population and its changing trends in 1991-2016

Year	1991	1996	2002	2006	2011	2016
Population	52,314	52,945	58,774	67,059	80,559	84,697
Actual Change	-	631	5,829	8,285	13,500	4,138
% of Change	-	1.2	11.0	14.1	20.1	5.1

Source: CSO StatBank

As it can be traced in the Table above, the County has had a steady growth of population since 1991. And even though the growth rates increased considerably over the 1996-2006 and 2006-2011, it dropped from 20.1% in 2011 to 5.1% in 2016 resulting in a slight growth of the population.

The age profile of the EMRA region in 2016 was relatively young with nearly half a million children or 1 in 5 people (21.2%) in the Region aged under 14 years of age. In this context, Laois stands amongst counties with the highest proportion of young people (0-14 years old) right after County Meath (25.1%) and Fingal (24.5%).

Table 7. Age Dependency Ratios over 2011-2016

	2011	2016	Actual Change	% of Change
0-14 years	19,913	20,812	899	4.5
15-64 years	25,546	54,277	28,731	112.5
65 years and over	8,100	9,608	1508	18.6
Young Age Ratio (%)	37.9	38.3	-	-
Old Age Ratio (%)	15.4	17.7	-	-
Total Dependency Ratio	53.3	56	-	-

Source: CSO StatBank

Spatial distribution of the total age dependency within the County shows that the highest rates of age dependency are located in Garrymore (91%), Cullenagh (87%), Tankardstown (80.4%), and Kilnaseer (79.6%). On the other hand, the least rates of age dependency are located in Colt (43.8%), Kilmullen (46.8%), Brisha (47.2%), and Ballickmoyler (47.7%). As illustrated in the Figure below, moving from east towards west of the County and specifically to the southern ends, there is an increase in the rate of age dependency.

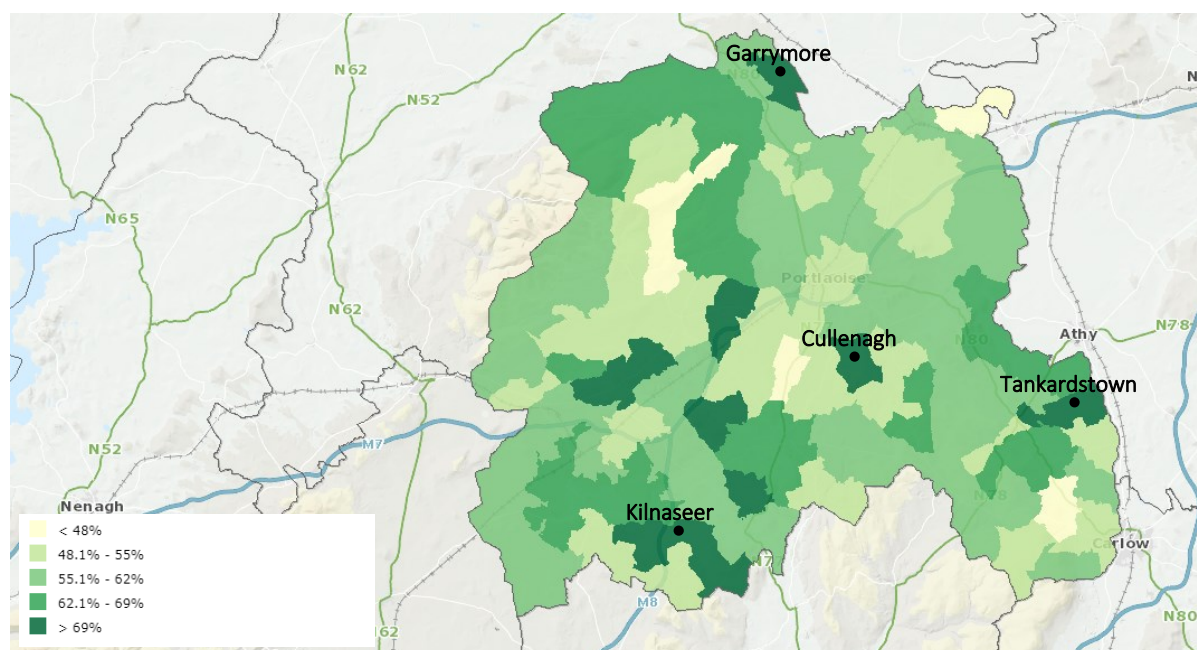


Figure 2. Age Dependency Ratio by Electoral Division - 2016

Investigating the age profile of the County over the Census 2011-2016 indicates that there was a moderate increase in the cohort aged under 14 years age, while the old age cohort increased with a greater growth rate (15.6%). An extended age profile of the County shows that a steady growth of old population can be expected for the County in coming years (see Figure 3).

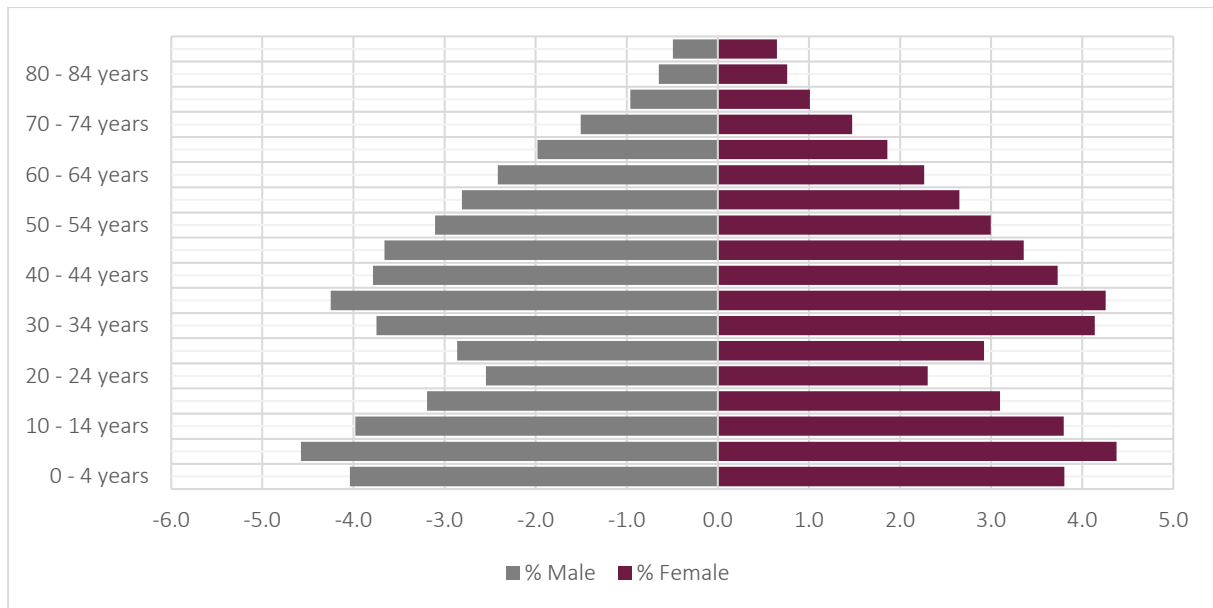


Figure 3. Population Age Pyramid of the County Laois - 2016

Within the County, Portlaoise is ranked as one of the three key settlements across EMRA to have more than a quarter of the young population (25.5%). As it is mapped on the Figure below, ED's residing the youngest average age groups include Garrymore (with an average of 29.1 years old), Dangans (29.2 years old), Borris (29.6 years old), and Clondarrig (29.9 years old). On the other hand, the ED's residing the oldest average age groups include Colt (with an average of 45 years old), Nealstown (43.7 years old), Graigue (42.9 years old), and Farnans (42.6 years old). In general, moving from east to the west of the County, an increase in the average age groups can be identified. This indicates the spots where there is a need to assess and plan for adequate healthcare, accommodation and services to enable independent living for as long as possible, encourage active lifestyles and address isolation for older residents.

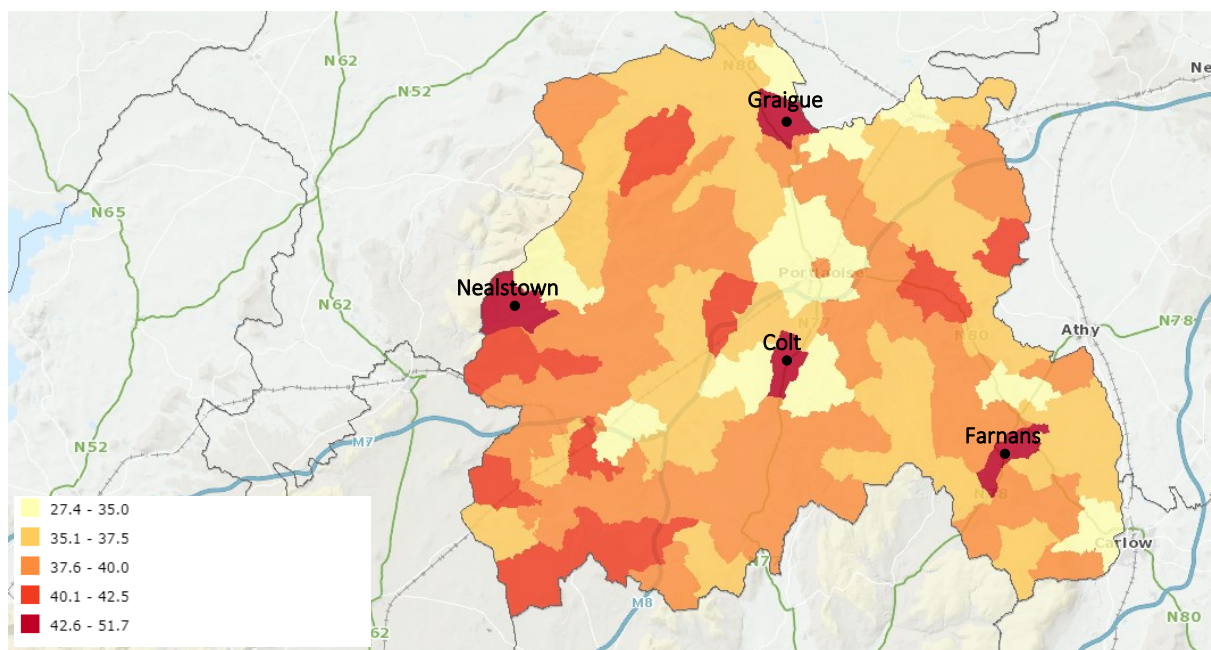


Figure 4. Average Age by Electoral Division - 2016

3.1.2 Population Distribution

According to the CSO's parameters, a total of 40,979 people (48.3%) were living in urban settlements in Laois in 2016. 43,718 (51.6%) were living in smaller towns and villages, as well as in the rural remainder of the County. In 2011, census results showed a distribution between the urban and rural population as 47.3% and 52.6% respectively. Thus, Laois is slightly becoming more urban in nature as a whole. As it can be seen in the Figure below, population change over 2011-2016 is mostly concentrated within the northern parts of the County within and around Portlaoise. Thereafter, its Graigue rural and Portarlington having the biggest share of the population change within the same period.

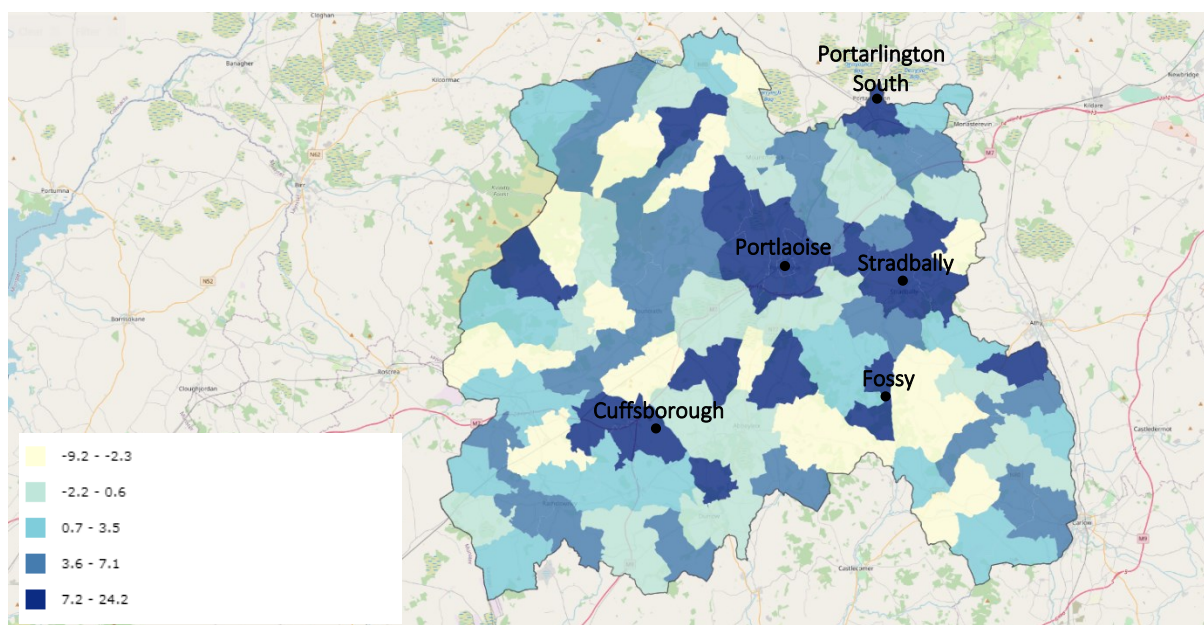


Figure 5. Percentage Change in Population Change by Electoral Division 2011-2016

The overall distribution of population in Census 2016 indicates that there are significant variances in population trends within ED's throughout the County. With a population of 16,058 in Census 2016, Portlaoise rural contains the highest concentration of the total population along with the ED's of Portarlington (7,142 persons), Graigue rural (4,793 persons), and Portlaoise urban (3,951 persons). As evident in the Figure below, the EDs to the east of the county are more densely populated when compared to the west. The location of the Slieve Bloom Mountains to the west of the county provides justification for the sparsely populated EDs. The ED of Mountrath attains 3% (2,376 persons) of the total population, the most populated ED to the west.

According to the 2016 Census, the total population of Portlaoise study area is 22,066 persons an increase of 2% or 443 persons in the five-year period since the 2011 Census with population being more concentrated to the north of Portlaoise.

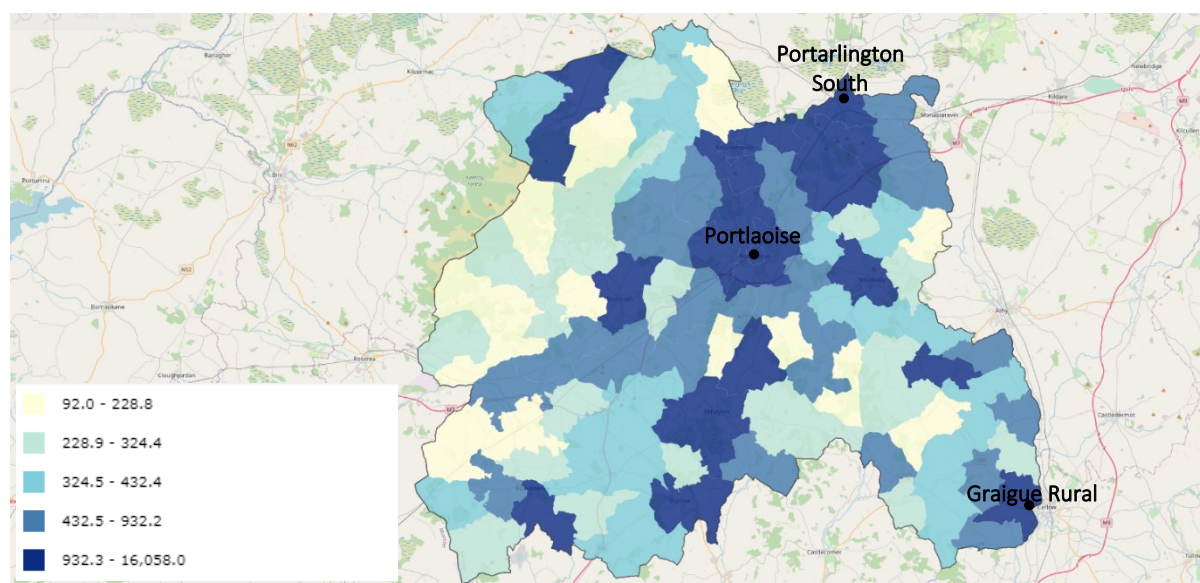


Figure 6. Spatial Distribution of Population in County Laois - 2016

As a Key Town within the County Laois settlement hierarchy 2017-2023, Portlaoise experienced a rate of growth considerably higher than the county average between 2011 and 2016, with the population increasing by 9.46% from 20,145 persons in 2011 to 22,050 persons in 2016. Population change across the various settlements identified in the settlement hierarchy is set out in the Table below.

Table 8. Population Growth in Laois 2011-2016

Settlement Typology	Settlements	Population 2011	Population 2016	Growth Rate 2011-2016 (%)
Key Towns	Portlaoise	20,145	22,050	9.46
	Graiguecullen (Laois) ²	3,966	4,692	18.31
Self-sustaining Growth Towns	Portarlinton South (Laois)	6,110	6,596	7.95
Self-sustaining Towns	Abbeyleix	1,827	1,770	-3.12
	Mountrath	1,661	1,774	6.80
	Stradbally	1,154	1,350	16.98
	Mountmellick	4,735	4,777	0.89
Towns & Villages	Rathdowney	1,208	1,271	5.22
	Durrow	843	835	-0.95
	Ballylynan	1,084	1,101	1.57
Rural (Served)	Clonaslee	518	566	9.27
	Killenard	522	671	28.54
	Ballyroan	455	563	23.74
	Borris-in-Ossory	475	508	6.95
Rural Remainder		35,856	36,173	0.88

Source: CSO StatBank, SAP WebGIS Map

² As set out in the *Regional Spatial and Economic Strategy*, pg. 44, Graiguecullen (Carlow) is a designated "Key Town", and as asserted in the *Submission to the Carlow Boundary Committee 2016*, and *Report of the Carlow Boundary Review Committee - 2016*, it covers the Carlow/Laois boundary and is divided between two electoral districts: Graigue Urban (Carlow) and Graigue Rural (Laois).

The population distribution across the settlement hierarchy in County Laois remained consistent over the period 2011 and 2016. However, the growth rate is not distributed evenly in different settlements. While areas such as Stradbally, and Portarlinton South had growing populations with growth rates considerably greater than the County figure (11.3%, 9.03% respectively), settlements such as Abbeyleix, Mountmellick (Urban and Rural), Durrow and Ballylynan had a declining population.

3.1.3 Components of Population Change

The change in the population between successive census can be broken down into the combined effect of natural increase (births less deaths) and net migration (immigration less emigration). Table 9 presents the components of intercensal population change back to 2002, which indicates the overall trend of the components align with the State. While the birth and death rates defining the natural growth of the population are close to the State figures over this period, the migration variation is above the Irish national average and is pushing the rate of population change in the County above the national figure. Within the County, except for the period of 2006-2011 where drastic fluctuations occurred, the overall trend of the components of population change shows a decline since 2002, which indicates that population is increasing with a slower growth rate.

Table 9. Components of Population Change and Average Annual Rates of County Laois 2002-2016

	2002	2006	2011	2016
Change in Population since Previous Census (Number)	5829	8285	13500	4138
Births since last Census (Number)	4630	3835	6701	6123
Deaths since last Census (Number)	2730	1535	1998	2235
Natural Increase since last Census (Number)	1900	2300	4703	3888
Change in Population since last Census (Number)	5829	8285	13500	4138
Net Migration since last Census (Number)	3929	5985	8797	250
Birth Rate since last Census (Avg. Annual Rate per 1000)	13.8	15.2	18.2	14.8
Death Rate since last Census (Avg. Annual Rate per 1000)	8.1	6.1	5.4	5.4
Rate of Natural Increase since last Census (Avg. Annual Rate per 1000)	5.7	32.9	12.7	9.4
Rate of Change in Population since last Census (Avg. Annual Rate per 1000)	17.4	9.1	36.6	10
Rate of Net Migration since last Census (Avg. Annual Rate per 1000)	11.7	23.8	23.8	0.6

Source: CSO StatBank

3.1.4 Household Size

In the State, the number of private households increased by 2.9% over the Census 2011-2016 with a growth of average household size from 2.73 persons to 2.75 persons which represents a reversal of the long-term decline in average household size in Ireland. With a growth rate of 3.8% over the same intercensal, the number of private households in County Laois increased from 28,020 in 2011 to 29,107 in 2016. Moreover, the average household size in Laois

increased from 2.8 in 2011 to 2.9 in 2016. Therefore, the County not only stands above the national average by the growth rate of private households, but also with the average size of the households.

Table 10. Average Number of Persons per Private Household 2011-2016

	2011	% of Total	2016	% of Total	% of Change
1-person household	6,096	21.8	6,404	22.0	5.1
2-person household	7,660	27.3	7,689	26.4	0.4
3-person household	5,105	18.2	5,052	17.4	-1.0
4-person household	4,886	17.4	5,401	18.6	10.5
5 and over-person household	4,273	15.2	4,561	15.7	6.7
All private households	28,020	100.0	29,107	100	3.9
All persons in private households	79,751	-	83,534	-	4.7
Average number of persons in in private households	2.8	-	2.9	-	-

Source: CSO StatBank

As illustrated in the Table above, the pattern of family formation in Laois is mostly characterised by two-person households (22%) followed by single-persons households (22%). However, the growth rate of different household size groups shows that 4-person households increased considerably (10.5%) over the same period and is followed by households with more than 5 persons (6.7%). This represents a long-term increase in average household size in the County which is in contrast with the household formation trends in the State.

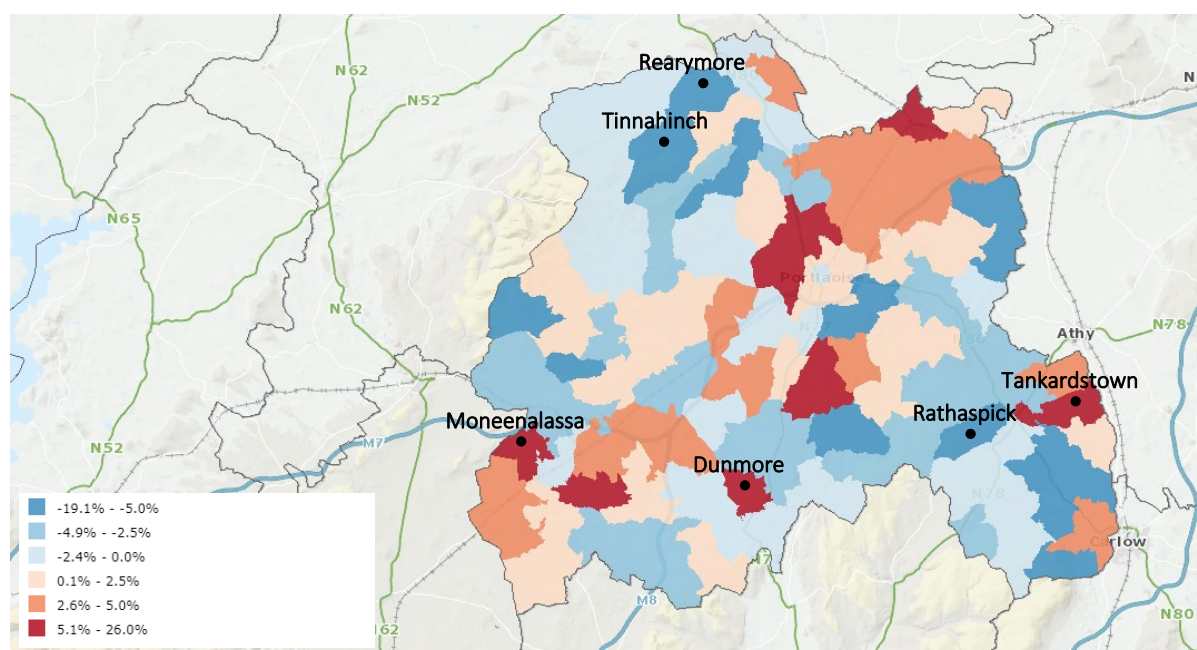


Figure 7. Percentage Change in Average Household Size by Electoral Division 2011-2016

CSO database on Census 2016 indicates that greatest average household sizes are located in Garrymore (3.68), Kilmurry (3.35), Moyanna (3.32), Aghmacart (3.31), while the least average household sizes are in Portlaoise Urban (2.39), Rathdowney (2.42), Mountmellick Urban (2.51),

Borris-in-Ossory (2.57). Moreover, mapping the percentage of change in average household size within the County shows that the most drastic changes from a greater average household size to a smaller household size, as marked with deep blue on Figure 7, had occurred in Rathaspick (-12% from 3.24 to 2.85), Tinnahinch (-10.40 from 2.89 to 2.59), Rearymore (-9.90 from 3.32 to 2.99). To other extent, the ED's with the greatest changes towards bigger average household size, as marked with deep red on the Figure above, comprise Moneenalassa (+16.10 from 2.73 to 3.17), Dunmore (+8.70 from 2.89 to 3.14), Tankardstown (+7.90 from 3.05 to 3.29). On the other hand, an insight to the spatial distribution of single households in settlements throughout the County (Figure 8) indicates that the greatest figures are located in Carlow (8,569 persons), Portlaoise (7,066 persons), and Portarlinton (2,370 persons). However, considering the percentage of single persons aged 15 years and over to the total population of settlements, the first three settlements with the highest rates of single population would be Castletown (48.7% with 155 persons), Mountrath (48.2% with 661 persons), and Errill (47.4% with 65 persons).

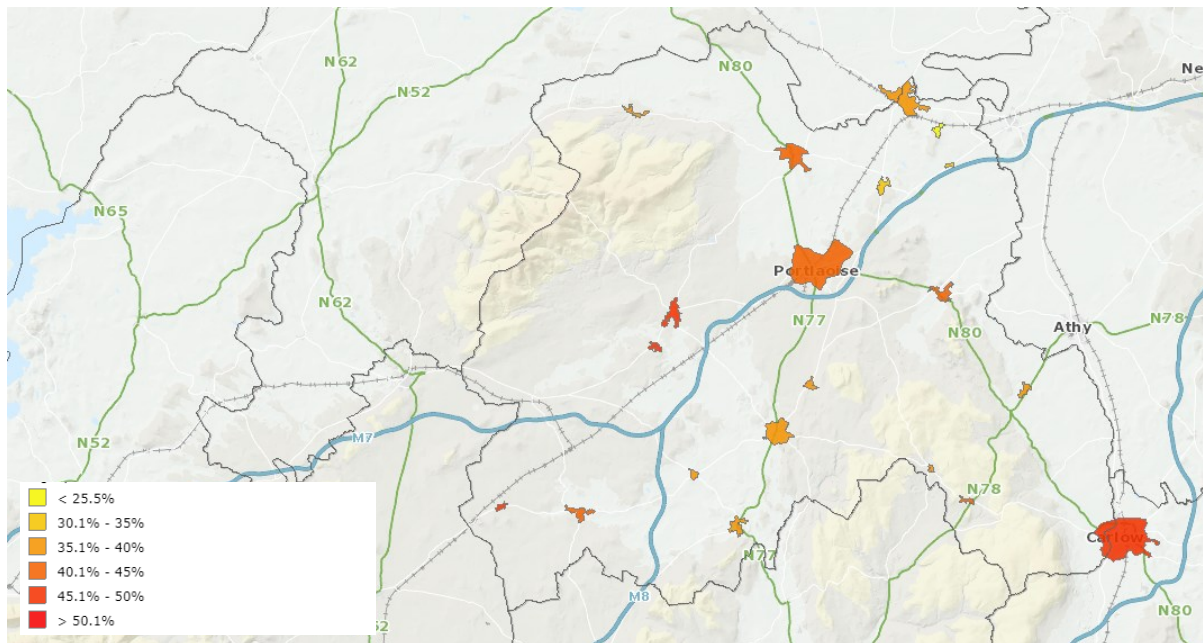


Figure 8. Single Population by Settlement - 2016

The spatial distribution of the average household size throughout the County represents the type of emerging demand in the housing market. In Laois, moving towards eastern ED's, specifically Portlaoise, Portarlinton, and Graiguecullen, there is a younger population, smaller average household size groups, and a tendency for reduced household sizes in the future. This can be met by supplying according to the demand in the short- to medium-term, and be more balanced in the long-run by integrating land-use policy with the housing strategy and planning for a more evenly distribution of employment centres to provide for promoting more inclusive communities.

3.1.5 Population Projection

A number of population scenarios for County Laois have been investigated to 2031, including two “Non-intervention Scenarios” relying upon growth rate of the population over the previous 5-year intercensal period. These non-intervention scenarios utilise a projection of population developed using the Cohort Component Method (CCM). They are called ‘Non-Intervention’ as they do not assume a policy-based interaction on the modelled trajectory of population growth across Laois. CCM is used internationally as the best-in-class methodology for demographic projection, including by the Central Statistics Office (CSO) to produce the Irish National & Regional population and labour force projections. It closely examines the interactions between the three key components driving changes in the population: mortality, fertility, and migration. Details of these scenarios are summarised as the following.

Non-intervention Scenario - A

The first non-intervention scenario is based on the national figures provided by the CSO StatBank. National population projections provide an indication of the future size and age structure of Ireland based on a set of assumptions of future fertility, mortality and migration, including several variant projections based on alternative scenarios. The results of these projections over 2016-2031 is summarised in Table 11 below.

Table 11. Population Projection over 2016-2031 for Ireland ³

Methods	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031
Method - M1F1	4739597	4803510	4865573	4926992	4987719	5047468	5106294	5164335	5221720	5278541	5334938	5390912	5446707	5502577	5558457	5614475
Method - M1F2	4739597	4803510	4865573	4926468	4986152	5044355	5101144	5156660	5211032	5264348	5316742	5368212	5418977	5469265	5519004	5568301
Method - M2F1	4739597	4793516	4845368	4896353	4946406	4995233	5042879	5089476	5135153	5180004	5224159	5267625	5310654	5353521	5396180	5438781
Method - M2F2	4739597	4793516	4845368	4895831	4944854	4992164	5037816	5081955	5124709	5166177	5206485	5245648	5283894	5321471	5358330	5394595
Method M3F1	4739597	4783521	4825170	4865720	4905096	4943003	4979468	5014626	5048585	5081452	5113360	5144315	5174560	5204400	5233816	5262973
Method M3F2	4739597	4783521	4825170	4865203	4903561	4939976	4974491	5007255	5038385	5067992	5096214	5123061	5148761	5173598	5197543	5220748

Source: CSO StatBank, ID: PEA22

With respect to these projections, and assuming a continuation of prevailing demographic trends within the State, then the growth rates in three different alternatives, ranging from high- to low-scenario, were calculated and applied to the County population in the most recent Census. The results are summarised in Table 12.

These alternatives reflect what might happen should national growth rate continue to develop as assumed. It does not account for settlement capacity or non-demographic factors (beyond the inherent motivation of why people migrate).

³ F1: TFR to remain at its 2016 level of 1.8 for the lifetime of the projections

F2: TFR to decrease to 1.6 by 2031 and to remain constant thereafter

M1: High net inward migration +30,000 per annum in 2017/2051

M2: Net inward migration continuing at more moderate levels +20,000 per annum in 2017/2051

M3: Low net inward migration +10,000 per annum in 2017/2051

Table 12. The Projected Population of the County based upon the CSO Projection Alternatives for the State

	2021	2022	2023	2024	2025	2026	2027
Method - M1F1 (high Scenario)	90,199	91,250	92,287	93,313	94,328	95,336	96,336
Method - M2F1 (Central Scenario)	90,011	89,981	92,093	92,069	94,128	94,108	96,129
Method M3F2 (Low Scenario)	89,793	89,754	91,851	91,817	93,861	93,832	95,838

Considering the high scenario as the baseline, estimates in this alternative indicates that the population of County Laois would range from 93,832 to 95,336 persons (compared to the 92,500 to 94,000 NPF/RSES targets) which includes an increase of 9,135-10,639 to the County population in Census 2016.

Table 13. The Projected Population within the Historical Growth of County Population

Non-intervention Scenario (high scenario)									
Year	1991	1996	2002	2006	2011	2016	2021	2026	2031
County Laois	52,314	52,945	58,774	67,059	80,559	84,697	90,199	95,336	100,331
Actual Change	-	631	5829	8285	13500	4138	5502	5137	4995
% of Change	-	1.2	11.0	14.1	20.1	5.1	6.5	5.7	5.2

Exploring this alternative within the historical growth of the County, as summarised in Table 13 above, the estimation produces a growth rate ranging from 6.5% to 5.2% which revolves around the growth rate of the County over the period of 2011 to 2016 (5.1%) and as illustrated in Figure 9, it indicates a steady linear growth since 1991, except for the period of 2006 to 2011 when the County experienced considerable growth. In this projection, the population of the County within the time-frame of the Development Plan is projected at 96,336 persons (higher scenario) and 95,838 persons (lowest scenario).

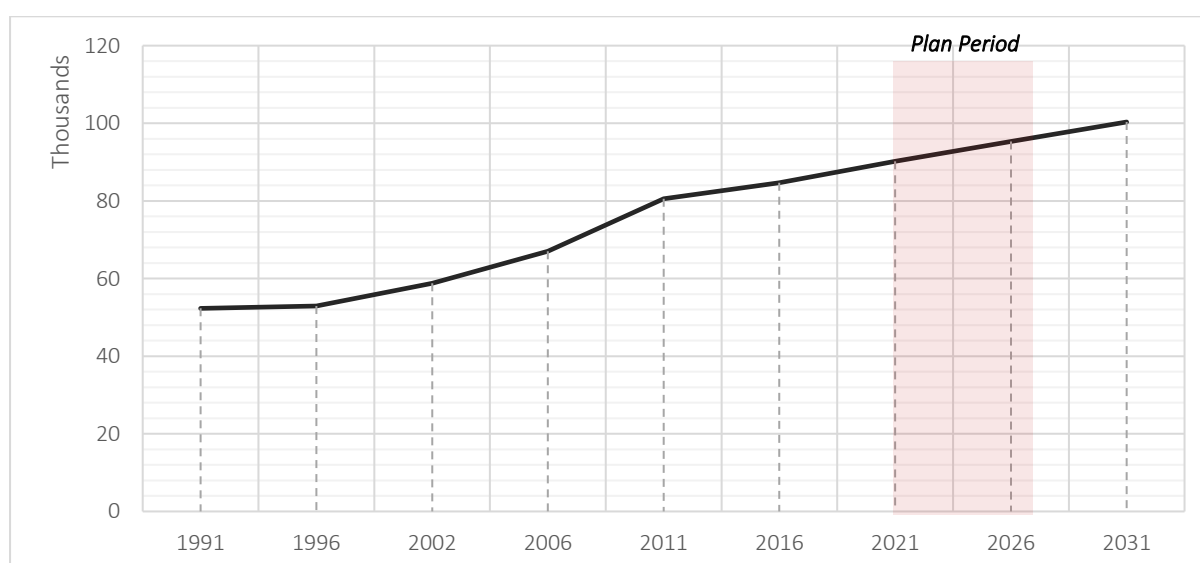


Figure 9. Population Trend in the County since 1991 in Non-intervention Scenario

Non-intervention Scenario - B

The second non-intervention scenario is based on the demographic changes within the County using the cohort component technique. This technique uses components of demographic change, including birth, deaths, and migration projecting the population by age groups and sex. A brief description of this technique is summarised in the following equation.

$$P_{t+n} = \text{survived population} + \text{births} + \text{migration}$$

Considering that the available age cohorts are in 4-year periods, while the lifetime of the Development Plan is set out at 2021-2027, the projection is performed three times within four-year intervals over 2016-2028. The first estimation over the course of 2016-2020 is based upon the Census 2016, while the next two rounds for 2024 and 2028 are utilising the previous projection results to project the population. Thereafter, the average annual population changes within these intervals are used to estimate the County population for 2021-2027. The results are summarised in Table 14 below.

Table 14. Projected Population Growth Over the Plan Period based upon Cohort Component Technique

Year	Total Population in County Laois	Annual Population Increase during Year	Annual Population Increase 2021-2027	Total Population Increase 2021-2027	Total Population Increase 2016-2027
2011	80,559	20.10%	-		
2016	84,697	5.10%	-		
2017	86,483	2.11%	1,786		
2018	88,268	2.11%	1,786		
2019	90,054	2.11%	1,786		
2020	91,839	2.11%	1,786		
2021	99,263	8.08%	7,424		
2022	106,686	8.08%	7,424		
2023	114,110	8.08%	7,424		
2024	121,533	8.08%	7,424		
2025	121,440	-0.08%	-93		
2026	121,347	-0.08%	-93		
2027	121,254	-0.08%	-93	29,417	36,560
2028	121,161	-0.08%	-93		

This scenario reflects what might happen should growth continue to develop as assumed within the County. It does not account for settlement capacity or non-demographic factors (beyond the inherent motivation of why people migrate). Projections in this scenario indicates that the population of County Laois would increase to 99,263 by 2021 and to 121,254 by 2027 (compared to the 92,500 to 94,000 NPF/RSES targets) which includes an increase of 36,557 to the County population in Census 2016.

Policy-intervention Scenario

In this policy intervention scenario, the NPF/RSES population targets are used as the fixed variables and then an interpolation of the required level of change per annum was developed for County Laois from baseline year 2016 to NPF/RSES target years 2026 and 2031; thus, producing annualised figures over the period of 2021 and 2027 which is the lifetime of the Development Plan.

Table 15. Projected Population Growth Over the Plan Period based upon NPF/RSES 2021 & 2031 Targets

Year	Total Population in County Laois	Annual Population Increase during Year	Annual Population Increase 2021-2027	Total Population Increase 2021-2027	Total Population Increase 2016-2027
2006	67,059	14.10%	-	-	-
2011	80,559	20.10%	-	-	-
2016	84,697	5.10%	-	-	-
2017	85,627	1.10%	930	-	-
2018	86,558	1.10%	930	-	-
2019	87,488	1.10%	930	-	-
2020	88,418	1.10%	930	-	-
2021	89,349	1.10%	930	-	-
2022	90,279	1.10%	930	-	-
2023	91,209	1.10%	930	-	-
2024	92,139	1.10%	930	-	-
2025	93,070	1.10%	930	-	-
2026	94,000	1.10%	930	-	-
2027	94,700	0.74%	700	6,280	10,000
2028	95,400	0.74%	700	-	-
2029	96,100	0.74%	700	-	-
2030	96,800	0.74%	700	-	-
2031	97,500	0.74%	700	-	-

As summarised in Table 16 below, the estimation produces a growth rate ranging from 5.5% to 3.7% over a longer period until 2031. This scenario provides a growth rate over both periods of 2016-2021 and 2021-2026 which is in line with the growth rate over 2011-2016 (5.1%). However, when projecting up to 2031, it considerably drops from 5.2% in 2021-2026 to 3.7% in 2026-2031, which can be justified by the increased level of error when aiming for longer time horizons.

Table 16. The Projected Population within the Historical Growth of County Population

Policy Intervention Scenario									
County Laois	1991	1996	2002	2006	2011	2016	2021	2026	2031
	52,314	52,945	58,774	67,059	80,559	84,697	89,349	94,000	97,500
Actual Change		631	5,829	8,285	13,500	4,138	4,652	4,651	3,500
% of Change		1.2	11.0	14.1	20.1	5.1	5.5	5.2	3.7

Projections in this scenario indicates that the population of County Laois would increase to 89,349 by 2021 and to 94,700 by 2027 with the latter including an increase of 5,351 to the County population in Census 2016.

It is noted that these projection alternatives were discussed in detail with the Local Authority, and in order to maintain consistency with the National Planning Framework and the Eastern and Midland Regional Assembly Regional Spatial and Economic Strategy 2019-2031, the policy-intervention scenario was selected as the baseline for estimation of housing need and demand in Section 5. Moreover, the most recent housing strategies of neighbouring counties (County Offaly and Westmeath) also indicate the same approach towards housing need and demand estimations.

3.2 Housing Price

3.2.1 Residential Property Price Index

According to the “Residential Property Price Index - May 2020” prepared by the CSO, residential property prices increased by 0.3% nationally in the year to May. This compares with an increase of 0.7% in the year to April and an increase of 2.6% in the twelve months to May 2019. Residential property prices in Ireland excluding Dublin were 0.7% higher in the year to May, with house prices up by 1.0% and apartments down by 1.5%. The region outside of Dublin that saw the largest rise in house prices was the South-West at 4.3%, i.e. at the other end of the scale, the South-East saw a 0.8% decline.

In this context, residential property price index in the Midlands decreased by 0.3%, while as reported by Myhome.ie, a two-bedroom apartment priced at €115,000 in 2020 Q2. This indicates a quarterly change of -8% and annual change of +4.17%. The quarterly change rate places the County amongst the highest ranked counties after County Offaly (-30.38) and Carlow (-20.33%). This index for a four-bedroom semi-detached dwelling is recorded as €200,000 in the same period, which shows a quarterly change of +1.27% and an annual change of +1.52%. Although most counties had zero quarterly change, County Laois ranked amongst those recorded a growth after County Kerry (+7.69%), Kilkenny (4.30%), Clare (2.63%), and Waterford (2.33%). These trends show that family houses have a steadily growing market in County Laois.

3.2.2 Median Price

Households paid a median price of €260,000 for a dwelling on the residential property market in the 12 months to May 2020. The highest median prices outside Dublin were in Wicklow (€330,392) and Kildare (€310,000), while the lowest price was €105,000 in Leitrim. In this spectrum, households paid a median price of €178,000 for a dwelling within the Midland

Region. As reported by Myhome.ie in 2020 Q2, households paid a median price of €175,000 for a dwelling in County Laois which indicated an annual change of +3.55%.

3.2.3 Mean Price

Households paid a mean price of €296,043 for a dwelling on the residential property market in the 12 months to May 2020. The mean price in Dublin (€438,713) was the highest in any region or county. Outside of Dublin, the Mid-East was the most expensive region, with a mean price of €305,273. Wicklow was the most expensive county in the Mid-East region, with a mean price of €367,344. Within this context and as recorded by Daft.ie property report, households paid a mean price of €177,628 for a dwelling in County Laois which indicates a year-on-year change of 0.4%. The breakdown of the mean price for different types of properties in June 2020 is summarised in the table below.

Table 17. Average Asking Price for Different Types of Properties in County Laois - June 2020

	Single bed Apt.	Two-bed Apt.	Three-bed Apt.	Four-bed Apt.	Five-bed Apt.
Average Asking Price	74,000	90,000	127,000	252,000	259,000
Annual Change	-1%	-7%	0%	-2%	-8%

Source: The Daft.ie Housing Market Report, June 2020, p. 13

3.2.4 Residential Property Rent Index

As asserted in the “Residential Tenancies Board; Rent Index - Q1 2020”, rents are highest in Dublin, the surrounding counties and larger urban counties such as Cork, Galway and Limerick. With the majority of renters concentrated in the large population centres near jobs, education and amenities, price pressures are greatest in these areas. There were seven counties where the standardised average rent exceeded €1,000 per month in Q1 2020, including Cork, Dublin, Galway, Kildare, Louth, Meath and Wicklow. In this context, Laois with a standardised average rent of €877 ranks amongst the counties with highest rents. However, compared to the fourth quarter of 2019, there is a slight decrease from €901 that can partially be justified by the impacts of COVID-19 on the housing market, as an insight to the year-on-year change of the standardised average rent proves an increase of 3.8%.

Table 18. Rent Index in County Laois - 2020 Q1

Index Q1 2020	Standardised Average Rent Q1 2020	Standardised Average Rent Q4 2019	Q-on-Q Change (%)	Standardised Average Rent Q1 2019	Y-on-Y Change (%)
119	877	901	-2.7	845	3.8

Source: Residential Tenancies Board; Rent Index Q1 2020, p. 11

Mapping the rate of change in weekly rents throughout the County indicates that North and Western parts of the County had greater changes with Arles leading the way (43.2% growth) followed by Emo (42.3%) and Doonane (29.6%) which indicates a growing demand for the housing market in these areas as they are closer to the bigger towns, transportation, and

working hubs. On the other hand, the least increase in rent prices over 2011-2016 is spotted in Ballybrittas (-5.4%), Ballinakill (-3.5%), and Meelick (-2.8%). In this spectrum, Portarlinton South as an attractive housing market in the County had 17.1% growth in the weekly rent, while weekly rents increased by 14.7% in Portlaoise and 9.1% in Graigue Rural.

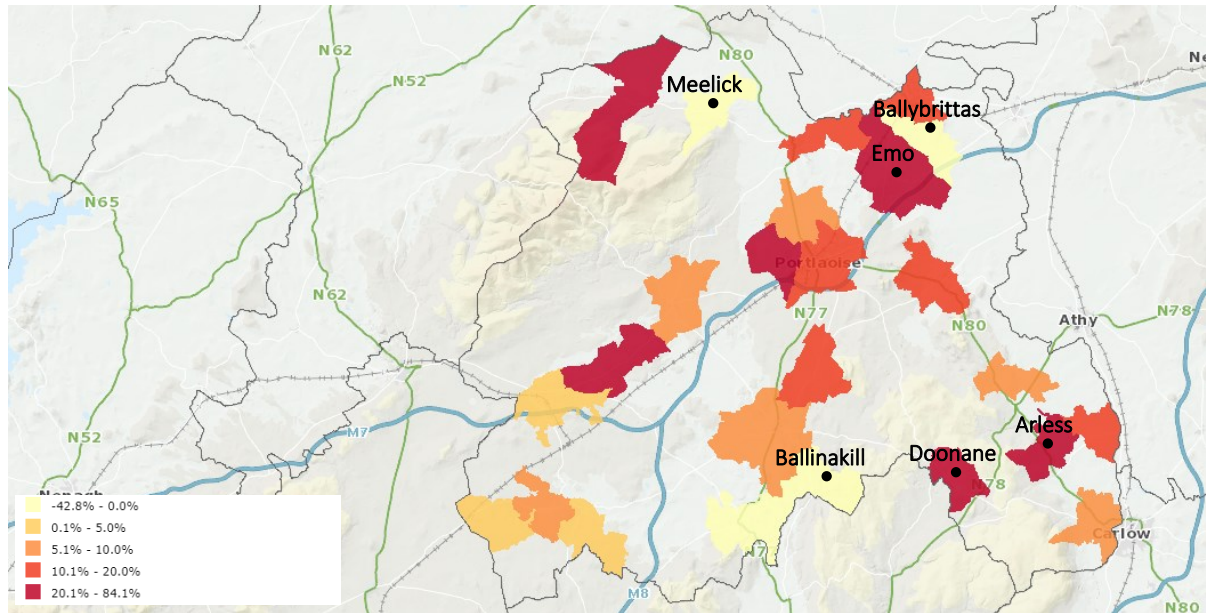


Figure 10. Percentage Change in Average Weekly Rent by ED's 2011-2016

3.2.5 Rent Pressure Zone

As set out within the map of “Designated Rent Pressure Zones - April 2020” by the Housing Agency, Portlaoise and Graiguecullen-Portarlinton are amongst the local electoral areas identified as Rent Pressure Zones throughout the County.

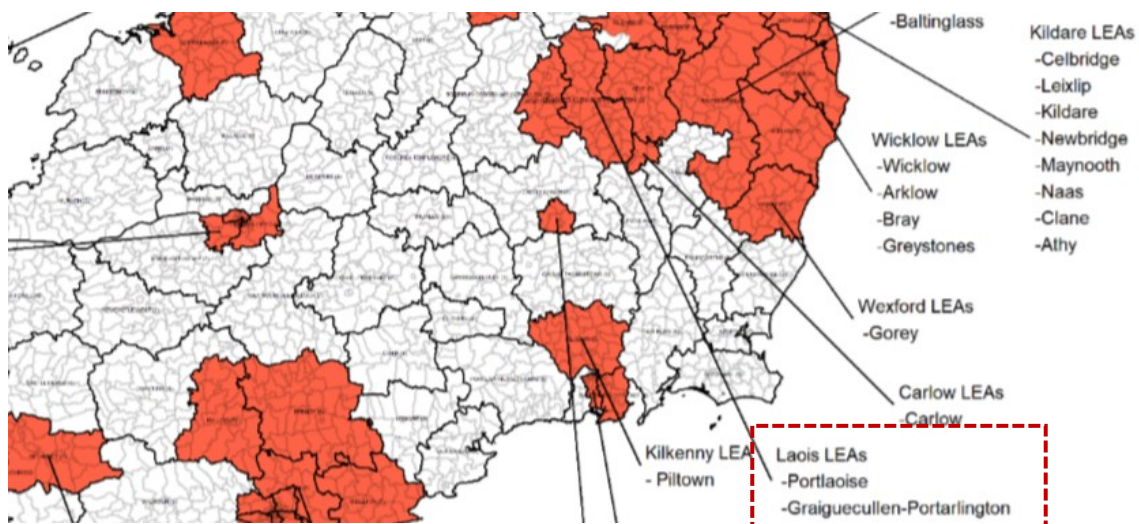


Figure 11. Rent Pressure Zones within the County Laois as Set by the Housing Agency

The high rental levels in these areas relative to other counties reflects the concentration of demand close to the country’s largest employment hubs, specifically in Dublin, and the access to public transport which again facilitates commuting to employment hubs. Comparing the

pressure zone map with the catchment area of the major employment hubs clearly illustrate the tight connection of Portlaoise and Portarlington South with Dublin, and Graiguecullen with both Kilkenny and Dublin, where people commute to every day for work.

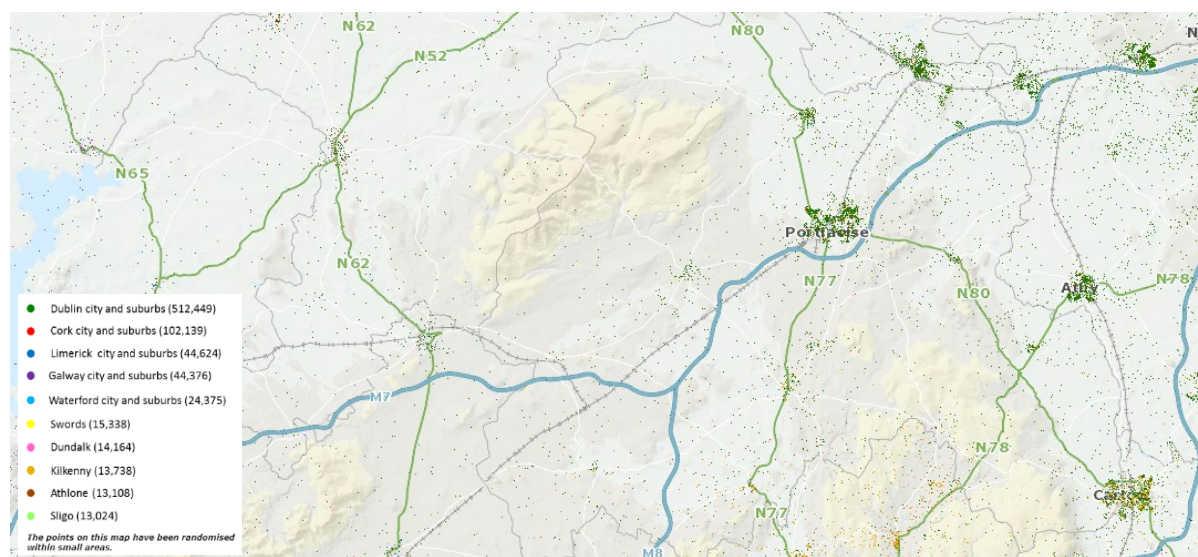


Figure 12. County Laois in Catchment Areas of Major Workplace Locations - 2016

3.3 Economic Trends

This section considers key economic indicators comparing County Laois with Ireland, including economic growth, employment, commuting and mortgage capacity information. The Irish economy has seen nearly a decade of sustained growth, with an improving picture in the Irish labour market, increases in employment and reductions in unemployment and increased overall economic activity. However, in light of the recent COVID-19 pandemic, an unusual level of uncertainty is triggered by the unprecedented consequences on the overall economy and also the housing market. The latest figures indicate that the Irish economy picked up strongly in 2015, in line with a surge in leading indicators across business surveys, and CSO's StatBank data sets relating to economic growth and employment profiles.

The general picture of steady growth for Ireland is likely to characterise developments through the coming years. The Irish economy registered strong growth in recent years with GDP increasing by almost 6% in 2019. While certain multi-national related transactions are distorting the headline figures, the large increase in taxation receipts and the continued strong performance of the Irish labour market means the underlying economy is performing well. However, it is expected to see the economy grow by a slower rate in 2020 of 3.3%.

The regional diversity of the Irish property market performance over the last 10 years indicate that both prices and rents have grown at significantly different rates in different areas of the country during this period. Areas of the country that had relatively high prices and rents initially experienced the fastest pace of growth subsequently. This suggests that different regions of the country have experienced varying economic growth rates over the past 10 years.

3.3.1 Economic Growth (GVA)

Gross Value Added (GVA) is a measure in economics of the value of goods and services produced in an area, industry or sector of an economy. It is generally regarded as the best measure of the sum of economic activity within an area. Gross Value Added (GVA) is conceptually the same aggregate as Gross Domestic Product (GDP). They both measure the added value generated in an economy by the production of goods and services, with the difference that GDP is measured after including product taxes (i.e. excise duties, non-deductible VAT, etc) and deducting product subsidies, while GVA is measured prior to adding product taxes but includes product subsidies.

Table 19 shows GVA figures between 2011 and 2015. It is important to highlight that the GVA figures consistently increased throughout the surveyed years for the State, however it fell slightly for the Midlands region (i.e. Laois, Longford, Offaly, and Westmeath) between 2011 and 2013, thus representing a decrease within the economic sector of the region. The region recovered in 2014, with an increase surpassing the figures for 2011. The fall in the region may indicate the migration of certain industries towards the other regions given the statistics shown at State level, as well as demonstrating the varying economic growth rates for the regions.

Table 19. Gross Value Added (GVA) by Region, Statistical Indicator and Year

	2011	2012	2013	2014	2015
State					
Gross Value Added (GVA) per person at Basic Prices (€)	34,336	34,961	35,789	38,400	52,461
Gross Value Added (GVA) at Basic Prices (%)	100.0	100.0	100.0	100.0	100.0
Population (%)	100.0	100.0	100.0	100.0	100.0
Persons at work (%)	100.0	100.0	100.0	100.0	100.0
GDP per person (€)	37,583	38,287	39,254	42,203	56,529
Midlands					
Gross Value Added (GVA) per person at Basic Prices (€)	19,092	19,001	18,051	19,153	22,320
Gross Value Added (GVA) at Basic Prices (%)	3.4	3.3	3.1	3.1	2.6
Population (%)	6.2	6.2	6.2	6.2	6.2
Persons at work (%)	5.8	5.9	5.9	5.9	6.0
GDP per person (€)	20,898	20,809	19,799	21,050	24,050

Source: CSO StatBank

3.3.2 Number of People Employed by Industry

Table 15 shows the proportion of people employed by industrial group for 2011 and 2016 in County Laois. As it stands, the majority of the population in County Laois work in both the commerce and trade industry and the professional services industry, with a higher increase in population working for the professional services industry.

The highest percentage increase can be seen in the building and construction industry which experienced a significant rise as per the 2016 census, with a 20.3% increase from the 2011 census statistics, and a 13.5% increase in the professional services industry for the second

highest growth between both census. There has been a fall in the proportion of people employed in public administration in County Laois (-3.2%). The agriculture, forestry and fishing industry has seen a slight fall but remains stable overall, with only a -0.4% decrease from previous census.

Table 20. Persons at work in County Laois by Industry and Census year

Industry	2011	2016	% in 2016	Change %
Agriculture, forestry and fishing	2,441	2,431	7	-0.4
Building and construction	1,643	1,976	6	20.3
Manufacturing industries	3,303	3,423	10	3.6
Commerce and trade	6,851	7,307	22	6.7
Transport and communications	2,040	2,286	7	12.1
Public administration	2,631	2,548	8	-3.2
Professional services	6,802	7,717	23	13.5
Other	4,626	5,853	17	26.5
Total	30,337	33,541	100	10.6

Source: CSO Census 2011-2016 SAPMAP Area (County Laois)

3.3.3 Employment Profile

Tables 16 and 17 below set out the current levels of employment and unemployment across County Laois, with the percentage of economically active people lower at 97.1% than the previous census at 97.4%. There are variations between the employer/employee status band with a higher percentage of employees at 43.6% than employers at 8.7%, showing that the percentage of people that are employer/self-employed is lower than the number of employees, with a 10 percentage points difference in the increase between both bands over the census periods. The unemployment percentage in County Laois has lowered from 13.6% for the 2011 census to 9.5% for the 2016 census statistics. It is important to note this percentage only contains the bands pertaining to 'Unemployed looking for first regular job' and 'Unemployed having lost or given up previous job' for ease of reference. In addition to the above, the number of people which have retired went up in 2016 by 20.1%, as well as the student population, which rose by 14.1 between the 2011 and the 2016 census.

Table 21. Population aged 15 years and over in the Labour Force by Age group and Census year

	2011	%	2016	%	% Change
All ages	30,337	100.0	33,541	100.0	10.6
15-24 years	2,245	7.4	2,138	6.4	-4.8
25-34 years	9,057	29.9	8,212	24.5	-9.3
35-44 years	8,449	27.9	9,999	29.8	18.3
45-54 years	6,417	21.2	7,743	23.1	20.7
55-64 years	3,368	11.1	4,484	13.4	33.1
65 years and over	801	2.6	965	2.9	20.5

Source: CSO StatBank

Table 22. Population aged 15 years and over by Principal Economic Status and Census year

	2011	%	2016	%	%Change
All persons aged 15 years and over	60,646	100.0	63,885	100.0	5.3
Employer or own account worker	5,435	9.0	5,574	8.7	2.6
Employee	24,760	40.8	27,876	43.6	12.6
Assisting relative	142	0.2	91	0.1	-35.9
Unemployed looking for first regular job	674	1.1	616	1.0	-8.6
Unemployed having lost or given up previous job	7,586	12.5	5,452	8.5	-28.1
Student or pupil	5,690	9.4	6,492	10.2	14.1
Looking after home/family	6,492	10.7	6,004	9.4	-7.5
Retired	6,723	11.1	8,077	12.6	20.1
Unable to work due to permanent sickness or disability	2,825	4.7	2,970	4.6	5.1
Other economic status	319	0.5	733	1.1	129.8

Source: CSO StatBank

3.3.4 Commuting Profile

As set out in Tables 18 and 19 below, the percentage of population who travels for longer than 1 hour has risen significantly in the time period between both census (2011 and 2016), with a 27% increase for those within the 1 hour - 1 ½ hour band and 26% for those commuting for 1 ½ hours and over. This is a clear indication that over 6,457 people attend their education or employment outside of County Laois, thus affecting the employment profile and spending habits within the County.

Table 23. Population aged 5 years and over by Journey time to work, school or college and Census year

	2011	2016	%	% Change
Under 15 mins	17,106	18,763	36	9.7
¼ hour - under ½ hour	12,251	13,444	26	9.7
½ hour - under ¾ hour	6,069	6,655	13	9.7
¾ hour - under 1 hour	2,278	2,416	5	6.1
1 hour - under 1 ½ hours	3,150	4,000	8	27.0
1 ½ hours and over	1,950	2,457	5	26.0
Not stated	3,262	4,191	8	28.5
Total	46,006	51,926	100	12.7

Source: CSO Census 2011-2016 SAPMAP Area (County Laois)

Table 24. Population aged 15 years and over at work by Towns and Means of Travel

	Portlaoise	Portarlinton	Mountmellick	Mountrath	Abbeyleix
All means of travel	8,438	3,104	1,571	586	645
On foot	725	157	143	65	63
Bicycle	102	25	23	2	6
Bus, minibus or coach	191	70	38	16	9
Train, DART or LUAS	243	260	30	5	16
Motorcycle or scooter	20	6	5	1	2
Motor car: Driver	5,180	1,986	985	339	428
Motor car: Passenger	487	168	92	34	27
Van	488	228	136	67	39
Other, incl. lorry	25	8	6	3	3
Work mainly at or from home	165	70	37	10	20
Not stated	812	126	76	44	32

Source: CSO StatBank

3.3.5 Mortgage Market Review

In February 2015, the Central Bank made Regulations to set limits on the size of housing loans made by the commercial lenders that it regulates. Following an evaluation and consultation process, revised limits took effect from 1 January 2017, under further Regulations. A second annual review was carried out in 2017. Following this review, the Central Bank made new Regulations (pdf), which take effect from 1 January 2018. The core elements of the measures, the Loan-to-Income (LTI) and Loan-to-Value (LTV) limits, both described below, have not changed for 2018. However, the rules have changed for 2018 as regards the flexibility that lenders have to make exceptions to the LTI limit.

Loan-to-Income limit (LTI)

There is a general limit of 3.5 times gross annual income for all new mortgage lending for principal dwelling homes, with some scope for flexibility. This includes lending to people in negative equity who are applying for a mortgage for a new property. This limit does not apply to buy-to-let mortgages.

Loan-to-Value limit (LTV)

There are different limits for different categories of buyer. Again, lenders have some scope for flexibility. The valuation of the property must have been carried out no later than 4 months before the date of the mortgage agreement.

Up to 31 December 2016: For first-time buyers of principal dwelling homes there was a limit of 90% LTV on the first €220,000 of the value of a residential property, so first-time buyers needed a deposit of 10% for a house or apartment costing €220,000 or less. A limit of 80% LTV applied on any excess value of the property above €220,000, so first-time buyers needed a deposit of 10% on the first €220,000 and 20% of any balance above €220,000.

Since 1 January 2017: For first-time buyers of principal dwelling homes the limit of 90% LTV applies on the full value of all residential property, so first-time buyers will need a deposit of 10% for any house or apartment, regardless of price. For non-first-time homebuyers, there is a limit of 80% of LTV on new mortgage lending, whatever the price of the property, so they will need a deposit of 20% of the total purchase price. For properties other than principal dwelling homes, including buy-to-let properties, a limit of 70% LTV applies.

The LTV limits do not apply to borrowers in negative equity applying for a mortgage for a new property. However, lenders may still opt to apply stricter lending standards, based on their assessment of each case.

Table 25. Summary of Loan-to-Value Mortgage limits

Type of buyer	House Price	Maximum limit of mortgage - up to end 2016	Maximum limit of mortgage - since January 2017	Minimum amount of deposit - up to end 2016	Minimum amount of deposit - since January 2017
First-time	Up to and including €220,000	90% of house price	90% of house price	10% of house price	10% of house price
First-time	Over €220,000	90% of the first €220,000, plus 80% of the excess over €220,000	90% of house price	10% of the first €220,000, plus 20% of the excess over €220,000	10% of house price
Not first-time	Any	80% of house price	80% of house price	20% of house price	20% of house price
In negative equity on current mortgage	Any	These limits do not apply but the lender's own limits may be stricter			
Buy-to-let or other non-principal dwelling	Any	70% of house price		30% of house price	

Source: Citizens Information and Banking & Payments Federation Ireland (BPI)

04

HOUSING STOCK PROFILE

4.0 HOUSING STOCK PROFILE

This chapter will consider what existing stock is available to meet the housing needs of the local population and will demonstrate both housing and land supply within the County. Moreover, in terms housing stock, it also covers the social housing stock and its most recent changes.

4.1 Existing Housing Stock

4.1.1 Stock and Composition

The global recession and collapse of the property market in 2008 resulted in the stagnation of household construction in the County and across the State. Census data indicates that the housing stock of the County in 2011 was 32,664 and increased marginally by 1.3% to 33,115 in 2016.

Table 26. Existing Housing Stock in County Laois - 2016

Housing Stock	Vacant Holiday Homes	Other Vacant Dwellings	Total Vacancy	% Vacancy
33,115	139	3,163	3,302	10

Source: CSO StatBank

Since then, there has been a sustained rise in the number of residential units completed. The Table below indicates that the housing stock has increased by 817 units⁴ or 2.4% during the period 2016-2020. This figure also represents a 44% increase on the number of units completed over 2011-2016.

Table 27. Unit Completion over 2016-2020

Year	2016	2017	2018	2019	2020 (January-September)
Unit Completion	103	117	235	242	120

Source: CSO StatBank

Census 2016 data shows that there were 3,163 vacant units (this figure excludes vacant holiday homes) in the county in 2016. Vacancy rates in existing residential properties across the county are set out in Table 26. This distinguishes between vacant residential properties and holiday homes. The percentage vacancy rate provided is based on the 'Other Vacancy' category as a percentage of total housing stock and excludes vacant holiday homes.

As illustrated in Figure 13, the major share of the housing stock is concentrated in the eastern side and inner lands of the County with Portlaoise Rural (5,607), Portarlinton South (2,954), Portlaoise Urban (1,836), Graigue Rural (1,810), Mountmellick Urban (1,389), and Abbeyleix (1,278), and Mountrath (1,075) containing almost half (48.1% or 15,949 units) of the housing stock.

⁴ Department of Housing Local Government and Heritage BCMS Commencement Notice Returns

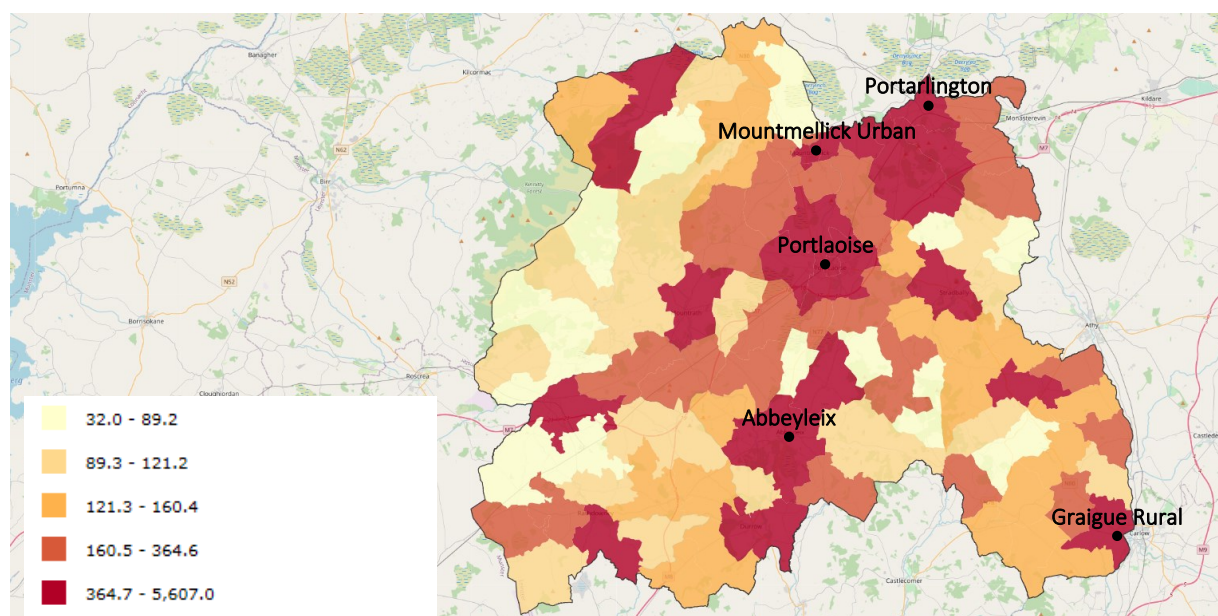


Figure 13. Spatial Distribution of the Housing Stock in County Laois - 2016

Comparing this housing stock with the previous Census data indicate that the housing stock was marginally decreased in Portarlington South, Portlaoise Urban and Graigue Rural, while, it was stable in Mountmellick Urban, and slightly increased in Portlaoise Rural, Abbeyleix, and Mountrath (Table 28). This shows that the main stock of the housing in the County has been maintained in a stable level.

Table 28. Housing Stock Change in Settlements with the Greatest Housing Stock in the County 2011-2016

	2011	2016	% Change
Portlaoise Rural	5,554	5,607	+0.95
Portarlington South	2,973	2,954	-0.64
Portlaoise Urban	1,852	1,836	-0.87
Graigue Rural	1,816	1,810	-0.33
Mountmellick Urban	1,389	1,389	0.00
Abbeyleix	1,272	1,278	+0.47
Mountrath	1,074	1,075	+0.09

Source: CSO StatBank

By excluding the holiday homes and exploring the vacant dwellings within the County, as it is illustrated in the Figure 14, it is evident that most of the vacant dwellings are stocked in the south-west of the County with Moneenalassa (21%), Garrymore (20%), Errill (19%), Borris-in-Ossory (18%), and Kildellig (16%) having the highest vacancy rates respectively. These rates are standing considerably higher than the national figure which is 13 percent.

From the Figure above, it is also apparent that the ED's containing the majority of the housing stock are mostly having a moderate rate of vacant dwellings, ranging from 10 to 13 percent which is comparable to the national figure.

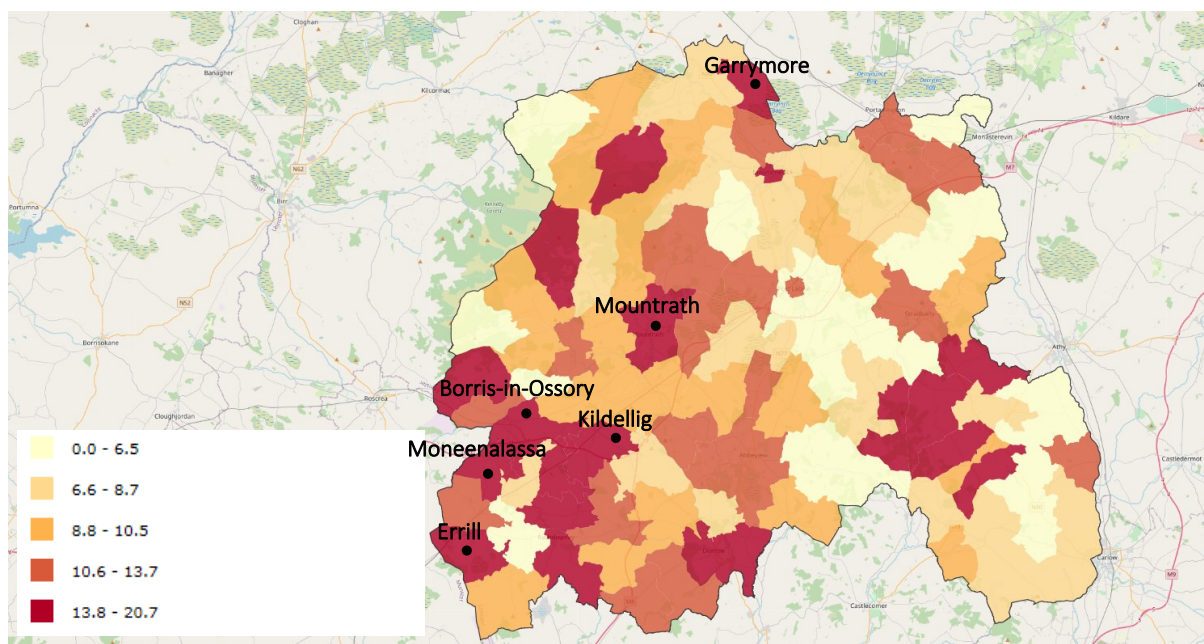


Figure 14. Housing Vacancy Rate throughout the County - 2016

Further details on the change of vacant dwellings within these ED’s over the period of 2011-2016 shows that except for the Mountmellick Urban, the rest are managing to reduce the vacant dwellings. However, Mountrath is still having a high rate of dwelling vacancy (14%) which calls for further investigations.

Table 29. Vacant Dwellings Change in Settlements with the Greatest Housing Stock in the County 2011-2016

	2011	2016	% Change
Portlaoise Rural	627	351	-44
Portlaoise Urban	274	199	-27
Graigue Rural	193	158	-18
Mountrath	182	151	-17
Portarlinton South	426	370	-13
Abbeyleix	197	173	-12
Mountmellick Urban	198	203	+3

Source: CSO StatBank

On a micro-level, studying the vacancy rate over the intercensal period 2011-2016 by ED’s indicates that the most dynamic market of vacant houses was in Rathaspick, of which 50% of dwellings that were vacant in April 2011 were found to be occupied in April 2016. On the other hand, Moneenalassa had the least active market of vacant houses with 14.3% of dwellings that were vacant in April 2011 were found to be occupied in April 2016. In general, as mapped on the Figure below, Portlaoise and its environs had the biggest share of vacant houses being occupied over 2011-2016.

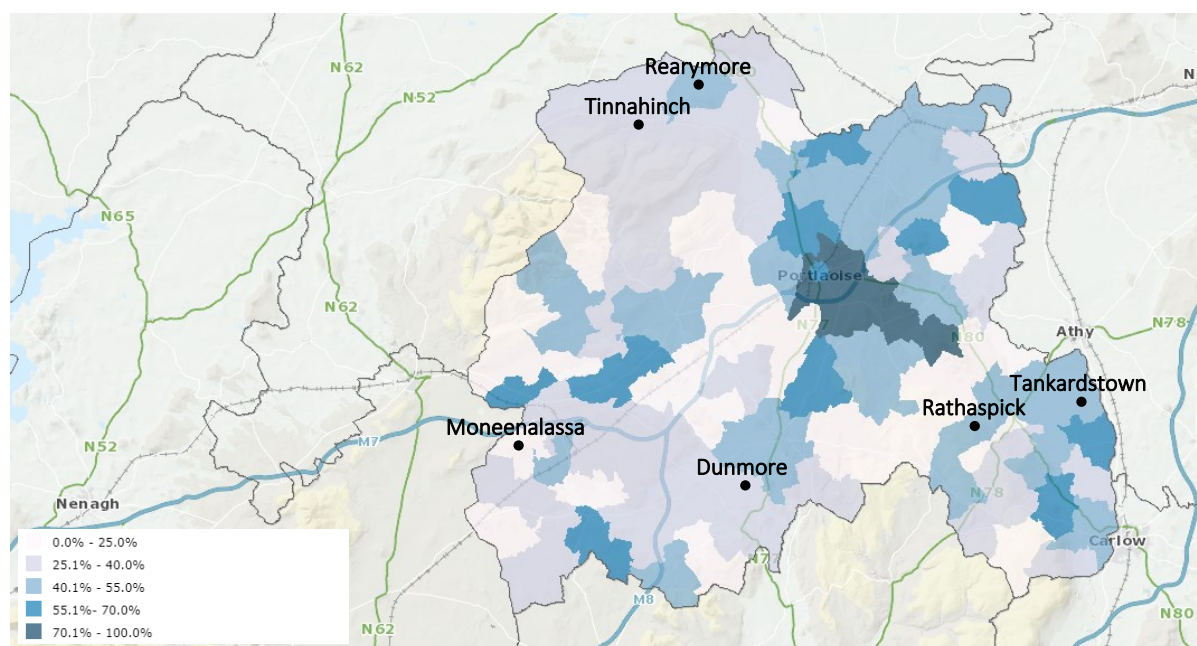


Figure 15. Distribution of dwellings that were vacant in 2011 and occupied in 2016

4.1.2 Housing Tenure

According to Census 2016, home ownership remains the dominant tenure in County Laois, where 71.6% of households are categorised as owner occupied units. However, the tenure trends over the decade to 2016 indicates that there was a 197% growth in the private rental market with an increase from 1,355 households in 2006 to 4,029 in 2016. Comparatively, the owner occupancy had a more moderate growth rate which is indicative of the slight decline of occupancy in the long run. The owner occupancy had a growth rate of 15% with increasing from 18,024 in 2006 to 20,780 households in 2016. Therefore, a slight move towards increased share of the rental market can be identified in the County. As summarised in the Table below, 10.1% (2,944) of households were in the social housing in 2016.

Table 30. Housing Occupancy in County Laois - 2016

Type of Occupancy	Households	Households %
Owner Occupied (all)	20,835	71.6
Private Rental	4,029	13.8
Other Rental	2,944	10.1
Rent Free	474	1.6
Not Stated	825	2.8
Total	29,107	100.0

Source: CSO StatBank

These trends over the period of 2011-2016 are less drastic; there was a minor increase in the owner-occupied housing market with a change rate of less than 1%. However, the private rental market experienced a moderate growth rate of approximately 9%, while other rental housings which includes renting from Local Authority and a Voluntary Body had the greatest

increase of all, growing from 2,565 households to 2,944. This indicates a growth rate of circa 15% over 2011-2016.

Table 31. Change of Housing Occupancy Type over the period of 2011-2016

	2011	%	2016	%	% of Change
Owner Occupied (all)	20832	74.3	20835	71.6	0.01
Private Rental	3700	13.2	4029	13.8	8.89
Other Rental	2565	9.2	2944	10.1	14.78
Rent Free	496	1.8	474	1.6	-4.44
Not Stated	427	1.5	825	2.8	93.21
Total	28020	100.0	29107	100.0	-

Source: CSO StatBank

As illustrated in Figure 16, homeownership is the most popular housing tenure throughout the County, however, when moving towards northern ED's and specifically within Portlaoise and Portarlinton, a growth of rental housing market can be recognised. Accordingly, the ED's with the highest rate of homeownership include: Nealstown (100%), Kilcolmanbane (98%), and Moneenalassa (95.7%) which are marked with light green on the Figure below, while the least rates of homeownership are located in Portlaoise (49.6%), Borris, (51.8%) and Clondarrig (56%) that are marked with dark green on the Figure.

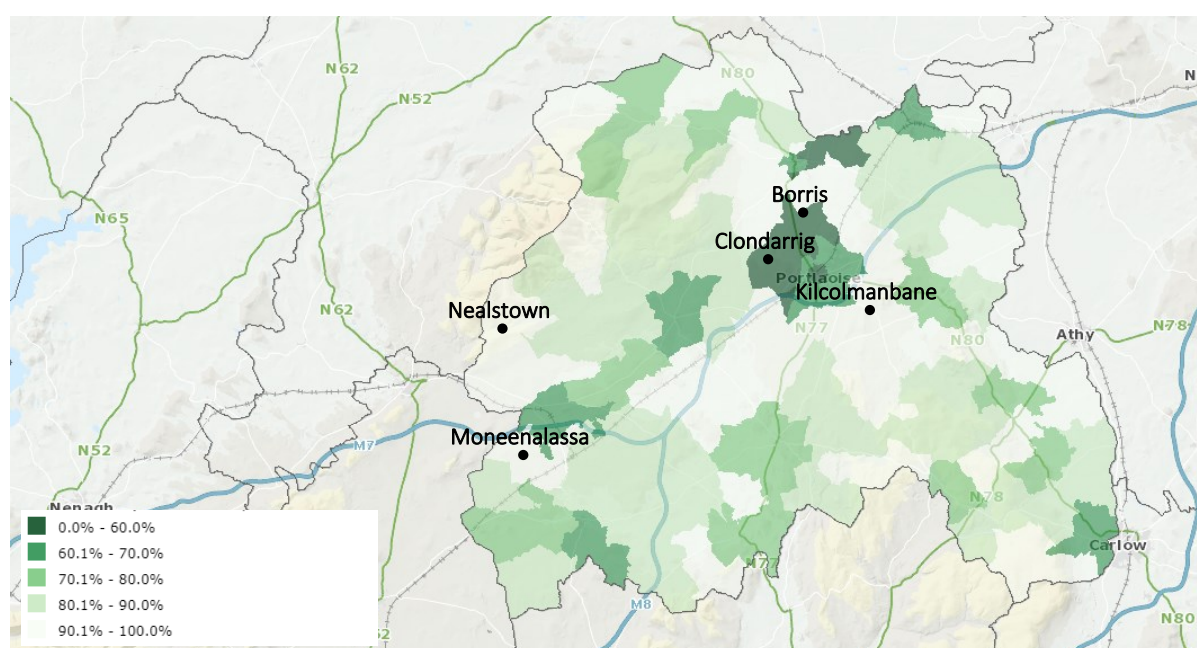


Figure 16. Spatial Distribution of Homeownership Rate by Electoral Divisions - 2016

4.1.3 Social Housing Stock

The Overall Social Housing Provision provided by the Department of Housing, Planning and Local Government represents all social housing constructions activity undertaken by local authorities and Approved Housing Bodies (AHBs) since 2004.

County Laois aided in the provision of an overall social housing stock of 468 units in 2019, which is 16% above the 2019 target for the County (116% target achieved by Q4 2019). A breakdown of the County social housing stock provided in 2019 is summarised in the Table below.

Table 32. Breakdown of Social Housing Activity in County Laois - 2019

LA New Build	AHB New Build	Part V -New Build (All delivery stream)	Total New Build	DHPLG funded LA Voids - limited to capped ceilings under Rebuilding Ireland	All Build Total	LA Acquisition	AHB Acquisition	Acquisition Total	Leasing Total	RAS	HAP	Total 2019 Output under Rebuilding Ireland	2019 Social Housing Delivery Targets	% of 2019 target Achieved by end Q4 2019	DHPLG funded LA Voids - delivered above capped limits under Rebuilding Ireland
1	10	6	17	5	22	46	16	62	11	19	354	468	403	116%	18

Source: Department of Housing, Planning & Local Government, Social Housing Delivery by Local Authority 2019

Since 2016, the total social housing delivery output for Laois County is 1,595 units. The delivery of social housing in Laois has increased by 425% (379 units) when comparing the output in 2019 to the 2016 figures. In 2019, 116% of the total units were delivered. As of 21st September 2016, and as asserted in the “*Summary of Social Housing Assessments - 2016*”, 1,198 households were assessed as qualified for housing support. Accordingly, the number of households qualified for support increased by 296 (or 32.8%) compared to the last assessment carried out in 2013 that is a substantial increase in the State, after Roscommon (122%), Leitrim (44.6%).

As asserted in the draft socio-economic study of the County, ‘when discussing the distribution of social units in Laois County, it was confirmed that the majority is located within Portlaoise Rural ED. Figure below provides an insight into the location of these units in Portlaoise and confirms the number of social units is much less to the south when compared to the north of the study area. Of the 1,091 social units in Portlaoise study area, the SAP areas as shown in red account for 19% (206 units) of the total amount with 8% (82 units) located within the SAP of the Kiliminchy residential development to the north east. It is noted the surrounding SAP areas also have a high concentration of social units confirming the social units is evenly distributed throughout the settlement to avoid high levels of concentration. Similarly, all data captured and analysed from the Census the data is only applicable to 2016’ (p. 288).

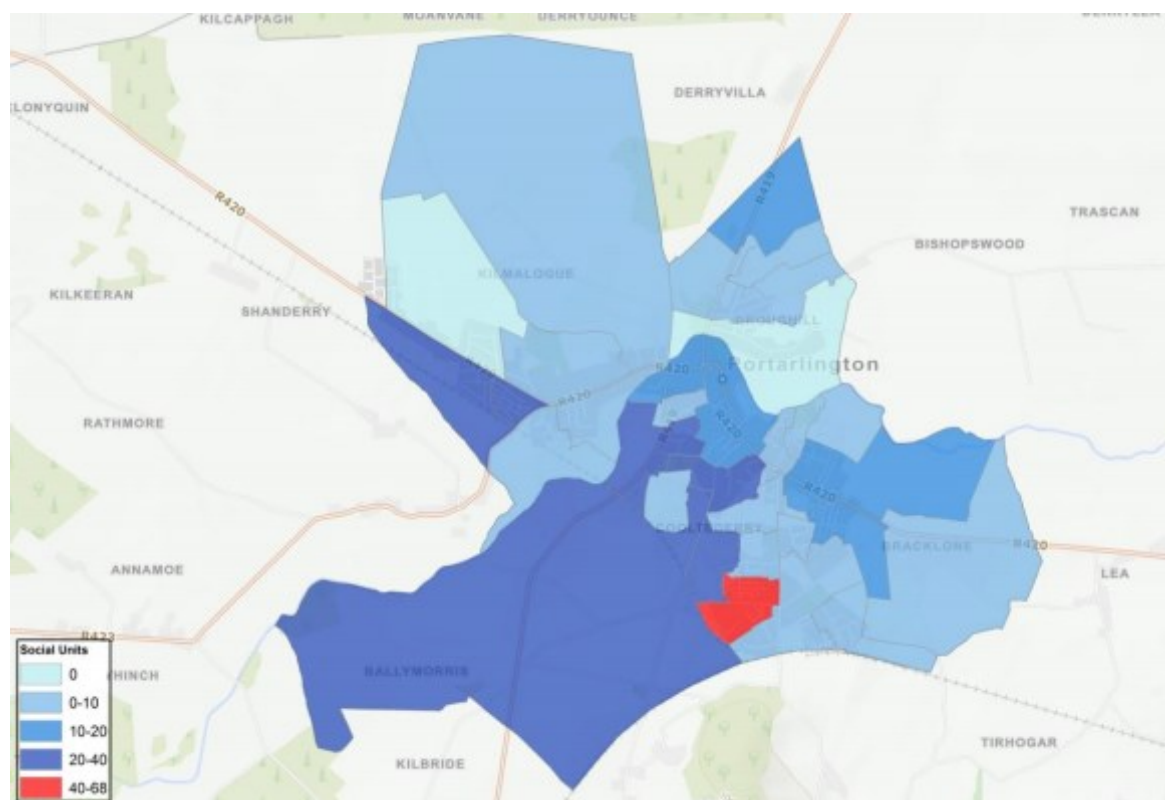


Figure 17. Distribution of Households Rented from Local Authority and Voluntary/Co-Operative Housing Body - 2016 (source: draft socio-economic report, pg. 289)

Currently, there are 1,935 no. households on the waiting list, of which 4 families are living on unauthorised sites, 1 family on a halting site, 8 families in LA group housing, 103 families in LA housing, 13 families in AHB housing, 35 families in privately rented units, 13 families in own resources, and 10 families in shared accommodation. In response, latest figures on social housing delivery (Table 33) indicate that 158 no. social housing units had been delivered over 2019-2020, of which 81% was delivered by AHB's, followed by 10% that was supplied by the Local Authority. Compared to the 2019 figures, it is apparent that AHB's took a considerable role in supplying social housing followed by the Local Authority.

Table 33. Social Housing Delivered in County Laois 2019-2020

	LA	AHB	Part V
Number of Units	7	54	6
% of Total	10	81	9

Source: Department of Housing, Planning & Local Government, Social Housing Delivery by Local Authority 2019

4.1.4 Type of Accommodation

As summarised in the Table below, profile of housing in Laois is dominantly characterised by houses/bungalows (95%), and the apartments comprise less than 3% of the whole housing market in the County. Cross referencing these figures with the household size and bigger size family's growth over 2011-2016, it can be drawn that the accommodation typology in County Laois follows the same pattern as it has, however, as discussed in the housing tenure section,

towns that are having the most dynamic housing markets including Portlaoise, Portarlington, and Graiguecullen will have a changing landscape in their housing, not only in terms of a growing rental market, but also in supplying more apartments and a tendency for smaller sized housing units.

Table 34. Type of Accommodation in County Laois 2011-2016

Type of accommodation	2011		2016		% of Change	
	Households	Persons	Households	Persons	Households	Persons
House/Bungalow	26,278	76,290	27,233	79,684	3.6	4.4
Flat/Apartment	1,174	2,094	1,278	2,284	8.9	9.1
Bed-sit	26	47	16	21	-38.5	-55.3
Caravan/Mobile Home	104	187	110	224	5.8	19.8
Not stated	438	1133	470	1,321	7.3	16.6
Total	28,020	79,751	29,107	83,534	3.9	4.7

Source: CSO StatBank

4.2 Existing Housing Supply

4.2.1 Unfinished Housing Developments

The 2017 National Housing Development Survey which tracks progress on unfinished housing developments since 2010 recorded 1,635 unfinished developments, of which nearly 40% is occupied. As it can be seen in the Table below, there was a drastic fall not only in the number of unfinished developments from 2016 (1,958 units), but also in the number of unfinished developments with expired planning permission (1,185 units). Although, there was a drop in the vacancy rate of unfinished developments from 227 units to 135, County Laois still has one of the highest vacancy rates after County Wexford (227 units) and Wicklow (251 units). However, as asserted by the “2017 Annual Progress Report on Actions to Address Unfinished Housing Developments”, ‘in overall terms, vacancy levels within unfinished developments are not significantly high or out of kilter with ‘normal’ vacancy levels’ (pg. 9).

Table 35. Unfinished Housing Developments - (2016-2017)

	2016		2017	
	Units	%	Units	%
Occupied	1,245	34.7%	653	39.9%
Vacant	227	6.3%	135	8.3%
Near Complete	85	2.4%	66	4.0%
Wall Plate	18	0.5%	16	1.0%
DPC	146	4.1%	99	6.1%
Foundations	96	2.7%	75	4.6%
Not Started	0	0.0%	0	0.0%
Planning Expired	1,776	49.4%	591	36.1%
Total	3,593	100.0%	1,635	100.0%
Occupied Impacted	-	-	26	4.0%

Source: Department of Housing, Planning & Local Government, Unfinished Housing Developments

4.2.2 Housing Permissions

Table 36 illustrates the number of granted planning applications in County Laois since 2018. As it can be seen, although there was a 6.9% growth in the overall number of granted applications from 2018-19, breaking it down into quarters shows that the overall trend fluctuates with no specific pattern.

Table 36. Granted Planning Applications in County Laois during 2018 and Quarter 1 2020

Granted Applications	2018				2019				2020
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Houses	36	43	26	49	51	44	40	27	32
Multi-development Houses	3	4	4	5	5	5	6	3	3
One-off Houses	33	39	22	44	46	39	34	24	29
Private Flats/Apartments	2	3	3	1	4	3	4	4	3
Total	74	89	55	99	106	91	84	58	67
% of Change	-	20.3	-38.2	80.0	7.1	-14.2	-7.7	-31.10	15.5

Source: CSO StatBank

In terms of typology of the granted permissions, the houses and single one-off dwellings are the dominant types with a minor drop in the overall period of 2018-2020 Q1. On the contrary, a slight growth can be spotted on the private apartments with a grant permission. However, the overall profile of the granted permissions indicates that the housing market of County Laois is mostly characterised by houses and single one-off dwellings.

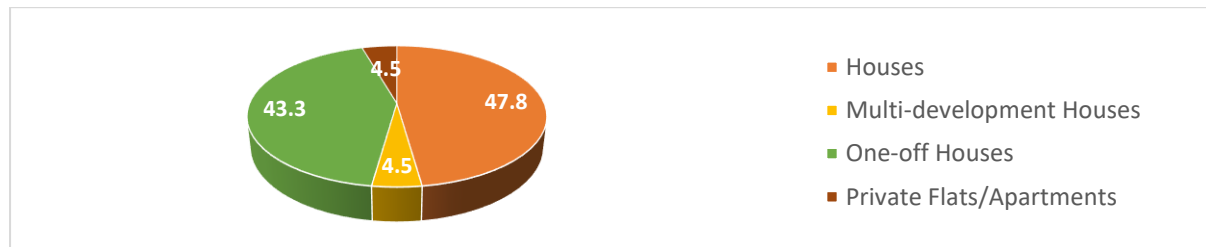


Figure 18. The Typology of Granted Permissions in County Laois - 2020 Q1

4.2.3 Social Housing Pipeline

The latest data on the social housing in County Laois shows that a total number of 520 social housing units are in the pipeline with AHB supplying more than half of this figure (53%) followed by the Local Authority (45%). By the slight increase of apartment developments, a marginal growth of the Part V share in proving the social housing is also observable.

Table 37. A Breakdown of the Social Housing Pipeline in County Laois 2018-2020

	LA Planned without Part VIII approval	LA with Part VIII approval	LA Under Construction	AHB with Part VIII approval	AHB Approved	AHB Under Construction	Part V Under Construction
Number of Units	125	68	41	111	84	83	8
% of Total	24	13	8	21	16	16	2

Source: Laois County Council

4.3 Land Acquisitions

As illustrated in the Figure below, the latest figures indicate that County Laois has 46 no. lands acquisition by the Local Authority which is a 39.4% increase to 2018. On the contrary, the AHB's had a drop from 58 land acquisitions in 2018 to 16 land acquisitions in 2019, that is a 72.4% decline. However, when compared to the social housing delivery by the mentioned sections, a faster delivery in social housing units can be identified.

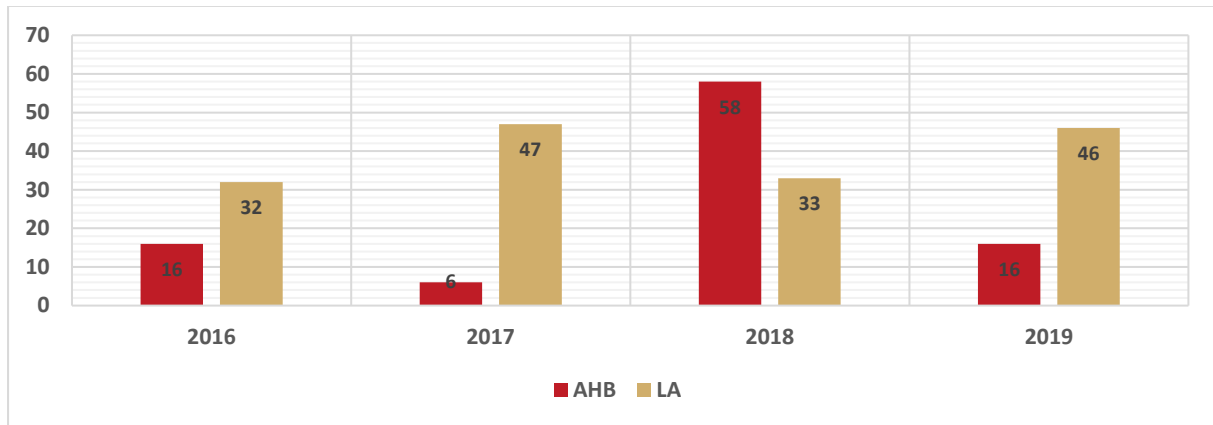


Figure 19. Acquisitions by Laois County Council and AHB 2016-2019

Moreover, the online Housing Land Map as a key part of the Rebuilding Ireland initiative provides with details of Local Authority owned and Land Aggregation Scheme sites throughout the State. Utilising the dataset provided by this portal, the following sections focus on the land supply and their current zoning objectives within the County Laois. As such, it represents an insight to the existing land bank of the County. Available lands throughout the County are illustrated in the Figure below, the details on these lands are summarised in tables as the following.

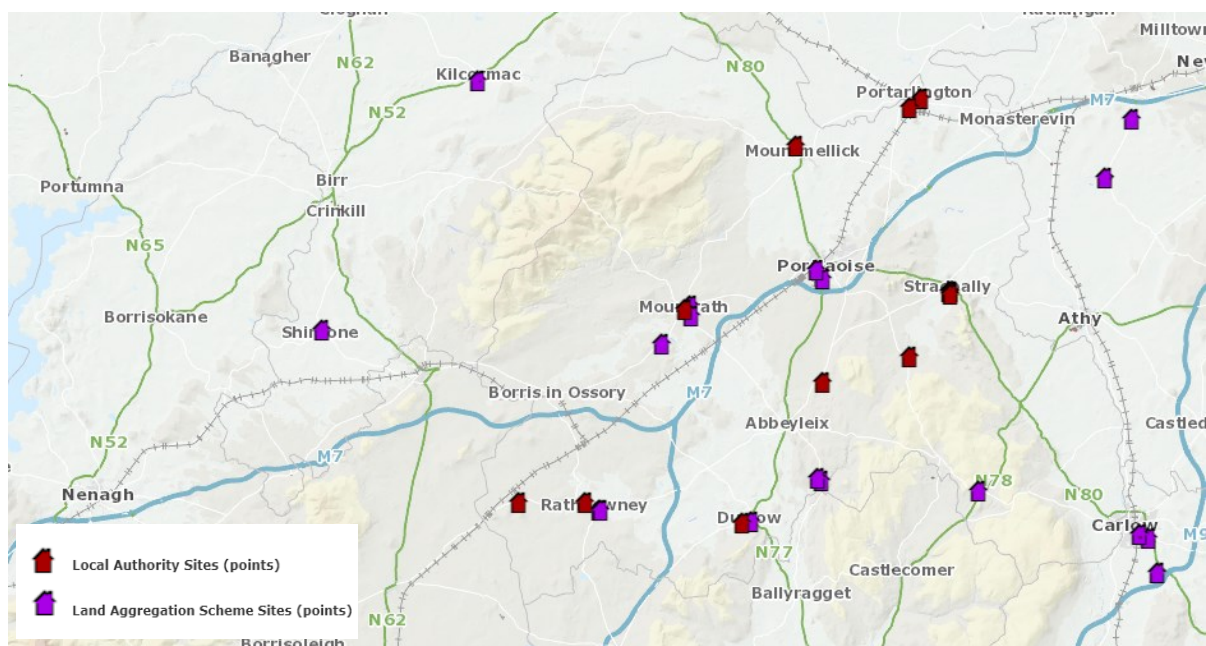


Figure 20. Spatial Distribution of Lands Owned by LA of Land Aggregation Scheme in the County

4.3.1 Local Authority Sites

The details on the Local Authority Sites within the County Laois, including the zoning objectives and site area can be found in Table 38 below.

Table 38. Details of the Local Authority Sites

Location	Site Area (ha.)	Greenfield	Zoning
Bracklone Street Portarlinton	0.49	Yes	Residential
Rear of gardens at Bracklone Street Portarlinton (except No. 5)	0.33	Yes	Residential
The Green, Stradbally	0.29	Yes	Residential
The Green, Stradbally	1.41	Yes	Residential
Corrig, Stradbally	1.30	Yes	Residential
Timahoe	1.06	Yes	Residential
Cork Road, Durrow	2.95	Yes	Residential
Errill	1.82	Yes	Residential
Pattison Estate, Mountmellick	0.36	Yes	Residential
Shannon Street, Mountrath	0.13	No	Residential
Ballyroan	2.39	Yes	Residential
Castletown – Serviced Sites	1.64	Yes	Residential
Kingdom Hall, Portlaoise	0.077	No	Residential
Hepburn Court, Portlaoise	0.26	No	Residential
Knockmay, Portlaoise	1.74	Yes	Residential
54 Hillview, Portlaoise	0.028	No	Residential
Moore Street, Rathdowney	0.046	No	Residential
Green Road, Portlaoise	0.049	No	Residential
Cemetery Road, Mountrath	0.097	Yes	Residential
Rush Hall, Mountrath	0.096	Yes	Residential
Rear of Kirwan Park, Mountmellick	0.73	Yes	Residential
Tullamore Road, Clonaslee	0.24	Yes	Residential
Ballymorris Road, Portarlinton	0.99	Yes	Residential
Woodbrook, Mountrath	0.18	Yes	Residential
Portlaoise Road, Abbeyleix	4.02	Yes	Residential
Leylandii Drive, Balltlinan	0.077	Yes	Residential
Mooreville Terrace, Rathdowney	0.404	Yes	Residential
Coolroe, Ballybrittas - Rural	0.404	Yes	N/A
Harbour Court, Mountmellick	0.18	Yes	Residential
Tyrells land, Stradbally Road, Portlaoise	2.02	Yes	Residential
Iona, Abbeyleix Road, Portlaoise	0.069	No	Town Centre
County Hotel, Main Street, Portlaoise	0.051	No	Town Centre
Clonroosk, Portlaoise	0.33	Yes	Residential
Abbeyleix Road, Portlaoise	1.41	Yes	Residential

Source: Laois County Council

4.3.2 Land Aggregation Scheme

The details on the Local Authority Sites within the County Laois, including the zoning objectives, site area, and the potential number of units that can be supplied on them can be found in the Table below.

Table 39. Details of the Land Aggregation Scheme in County Laois

Location	Site Area (ha.)	Zoning	Serviced	LAGS/LA	Development Potential
Castletown	1.50	not zoned	Yes	LAGS	The rural village location of Castletown is close to Mountrath. The potential number of units for the site is 20.
Portlaoise Road, Mountrath	3.10	Community/ Education/ Institutional	-	LAGS	The site is located on the east side of Mountrath and adjacent to filling station and services to existing development. Should the current zoning change there would be potential for 40 units.
Golflinks Road, Rathdowney	4.2	Tourism	-	LAGS	Large site in small town location removed from the town centre and not zoned for housing.
Woodbrook, Mountrath	1.73	Residential	Yes	LAGS	The site is located to the south of the town off the R430 and is adjacent to existing housing. The potential number of units for this site is 20.
Bride Street Ballinakill	1.214	Residential	YES	LA	This site is located to the west of the Village square. No development potential in the medium term.
Derry Road Durrow	0.906	Residential	YES	LAGS	This site is located south of the N77 opposite the Catholic Church. The potential number of units for the site is 20-30 and is been considered for medium term development.
Doonane, Crettyyard	0.728	Residential	YES	LAGS	This site is located south of the R430 opposite Newtown NS. The potential number of units for the site is 18 and is been considered for medium term development to provide 6 units in Phase 1 development.
Adjoining cemetery Ballinakill	1.182	Community/ Education/ Institutional	YES	LAGS	This site is located to the south of the Village. No development potential in the medium term.

Source: Laois County Council

05

ESTIMATING HOUSING NEED & DEMAND

5.0 ESTIMATING HOUSING NEED AND DEMAND

The determination of housing need and supply over the operational period of the Development Plan is a fundamental cornerstone of the Housing Strategy. Having reviewed and analysed the existing needs and supply in prior sections, the following section is focused on the projection and determining the future housing requirements to cover the plan period of 2021-2027.

5.1 Determination of Average Household Size and Additional Household Requirements

Several population scenarios for County Laois have been investigated to 2031 and a 'Policy-Intervention Scenario' has been applied for the purpose of this analysis into the county's housing needs. In accounting for the NPF/RSES population growth targets, an interpolation of the required level of change per annum was developed for County Laois from baseline year 2016 to NPF/RSES target years 2026 and 2031; thus producing annualised figures between the 2021 and 2027 lifetime of the Plan. Using this scenario, the projected growth in population over the plan period is identified in the Table below. This sets out that the population of County Laois will increase by 6,280 people during the plan period to a total of 94,700 people in 2027 (see Table 15). As mentioned earlier, Census 2016 results indicate that Laois had a population to household ratio of 2.9 which is higher than the state average of 2.7. However, the NPF states that this is expected to decline to around 2.5 by 2040, while also acknowledging that household sizes in urban areas tend to be smaller than in the suburbs or rural parts of the country. Analysis of historic trends has undertaken to determine the evidence-based graduated reduction in average household size with an annualised rate of decline of 0.69%, which is slightly less than the national average of 0.71%.

Table 40. Average Household Size Trends in County Laois 1981-2016

	1981	1986	1991	1996	2002	2006	2011	2016
Average Household Size	3.8	3.7	3.5	3.3	3.1	2.9	2.8	2.9

Source: CSO StatBank

This rate has been applied to the average household size for County Laois from the 2016 Census to establish the trend adjusted average household size that has been projected during the Plan period. As shown in Table 41, the average household size is thus projected to be 2.7 at the end of the Plan period. By applying the relevant household size to projected population increases, it is possible to forecast required household numbers to the end of the plan period. As summarised in the same table, the number of households in County Laois is expected to increase from 29,107 households in 2016 to 35,126 households in 2027 providing a total demand of 3,886 households, or the equivalent of 555 units per annum on average.

Table 41. Projected Households over the Plan Period

Year	Total Population in County Laois	Average Household Size in County Laois	No. of Households	No. of Anticipated Houses per Annum	Total Anticipated Houses 2021-2027	Average Anticipated Houses per Annum 2021-2027
2006	67,059	2.97	22,591	-	-	
2011	80,559	2.88	28,020	-	-	
2016	84,697	2.91	29,107	-	-	
2017	85,627	2.89	29,630	523	-	
2018	86,558	2.87	30,161	531	-	
2019	87,488	2.85	30,698	537	-	
2020	88,418	2.83	31,240	543	-	
2021	89,349	2.81	31,789	549	-	
2022	90,279	2.79	32,344	555	-	
2023	91,209	2.77	32,905	561	-	
2024	92,139	2.75	33,472	567	-	
2025	93,070	2.73	34,046	574	-	
2026	94,000	2.71	34,625	580	-	
2027	94,700	2.70	35,126	501	3,886	555

Regarding the number of anticipated houses per annum as summarised in Table 41 above, and the number of completed units over 2016-2020 in Table 27, the housing allocation is reflected in the Table below.

Table 42. Housing Allocation in County Laois over 2021-2027

Pop 2016	Pop Allocation	NPE Projected Pop 2027	Projected Pop Increase to 2016-2027	Housing Allocation 2016-2027	Approx. Units Completed 2016-2020	Housing Allocation 2021-2027	Residential Units to be Delivered on Infill/Brownfield Sites	Residential Units to be Delivered on Greenfield Sites	Quantum of Greenfield Land Required for Residential Development
84,697	100%	94,700	10,003	6,019	817	5,202	1,719	3,483	105.64

5.2 Calculation of Estimated Distribution of Household Disposable Incomes

Disposable income is the amount of income, after tax is deducted, that is available to a household or individual for spending and saving. It functions as an important measure of housing affordability in any given area, i.e. the ability of a household to purchase their own home. This calculation of an estimated distribution has been based on the weekly and annual disposable household incomes at national level from the 'Household Budget Survey 2015-2016' by the CSO. These national incomes have been adjusted to county level based on the application of an inflator/deflator rate. A deflator rate of 0.857 has been applied to County Laois based on the CSO report on County incomes and Regional GDP from 2016, which is the baseline year at the time of the survey. Table 19 below illustrates the outputs of this exercise,

with findings disaggregated into ten income deciles and applied to the proportion of households within each decile. This indicates that in 2017 after taxes, about one third of the households in County Laois have an average annual disposable income of €21,090, or the equivalent of €405.58 per week.

Table 43. Calculation of the Distribution of Disposable Household Incomes (Annual and Weekly) during the Baseline Year

Decile	Average Weekly Income 2009-10	Average Weekly Income 2015-16	Change from 2009-10 to 2015-16	Assumed Annual Income Increase 2010-16	Adjusted Average Weekly Income 2017	Households in Each Category 2015-16	Average Annual Income 2017	Laois County Deflator	Laois Average Annual Income 2017	No. Households in Laois 2015-16
	€	€	%	%	€	%	€	-	€	-
1 st Decile	188.91	197.40	4.5	0.90	199.17	9.83	10,357.06	0.857	8,874.61	2,860
2 nd Decile	300.98	324.40	7.8	1.56	329.45	10.57	17,131.32	0.857	14,679.25	3,077
3 rd Decile	431.28	465.86	8.0	1.60	473.33	10.47	24,613.19	0.857	21,090.21	3,047
4 th Decile	549.20	593.56	8.1	1.62	603.15	10.44	31,363.73	0.857	26,874.51	3,039
5 th Decile	669.20	725.85	8.4	1.68	738.08	10.25	38,380.05	0.857	32,886.56	2,983
6 th Decile	802.56	865.88	7.9	1.58	879.54	9.94	45,736.24	0.857	39,189.83	2,894
7 th Decile	972.03	1,026.46	5.6	1.12	1,037.96	9.62	53,973.69	0.857	46,248.22	2,800
8 th Decile	1,183.82	1,215.55	2.7	0.54	1,222.07	9.65	63,547.44	0.857	54,451.64	2,809
9 th Decile	1,472.66	1,473.25	0.0	0.01	1,473.37	9.61	76,615.14	0.857	65,648.91	2,796
10 th Decile	2,289.38	2,229.05	-2.6	-0.53	2,217.30	9.62	115,299.70	0.857	98,796.39	2,800
Total			5.0	1.0		100.0				29,107

5.3 Calculation of Average Annual Household Disposable Income Distribution

To inform the projection of affordability in County Laois during the plan period, the baseline figures have been inflated annually using the forecasted growth rates in relation to Gross Domestic Product (GDP). The forecasted GDP rates have considered the estimated distribution of household disposable incomes for 2016 from the Household Budget Survey by the CSO and have been determined based on historic and the latest forecasted GDP growth rates during the plan period from the Department of Finance (Monthly Economic Bulletin: February 2020), the Central Bank (Quarterly Bulletin: QB1 - February 2020), and the ESRI (Quarterly Economic Commentary - Winter 2020). Based on the latest and current economic outlook, a GDP growth rate of 8.2% and 6% was considered during 2018 and 2019 respectively, whilst 3.1% is expected during 2020 and 2021, and a 2.9% GDP growth rate was conservatively applied for the remainder years pertaining to the plan period. The key outputs of this calculation are shown on the Table below, which highlights a notable difference in average annual disposable incomes across each of the ten deciles for each plan period year.

Table 44. Calculation of Average Annual Household Disposable Income Distribution in County Laois (€)

	2021	2022	2023	2024	2025	2026	2027
% Growth	3.1%	2.9%	2.9%	2.9%	2.9%	2.9%	2.9%
1st Decile	10,819.32	11,133.08	11,455.94	11,788.16	12,130.02	12,481.79	12,843.76
2nd Decile	17,895.93	18,414.91	18,948.94	19,498.46	20,063.92	20,645.77	21,244.50
3rd Decile	25,711.73	26,457.37	27,224.63	28,014.15	28,826.56	29,662.53	30,522.74
4th Decile	32,763.56	33,713.70	34,691.40	35,697.45	36,732.68	37,797.92	38,894.06
5th Decile	40,093.03	41,255.73	42,452.15	43,683.26	44,950.07	46,253.62	47,594.98
6th Decile	47,777.54	49,163.09	50,588.82	52,055.90	53,565.52	55,118.92	56,717.37
7th Decile	56,382.65	58,017.74	59,700.26	61,431.57	63,213.08	65,046.26	66,932.60
8th Decile	66,383.69	68,308.82	70,289.78	72,328.18	74,425.70	76,584.04	78,804.98
9th Decile	80,034.63	82,355.64	84,743.95	87,201.52	89,730.37	92,332.55	95,010.19
10th Decile	120,445.76	123,938.69	127,532.91	131,231.37	135,037.08	139,953.15	142,982.79

5.4 Calculation of Average Monthly Household Disposable Income Distribution

As outlined in the previous sub-section, these calculations have been based on the same forecasted data but scaled to provide the monthly estimates of disposable income per household in each decile as described in the Table below.

Table 45. Calculation of Average Monthly Household Disposable Income Distribution in County Laois (€)

	2021	2022	2023	2024	2025	2026	2027
% Growth	3.1%	2.9%	2.9%	2.9%	2.9%	2.9%	2.9%
1st Decile	901.61	927.76	954.66	982.35	1,010.83	1,040.15	1,070.31
2nd Decile	1,491.33	1,534.58	1,579.08	1,624.87	1,671.99	1,720.48	1,770.37
3rd Decile	2,142.64	2,204.78	2,268.72	2,334.51	2,402.21	2,471.88	2,543.56
4th Decile	2,730.30	2,809.48	2,890.95	2,974.79	3,061.06	3,149.83	3,241.17
5th Decile	3,341.09	3,437.98	3,537.68	3,640.27	3,745.84	3,854.47	3,966.25
6th Decile	3,981.46	4,096.92	4,215.74	4,337.99	4,463.79	4,593.24	4,726.45
7th Decile	4,698.55	4,834.81	4,975.02	5,119.30	5,267.76	5,420.52	5,577.72
8th Decile	5,531.97	5,692.40	5,857.48	6,027.35	6,202.14	6,382.00	6,567.08
9th Decile	6,669.55	6,862.97	7,062.00	7,266.79	7,477.53	7,694.38	7,917.52
10th Decile	10,037.15	10,328.22	10,627.74	10,935.95	11,253.09	11,579.43	11,915.23

5.5 Determination of Distribution of Total Anticipated Households

This calculation has been based on the outputs related to the Determination of Average Household Size and Additional Households Required (Table 27) in relation to the number of private households per year during the plan period, and the distribution of housing units in the State from the Household Budget Survey 2015-2016 by the CSO. Table 31 below identifies the distribution of total households across each of the ten deciles during the plan period.

Table 46. Determination of Distribution of Total Anticipated Households per Decile

Range	% Households	2021	2022	2023	2024	2025	2026	2027
1 st Decile	9.83%	3,124	3,178	3,233	3,289	3,345	3,402	3,451
2 nd Decile	10.57%	3,361	3,419	3,479	3,539	3,599	3,660	3,713
3 rd Decile	10.47%	3,328	3,386	3,445	3,504	3,564	3,625	3,677
4 th Decile	10.44%	3,319	3,377	3,435	3,495	3,554	3,615	3,667
5 th Decile	10.25%	3,258	3,315	3,373	3,431	3,490	3,549	3,600
6 th Decile	9.94%	3,161	3,216	3,272	3,328	3,385	3,443	3,493
7 th Decile	9.62%	3,059	3,112	3,166	3,220	3,276	3,331	3,380
8 th Decile	9.65%	3,068	3,121	3,176	3,230	3,286	3,341	3,390
9 th Decile	9.61%	3,054	3,107	3,161	3,216	3,271	3,326	3,374
10 th Decile	9.62%	3,059	3,112	3,166	3,220	3,276	3,331	3,380
Total	100.00%	31,789	32,344	32,905	33,472	34,046	34,625	35,126

5.6 Determination of Distribution of Additional Anticipated Households

As outlined in the previous sub-section, these calculations have been based on the same forecasted data but scaled to provide the anticipated households in each decile as described in the Table below.

Table 47. Distribution of Additional Households per Decile in County Laois (no. of households)

Range	% Households	2021	2022	2023	2024	2025	2026	2027
1 st Decile	9.83%	54	55	55	56	56	57	49
2 nd Decile	10.57%	58	59	59	60	61	61	53
3 rd Decile	10.47%	57	58	59	59	60	61	52
4 th Decile	10.44%	57	58	59	59	60	61	52
5 th Decile	10.25%	56	57	58	58	59	59	51
6 th Decile	9.94%	55	55	56	56	57	58	50
7 th Decile	9.62%	53	53	54	55	55	56	48
8 th Decile	9.65%	53	54	54	55	55	56	48
9 th Decile	9.61%	53	53	54	54	55	56	48
10 th Decile	9.62%	53	53	54	55	55	56	48
Total	100.00%	549	555	561	567	574	580	501

5.7 Calculation of Projected House Price Bands

The following section is providing a calculation of projected house prices bands based upon the percentage split of 8 price bands. Accordingly, a background assessment of the housing sale prices in the current market is conducted. In this regard, 2019 is taken as the baseline year and several databases were used to capture the relevant data on property transactions, including Residential Property Price Register, CSO and Daft. As demonstrated in the Table below, 904 transactions occurred in County Laois across the 8 price bands during 2019. The

greatest share of these transactions is for those categorised as €150,000 to 200,000 price band (36.6%), while the least transactions were in the €350,000-400,000 price band.

Table 48. Overview of House Sales in County Laois - 2019

Price Band (€)	Number of Transactions	% of Total Sales
0-100,000	147	16.3
100,000-150,000	194	21.5
150,000-200,00	328	36.3
200,000-250,000	125	13.8
250,000-300,000	53	5.9
300,000-350,000	24	2.7
350,000-400,000	13	1.4
400,000+	20	2.2
Total	904	100.0

As part of the price assessment and projection for Laois, it is important to determine, generally, current house price sales and how they may fluctuate over the plan period. For this reason, historic house prices have been investigated through analysis of the Residential Property Price Register, CSO and Daft data in order to contextualise general trends and how they can influence the market. As illustrated in Table 49, the recession and subsequent period of economic growth has resulted in large variances in house prices and in year-on-year growth metrics. In the Table below, the change rate in CSO data and RPPR are calculated, while the Daft rates are copied directly from the reports which are accessible through the Daft portal. Noted that checking these rates with the given house prices in the same portal, several discrepancies have been identified. These has been marked in the table and the calculated ones are listed in the footnote.

Table 49. Historic Year-on-year Change in House Price Metrics in County Laois

Year	Annual Change in Average House Sale Prices (CSO)	Annual Change in Average House Sale Prices (Daft) ⁵	Annual Change in Average House Sale Prices (Daft)	Annual Change in Average House Sale Prices (RPPR)	Annual Change in Median House Sale Prices (RPPR)
2011	-25.7	-23.9	-23.6	-23.7	-26.7
2012	-23.5	-13.0	-19.3	-23.8	-27.3
2013	-1.4	-16.2	-42.5	4.1	-12.5
2014	19.2	3.3	50.6	2.3	19.6
2015	18.7	14.2	53.7	24.6	25.4
2016	6.2	9.7	9.7	22.8	20.0
2017	14.2	5.5	5.5	-1.3	9.1
2018	8.3	12.0	12.0	5.1	10.5
2019	10.5	-1.9	-1.9	8.7	11.8

⁵ The rates in this column are directly copied from the Daft.ie House Price reports, while the next column consists the rates which has been calculated utilising the average house prices by the same reports.

Comparing the house price changes across these sources, however, there is still discrepancies which cannot be justified. As such, the average of annual house prices based on different sources of data has been calculated. The results are summarised in the Table below.

Table 50. Average House Prices by Various Sources of Data in County Laois 2011-2019

	Annual Change in Average House Sale Prices (CSO)	Annual Change in Average House Sale Prices (Daft)	Annual Change in Average House Sale Prices (RPPR)	Annual Change in Median House Sale Prices (RPPR)
Average 2011-2019	2.9	-1.1	2.1	3.3

Considering the recorded property transactions in the Property Services Regulatory Authority as the baseline data, an assuming on the context of improving economic conditions and its associated influence on house prices, it is anticipated that the distribution per price band will continue to change during the plan period as demonstrated in the Table below.

Table 51. Calculation of Projected Distribution of Houses by Price Band in County Laois during the Plan Period

Price Band (×1000€)	Annualised Change	2019	2020	2021	2022	2023	2024	2025	2026	2027
0-100	0.088	16.26	14.74	13.29	11.92	10.64	9.45	8.36	7.36	6.46
100-150	0.113	21.46	19.89	18.34	16.83	15.36	13.96	12.63	11.37	10.20
150-200	0.286	36.28	38.85	41.38	43.85	46.24	48.53	50.71	52.77	54.69
200-250	0.229	13.83	14.15	14.41	14.59	14.70	14.75	14.73	14.65	14.51
250-300	0.308	5.86	6.38	6.92	7.45	7.99	8.53	9.06	9.59	10.11
300-350	0.071	2.65	2.37	2.10	1.86	1.63	1.43	1.24	1.08	0.93
350-400	0.117	1.44	1.34	1.24	1.14	1.04	0.95	0.86	0.78	0.70
400+	0.233	2.21	2.27	2.32	2.36	2.39	2.40	2.41	2.40	2.39
Total	-	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00

This information has supported the calculation of projected house price bands based on the percentage split of the eight price bands (Table 51) and the average price of each band. This reflects market changes during the Plan period as summarised in the Table below.

Table 52. Projected Growth Rate of House Prices in County Laois

Avg. price in each band (×€1000)	2019	2020	2021	2022	2023	2024	2025	2026	2027
1st Band: 50	249591	230229	211227	192778	175054	158196	142317	127483	113471
2nd Band: 125	823481	776853	728927	680372	631852	583975	537293	492223	448073
3rd Band: 175	1949187	2124087	2302239	2482252	2662859	2842894	3021418	3197384	3362127
4th Band: 225	955068	994684	1030375	1061751	1088572	1110712	1128194	1141037	1146703
5th Band: 275	494937	548496	604583	662912	723206	785198	848660	913317	976665
6th Band: 325	264872	240501	217199	195126	174413	155151	137393	121147	106143
7th Band: 375	165545	156660	147454	138062	128618	119244	110054	101138	92354
Average House Price	163.32	166.12	168.82	171.41	173.93	176.18	178.33	180.39	182.21
Annual Change (%)	-7.60	1.71	1.63	1.53	1.47	1.29	1.22	1.15	1.01

As compared the indicative house price metrics in Table 52 with the average growth rate of house prices in the County over 2011-2019 in Table 50, the projected rates are aligned with the historical trends of housing prices in Laois. In the next step, the projected growth rate of

house prices in the County were applied to each price band in order to forecast house prices in each price bracket. The results are summarised in the following Table.

Table 53. Calculation of Projected House Price Bands during the Plan Period

Year	Projected Avg. Price Change	1st Band		2nd Band		3rd Band		4th Band		5th Band		6th Band		7th Band	
2019	-	100,000	100,001	150,000	150,001	200,000	200,001	250,000	250,001	300,000	300,001	350,000	350,001	400,000	
2020	1.71	101712	101713	152568	152569	203424	203425	254280	254281	305137	305138	355993	355994	406849	
2021	1.63	103368	103369	155051	155052	206735	206736	258419	258420	310103	310104	361786	361788	413470	
2022	1.53	104953	104954	157430	157431	209906	209907	262383	262384	314859	314860	367336	367337	419812	
2023	1.47	106496	106497	159744	159745	212992	212994	266241	266242	319489	319490	372737	372738	425985	
2024	1.29	107873	107874	161810	161811	215746	215747	269683	269684	323619	323620	377556	377557	431492	
2025	1.22	109194	109195	163790	163791	218387	218388	272984	272985	327581	327582	382177	382179	436774	
2026	1.15	110449	110451	165674	165675	220899	220900	276123	276125	331348	331349	386573	386574	441798	
2027	1.01	111569	111570	167354	167355	223138	223139	278923	278924	334707	334708	390492	390493	446276	

5.8 Calculation of Mortgage Capacity of Households

The following section is providing a determination as to whether households in each decile can qualify for a mortgage that enables them to purchase a house in the lowest price band under the current macro-prudential rules, as set out by the Central Bank of Ireland. Accordingly, the Central Bank of Ireland have measures in place that set limits on size of mortgages that consumers can borrow through the use of loan-to-value (LTV) and loan-to-income (LTI) limits (see Section 3.3.5). The LTI limit restricts the amount of money that households can borrow to a maximum of 3.5 times their gross annual income. Using the projected annual income in Section 5.3, the mortgage capacity for households in County Laois per decile is determined as per the following Table.

Table 54. Mortgage Capacity of Households per Decile (€) in County Laois based on Central Bank Rules

Decile	2021	2022	2023	2024	2025	2026	2027
1 st Decile	37,868	38,966	40,096	41,259	42,455	43,686	44,953
2 nd Decile	62,636	64,452	66,321	68,245	70,224	72,260	74,356
3 rd Decile	89,991	92,601	95,286	98,050	100,893	103,819	106,830
4 th Decile	114,672	117,998	121,420	124,941	128,564	132,293	136,129
5 th Decile	140,326	144,395	148,583	152,891	157,325	161,888	166,582
6 th Decile	167,221	172,071	177,061	182,196	187,479	192,916	198,511
7 th Decile	197,339	203,062	208,951	215,010	221,246	227,662	234,264
8 th Decile	232,343	239,081	246,014	253,149	260,490	268,044	275,817
9 th Decile	280,121	288,245	296,604	305,205	314,056	323,164	332,536
10 th Decile	421,560	433,785	446,365	459,310	472,630	486,336	500,440

Using the first three deciles and the fourth decile in 2027 as key variables, the number of households that can/cannot be qualified has been determined based upon those income

deciles that can meet the Central Bank requirements. The results are colour coded in the following Table, with green determined qualified households.

Table 55. Determination of Mortgage Qualification for Households

Year	Decile	Additional Anticipated Households	Upper Value of Cheapest House Price Band	Min. LTV (90% of Cheapest House Price)	Max. LTI (3.5 LTI)	Mortgage Qualified Households	Households Not Qualified for a Mortgage
2021	1 st Decile	54	103368	93031	37868	0	54
	2 nd Decile	58			62636	0	58
	3 rd Decile	57			89991	0	57
	4 th Decile	57			114672	57	0
	5 th Decile	56			140326	56	0
	6 th Decile	55			167221	55	0
	7 th Decile	53			197339	53	0
	8 th Decile	53			232343	53	0
	9 th Decile	53			280121	53	0
	10 th Decile	53			421560	53	0
	Total	549	-	-	-	380	169
2022	1 st Decile	55	104953	94458	37868	0	55
	2 nd Decile	59			62636	0	59
	3 rd Decile	58			89991	0	58
	4 th Decile	58			114672	58	0
	5 th Decile	57			140326	57	0
	6 th Decile	55			167221	55	0
	7 th Decile	53			197339	53	0
	8 th Decile	54			232343	54	0
	9 th Decile	53			280121	53	0
	10 th Decile	53			421560	53	0
	Total	555	-	-	-	384	171
2023	1 st Decile	55	106496	95846	37868	0	55
	2 nd Decile	59			62636	0	59
	3 rd Decile	59			89991	0	59
	4 th Decile	59			114672	59	0
	5 th Decile	58			140326	58	0
	6 th Decile	56			167221	56	0
	7 th Decile	54			197339	54	0
	8 th Decile	54			232343	54	0
	9 th Decile	54			280121	54	0
	10 th Decile	54			421560	54	0
	Total	561	-	-	-	388	173
2024	1 st Decile	56	107873	97086	37868	0	56
	2 nd Decile	60			62636	0	60
	3 rd Decile	59			89991	0	59
	4 th Decile	59			114672	59	0

	5 th Decile	58			140326	58	0
	6 th Decile	56			167221	56	0
	7 th Decile	55			197339	55	0
	8 th Decile	55			232343	55	0
	9 th Decile	54			280121	54	0
	10 th Decile	55			421560	55	0
	Total	567	-	-	-	392	175
2025	1 st Decile	56	109195	98276	37868	0	56
	2 nd Decile	61			62636	0	61
	3 rd Decile	60			89991	0	60
	4 th Decile	60			114672	60	0
	5 th Decile	59			140326	59	0
	6 th Decile	57			167221	57	0
	7 th Decile	55			197339	55	0
	8 th Decile	55			232343	55	0
	9 th Decile	55			280121	55	0
	10 th Decile	55			421560	55	0
Total	574	-	-	-	397	177	
2026	1 st Decile	57	110449	99404	37868	0	57
	2 nd Decile	61			62636	0	61
	3 rd Decile	61			89991	0	61
	4 th Decile	61			114672	61	0
	5 th Decile	59			140326	59	0
	6 th Decile	58			167221	58	0
	7 th Decile	56			197339	56	0
	8 th Decile	56			232343	56	0
	9 th Decile	56			280121	56	0
	10 th Decile	56			421560	56	0
Total	580	-	-	-	401	179	
2027	1 st Decile	49	111569	100412	37868	0	49
	2 nd Decile	53			62636	0	53
	3 rd Decile	52			89991	0	52
	4 th Decile	52			114672	52	0
	5 th Decile	51			140326	51	0
	6 th Decile	50			167221	50	0
	7 th Decile	48			197339	48	0
	8 th Decile	48			232343	48	0
	9 th Decile	48			280121	48	0
	10 th Decile	48			421560	48	0
Total	501	-	-	-	346	155	

5.9 Calculation of Projected Needs for Ownership

The following section provides a calculation of the approximate affordable house price for each of the ten income deciles per year over the plan period based on the application of the annuity formula. Following this, the calculation of the households surplus and/or deficit per price band has been undertaken with respect to the number of households that can qualify for a mortgage. In estimation of affordable house prices in the County and over the Plan period, the maximum affordable house price for each of the income deciles is based on a number of evidence-based variables that have been established through analysis of historic mortgage lending data from the Central Bank. The key variables that have been used in the annuity formula for the purpose of this assessment are as follows:

- Maximum affordability threshold of 35 per cent;
- LTV ratio of 0.90;
- Annual interest rate (APR) of 3%; and
- Loan term of 29 years.

The results are illustrated in the Table below. It is noted that whilst some of the lower deciles have a maximum affordable house price that is higher than the lowest price band for that year, as outlined in the preceding step, these households would not qualify for a mortgage due to the current Central Bank rules.

Table 56. An Indication of Affordable House Prices (€) in County Laois per Decile

Decile	2021	2022	2023	2024	2025	2026	2027
1 st Decile	81,428	83,790	86,220	88,720	91,293	93,941	96,665
2 nd Decile	134,689	138,594	142,614	146,750	151,005	155,384	159,891
3 rd Decile	193,512	199,124	204,898	210,840	216,955	223,246	229,721
4 th Decile	246,585	253,736	261,095	268,667	276,458	284,475	292,725
5 th Decile	301,749	310,499	319,504	328,769	338,304	348,114	358,210
6 th Decile	359,584	370,012	380,742	391,784	403,145	414,837	426,867
7 th Decile	424,348	436,654	449,317	462,347	475,755	489,552	503,749
8 th Decile	499,618	514,107	529,016	544,357	560,143	576,388	593,103
9 th Decile	602,357	619,826	637,801	656,297	675,330	694,914	715,067
10 th Decile	906,500	932,789	959,840	987,675	1,016,317	1,045,791	1,076,119

As the next step, the housing surplus and deficit per price band has been determined. This is supported by the determination of additional households required (see Table 47 and Table 51), the projected house price bands (see Table 53), the determination of households that can qualify for a mortgage (see Table 55) and the calculation of housing affordability (see Table 56). Accordingly, a surplus in a given price band would be where the number of anticipated housing units 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. On the other hand,

a deficit within a price band would be where there is a fewer households anticipated compared to 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. The results are summarised in the following Table.

Table 57. Housing Shortfall Determination based on Additional Households Qualified for a Mortgage and able to Buy at the Upper Value of House Price Bands

Year	Range	No. of Households Required	Running Total	Affordability Threshold	Household Band Position	Upper Value of House Prices	Households Required in Each Band	% of Housing Units Anticipated per Price Band	No. of Anticipated Housing Units	Housing Shortfall	Housing Shortfall as % of Total Required Households
2021	1 st Decile	54	54	81428	1 st & 2 nd Band	155051	129	13.29	73	56	10.21
	2 nd Decile	58	112	134689	3 rd & 4 th Band	258419	97	18.34	101	-4	-
	3 rd Decile	57	169	193512	5 th & 6 th Band	361786	107	41.38	227	-120	-
	4 th Decile	57	227	246585	7 th Band	413470	55	14.41	79	-24	-
	5 th Decile	56	283	301749	8 th Band	None	-	12.58	69	-	-
	6 th Decile	55	338	359584							
	7 th Decile	53	390	424348							
	8 th Decile	53	443	499618							
	9 th Decile	53	496	602357							
	10 th Decile	53	549	906500							
	Total	549	-	-	-	-	-	100	549	-	10.21
2022	1 st Decile	55	55	83790	1 st & 2 nd Band	157430	128	11.92	66	62	11.14
	2 nd Decile	59	113	138594	3 rd & 4 th Band	262383	97	16.83	93	4	0.64
	3 rd Decile	58	171	199124	5 th & 6 th Band	367336	106	43.85	243	-137	-
	4 th Decile	58	229	253736	7 th Band	419812	55	14.59	81	-26	-
	5 th Decile	57	286	310499	8 th Band	None	-	12.81	71	-	-
	6 th Decile	55	341	370012							
	7 th Decile	53	395	436654							
	8 th Decile	54	448	514107							
	9 th Decile	53	502	619826							
	10 th Decile	53	555	932789							
	Total	555	-	-	-	-	-	100	555	-	11.78
2023	1 st Decile	55	55	86220	1 st & 2 nd Band	159744	128	10.64	60	68	12.18
	2 nd Decile	59	114	142614	3 rd & 4 th Band	266241	97	15.36	86	11	1.95
	3 rd Decile	59	173	204898	5 th & 6 th Band	372737	106	46.24	259	-153	-
	4 th Decile	59	232	261095	7 th Band	425985	54	14.70	82	-28	-
	5 th Decile	58	289	319504	8 th Band	None	-	13.05	73	-	-
	6 th Decile	56	345	380742							
	7 th Decile	54	399	449317							
	8 th Decile	54	453	529016							
	9 th Decile	54	507	637801							
	10 th Decile	54	561	959840							
	Total	561	-	-	-	-	-	100	561	-	14.12

2024	1 st Decile	56	56	88720	1 st & 2 nd Band	161810		9.45	54	-2	-0.43
	2 nd Decile	60	116	146750	3 rd & 4 th Band	269683		13.96	79	-37	-
	3 rd Decile	59	175	210840	5 th & 6 th Band	377556		48.53	275	100	17.67
	4 th Decile	59	234	268667	7 th Band	431492		14.75	84	-150	-
	5 th Decile	58	292	328769	8 th Band	None	-	13.31	75	-	-
	6 th Decile	56	349	391784							
	7 th Decile	55	403	462347							
	8 th Decile	55	458	544357							
	9 th Decile	54	512	656297							
	10 th Decile	55	567	987675							
Total	567	-	-	-	-	-	100	567	-	17.24	
2025	1 st Decile	56	56	91293	1 st & 2 nd Band	163790	127	8.36	48	79	13.77
	2 nd Decile	61	117	151005	3 rd & 4 th Band	272984	96	12.63	72	23	4.06
	3 rd Decile	60	177	216955	5 th & 6 th Band	382177	105	50.71	291	-186	-
	4 th Decile	60	237	276458	7 th Band	436774	55	14.73	85	-30	-
	5 th Decile	59	296	338304	8 th Band	None	-	13.57	78	-	-
	6 th Decile	57	353	403145							
	7 th Decile	55	408	475755							
	8 th Decile	55	464	560143							
	9 th Decile	55	519	675330							
	10 th Decile	55	574	1016317							
Total	574	-	-	-	-	-	100	574	-	17.83	
2026	1 st Decile	57	57	93941	1 st & 2 nd Band	165674	126	7.36	43	83	14.36
	2 nd Decile	61	118	155384	3 rd & 4 th Band	276123	95	11.37	66	29	5.08
	3 rd Decile	61	179	223246	5 th & 6 th Band	386573	231	52.77	306	-75	-
	4 th Decile	61	240	284475	7 th Band	441798	149	14.65	85	64	10.99
	5 th Decile	59	299	348114	8 th Band	None	-	13.85	80	-	-
	6 th Decile	58	357	414837							
	7 th Decile	56	413	489552							
	8 th Decile	56	468	576388							
	9 th Decile	56	524	694914							
	10 th Decile	56	580	1045791							
Total	580	-	-	-	-	-	100	580	-	30.43	
2027	1 st Decile	49	49	96665	1 st & 2 nd Band	167354	107	6.46	32	75	14.90
	2 nd Decile	53	102	159891	3 rd & 4 th Band	278923	81	10.20	51	30	6.05
	3 rd Decile	52	155	229721	5 th & 6 th Band	390492	88	54.69	274	-186	-
	4 th Decile	52	207	292725	7 th Band	446276	45	14.51	73	-27	-
	5 th Decile	51	258	358210	8 th Band	None	-	14.13	71	-	-
	6 th Decile	50	308	426867							
	7 th Decile	48	356	503749							
	8 th Decile	48	405	593103							
	9 th Decile	48	453	715067							
	10 th Decile	48	501	1076119							
Total	501	-	-	-	-	-	100	501	-	20.95	

5.10 Calculation of Projected Needs for Private Rental

The following section is a calculation of the households not meeting the affordability criteria to privately rent a home with respect to the number of households that cannot qualify for a mortgage. In this regard, an estimation of the rental prices by unit types is carried out based upon the rental price changes over a ten-year period up to 2019. To build up the historical trend of rental market in County Laois, the baseline data is captured from the Rental Tenancy Board on the CSO website and summarised in the Table below. As mentioned earlier, there are two Rent Pressure Zones within County Laois, including Graiguecullen and Portarlinton which were designated in July 2019.

Table 58. Rental Price Changes by Unit Type (€) in County Laois over 2010-2019

	One bed	Two bed	Three bed	Four-plus bed	All bedrooms	y-o-y Change
2019	603.75	775.50	840.44	955.58	825.45	8.88
2018	563.78	708.57	766.96	886.36	758.10	8.63
2017	509.84	648.41	709.87	809.30	697.88	9.33
2016	468.58	588.04	652.20	748.70	638.35	10.20
2015	430.89	530.22	595.27	685.86	579.26	7.95
2014	395.27	487.74	555.32	630.17	536.61	3.92
2013	379.41	463.51	539.44	600.25	516.38	-0.74
2012	383.82	467.75	542.20	606.27	520.25	-1.41
2011	397.01	471.14	554.98	611.70	527.68	-6.64
2010	443.35	516.40	587.26	643.60	565.23	-8.32
Average	457.57	565.73	634.39	717.78	616.52	-
Annual Change Rate	3.62	5.02	4.31	4.85	4.60	-

Establishing a demand price per unit type database, then the annual growth rate for each type of unit was calculated, which then was applied to estimate the rent prices in County Laois over the plan period. The results are summarised in the Table below.

Table 59. Estimated Rental Prices by Unit Type (€) throughout the Plan Period in County Laois

	One bed	Two bed	Three bed	Four-plus bed
2019	604	776	840	956
2020	626	814	877	1002
2021	648	855	914	1050
2022	672	898	954	1101
2023	696	943	995	1155
2024	721	991	1038	1211
2025	747	1040	1083	1269
2026	774	1092	1129	1331
2027	802	1147	1178	1395

As illustrated in Table 55, the three first income deciles in each year over the Plan period were not qualified for a mortgage. Regarding the Maximum affordability threshold of 35%, and based on the projected average monthly household disposable income per decile (see Table 45), the number of households not meeting the *Affordability Criteria* for private rental over the

Plan period has been identified as outlined in Table 60. The households cannot afford private rental are marked in red and are therefore considered to require social housing.

Table 60. Number of Additional Anticipated Household that Do not Qualify for a Mortgage and Cannot Afford Private Rental

	2021	2022	2023	2024	2025	2026	2027
1 st Decile	54	55	55	56	56	57	49
2 nd Decile	58	59	59	60	61	61	53
3 rd Decile	57	58	59	59	60	61	52
Total	112	114	114	116	117	118	102

5.11 Summary of Projected Social Housing Needs

The following section provides an overview of the anticipated social housing needs for Laois County council as set out in the preceding steps and reflects assessments for mortgage qualification and the affordability for ownership and private rental. As outlined in Table 61. Housing shortfall throughout the plan period in County Laois, a total number of 3,886 additional is anticipated over the Plan period, of which 1,200 no. would not be qualified for a mortgage and 793 no. would not qualify for a mortgage and cannot afford private rental either.

Table 61. Housing shortfall throughout the plan period in County Laois

	2021	2022	2023	2024	2025	2026	2027	2021-2027
Number of Additional Anticipated Households	549	555	561	567	574	580	501	3,886
Number of Additional Households not Qualified for a Mortgage	169	171	173	175	177	179	155	1,200
Number of Additional Households not Qualified for a Mortgage and cannot Afford Private Rental	112	114	114	116	117	118	102	793
Housing Shortfall (%)	20.4	20.5	20.3	20.5	20.4	20.3	20.4	20.4

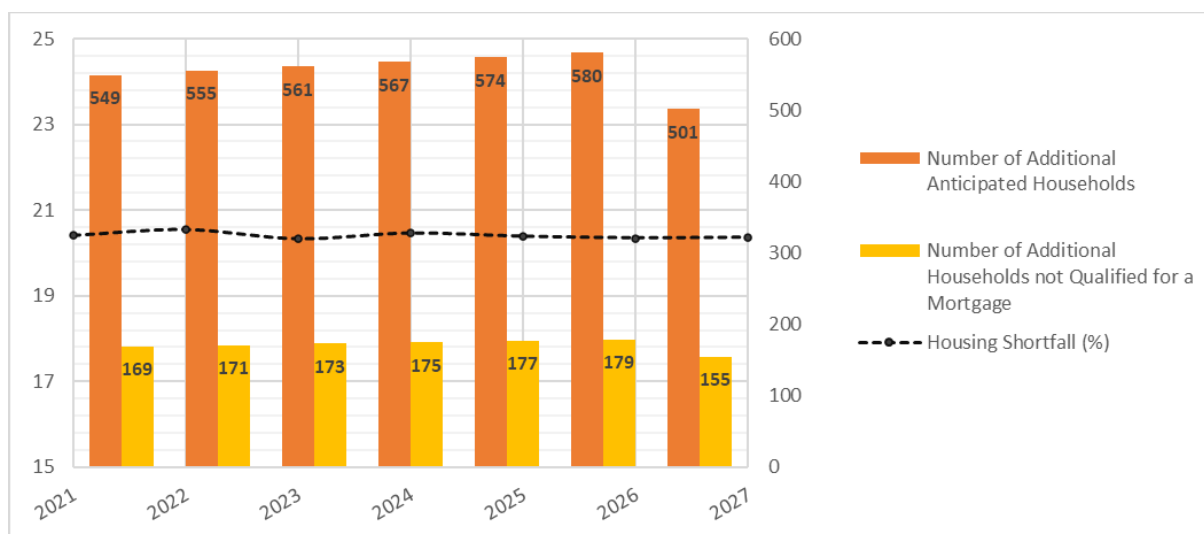


Figure 21. An Overview of Housing Requirements over the Plan Period

06

ANALYSIS OF HOUSING
REQUIREMENTS

6.0 ANALYSIS OF HOUSING REQUIREMENTS

6.1 Overview

The following section provides an overview of the overall housing requirements for County Laois having regard to the supply and demand analysis outputs which has been determined in the previous sections over the Plan period of 2021-2027.

As set out in Section 3.1, the indication of population projection based on a policy-intervention scenario shows that the population of Laois is expected to increase to 89,349 by 2021 and to 94,700 by 2027 with the latter including an increase of 5,351 individuals compared to Census 2016. As outlined in Section 5.1, analysis of the historical trend of households' formation in the County indicates an increase of 35,126 households to 2027. This establishes a total anticipated number of 3,886 households over the Plan period, or the equivalent of 555 households per annum on average.

Furthermore, the households required to fulfil the target as set by the NPF for County Laois from 2016-2027 is 6,019 units as prepared on projected households based on household size on an annual basis. It is assumed based on this that 2,133 units were delivered from 2016 - 2020, however evidence shows 817 units were in fact delivered in the County over the period 2016 -2020. The formula applied in the housing strategy shows for the period of the plan 3,886 units will be required, however the core strategy has been prepared against the total household requirement 6,019 units minus the actual delivery of 817. It is therefore necessary to zone for delivery of 5,202 units on brownfield/infill/greenfield sites to ensure compliance with the overall NPF target as set for the County.

Studying the income profile of the county and calculating the mortgage capacity of the households in Laois as outlined in Sections 5.2 to 5.8 with regard to projection of affordable housing thresholds in the County determines that 1,200 of the 3,886 additional anticipated households will not qualify for a mortgage during the Plan period.

As asserted in Section 93 of the Planning and Development Act 2000, an "eligible person" for "affordable housing" is defined as 'a person who is in need of accommodation and whose income would not be adequate to meet the payments on a mortgage for the purchase of a house to meet his or her accommodation needs because the payments calculated over the course of a year would exceed 35 per cent of that person's annual income net of income tax and pay related social insurance.' This has been applied within this analysis and informs the determination of the social requirement for the Plan period. It should be noted that while some of these households could afford to sustainably repay a loan of a certain size, their inability to qualify for a mortgage precludes them and effectively results in them being considered as having either a social or affordable need.

Applying the above affordability criteria to the anticipated households per annum indicates that of the 1,200 households which are not qualified for a mortgage over the Plan period, 793 no. households (20.4%) do not meet the affordability criteria for the private rental market. These households are therefore considered to require social and affordable housing, which as illustrated in Figure 21 equates to 20.3 to 20.4 per cent of the additional households per annum during the life course of the Plan.

The following provides an analysis of housing requirements in the County, including the estimation of single one-off dwellings, household size cohorts, and household tenure. Moreover, it provides an overview of the specific housing needs in the County that covers the statistics on homeless, travellers’ accommodation, disability, and housing for older people.

6.2 Single One-off Dwellings

As set out by the NPF, Development Plans are required to project the demand for single one-off dwellings throughout the Plan period. According to National Policy Objective 20:

‘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.’

For this purpose and as it is illustrated on Figure 22, the percentage of one-off dwelling granted permissions to the overall housing granted permissions was calculated. Based upon this, a linear extrapolation of the number of granted planning applications for single one-off dwellings over 2006-2019 has been undertaken. This identifies that approximately 49.7% of all granted residential units within any given year have been for single one-off dwellings.

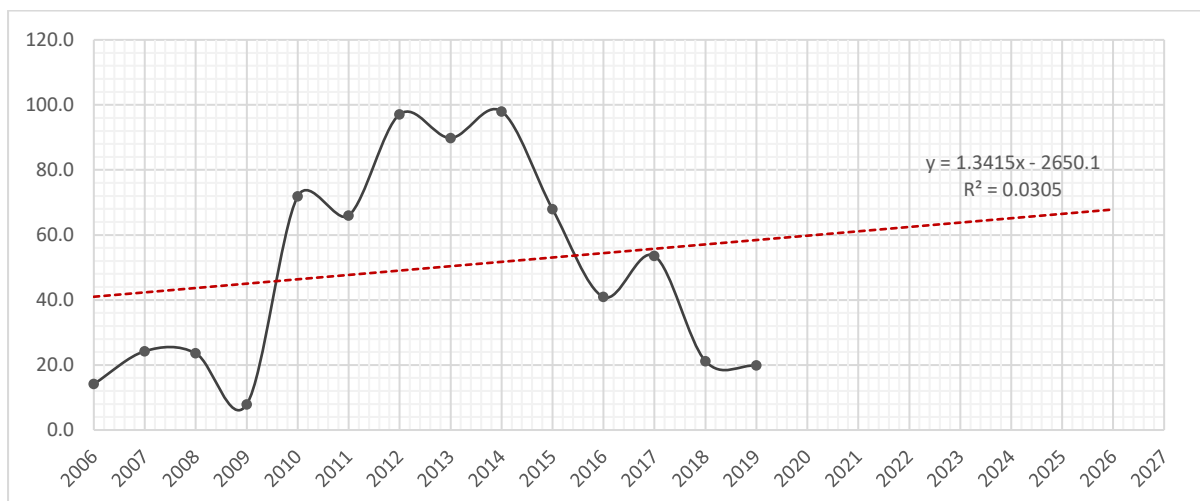


Figure 22. Granted Applications for Single One-Off Dwellings as a % of Total Granted Permissions for Residential Developments over 2006-2019

Following the same trend as of 2006-2019, it is estimated that a total number of 1,785 single one-off houses are expected during the Plan Period, which equates an average of 255 no. one-

off dwellings each year. However, as shown in Figure 22, the number of one-off dwellings since 2006 is not having a straightforward trend. In fact, breaking down its trending since 2006 indicates slight fluctuations over 2006 to 2009, followed by a huge jump from 7.9% in 2009 to 71.9% in 2010. Figures during 2010-2014 shows a great number of granted permissions were allocated to the rural housing, and only after then, a declining trend with a few fluctuations in 2017 can be observed.

Considering the challenges that are faced by the rural communities, ranging from urban generated pressures in some locations, to a declining and ageing population, the structure of the economy and lack of access to quality infrastructure and new technologies, there seems to be an urge for policy intervention which has been quoted as “Cluster Planning” within the NPF and RSES. The cluster planning aims to encourage more focused settlements in the country where “Cluster Living” around towns and villages will emerge. Therefore, the estimation of single one-off dwellings over the Plan Period is based on an intervention-policy approach, where the number of rural housing is aimed to be restricted to an average of 100 no. of units for each year over the Plan Period, equating a total number of 600 no. one-off dwellings during 2021-2027.

6.3 Household Size Cohort

Set out within Section 6.6 of the NPF, household composition and projections are informative evidence input which can assist with building up a better understanding of the future demand market of the County. In this regard, an analysis of the historical trending of the households with a concentration on the household size cohort per household would help identify the patterns of change, and apply that to the projected households to estimate how the composition of households may change during the Plan period.

In this regard, a database of the household size cohorts over 2006-2016 was established. By utilising the annualised growth rate over the mentioned period to 2017-2027, a projection of the share of each cohort from the total households was also provided. The results are illustrated in Figure 23. As it can be seen, the bigger size households, including four-plus households, are forming approximately 49% of the total, while single- and two-person households form approximately 35% of the overall households.

The percentage of household size cohorts within the Plan period then was applied to the household projections. For further details on the household projections refer to section 5.1. The results of the estimation of household size cohorts are summarised in Table 62.

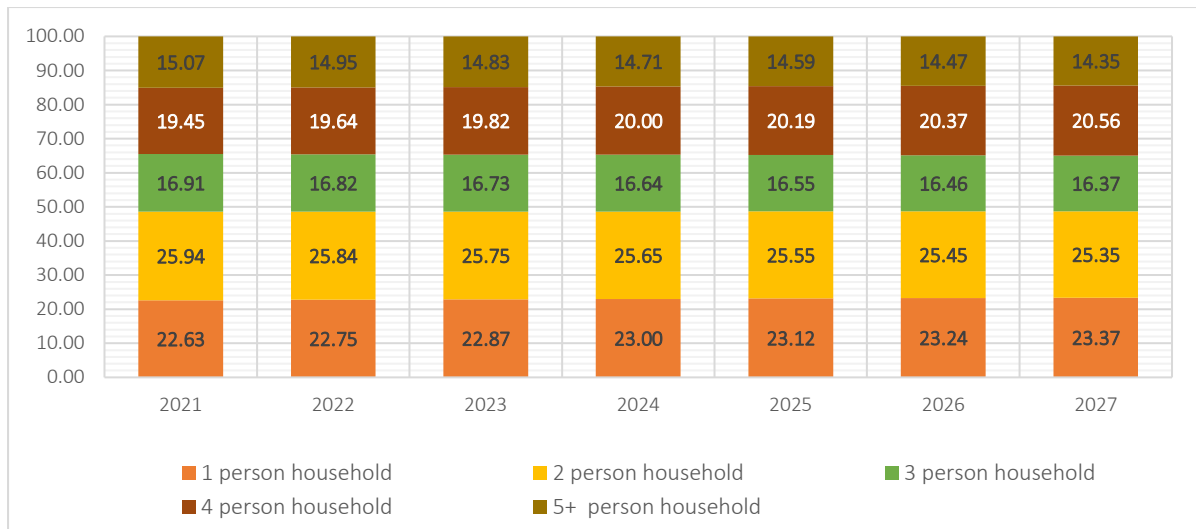


Figure 23. Projection of Household Size Cohorts Trending over the Plan Period

The indication of anticipated households in each cohort shows that two-person households are expected to have 25% of the overall households followed by single-person households (23%). Comparing these outputs with Census 2016 indicate that the 4-person households are expected to have the greatest growth rate (34%), followed by single-person households (28%), and two person households (16%).

This indicates that a growing demand for apartments and smaller-size houses are expected, while the bigger size houses are still having a steady market in the County which by considering the dominant characteristics of the County is not unexpected.

Table 62. Indication of Households in Each Household Size Cohort over the Plan Period

Year	No. of Anticipated Households	1-person Household	2-person Household	3-person Household	4-person Household	5plus-person Household
2017	29,630	6,556	7,799	5,117	5,551	4,607
2018	30,161	6,711	7,911	5,182	5,704	4,653
2019	30,698	6,869	8,023	5,246	5,861	4,699
2020	31,240	7,030	8,134	5,311	6,021	4,744
2021	31,789	7,193	8,247	5,376	6,184	4,789
2022	32,344	7,358	8,359	5,441	6,351	4,834
2023	32,905	7,527	8,472	5,506	6,522	4,879
2024	33,472	7,698	8,585	5,571	6,696	4,923
2025	34,046	7,872	8,698	5,635	6,873	4,967
2026	34,625	8,048	8,812	5,700	7,055	5,011
2027	35,126	8,208	8,904	5,750	7,222	5,042

6.4 Household Tenure

Household tenure is a crucial demographic characteristic, assisting in identifying the demand market, and an analysis of the historical trending of the households with a concentration on the tenure would help identify the patterns of change, and apply that to the projected

households to estimate how the composition of households may change during the Plan period.

In this regard, a database of the household tenure over 2006-2016 was established. By utilising the annualised growth rate over the mentioned period to 2017-2027, a projection of the share of each tenure type from the total households was also provided. The results are illustrated in Figure 24.

As it can be seen, rental market is expected to expand its share in the market, while the owner occupancy is expected to drastically shrink. Assuming a flat rate growth for these markets up to 2027, it is expected that owner occupancy forms approximately 44% of the market, while private rental is anticipated to take almost 45% of the market.

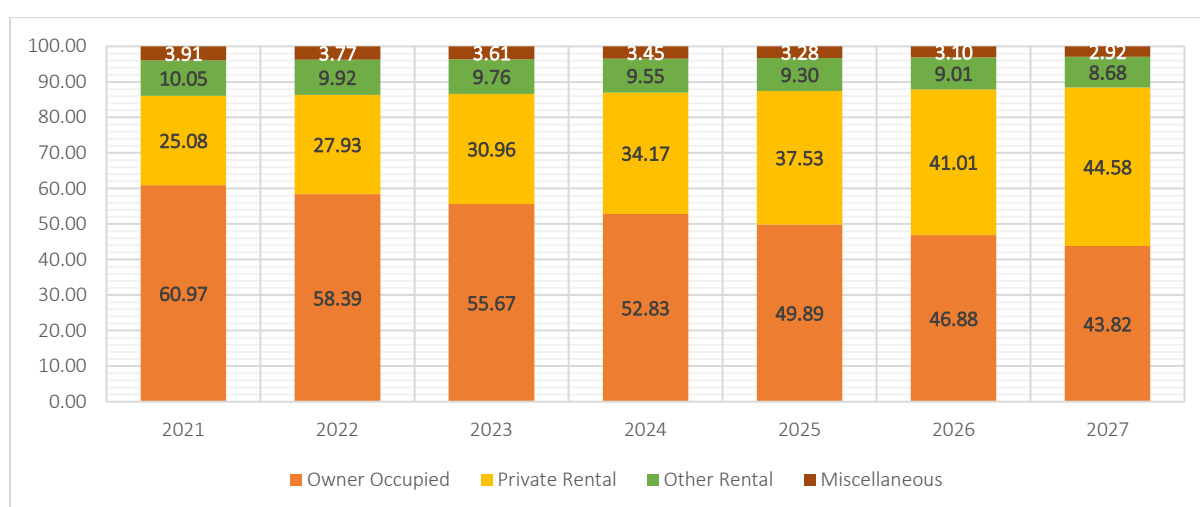


Figure 24. Estimated Share of Housing Tenure of the Projected Households over 2021-2027

An indication of the expected households in each tenure type is summarised in the Table below. In this estimation, the projected number of households is assumed as the fixed variable.

Table 63. Indication of Tenure Composition over the Plan Period

Year	Owner Occupied	Private Rental	Other Rental	Misc.	Total
2006	18,024	1,355	1,957	1,085	22,421
2011	20,832	3,700	2,565	923	28,020
2016	20,835	4,029	2,944	1,299	29,107
2017	20,673	4,649	3,012	1,296	29,630
2018	20,451	5,348	3,073	1,289	30,161
2019	20,164	6,132	3,124	1,278	30,698
2020	19,807	7,005	3,165	1,262	31,240
2021	19,381	7,971	3,194	1,243	31,789
2022	18,885	9,032	3,209	1,218	32,344
2023	18,318	10,188	3,210	1,189	32,905
2024	17,683	11,438	3,196	1,155	33,472
2025	16,986	12,777	3,165	1,117	34,046
2026	16,232	14,199	3,119	1,075	34,625
2027	15,392	15,657	3,050	1,026	35,126

6.5 Specific Housing Needs

6.5.1 Homeless

Provided by the local authorities through the Pathway Accommodation & Support System (PASS), the latest figures on homeless in the Midland region and specifically County Laois is summarised in the Table below.

Table 64. Latest Number of Homeless in Midlands and in County Laois - 2020

	January	February	March	April	May
Midland	109	114	97	98	92
County Laois	30	34	30	31	24

Source: Department of Housing, Planning and Local Government, Homeless Data

6.5.2 Traveller Accommodation Programme 2019-2024

As cited in the review of the planning context, “Laois County Council Traveller Accommodation Programme 2019-2024” conducted an evaluation of the previous Programmes and based upon the assessment of the existing needs, 33 Traveller Group Housing units were included in these Programmes, however, only 6 units (18%) were provided. The current Programme summarises the outcome of previous Programmes as the following Table.

Table 65. An Overview of the Previous Traveller Accommodation Programme

Programme	SSH		GHS		HS		Total	
	Target	Provided	Target	Provided	Target	Provided	Target	Provided
2000-2004	17	72	5	0	5	32	27	104
2005-2008	35	58	5	0	0	0	40	58
2009-2013	31	22	6	6	0	0	37	28
2014-2018	41	48	0	0	0	0	41	48
Total	124	200	16	6	5	32	145	238

Source: Traveller Accommodation Programme 2019-2024, p. 7

Accordingly, it is estimated that there is a projected need for 238 households during the duration of the programme.

Table 66. Current Traveller Accommodation Provision in County Laois

Type of Accommodation	No. of Households
Unauthorised Sites	4
Halting Site	1
LA Group Housing	8
LA Housing	103
AHB Housing	13
Privately Rented	35
Own Sources	13
Shared Accommodation	10
Total	187

Source: Laois County Council

As asserted in the Programme, whilst it has not been possible to establish the accommodation preferences of these 238 individuals, it is envisaged based on the housing applicants' strong preference for standard social housing, that the majority would consider standard accommodation. Moreover, the details of the current Travellers accommodation can be found in the Table below.

6.5.3 Refugee Resettlement Programme 2015-2016

Under Ireland's refugee resettlement programme, Portlaoise was selected as a resettlement location in 2015. Accordingly, 54 Syrian refugees were brought to the town for permanent resettlement. Under Laois Refugee Resettlement Programme, 54 Syrian refugees have been allocated social housing in Laois. The Project officially closed in June 2016.

6.5.4 Laois Refugee Resettlement Programme 2019

As part of the Irish Refugee Protection Programme, and in line with the UN Resettlement Programme, the main objective of the Laois Refugee Resettlement Programme 2019 is to support recently arrived refugees from Syria who will be resettled in County Laois. The overall objective of the programme is to ensure the Syrian refugees settle into the community, access services appropriately and build lasting relationships with the local community.

In this regard, a total of 112 refugees from Syria are to be housed in Laois under this programme. Laois County Council is to provide accommodation for the 112 people from Syria, comprising 7 two-bedroom units, 11 three-bedroom homes and 4 four-bedroom houses across the County.

The 22 homes for Syrian families in County Laois are included in the county's target of 627 social housing units to be delivered by 2021, as part of the 'Rebuilding Ireland' construction programme.

6.5.5 People with Disabilities

As cited by the Laois County Council, currently there are 58 households in need of specific housing and accommodation requirements within the County.

It is worth noting that the above figures are the Local Authority data on the composition of specific housing needs in the County, however, this is also relevant for those in the private housing sector.

6.5.6 Housing for Older People

As cited by the Laois County Council, currently there are 420 households aged over 55 years old and in need of specific housing and accommodation requirements within the County.

It is worth noting that the above figures are the Local Authority data on the composition of specific housing needs in the County, however, this is also relevant for those in the private housing sector.

07

POLICY OBJECTIVES TO
DELIVER HOUSING
STRATEGY

7.0 POLICY OBJECTIVES TO DELIVER HOUSING STRATEGY

As stated throughout this document, HNDAs are designed to give broad, long-run estimates of what future housing need might be, rather than precision estimates. They provide an evidence base to inform housing policy decisions in a Local Housing Strategy and land allocation decision in Development Plans.

An HNDA is just the first step in the housing planning process and HNDA housing estimates derived get refined in the Housing Supply Targets for the pertaining Housing Strategy. Factors such as housing policies, available finance and capacity of the construction sector are used to translate the HNDA estimates into the Housing Supply Targets. Each step of this housing planning process informs the next step. In this regard, a detailed timeline should be put in place jointly by housing and planning officials to ensure that each step takes place at the right time.

Based upon the comprehensive analysis of the existing housing market in County Laois, and the projection and/or estimation of the housing requirements over the Plan period, the following section provides the housing objectives that inform the overall approach to the housing strategy within the County. These objectives are comprising the general housing objectives and the housing objectives relating to social housing and provision of specific housing needs.

7.1 Key Principles of the Housing Strategy

The overarching purpose of a housing strategy is to ensure that the proper planning and sustainable development of the area of the development plan provides for the housing of the existing and future population of the county in an appropriate manner. The housing strategy will then help to inform the Development Plan in relation to the scale of house building and the quantum of land required to deliver this.

As such, the key principles of the housing strategy contemplate the following:

- To work to deliver the estimated population targets as set out in the NPF and RSES, having regard to the settlement hierarchy for County Laois as set out in the Laois County Development Plan.
- To ensure an adequate provision of house types, mix and sizes is available for people with varying levels of income, including provision of social rental housing for households unable to afford housing from their own resources and specific housing requirements.
- To reduce vacancy through a range of measures including re-use of existing buildings, infill development schemes, and area- or site-based regeneration, particularly in opportunity sites.

- To prioritise residential development of undeveloped residentially zoned lands located within and adjacent to established residential areas within towns/villages in order to consolidate the built-up area of the towns/villages.
- To promote inclusivity between people of different social backgrounds in order to create socially balanced and sustainable communities within all housing areas across County Laois.
- To monitor and undertake an interim review of the housing strategy in a timely manner, allowing for a successful implementation of the policies set out in the strategy.

7.2 Development Plan Housing Objectives

The Planning and Development Act 2000 (as amended) sets out clear requirements for the monitoring and review of Local Authority housing strategies. Section 95 subsection (1)(b) requires that a Planning Authority 's development plan shall include objectives in order to secure the implementation of the housing strategy. These objectives should relate to:

- The existing and likely future need for social housing;
- The need to ensure the availability of housing for persons who have different levels of income;
- The need to provide different types and sizes of housing, to match, in so far as possible, the different types of households to be provided for;
- The special needs of the elderly and those with disabilities must be provided for;
- The need to counteract social segregation in the provision of housing;
- The reduction of vacancy in order to consolidate the established residential areas and to address a rising demand in housing provision; and,
- The regeneration of derelict/underutilised/vacant sites in line with a Public Realm Strategy that encourages the creation of vibrant towns and villages for people to live and work in.

This Housing Strategy sets out the objectives, which are to be incorporated into the respective plans of the Laois Local Authorities, in the following subsections for a) General Housing, and b) Social and Specific Housing.

7.2.1 General Housing Objectives

It is the policy of the Council:

- To secure the implementation of the Laois County Housing Strategy in accordance with the provision of national legislation and relevant policies and standards.

- To support the regional Settlement Strategy, taking into consideration the estimated population growth set out within the NPF and RSES, and make provision for the scale of population growth and housing allocations.
- To ensure that sufficient zoned land is available at appropriate locations to cater for the envisioned population growth within the County and to satisfy residential development needs within the County in compliance with the Core Strategy and Settlement Strategy of the Development Plan.
- To engage in active land management and site activation measures, including the implementation of the vacant site levy on all vacant residential and regeneration lands, and address dereliction and vacancy to ensure the viability of towns and village centres, i.e. Portlaoise, Portarlington, Mountmellick.
- To plan for future housing needs and housing allocation within the County in accordance with the estimated population targets and the Settlement Strategy, in order to facilitate the expansion of existing settlements in a planned, sequential and coordinated manner, which ensures development is built alongside the necessary infrastructure including works with Irish Water, and to consolidate the built-up area within the existing settlements. This ensures the creation of sustainable communities in line with national policy.
- In relation to rural housing, it shall be provided where it promotes the economic role of these areas, negates isolation and promotes social inclusion. Development will be subject to infrastructure being delivered in rural areas or working with Irish Water to develop same.
- To ensure that an appropriate mix of housing types and sizes is provided in each residential development and within communities in keeping with Development Plan standards. All new housing development is expected to be of a high-quality design in compliance with the relevant standards.
- To promote residential densities appropriate to the development's location and surrounding context, having due regard to Government policy relating to sustainable development, which aims to reduce the demand for travel within existing settlements, and the need to respect and reflect the established character of rural areas.
- To promote best practice and innovative solutions in relation to the ongoing management and maintenance of all housing stock and associated public realm.
- To ensure that investment in infrastructure is distributed in a balanced manner around the County, with priority given to designated growth towns in line with the Settlement Strategy and in accordance with the sequential approach for developments. This includes working with Irish Water to ensure infrastructure is being delivered in rural areas.
- To encourage the allocation of housing near co-working spaces and remote working hubs, as well as new housing in proximity of community centres which offer co-working

services. This can promote a sustainable growth of the towns and villages located to the west of the County, or where deemed appropriate, and address the rising commuting daily trend from County Laois to Dublin.

- To support the development of serviced sites to address the issue of single one-off dwellings.
- To promote residential development addressing any shortfall in housing provision through active land management and a coordinated planned approach to developing appropriately zoned lands at key locations including regeneration areas, vacant sites, and underutilised sites. This includes backland development, thus promoting a more efficient use of zoned land.
- To encourage and ensure high standards of energy efficiency in existing and new residential developments in line with good architectural conservation practice and promote energy efficiency and conservation in the design and development of new residential units, encouraging improved environmental performance of building stock. Improving environmental performance may include measures to reduce carbon emissions, improve resource use efficiency and minimise pollution and waste.
- In order to address public safety and environmental improvement within Unfinished Housing Estates, the Local Authority should continue to work with developers and residents of private residential developments, where possible.

7.2.2 Social and Specific Housing Objectives

In relation to social and specific housing, including Traveller accommodation, people with disabilities and housing for older people, it is the policy of the Council:

- To ensure that all new housing contemplates the principles of adaptability and flexibility, and addresses the changing needs of the homeowner, to facilitate a lifelong home for people and independent living in relation to housing for older people.
- In this regard, to support the concept of independent living and assisted living for older people, as well as the provision for specific purpose-built accommodation.
- To facilitate and ensure the provision of social housing and affordable housing throughout the County to sufficiently cater for social and specific housing needs and relevant requirements over the Development Plan period.
- To progress the provision of social and specific housing through partnership with approved housing bodies, voluntary and co-operative organisations, the Health Service Executive, and through agreements with private developers.
- To promote social integration and facilitate a diverse range of dwelling tenures within housing developments, including social housing within the County.

- To build and support the delivery of new housing appropriate to the needs of the county in terms of the demand for social housing, the needs of people with disabilities, homeless people, older people, and the Traveller community.
- To meet the County's housing need for social housing provision through a range of mechanism, including Part V of the Planning and Development Act 2000 (as amended), a social housing building programme, acquisition, leasing, the Housing Assistance Payment (HAP) scheme, the Rental Accommodation Scheme (RAS) and the utilisation of existing housing stock, i.e. vacant and underutilised sites.
- To ensure the provision of housing for people with varying levels of income taking into consideration the housing support system and the planning system which will ensure that an appropriate mix of units is provided in appropriate locations. All new social and/or affordable housing should be of the highest standard of design and in accordance with the development standards set out in the County Development Plan and the DoEHLG social housing guidelines.
- In accordance with the provision of national legislation, 10% of all lands zoned for residential uses, or for a mixture of residential and other uses, shall be reserved for the provision of social and/or affordable housing in order to address the requirement for social housing under Part V, thus promoting tenure diversity and socially inclusive communities within the County.
- In this regard, the percentage reservation for Part V shall be decided on a case-by-case basis of individual site assessment. Criteria to be taken into account will include the type and location of the housing units required by the Planning Authority at a given time, as defined by the priority housing list by the Housing Section and the existing mix of housing classes in the area. The location, house size and house design requirements for permissions that will include social housing shall be discussed at pre-planning meetings between the applicant and the Local Authority.
- To implement the Laois County Council Traveller Accommodation Programme 2019-2024 (and any superseding programmes agreed by the Council) in accordance with the principles of proper planning and sustainable development.

7.3 Monitoring & Implementation

A review of the Housing Strategy, within two years after the making of the Development Plan, is necessary to ensure its successful implementation. The Chief Executive will give a report to members 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.

In addition to the statutory requirement to prepare a two-year progress report on securing the objectives of the Housing Strategy and Development Plan, a progress report on the performance indicators, which will measure performance and progress and will include accurate measurements of energy efficient improvements, delivery of renewable energy and the overall carbon emissions reductions in the County, shall be presented to the Council on a biennial basis. This approach will assist in the transparency and objective evaluation of the two-year review process.

Active land management including the implementation of the vacant site levy on all vacant residential and regeneration lands as set out in the Urban Regeneration and Housing Act 2015 are key means to implement the Housing Strategy.

As far as practicable, the Council will implement a monitoring programme, including regular review of targets and analysis of latest CSO data, managing and updating of waiting lists, stakeholder engagement. This aspect of monitoring will ensure compliance with the Housing Strategy objectives as set out in the Development Plan.

In terms of an overall approach, the Council will seek to 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, sewerage, are secured and provided in conjunction with proposed developments and in line with the pertaining legislation and best practice.

08

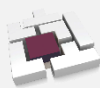
CONCLUSION

8.0 CONCLUSION

Downey Planning have prepared this Housing Strategy and HNDA on behalf of Laois County Council and in accordance with the requirements of Part V of the Planning and Development Act 2000 (as amended). This document addresses the following key issues:

- Identification of housing need within County Laois;
- Identification of social and specific housing needs within County Laois;
- Identification and estimation of supply requirements to satisfy identified future needs within County Laois;
- Analysis of key findings within each section of the Housing Strategy and HNDA; and,
- Consideration of specific policy response to the above.

For the preparation of this strategy, Downey Planning have undertaken an assessment of all relevant and up-to-date legislation, publications, and data resources, all of which have been analysed in detail to provide a robust and evidenced base for future policy development and implementation. This Housing Strategy and HNDA meets the relevant statutory requirements for its production and provides for housing needs estimates in accordance with existing and future population projections, which will ensure the proper planning and sustainable development of County Laois.



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