

GALWAY COUNTY HOUSING STRATEGY & HOUSING NEED DEMAND ASSESSMENT

For the preparation of the Galway County
Development Plan 2022-2028

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EXECUTIVE SUMMARY

The Galway 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 Galway County Development Plan 2022-2028 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 Galway 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 and Planning Department of Galway 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 2022-2028. 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 Galway throughout a number of Census years and proposes a Housing Strategy which would enable the Council to plan accordingly.



Section 01.

INTRODUCTION

1.0 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 Galway 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 2022 to 2028.

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 Galway 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 Galway 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 Galway over the six-year Development Plan period from 2022 to 2028.

1.2 Core Outputs

There are five Core Outputs which can be identified across the HNDA which need to be completed 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 Galway.</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>

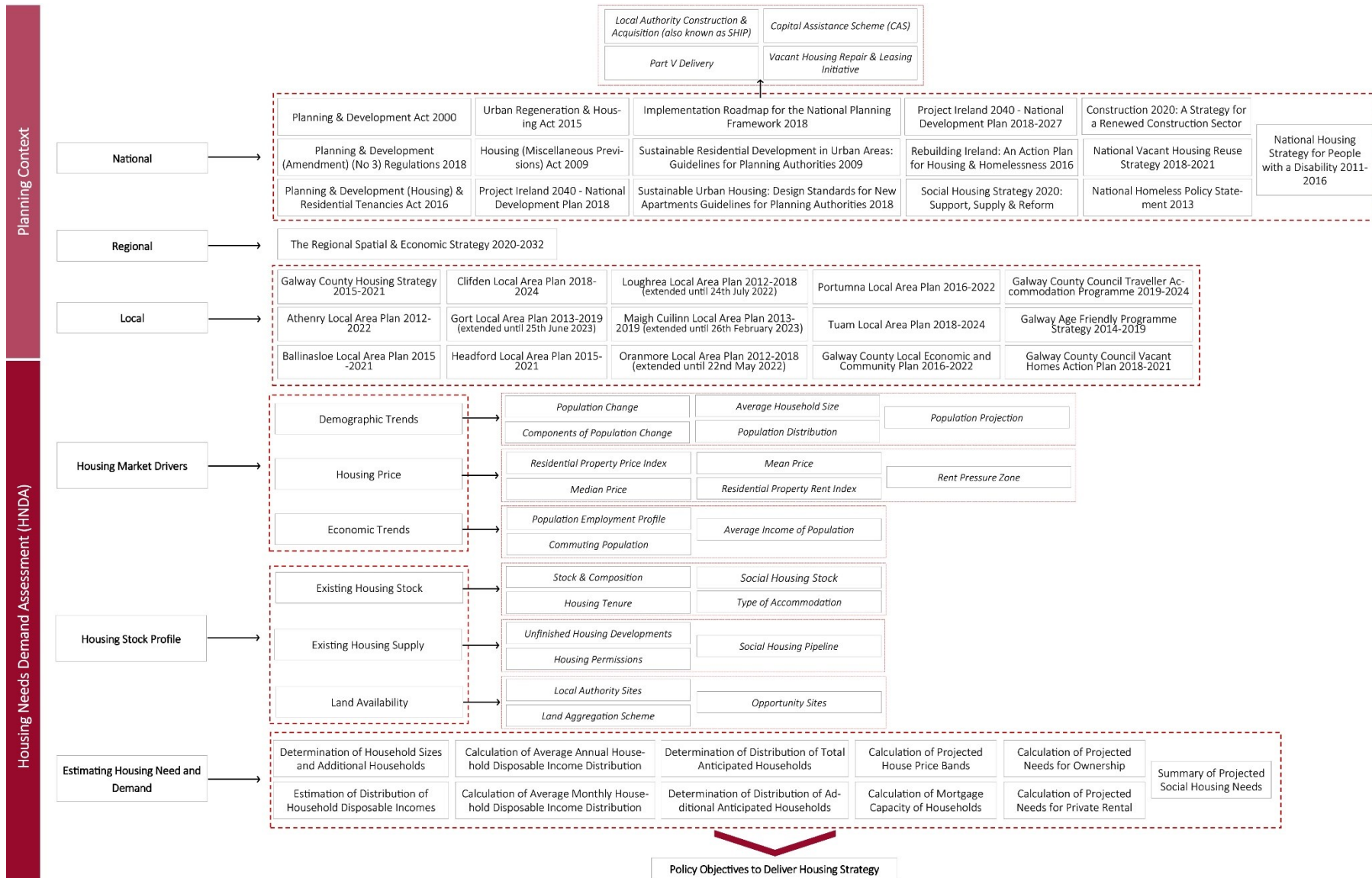


Figure 1. The Structure of the Housing Strategy

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 Galway 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 - August 2020" in the CSO Census databases;
- The "Urban and Rural Life in Ireland 2019 - December 2019" in the CSO Census databases;
- Myhome.ie portal and "Myhome.ie Q3 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 2020 Q3”;
- Property Services Regulatory Authority and the search portal for “Residential Property Price Register”;
- Residential Tenancies Board and report on “Rent Index Q2 2020”;
- Department of Housing, Planning & Local Government and the “Homelessness Reports January to December 2020”;
- The Department of Housing, Planning and Local Government, and the ‘Homelessness Report May 2020’;
- ESRI’s reports on “Irish house price sustainability: a county-level analysis” and “Budget Perspectives 2018: Paper 2”;
- ESRI’s research work on “Regional Demographics and Structural Housing Demand at a County Level” authorised by Adele Bergin and Abián García Rodríguez, December 2020;
- The Department of Housing, Local Government and Heritage, and the “Housing Supply Target Methodology for Development Planning; Guidelines for Planning Authorities issued under Section 28 of the Planning and Development Act, 2000 (as amended)”, December 2020.

1.5 Quality Assurance

The HNDA has been developed in consultation with Galway County Council’s Housing Department and Planning 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 Galway. 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.

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

There was a legislative update with respect to housing in the form of 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 developments 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 area 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 relevant 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 (from 2020/2021).

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 Northern and Western Region are listed in Table 2.1 below. For the purposes of this Development Plan (2022-2028), figures up to 2028 are also considered in subsequent sections.

Table 1. Transitional Regional and County Population Projections to 2031 for the Northern and Western Regional Assembly

Regions & Counties	2016	2026	2031
North-west			
Donegal	159,000	173,500-176,500	179,500-183,500
Sligo	65,500	71,500-72,500	74,000-75,500
Leitrim	32,000	35,000-35,500	36,000-37,000
Mid-west			
Galway	258,000	300,000-308,500	322,000-334,500
Mayo	130,500	142,000-144,500	147,000-150,500
Roscommon	64,500	70,500-71,500	73,000-74,500
Border			
Cavan	76,000	83,000-84,500	86,000-88,000
Monaghan	61,500	67,000-68,000	69,000-71,000
Total	847,000	942,500-986,500	961,500-1,014,500

Source: Implementation Roadmap for the National Planning Framework, Appendix 3, pg. 15

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 Urban Development and Building Heights Guidelines for Planning Authorities (2018)

The 'Urban Development and Building Heights, Guidelines for Planning Authorities' are intended to set out national planning policy guidelines on building heights in relation to urban areas, building from the strategic policy framework set out in the National Planning Framework

2040 (NPF). This document recognises that in recent years local authorities, through the statutory plan processes, have begun to set generic maximum height limits. However, such limits if inflexibility and unreasonably applied, can undermine national policy objectives to provide more compact urban forms as outlined in the National Planning Framework and instead can continue unsustainable patterns of development.

These Guidelines reinforce that, *“a key objective of the NPF is therefore to see that greatly increased levels of residential development in our urban centres and significant increases in the building heights and overall density of development is not only facilitated but actively sought out and brought forward by our planning processes and particularly so at local authority and An Bord Pleanála levels.”*

The document states that it is critically important that development plans identify and provide policy support for specific geographic locations or precincts where increased building height is not only desirable but a fundamental policy requirement. Locations with the potential for comprehensive urban development or redevelopment should be identified where, for example, a cluster of higher buildings can be accommodated as a new neighbourhood or urban district or precinct.

Section 1.10 of the Guidelines state that the rationale *“for consolidation and densification in meeting our accommodation needs into the future must also be applied in relation to locations that development plans and local area plans would regard as city and town centre areas”*. It continues, *“in such areas, it would be appropriate to support the consideration of building heights of at least 6 storeys at street level as the default objective, subject to keeping open the scope to consider even greater building heights by the application of the objectives and criteria laid out in Sections 2 and 3 of these guidelines, for example on suitably configured sites, where there are particular concentrations of enabling infrastructure to cater for such development, e.g., very significant public transport capacity and connectivity, and the architectural, urban design and public realm outcomes would be of very high quality.”*

Section 1.11 states *“these guidelines therefore set out national planning policy that:*

- *Expand on the requirements of the National Planning Framework; and*
- *Applies those requirements in setting out relevant planning criteria for considering increased building height in various locations but principally (a) urban and city-centre locations and (b) suburban and wider town locations.”*

The following Special Planning Policy Requirements are contained within the Guidelines:

Specific Planning Policy Requirement 1 – *“In accordance with Government policy to support increased building height and density in locations with good public transport accessibility, particularly town/city cores, planning authorities shall explicitly identify, through their statutory plans, areas where increased building*

height will be actively pursued for both redevelopment, regeneration and infill development to secure the objectives of the National Planning Framework and Regional Spatial and Economic Strategies and shall not provide for blanket numerical limitations on building height.”

Specific Planning Policy Requirement 2 – *“In driving general increases in building heights, planning authorities shall also ensure appropriate mixtures of uses, such as housing and commercial or employment development, are provided for in statutory plan policy. Mechanisms such as block delivery sequencing in statutory plans could be utilised to link the provision of new office, commercial, appropriate retail provision and residential accommodation, thereby enabling urban redevelopment to proceed in a way that comprehensively meets contemporary economic and social needs, such as for housing, offices, social and community infrastructure, including leisure facilities.”*

Specific Planning Policy Requirement 3 – *“It is a specific planning policy requirement that where;*

- (A) 1. An applicant for planning permission sets out how a development proposal complies with the criteria above, and*
- 2. the assessment of the planning authority concurs, taking account of the wider strategic and national policy parameters set out in the National Planning Framework and these guidelines;*

then the planning authority may approve such development, even where specific objectives of the relevant development plan or local area plan may indicate otherwise.

- (B) In the case of an adopted planning scheme the Development Agency in conjunction with the relevant planning authority (where different) shall, upon the coming into force of these guidelines, undertake a review of the planning scheme, utilising the relevant mechanisms as set out in the Planning and Development Act 2000 (as amended) to ensure that the criteria above are fully reflected in the planning scheme. In particular the Government policy that building heights be generally increased in appropriate urban locations shall be articulated in any amendment(s) to the planning scheme*

- (C) In respect of planning schemes approved after the coming into force of these guidelines these are not required to be reviewed.”*

Specific Planning Policy Requirement 4 – *“It is a specific planning policy requirement that in planning the future development of greenfield or edge of city/town locations for housing purposes, planning authorities must secure:*

1. *The minimum densities for such locations set out in the Guidelines issued by the Minister under Section 28 of the Planning and Development Act, 2000 (as amended), titled “Sustainable Residential Development in Urban Areas (2007)” or any amending or replacement Guidelines;*
2. *A greater mix of building heights and typologies in planning for the future development of suburban locations; and*
3. *Avoid mono-type building typologies (e.g. two storey or own-door houses only), particularly, but not exclusively so in any one development of 100 units or more.”*

2.1.12 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 focuses 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.

2.1.13 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:** Provision of 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)¹ is also a key component to deliver the vision.

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.

2.1.14 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;

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

- 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.

2.1.15 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.

2.1.16 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.

2.1.17 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.

2.1.18 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.

2.1.19 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.

2.1.20 Action Plan for Rural Development

Rural Ireland has been faced with many challenges over recent decades, however, the perception that “rural” is synonymous with “decline” is wrong. The Action Plan for Rural Development indicates that, *“Ireland’s economy and heritage are heavily dependent on the contribution of rural areas”*. The aim of this Action Plan is to focus on the positive attributes of rural Ireland and unlock its potential through a framework of supports at national and local level. It seeks to *“ensure that people who live in rural areas have increased opportunities for employment locally, and access to public services and social networks that support a high quality of life.”*

Noting that road infrastructure continues to improve, access to and from towns and cities easier and quicker, which in turn makes parts of rural Ireland destinations of choice for those who value a sense of place, space and community. *“It is time to change the narrative about rural Ireland and highlight the vital role which rural Ireland plays - and will continue to play - in shaping Ireland’s economic success, including through its heritage and culture.”*

In delivering this framework of supports, the Action Plan will:

- *Support the creation of 135,000 new jobs in rural Ireland by 2020 by supporting indigenous businesses, investing €50m for collaborative approaches to job creation in the regions, and increasing Foreign Direct Investment in regional areas by up to 40%.*
- *Implement a range of initiatives to rejuvenate over 600 rural and regional towns, including a pilot scheme to encourage residential occupancy in town and village centres.*
- *Assist over 4,000 projects in rural communities to boost economic development, tackle social exclusion and provide services to people living in remote areas.*

- *Increase the number of visitors to rural Ireland by 12% in the next three years through targeted tourism initiatives, including increased promotion of Activity Tourism.*
- *Accelerate the preparation for the rollout of high-speed broadband and ensure that all homes and businesses in rural Ireland are connected to broadband as early as possible.*
- *Improve job opportunities for young people in rural areas by increasing the number of apprenticeships and traineeships available locally.*
- *Develop an Atlantic Economic Corridor to drive jobs and investment along the Western seaboard and contribute to more balanced regional development.*
- *Invest over €50 million in sports, recreation and cultural facilities throughout the country, including in rural areas.*
- *Protect vital services in rural Ireland by improving rural transport provision, enhancing rural GP services and protecting rural schools.*

As acknowledged in the document, there is no “one-size-fits-all” approach to rural development, different rural areas have different needs and require different solutions. This Action Plan provides “*a cohesive structure across a range of policy areas to help support communities in rural Ireland to maximise their assets and realise their potential, leading to a better quality of life for those living in rural communities.*”

The Action Plan is based around five key thematic Pillars, each of which has a series of objectives and actions. These five Pillars are:

- *Pillar 1: Supporting Sustainable Communities*
- *Pillar 2: Supporting Enterprise and Employment*
- *Pillar 3: Maximising our Rural Tourism and Recreation Potential*
- *Pillar 4: Fostering Culture and Creativity in rural communities*
- *Pillar 5: Improving Rural Infrastructure and Connectivity*

The following key objectives pertain to ‘*Pillar 1: Supporting Sustainable Communities*’:

- *“Make rural Ireland a better place in which to live and work by revitalising our town and village centres through the implementation of initiatives such as the Town and Village Renewal Scheme, the CLÁR and RAPID Programmes and measures to support people to live in town centres.*
- *Enhance local services in the community through the provision of support for rural GPs, through ongoing development of the primary care sector to deliver better care close to home in communities, through support for the rural post office network to adapt to a changing business environment, and through continued access to schools for children in rural Ireland.*

- *Empower Local Communities, including through the development and support of the Public Participation Network and Local Community Development Committees, to ensure that a diversity of voices is heard and included in local decision-making processes and that communities continue to identify their own needs and solutions.*
- *Build better communities through ongoing investment in the LEADER Programme and support vulnerable rural communities through initiatives such as the Rural Social Scheme.”*

As stated within this Action Plan, “our towns and villages are at the heart of rural communities and should be places where people can live, work, access services and raise their families in a high quality environment”. As such, it is important that measures are implemented to help bring life back into rural towns and villages and enable them to become vibrant places where people socialise, live and work. The rejuvenation of towns and villages will be supported under this Action Plan through schemes such as the Town and Village Renewal Scheme, the CLÁR Programme and initiatives to encourage people to reside in town centres.

2.1.21 Town Centre Living Initiative (TCLI) (May 2020)

The Town Centre Living Initiative (TCLI) is a pilot scheme managed by the Department of Rural and Community Development (DRCD) which seeks “to develop innovative proposals that encourage the reuse of vacant and underused buildings in town centres for living”. The aim of the initiative was to explore how to encourage increased residential occupancy in rural towns and villages, thus addressing the issue of vacant properties. It is of worth to note that this pilot scheme serves as a complement to the Town and Village Renewal Scheme and the Rural Regeneration and Development Fund.

Six towns were identified to pilot the approach, these are as follows:

- Ballinrobe, Co Mayo
- Banagher, Co Offaly
- Boyle, Co Roscommon
- Callan, Co Kilkenny
- Cappoquin, Co Waterford
- Castleblayney, Co Monaghan

The TCLI report documents the activities and findings of each pilot project in the six towns and a collaborative workshop involving representatives from the TCLI pilot towns and other stakeholders held in September 2019. The initiative was delivered by the relevant Local Authorities in collaboration with the local communities.

The issues arising and the potential solutions in relation to vacancy and dereliction were synthesised into 15 issues arising and suggested action areas, and were consistently organised into 5 themes that emerged during the initiative:

- *“Providing supports refers to hard or soft supports, at either local or national level, which are needed to deliver practical assistance to address identified gaps in knowledge, expertise or capacity.*
- *Finances and resources refers to financial issues that may be holding back reuse, and to ways in which these might be addressed.*
- *Imagination and vision refers to what future towns are for, what they look like, and how they may need to change to accommodate modern living.*
- *Confidence and motivation refers to the less tangible issues that hold property owners back from moving forward towards adaptive reuse.*
- *Approach refers to the broader, national context of towns and vacancy, and the significant challenges and opportunities facing Ireland in the future.”*

As indicated in the TCLI report Local Authorities play a central role in town centre revival and individual property owners need both financial and non-financial supports to help bring vacant buildings back into use. The pilot scheme shows that addressing the challenges of vacant premises should be addressed as a whole in order to encourage town centre living.

The areas identified within the report of the pilot scheme which require further consideration include:

- *“Building public confidence in the future of town centres.*
- *Reimagining and communicating how town centres can be desirable places to live, work and belong, for example through a ‘Vision Plan’.*
- *Appointing Town Centre Officers and/or Management Teams to assist property owners and to drive implementation of plans for each town.*
- *Incentivising the reuse of vacant buildings through financial and non-financials supports.*
- *Strengthening legal supports and instruments to facilitate easier and clearer change of ownership.*
- *Establishing a cross-cutting Town Centre First Approach which puts town centres at the heart of decision making.”*

The report also notes that it is hoped that projects emerging from the pilot will form part of the wider solution for the regeneration of many rural towns and villages, and further states that, *“it is envisaged that the implementation of emerging projects could, subject to the quality of the proposals and the expected outcomes in terms of available residential properties, potentially be funded through the new Rural Regeneration Development Fund.”*

2.1.22 Structural Housing Demand in Ireland and Housing Supply Targets (December 2020)

The Housing and Planning Divisions of the Department of Housing, Local Government and Heritage (DHLGH) jointly engaged the Economic and Social Research Institute (ESRI) to undertake independent research into structural housing demand in Ireland to 2040.

The findings of the ESRI work were published as a research paper on Structural Housing Demand at County Level on 14th December 2020. The ESRI research provides a robust, up-to-date, and independently developed housing demand projection, to inform policy and investment with regard to housing at national and local levels. As per the Ministerial Letter to Local Authorities on 18th December 2020, the ESRI projection model and paper are now the definitive source of information for Government, in the context of regular and often divergent estimates of housing demand from various sources.

As outlined in the Ministerial Letter, the ESRI work is of particular importance to the local government sector, as it provides an integrated model of housing demand that takes into account demographic, economic and housing market factors, including inter-county migration, at individual local authority level. It underpins the development of the Housing Need and Demand Assessment (HNDA) tool for local authorities and will assist in informing the development of multi-annual social housing targets from 2021.

The ESRI projections include a scenario aligned with the National Planning Framework (NPF). This scenario will be used to monitor progress towards meeting identified housing demand and the need to increase overall housing output in support of NPF targeted population growth and associated settlement pattern.

The ESRI work provides a consistent national methodology for translating the population targets set out in the National Planning Framework (NPF) and the three Regional Spatial and Economic Strategies (RSESs), into projected demand for new households.

2.2 Regional Policy

2.2.1 Regional Spatial and Economic Strategy (RSES) 2020-2032

The Regional Spatial and Economic Strategy (RSES) provides a high-level development framework for the Northern and Western Region (NWRA) that supports the implementation of the National Planning Framework (NPF) and the relevant economic policies and objectives of Government. It provides a 12-year strategy to deliver the transformational change that is necessary to achieve the objectives and vision of the Assembly.

This RSES provides a robust strategy to deliver anticipated growth, building upon this region's key strategic assets and opportunities and addressing challenges ahead. It also provides Regional Development Objectives that guide policy responses to ensure that people's needs -

such as access to housing, jobs, ease of travel and overall well-being - are met, up to 2040 and beyond.

The overarching ambition of the strategy is for a region that is “*Vibrant, Connected, Natural, Smart and a Great Place to Live, consolidated by a strong settlement strategy focusing on ‘People’ and ‘Places’.* The intention is that it becomes a living framework, which will be supported as required by detailed action plans, investment proposals and delivery partnerships.”

In this regard, there are Five Growth Ambitions which are described as follows:

PEOPLE AND PLACES - *Compact growth will be pursued to ensure sustainable growth of more compact urban and rural settlements, supported by jobs, houses, services and amenities, rather than continued sprawl and unplanned, uneconomic growth.*

VIBRANT AMBITION - *The NWRA believes that strong economic growth, which creates permanent, sustainable jobs, is best achieved by building a competitive and productive economy. Focusing policies on scale, investing in connectivity and our people whilst aggressively pursuing a low carbon approach to enhance our differentiation.*

NATURAL AMBITION - *It has been identified that more strategic actions are required to prepare the region for what is to come and highlights the need to create a combined long term vision for the future of both energy supply and our ability to use renewable energy. To address our energy requirements our RSES emphasises the need for coordination, new thinking, investment, and skills to implement change. All considerations need to be cognisant of our natural resources, landscape, and heritage (natural, social and cultural).*

CONNECTED AMBITION - *Accessibility and mobility within the region have a direct effect on the region’s economic competitiveness. It also has an effect on the attractiveness of the region as a favourable living and visiting environment. The RSES will support further investment in sustainable transport measures. In addition, to achieve our Vision for the region we need to strengthen our digital network and enable new technologies to work by ensuring that policies and systems are in place that can help people transition to a world much more digitally connected.*

INCLUSIVE AMBITION - *One of the strongest foundations and emerging propositions this region has to build on is its ‘livability’. The region aspires to be one of the most liveable places in Europe with a commitment to sustainable and inclusive growth.*

INFRASTRUCTURE AMBITION - Provision and maintenance of economic infrastructure, such as energy, water, and wastewater, are key to delivering compact growth and a connected, vibrant, inclusive, resilient, and smart region.

In terms of demographics for the region, the population of the Northern and Western Region is dispersed unevenly and has historically had a lower level of urbanisation compared to other regions. However, Galway is identified as the fastest growing city in Ireland over the past 50 years. In 2016 the total population residing within the region was 847,442. This figure represents approximately 17.8% of the entire population of Ireland. The National Planning Framework provides a target growth rate for Galway between 50%-55% to 2040. This RSES has targeted the Key Towns to grow their population by at least 30%, relative to Census 2016 (i.e., Ballinasloe and Tuam).

Table 2. Metropolitan Area Strategic Plan and Regional Centres Population Targets

	Settlement	Population 2016	% Increase to 2040 (min)	Uplift to 2040	Proposed 2026 Uplift (min)	Proposed 2031 Uplift (min)	Transitional Target Population
Metropolitan Area	Galway City	79,900	50-55	42,000	23,000	12,000	115,000
Regional Growth Centres	Athlone	21,300	40	8,700	4,800	2,400	28,500
	Letterkenny	19,300	40	8,000	4,400	2,200	26,000
	Sligo	19,200	40	8,000	4,400	2,200	26,000

Source: Regional Spatial and Economic Strategy - Executive Summary, pg. 11

The RSES contains the following Regional Policy Objectives:

RPO 3.1: “Develop urban places of regional-scale through:

- Delivering on the population targets for the Metropolitan and Regional; Growth Centres through compact growth;
- Delivering significant compact growth in Key Towns; and,
- Developing derelict and underutilised sites, with an initial focus within town cores.”

RPO 3.2:

“(a) Deliver at least 50% of all new city homes targeted in the Galway MASP, within the existing built-up footprint of Galway City and suburbs.

(b) Deliver at least 40% of all new housing targeted in the Regional Growth Centres, within the existing built-up footprint.

(c) Deliver at least 30% of all new homes that are targeted in settlements with a population of at least 1,500 (other than the Galway MASP and the Regional Growth Centres), within the existing built-up footprints.”

RPO 3.3: *“Deliver at least 20% of all new housing in rural areas on brownfield sites.”*

RPO 3.4: *“To support the regeneration and renewal of small towns and villages in rural areas.”*

RPO 3.5: *“Identify and develop quality green infrastructure, within and adjacent to City, Regional Growth Centres and Key Towns.”*

RPO 3.6: *“Support a coherent and consistent approach in the identification and monitoring of the scale of housing vacancy within the region, identifying vacancy hotspots and informing the setting of actions, objectives and targets in Action Plans and identify how these might best be achieved.”*

RPO 3.7: *“The Assembly supports local authorities in identifying and prioritising a program for the provision of serviced sites within smaller towns and villages within 1 year of the adoption of the RSES. A rolling 2-year implementation plan shall subsequently be prepared.”*

RPO 3.8: *“Support the design of new/replacement/refurbished dwellings to high energy efficiency standards that fully avail of renewable technologies, maximise solar gain, utilising modern materials and design practices.”*

RPO 3.9: *“Identify suitable development opportunities for regeneration and development that are supported by a quality site selection process that also addresses environmental constraints and opportunities.”*

RPO 3.10: *“Ensure flood risk management informs development by avoiding inappropriate development in areas at risk of flooding and integrate sustainable water management solutions (such as SUDS, non-porous surfacing and green roofs) to create safe places. Development plans should assess flood risk by implementing the recommendations of the Planning System and Flood Risk Assessment Guidelines for Planning Authorities (2009) and Circular PLO2/2014 (August 2014).”*

RPO 3.11: *“Local Authorities, DHPLG, OPW, and other relevant Departments and agencies to work together to implement the recommendation of the CFRAM programme to ensure that flood risk management policies and infrastructure are progressively implemented.”*

RPO 3.12: *“Within Gaeltacht Areas and Gaeltacht Towns, in particular, emphasis shall be assigned to the impacts of proposed developments and their impact on the community of language and the maintenance and development of its socialisation networks.”*

RPO 3.13: *“To support the role of smaller and medium-sized towns, which demonstrate an important role in terms of service provision and employment for their catchments within the economic function of the county. Such settlements will be identified through the Development Plan process as part of the Settlement Hierarchy and the Core Strategy.”*

The Settlement Strategy for the region designates Ballinasloe and Tuam as Key Towns. 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.

In relation to Ballinasloe, one of the Key Future Priorities for the town includes: *“realising the town’s potential as a ‘County Town’, ensuring a balance of development in the town centre of Ballinasloe, and providing for compact growth and brownfield development, revitalising Dunlo Street, Market Square, Society Street and Main Street, and to reduce vacancies and support the vitality and vibrancy of these core shopping streets/side streets and the town centre.”*

The Key Future Priorities for Tuam differ slightly, as the focus for the town lies in promoting Tuam as a destination for business, however, the following priorities apply: *“to develop Tuam as the focus for future development in North Galway providing the infrastructure and services for its surrounding small towns/villages and rural lands”, as well as to “capitalise on the compact urban form of Tuam town centre by encouraging greater connectivity for new development which promotes and encourages walking and cycling ensuring that principles of sustainable transportation along with practical design measures become central to the development of new neighbourhoods.”*

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

2.3 Local Policy

2.3.1 Galway County Housing Strategy 2015-2021

The Galway County Housing Strategy 2015-2021 provided a comprehensive review of demographics and housing demand within County Galway to inform the Galway County Development Plan 2015-2021. The overarching purpose of this Housing Strategy is to ensure

that the proper planning and sustainable development of Galway County provides for the housing needs of existing and future populations in an appropriate manner. Key Principles of the Housing Strategy include:

- To work to deliver the population targets and population distributions set out in the Regional Planning Guidelines for the West Region, having regard to the County's established settlement hierarchy as set out in the Galway County Development Plan;
- To counteract undue housing segregation by promoting socially balanced and inclusive communities in all housing areas across County Galway;
- 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 outlined within the Galway County Housing Strategy 2015-2021, the population of Galway County is expected to increase to approximately 198,500 people over the period to 2022 (as per the Regional Planning Guidelines for the West Region), with a calculated population increase over the Development Plan period 2015-2021 of 13,160. The strategy identifies a need to provide approximately 4,133 units over the plan period 2015-2021, alongside a surplus of 357 hectares of residentially zoned lands in the County to meet identified requirements.

The Housing Strategy indicates that there is a significant number of constraining factors restricting the delivery of social housing at the time of the housing assessment, and thus it envisages that future requirements will be addressed via a combination of options including the Rental Accommodation Scheme (RAS) and partnership working with Voluntary Bodies and Housing Co-Operatives.

Furthermore, an assessment of the changing demographic profile of the County indicates there will be a need to provide greater mix of housing types and sizes in the future, including the need to cater for specialist needs such as the elderly and those with disabilities.

In relation to the Demographic and Market Assessment section, the main findings include:

- *“The population of County Galway increased by 33% between 1996-2011.*
- *At 9.96%, recorded population growth in Galway between 2006-2011 outstripped the national growth rate of 8.2%.*
- *Between 2006-2011 there was a 36.6% increase in the population of Oranmore, a 23% increase in Athenry, while Tuam and Loughrea both recorded growth rates of 11.7%.*
- *The average household size in County Galway fell from 3.39 in 1996 to 2.89 in 2011.*
- *There were 9,366 housing completions in County Galway over the period 2007-2012.*

- *The current average house price in County Galway is €131,219.”*

The summary of the Housing Demand section highlights the following:

- *“The population of Galway County is expected to increase by 13,160 persons between 2015-2021.*
- *It is envisaged that a total of 4,133 units will need to be provided over the plan period, the equivalent of a per annum average of 689 units.*
- *Approximately one third of the households in Galway have an average disposable income of €15,567 (about €299.37 per week).*
- *Affordability modelling suggests that approximately 513 social housing units will have to be delivered over the period 2015-2021.*
- *On average, there is likely to be a 12.4% shortfall in the delivery of social housing over the plan period.”*

Within the Housing Supply section, the strategy notes the housing needs of the following categories of persons which require special attention, in accordance with the Galway County Council Assessment of Housing Need carried out in May 2013.

The Travelling Community: The Housing Strategy states that, “Galway County has one of the largest concentrations of Travelling persons in the country”, and further notes that there was a total population of 2,476 travellers (Census 2011), the equivalent of 14.1 travellers per 1000 persons resident in the County. The document indicates that 87% of travellers in the County reside in permanent private accommodation, with a further 10% living in temporary accommodation.

Older Persons and Persons with Disabilities: As outlined in the strategy, there were 160 disabled persons in need of social housing support from the Local Authority, with 54% of these persons affected by a physical disability and 43% with a mental health difficulty. The 2011 Census figures highlighted a number of notable increases in the age groups of 65 and over for the County. As such, the strategy envisaged that greater levels of independent, semi-independent, and supervised housing will be required.

2.3.2 Variation No. 2(a) to the Galway County Development Plan 2015-2021

The Bearna Local Area Plan (LAP) 2007-2017 was incorporated into the Galway County Development Plan 2015-2021, by way of a variation to the Development Plan, thus ensuring full consistency between both.

As a coastal village situated on the western edge of Galway City (approximately 6.5km west of the City centre Eyre Square and 11km east of An Spidéal), Bearna village has a unique character as a result of its fishing and Gaeltacht heritage and an attractive seaside location in close

proximity to Galway City. The village is located at the gateway to Gaeltacht na Gaillimhe (County Galway Gaeltacht), which is the single largest Gaeltacht in the country. Due to the village's close proximity to Galway City, Bearna has experienced significant growth in and surrounding the village in recent years. According to the Census 2016, the total population of Bearna village was 1,998 people, a 6.4% increase from the 2011 Census figure.

The Bearna LAP, now Variation No. 2(a) of the pertaining Development Plan, is underpinned by a strategic vision intended to guide the future growth and development of the plan area in a sustainable manner. This vision sees *“to promote Bearna as a sustainable and vibrant coastal village, which maintains its attractive character, capitalises on its existing and future accessibility strengths, while offering a pleasant environment for a growing community, for living, shopping, education, business, recreation and tourism, all balanced against the need to safeguard and enhance the environmental sensitivities of the area, for present and future generations to come.”*

It is important to ensure that there are *“a range of facilities, amenities and supporting services, including educational, recreational, religious, social, community and civic requirements for children, youths, adults and older persons, to serve a growing community, as well as visitors to Bearna”*. In relation to growing communities, the Core Strategy indicates that Bearna was assigned a population growth target of 420 persons by 2021 with a land allocation of 12.12 hectares provided to accommodate new residential development over the plan period.

The Development Strategy for the future growth of Bearna consists of the ‘Refinement and Consolidation’ of the village. In doing so, this option seeks to enhance sustainability, and provide for a community that promotes economic and social development and ensures a high quality of life, balanced with the protection of the environment. This preferred development option also supports Government policy to consolidate existing built-up urban areas of cities, towns, and villages, rather than the continual expansion and sprawl of such urban areas out into the countryside, in order to achieve sustainable development.

As stated in the document, *“new development, in particular housing, should be delivered on under-utilised, infill and/or brownfield sites, including the redevelopment of existing sites and buildings, to build-up the existing development envelope of the urban area and to ensure that serviced lands close to the centre and public transport options are the primary focus for development in the short to medium term”*. In relation to residential development, the following objectives form part of the overall development strategy for Bearna.

Objective RD1 - Residential Development Phasing: *“Support the development of lands designated as Residential (Phase 1) within the lifetime of the Plan, subject to normal planning, access and servicing requirements, and reserve the lands designated as Residential (Phase 2) for the longer term growth needs of the village. Residential (Phase 2) lands are generally not developable for housing within the*

lifetime of this Plan, with the exception of the following developments, which may be considered by the Planning Authority, subject to a suitable evidence based case being made for the proposal:

- a) Single house developments for local family members on family owned land, subject to a 7 year occupancy clause.
- b) Non-residential developments that are appropriate to the site context, residential amenities, the existing pattern of development in the area and the policies and objectives in the Plan.
- c) Where it is apparent that Residential (Phase 1) lands cannot or will not be developed for residential purposes within the plan period, residential development may be considered in limited cases in a phased manner on suitable Residential (Phase 2) lands, in exceptional circumstances:
 - Development on Residential (Phase 2) lands will normally only be considered where 50% of the lands in Residential (Phase 1) are committed to development.
 - Residential developments on Residential (Phase 2) lands will be subject to compliance with the Core Strategy in the Galway County Development Plan, the principles of proper planning and sustainable development, connectivity, including infrastructure and public footpath and lighting to the village centre, the sequential approach, avoidance of leap-frog developments, and subject to meeting normal planning, environmental, access and servicing requirements. Developments will only be permitted where a substantiated evidence based case has been made to the satisfaction of the Planning Authority and the development will not prejudice the future use of the lands for the longer term growth needs of Bearná.

Objective RD2 - Apartment Development: “Facilitate the development of apartments at appropriate locations, e.g. the village centre, and have regard to the Sustainable Urban Housing: Design Standards for New Apartments Guidelines for Planning Authorities (2015)(or as updated), the Sustainable Residential Developments in Urban Areas: Guidelines for Planning Authorities (2009) and Urban Design Manual: A Best Practice Guide - A Companion Document to the Guidelines for Planning Authorities on Sustainable Residential Development in Urban Areas (2009) in the assessment of this type of development.”

Objective RD3 - Quality Housing Environments: “Encourage the development of sustainable residential communities through the promotion of innovative, high quality building design and appropriate layouts, that prioritise walking, cycling and public transport options and provide for a high level of permeability, accessibility and

connectivity to the existing built environment, services and facilities. In this regard, future residential development proposals will be in accordance with the principles set out in the DoEHLG document Sustainable Residential Development in Urban Areas 2009 and its companion document Urban Design Manual: A Best Practice Guide for Planning Authorities 2009, or any updated version of these documents published during the lifetime of this plan and shall also have regard to the design principles as set out in the Design Manual for Urban Roads and Streets (2013) (or as updated)."

The document supports the principles of quality, sustainability, and inclusivity, as foremost in future residential development in Bearna, and states *"new multiple housing schemes within the plan area should provide for an appropriate variety of residential units to meet the current and future demands of the village and be responsive to their local context, in terms of design, layout and density. Multiple housing developments must also ensure compliance with Part V of the Planning and Development Act 2000, as amended, with respect to the provision of social housing units, as well as strengthen the use of the Irish language in the village through the allocation of a proportion of housing units for Irish speaking families"*. Overall, the Plan seeks to achieve the objectives set out for the village in a way that reflects the existing character and amenity of the area, its heritage, the surrounding landscape, the environment and improves the quality of life of residents and the local community.

2.3.3 Variation No. 2(b) to the Galway County Development Plan 2015-2021

The Gaeltacht Local Area Plan (LAP) 2008-2018 and the Claregalway (Baile Chláir) LAP 2005-2011 have been replaced with Variation No.2(b) to the Galway County Development Plan 2015-2021.

The Galway Gaeltacht covers extensive parts of County Galway, stretching from Baile Chláir to the east of the city to Cloch na Ron in west Connemara (approx. 100km distance), and from Oileán Árann northwards to Duiche Sheoigheach which borders County Mayo, spanning to townlands that are within Galway City boundary.

Given the unique and special traits of the Gaeltacht area, the document notes that, *"it is important that it retains that distinctive cultural heritage and natural beauty which is of National significance through the principles of sustainable development, whilst meeting the needs and aspirations of both the residents' and visitors alike"*. In this regard, the Settlement Plan for the area sets out the following: the high level strategies and objectives that are common to all areas and districts of the Gaeltacht; the zoning objectives for the three settlements of An Cheathrú Rua, An Spidéal and Baile Chláir; and detailed plans for the three settlements including land use maps and flood maps.

In relation to the future growth of the Gaeltacht area, the Core Strategy of the Galway County Development Plan 2015-2021 indicates population allocations for An Cheathrú Rua, An Spidéal and Baile Chláir. According to the Census 2016, the total population of all Gaeltacht areas in the country as of April 2016 was 99,617, which is down from 100,716 in 2011. The number of daily Irish speakers in the Galway Gaeltacht in April 2016 was 9,445, which is a reduction of 640 compared to the 2011 census figure. The total population of the Galway Gaeltacht is 49,524 persons, which accounts for 15,744 persons assigned to the city Gaeltacht and 33,750 persons for county Galway.

In order to achieve the strategic vision for the Gaeltacht area including the settlements of An Cheathrú Rua, An Spidéal and Baile Chláir, a number of potential development options were assessed to ascertain which Development Strategy is most suitable the three settlements of the Gaeltacht. The preferred development option refers to the 'Even Development' of the Plan areas, thus seeking to enhance sustainability, and provide for a community that promotes economic and social development and ensures a high quality of life balanced with the protection of the environment for the Gaeltacht area, particularly the settlement areas of An Cheathrú Rua, An Spidéal and Baile Chláir.

The Plan thus contains an overview of the Districts and settlement plans for An Cheathrú Rua, An Spidéal and Baile Chláir, identifying the following as the six distinct districts: Iorras Aithreach/Camas/Ros Muc; Dúiche Sheoigheach; Ceantar na nOileán/An Cromptán; Cois Fharraige; Oileáin Árainn; and Imeall na Cathrach.

These Gaeltacht Districts are deemed relevant and included as part of the Plan. Under the Gaeltacht Act, 2012, Gaeltacht Areas area re-designated as Gaeltacht Language Planning Areas with language plans agreed with the communities in each area. The Gaeltacht Districts listed above will complement the Language Planning Areas as outlined in the 20-Year Strategy for the Irish Language 2010-2030 and agreed with the relevant statutory agencies.

In order to ensure the continued vibrancy and life of the Districts in the Galway Gaeltacht areas, *“the provision of a mix of residential, business and cultural uses will be encouraged subject to the proper planning and development of the area and in accordance with the Core Strategy of the County Development Plan. The priority of these areas shall be for the regeneration of under-utilised or derelict sites in the identified settlements of Galway County Development Plan hierarchy”*. As such, the following objectives applies to the Gaeltacht:

Objective GL4 - Brownfield Development and Vacancy: *“Encourage the redevelopment of existing brownfield sites within established villages in the Gaeltacht area in order to maximise the sustainable regeneration of underutilised/vacant lands and/or buildings for potential commercial, cultural, retail, community and residential developments.”*

In relation to the development of zoned land, the Plan states that it *“should generally be phased in accordance with a sequential approach:*

- *Development should extend outwards from centre with undeveloped land closest to the village centres and public transport routes (if available) being given preference, i.e. “leapfrogging” to peripheral areas should be avoided;*
- *A strong emphasis should be placed on encouraging infill opportunities and better use of underutilised lands; and opportunity sites;*
- *Areas to be developed should be contiguous to existing developed areas.”*

As it stands, this Plan establishes a framework for the planned, co-ordinated, and sustainable development of the Gaeltacht area, and seeks to *“enhance and facilitate the balancing of economic, social and environmental infrastructure in order to maintain and develop a high quality of life, without compromising the protection of the environment and the needs of future generations.”*

2.3.4 Athenry Local Area Plan 2012-2022

This Local Area Plan (LAP) is a land use plan and overall strategy for the development of Athenry over the period 2012-2018 (extended to 2022). The successful implementation of the Plan will have a positive impact on Athenry ensuring that it develops in a sustainable manner and will complement the implementation of the pertaining County Development Plans.

This Local Area Plan (LAP) has been prepared by Galway County Council to provide a statutory framework for the future growth, development and improvement of Athenry that is consistent with the policies and objectives contained in the Galway County Development Plan 2009-2015 including its Core Strategy/Settlement Strategy and which addresses the needs and requirements of the local community, service providers and other stakeholders. The purpose of the LAP is to guide future development within the town of Athenry, in a sustainable and equitable manner and to inform members of the public, the local community, stakeholders and developers regarding policies and objectives for the development of the town, including provisions in relation to land use management, community facilities and amenities, transport and infrastructure, urban design, heritage and the environment.

Athenry is strategically located 22km east of Galway Gateway within the Eastern Strategic Corridor and is accessible by rail and motorway networks. The town presently acts as market town and service centre for the surrounding agricultural hinterland, with a main administrative focus around Market Square and a commercial core centred within Church Street, Old Church Street, Cross Street and North Gate Street. The town’s location within commuting distance of Galway Gateway has resulted in an increase in population and a greater demand for housing and rail commuter services.

The LAP notes that the proper planning and sustainable development of Athenry seeks to balance the wide ranging and sometimes competing needs of the local community, landowners, and the environment along with promoting the role envisaged for Athenry as a 'Key Town' within the County Core Strategy/Settlement Strategy as contained within the Galway County Development Plan 2009-2015.

This Core Strategy/Settlement Strategy has identified a target population growth of up to 1,122 persons for Athenry up to 2016 with 32.36Ha required to accommodate residential units over the Plan period. Given the significant growth patterns experienced in Athenry over the last two Census periods, ensuring appropriate, sustainable settlement patterns including the provision of the necessary planning framework to accommodate educational, community, leisure, and recreational facilities to satisfactorily match the level of population growth.

The Plan's strategic vision for Athenry envisions that the town "*will be a sustainable, self-sufficient, vibrant and socially inclusive key town, which protects and enhances its attractive medieval character while becoming an innovative growth centre within the Strategic Economic Corridor, supporting an educated workforce, providing a range of services/amenities and with a high quality of life for the local community. This will be delivered through a managed and phased development strategy on appropriately zoned and serviced lands in a manner that is balanced and sustainable for Athenry and the environs that it serves.*"

In this regard, a number of Development Strategy Options for Athenry were put forward and the preferred option forms part of the Development Strategy Policy for the Plan.

Policy DS1 - Development Strategy: "*It is the overarching policy of the Council to support and facilitate the sustainable development of Athenry in line with the preferred Development Strategy Option 4 - Managed Phased Development which allows Athenry to develop in a manner that maintains and enhances the quality of life of local communities, promotes opportunities for economic development, sustainable transport options and social integration, protects the cultural, built and natural heritage and environment and complies with relevant statutory requirements.*"

The preferred development strategy option is considered to be the most appropriate option for securing the managed growth of Athenry, while retaining its medieval fabric and taking account of environmental and other planning and sustainable development considerations over the Plan period.

2.3.5 Ballinasloe Local Area Plan 2015-2021

The Ballinasloe Local Area Plan is a land use plan and overall strategy for the development of Ballinasloe over the period 2015-2021. The successful implementation of the Plan will have a

positive impact on Ballinasloe, ensuring that it develops in a sustainable manner and complements the implementation of the County Development Plan.

This Local Area Plan (LAP) has been prepared by Galway County Council to provide a statutory framework for the future growth, development and improvement of Ballinasloe that is consistent with the policies and objectives contained in the current Galway County Development Plan including its Core Strategy/Settlement Strategy and which addresses the needs and requirements of the local community, service providers and other stakeholders. The purpose of the LAP is to guide future development within the town of Ballinasloe, in a sustainable and equitable manner and to inform members of the public, the local community, stakeholders and developers regarding policies and objectives for the development of the town, including provisions in relation to land use management, community facilities and amenities, transport and infrastructure, urban design, heritage and the environment.

Ballinasloe occupies a strategic location adjacent to the M6 National Primary route linking Dublin and Galway and is one of the principles 'Gateways to the West'. In addition, the town has daily public transport services (both rail and bus) to Galway, Athlone, and Dublin. Ballinasloe has an important sub-regional role regarding retail provision, employment, and community facilities in particular education and healthcare.

The residential growth experienced within Ballinasloe in recent years has further strengthened the economic base of the town. The majority of residential development is located outside the town core on the arterial routes out of the town. Housing estates or developments are generally small to medium in size, and while these estates/developments are not confined to any particular area of the town, Creagh and Glentaun/Kilgarve areas display a significant concentration of residential development east of the River Suck.

As stated within the LAP, the Core Strategy in the current Galway County Development Plan has identified a target population growth of up to 1,540 additional persons, corresponding to 477 additional housing units, up to the year 2021, the timeframe for the validity of the current County Development Plan. This target population results in a requirement for 35.81ha of zoned land for residential purposes (based on 50% over-zoning). The Plan also noted that, "*Ballinasloe has experienced a 6.8% increase in population growth over the last two Census periods (2006 & 2011: total change in population of 419 persons or a 6.8% increase on the 2006 population level).*"

The Plan seeks to balance the wide ranging, and sometimes competing, needs of the local community, businesses, landowners, and the environment along with promoting the role of Ballinasloe as a 'County Town' within County Galway, as established in the Galway County Development Plan 2015-2021.

As such, the strategic vision of the Plan seeks "*to promote Ballinasloe as a sustainable, self-sufficient, vibrant, socially inclusive and innovative 'County Town', which maintains its unique*

attractive character, capitalises on its strengths - in particular public transport, while offering a pleasant and qualitative environment for a growing population, for living, working, doing business, shopping, recreation and tourism, balanced against the need to safeguard and enhance the environmental sensitivities of the area for present and future generations. This will be delivered through a managed development strategy on appropriately zoned and serviced lands, in a manner that is balanced and sustainable for Ballinasloe and the immediate environs that it serves."

It is worth mentioning that the RSES for the Northern and Western Region identifies Ballinasloe as a 'Key Town'.

As part of the Development Strategy, a number of options were evaluated in order to choose the most appropriate option for the development of Ballinasloe in accordance with the relevant policies and standards. The preferred option is detailed under Policy DS1 - Development Strategy below.

Policy DS1 - Development Strategy: *"It is the overarching policy of Galway County Council to support and facilitate the sustainable development of the plan area in line with the preferred development strategy option, Option 2 - Consolidation of Existing Development with Sequential Development around Consolidated Areas with a Refined Plan Boundary which allows Ballinasloe to develop in a manner, that maintains and enhances the quality of life of local communities, promotes opportunities for economic development, social integration and sustainable transport options, protects the cultural, built and natural heritage and environment and complies with relevant statutory requirements."*

The Plan considers this to be the most appropriate development option for land use management and zoning approach for the town at the time, as it should secure the orderly and sequential development of Ballinasloe in accordance with the principles of proper planning and sustainable development.

2.3.6 Clifden Local Area Plan 2018-2024

This Local Area Plan is a land use plan and overall strategy for the development of Clifden covering the period 2018-2024. The successful implementation of the plan should have a positive impact on Clifden, ensuring it develops in a sustainable manner and complements the implementation of the Galway County Development Plan 2015-2021.

This Local Area Plan (LAP) has been prepared by Galway County Council to provide a statutory framework for the future growth and development of Clifden. The purpose of the LAP is to guide future development within the town in a sustainable and equitable manner and to inform

members of the public, the local community, stakeholders, and developers, of the policies and objectives that will shape the development of the town over the next six years.

Clifden is located in the western coastal area of Connemara in County Galway, approximately 80 kilometres northwest of Galway City. The town of Clifden is the main urban settlement serving the Connemara area as well a considerable rural hinterland in the west of the county. Apart from Galway City, the nearest large urban settlement is Westport in County Mayo, which is located 80km to the north-east. Clifden is served by the National Secondary Road, the N59 which is the main Galway-Clifden-Westport route, serving Connemara.

The Plan seeks to balance the wide ranging, and sometimes competing needs of the local community, landowners, and the environment, along with promoting the important role of Clifden within County Galway.

The Core Strategy stipulates a population growth target for Clifden of 250 persons by 2021 with a housing land requirement of 12.92Ha (which includes a permitted 50% over-provision) in order to accommodate residential development over the plan period.

This LAP is underpinned by a strategic vision which seeks *“to promote the sustainable development of Clifden, as a prosperous town, providing a focus for future residential, economic & social development in west Connemara. Promoting the town as a visitor destination while preserving its unique historic identity, character and environmental quality, as well as improving its accessibility.”*

A number of potential development options were considered for the Development Strategy of the town, the preferred option is contained within the policy below:

Policy DS 1 - Development Strategy: *“It is the overarching policy of Galway County Council to support and facilitate the sustainable development of the plan area in line with the preferred development strategy option, Alternative 1 - Even Development with a Refined Plan Boundary, which allows Clifden to develop in a manner that maintains and enhances the quality of life of the local community, promotes opportunities for economic development, sustainable transport options, connectivity and social integration, protects the cultural, built, natural heritage and environment and complies with relevant statutory requirements.”*

In addition to this, the defined town centre remains the primary target for the location of new retail & tourism development, with an opportunity to consolidated retail core. The LAP considers this to be the most appropriate option for securing the orderly and sequential development of Clifden.

2.3.7 Gort Local Area Plan 2013-2019 (extended until 25th June 2023)

The Gort Local Area Plan is a land use plan and overall strategy for the development of Gort over the period 2013-2023. The successful implementation of the Plan will have a positive impact on Gort, ensuring it develops in a sustainable manner, and will also complement the implementation of the County Development Plan.

This Local Area Plan (LAP) has been prepared by Galway County Council to provide a statutory framework for the future growth, development, and improvement of Gort that is consistent with the policies and objectives contained in the Galway County Development Plan 2009-2015 including its Core Strategy/Settlement Strategy and which addresses the needs and requirements of the local community, service providers and other stakeholders. The purpose of the Local Area Plan is to guide future development within the town of Gort, in a sustainable and equitable manner and to inform members of the public, the local community, stakeholders and developers regarding policies and objectives for the development of the town, including provisions in relation to land use management, community facilities and amenities, transport and infrastructure, urban design, heritage and the environment.

The Core Strategy in the Galway County Development Plan identified a target population growth of up to 820 persons for Gort to 2015, which results in a requirement for 23.66Ha of zoned land for residential purposes (based on 50% over-zoning). In terms of population trends, the LAP states that, *“according to the 2011 CSO figure, the population of Gort was recorded as 2,636 persons. This represents a population decrease of -5.2% (-146 persons) from the previous Census of 2006. It is recognised that the population growth targets (an additional 820 persons by 2016) as set out in the Regional Planning Guidelines and the County Development Plan Core Strategy are ambitious in the current economic climate.”*

The LAP is underpinned by a strategic vision intended to guide the future growth and development of Gort in a sustainable manner, and envisions *“Gort will be a sustainable, self-sufficient, vibrant, socially inclusive and innovative growth centre within the County, protecting and enhancing its attractive medieval character and natural environment, supporting an educated workforce, providing a range of supporting services/facilities/ amenities and with a high quality of life for the local community. This will be delivered through a managed and phased development strategy on appropriately zoned and serviced lands in a manner that is balanced and sustainable for Gort and the immediate environs that it serves.”*

In terms of Development Strategy for Gort, a number of options were considered for the town, with the following policy containing the preferred approach:

Policy DS - Development Strategy: *“It is the overarching policy of Galway County Council to support and facilitate the sustainable development of the Plan Area in line with the preferred development strategy option, Option 2 - Consolidate Existing Town Centre, Sequential Development around Established Urban Core*

and Controlled Eastward Expansion, and in a manner that maintains and enhances the quality of life of local communities, promotes opportunities for economic development, social integration and sustainable transport options, protects the cultural, built and natural heritage and environment and complies with relevant statutory requirements.”

As noted in the LAP, this option supports the consolidation of the town centre, promotes the infill and sequential development of the town, and encourages street-oriented development along the existing urban street network. This approach also integrates improvements in the public realm and smarter travel opportunities for the town.

2.3.8 Headford Local Area Plan 2015-2021

This Local Area Plan (LAP) is a land use plan and overall strategy for the development of Headford over the period 2015-2021. The successful implementation of the plan should have a positive impact on Headford, ensuring that it develops in a sustainable manner and complements the implementation of the County Development Plan.

Headford is located approximately 20km north of Galway City. The rural character of the surrounding landscape, rich heritage, and its proximity to Lough Corrib, provide many amenity opportunities for the village. The centre is characterised by its cohesive development as a predominantly 19th century commercial market village, laid out as a planned settlement in relation to the landlord’s mansion, Headford Castle, and its demesne. Headford also hosts a number of shops, commercial premises and amenities, providing a range of local services and facilities for those residing locally and in the surrounding hinterland.

The Core Strategy of the Galway County Development Plan 2015-2021 details the allocation of this county population target within County Galway, the hub town of Tuam, the Key Towns, the Other Villages including Headford, and the Other Settlements including rural areas up to 2021. Headford as one of the ‘Other Villages’ within the County Core Strategy/Settlement Strategy, seeks to sustain growth in order to achieve its potential as a self-sustaining village.

In relation to Headford, the Core Strategy indicates that the village has been assigned a population growth target of 251 persons by 2021 with a housing land requirement of 10.61Ha (which includes a permitted 50% over-provision) in order to accommodate residential development over the plan period. Under the previous Headford Local Area Plan 2005-2011, there was approximately 78.55Ha of undeveloped zoned residential land within the plan boundary.

This LAP is underpinned by a strategic vision, which is informed by guiding principles enabling the overall vision to be achieved. This overall vision seeks *“to promote Headford as a sustainable, self-sufficient and vibrant village, which maintains its, attractive rural character,*

capitalises on its accessibility to the River Corrib, Galway City gateway, the Tuam hub and the wider west region - while offering a pleasant environment for a growing community, for living, shopping, business, recreation and tourism, balanced against the need to safeguard and enhance environmental sensitivities of the area, for present and future generations to come."

In order to achieve the strategic vision for Headford, a number of Development Strategy Options were examined to ascertain which option can deliver most effectively on the vision for the town. The preferred option now forms the main policy for the development of Headford.

Policy DS 1 - Development Strategy: *"It is the overarching policy of Galway County Council to support and facilitate the sustainable development of the plan area in line with the preferred development strategy option, Option 3 - Consolidation of the Village with a Refined Plan Boundary, which allows Headford to develop in a manner that maintains and enhances the quality of life of the local community, promotes opportunities for economic development, sustainable transport options, connectivity and social integration, protects the cultural, built, natural heritage and environment and complies with relevant statutory requirements."*

This preferred Development Strategy Option is informed by the statutorily required environmental assessment and seeks to enhance sustainability, promote economic and social development, and ensure quality of life and the protection of the environment. It also aligns with and aims to deliver on the Core Strategy requirements set out for Headford in the Galway County Development Plan and supports the objectives of the Regional Planning Guidelines to provide for the sustainable, dynamic development of villages to a level that can deliver the conditions for balanced regional development.

2.3.9 Loughrea Local Area Plan 2012-2018 (extended until 24th July 2022)

The Loughrea Local Area Plan (LAP) is a land use plan which provides an overall strategy for the development of Loughrea over the period 2012-2022. The successful implementation of the Plan will have a positive impact on Loughrea, ensuring it develops in a sustainable manner, and will also complement the implementation of the County Development Plan.

Loughrea is located in east County Galway, approximately 30km southeast of Galway City and along the R446 regional route, a key strategic road between Dublin and Galway. Given the town's proximity to Galway City and the concentration of strategic infrastructure and employment opportunities within the area, it has experienced significant growth in previous Census periods.

As a medium-sized town with an area of 533ha and a population of 5,057 people in 2011, an increase in 525 people (or 11.6%) from the 2006 population of 4,532 people, Loughrea is

identified as a self-sufficient settlement and a 'Key Town' within the Core Strategy/Settlement Strategy of the Galway County Development Plan 2009-2015 and thus it is important that future development for anticipated growth is plan led so that Loughrea can enhance its vibrancy and grow in a sustainable manner.

It is indicated in the Core Strategy for the Galway County Development Plan 2009-2015 that Loughrea has a target population growth of up to 1,133 persons by 2015, which results in a housing land requirement of 32.68ha (based on 50% over-zoning) in order to accommodate residential development over the Plan period. The Plan also states that, *"under the previous Loughrea Local Area Plan 2005-2011, there was over 60ha of undeveloped zoned residential land within the development boundary in excess of the zoned land allocation under the Core Strategy."*

The Plan is underpinned by a strategic vision which envisions *"Loughrea will be a sustainable, self-sufficient, vibrant, socially inclusive and innovative growth centre within the County, protecting and enhancing its attractive medieval character and natural environment, supporting an educated workforce, providing a range of supporting services/facilities/amenities and with a high quality of life for the local community. This will be delivered through a managed and phased development strategy on appropriately zoned and serviced lands in a manner that is balanced and sustainable for Loughrea and the immediate environs that it serves"*. In order to achieve this strategic vision for Loughrea, a number of different Development Strategy Options were examined to ascertain which option was the most appropriate for the town.

Policy DS - Development Strategy: *"It is the overarching policy of Galway County Council to support and facilitate the sustainable development of the Plan Area in line with the preferred development strategy option, Option 2 - Consolidate Existing Town Centre, Sequential Development around Established Urban Core and Controlled Eastward Expansion, and in a manner that maintains and enhances the quality of life of local communities, promotes opportunities for economic development, social integration and sustainable transport options, protects the cultural, built and natural heritage and environment and complies with relevant statutory requirements."*

As noted in the Policy DS - Development Strategy above, Option 2 is considered the preferred development option for Loughrea. This option supports the consolidation and controlled expansion of the town centre, promotes the infill and sequential development of the town and encourages street-oriented development along the existing urban street network and the new route proposed to the east, including high quality edge treatments, improvements in the public realm and smarter travel opportunities.

2.3.10 Maigh Cuilinn Local Area Plan 2013-2019 (extended until 26th February 2023)

This Local Area Plan (LAP) is a land use plan and contains an overall strategy for the development of Maigh Cuilinn over the period 2013-2023. The successful implementation of the plan will have a positive impact on Maigh Cuilinn ensuring it develops in a sustainable manner and will also complement the implementation of the County Development Plan.

Maigh Cuilinn is a small village located approximately 10 km northwest of Galway City centre, at the junction of the N59 national secondary road to Clifden and the Spiddal to Knockferry local road. The village is also located within a Gaeltacht area. Maigh Cuilinn hosts a number of shops, commercial premises and amenities, providing a range of local services, and facilities for those residing locally and in the surrounding hinterland. It is worth noting that residential development has predominantly taken place in the south-western and north-eastern areas of the village. In accordance with pertaining policy, the forested areas of biodiversity/ecological significance generally remain undeveloped.

The Core Strategy in the Galway County Development Plan 2009-2015 has identified a target population growth of up to 408 persons for Maigh Cuilinn to 2015, which results in a requirement for 11.78ha of zoned land for residential purposes (based on 50% over-zoning). Under the previous Maigh Cuilinn Local Area Plan 2005-2011, there was approximately 100ha of undeveloped zoned residential land within the plan boundary.

This LAP is underpinned by a strategic vision which seeks *“to promote Maigh Cuilinn as a sustainable and vibrant village, which maintains its attractive character, capitalises on its existing and future accessibility strengths, while offering a pleasant environment for a growing community, for living, shopping, for education, business, recreation and tourism, all balanced against the need to safeguard and enhance the environmental sensitivities of the area, for present and future generations to come.”*

A review of a number of Development Strategy Options was carried out to ascertain which option can deliver most effectively on the vision for the village. The Plan indicates that Option 3 is considered the preferred Development Option, as it *“supports the consolidation of the village centre to accommodate future growth, promotes the sequential development of the remainder of the urban core, including infill development and the development of vacant, brownfield and underutilised sites in the village centre, ensuring that serviced lands close to the centre and public transport options are the primary focus for development in the short to medium term.”*

Policy DS 1 - Development Strategy: *“It is the overarching policy of Galway County Council to support and facilitate the sustainable development of the Plan Area in line with the preferred development strategy option, Option 3 - Consolidate the Village Centre with Sequential Development Around the Core, which allows Maigh Cuilinn to develop in a manner, that maintains and enhances*

the quality of life of local communities, promotes opportunities for economic development, sustainable transport options and social integration, protects the cultural, built, natural heritage and environment and complies with relevant statutory requirements.”

As it stands, the preferred option within the Development Strategy policy (Option 3) seeks to consolidate the existing village centre, promote sequential development around the village core and avoid peripheral development to the north and south.

2.3.11 Oranmore Local Area Plan 2012-2018 (extended until 22nd May 2022)

This Local Area Plan (LAP) is a land use plan providing an overall strategy for the development of Oranmore over the period 2012-2022. The successful implementation of the plan will have a positive impact on Oranmore ensuring it develops in a sustainable manner and will also complement the implementation of the County Development Plan.

Located 7km east of Galway City centre, at the inner shoreline of Galway Bay, Oranmore offers significant employment opportunities and has a viable commercial core. The rural character of the surrounding landscape provides many amenity opportunities given the town’s rich, varied heritage and proximity to the sea.

The Plan indicates that the pace of development has been significant in recent years, leading to a rapid rise in the population of Oranmore. As stipulated in the 2006 Census, the population of the town was 3,513, a 107% increase from the 2002 Census figure. It is indicated in the LAP that, *“the education levels of Oranmore residents were one of the best in Ireland, people who live here or moved here for work, were recorded as having a good level of education, with just 4.64% of the people educated to primary school level or with no formal education, while people with a third level degree or a higher qualification made up 38.35% of the Oranmore workforce. This was the highest in any Irish town and over double the national average of 16.57%.”*

Furthermore, Oranmore has been identified as a key town within the Core Strategy of the Galway County Development Plan and a Galway Metropolitan Area Satellite town. The Core Strategy of the County Development Plan also identified a target population growth of up to 1,130 persons for Oranmore to 2015, which results in a requirement for 32.60ha of zoned residential land, while under the previous Oranmore Local Area Plan 2006-2012 there was approximately 160ha of undeveloped zoned residential land within the plan boundary.

This LAP is underpinned by a strategic vision, which seeks *“to promote Oranmore as a sustainable, self-sufficient and vibrant town, which maintains its unique, attractive character, capitalises on its accessibility strengths - in particular rail, while offering a pleasant environment for a growing community, for living, shopping, business, recreation and tourism, balanced*

against the need to safeguard and enhance the environmental sensitivities of the area, for present and future generations to come.”

As part of the Development Strategy for the town, a number of options were reviewed. Option 3 was considered the preferred Development Option, as it *“supports the consolidation of the town centre to accommodate future growth, promotes the sequential development of the remainder of the urban core including the development of vacant and under-utilised sites in the town centre, ensuring that serviced lands close to the centre and public transport options are the primary focus for development in the short to medium term.”*

Policy DS 1 - Development Strategy: *“It is the overarching policy of Galway County Council to support and facilitate the sustainable development of the Plan Area in line with the preferred development strategy option, Option 3 - A Combination of a Future Strategic Development Area with Consolidation of the Town Centre and Surrounding Areas, Informed by Environmental Assessments, which allows Oranmore to develop in a manner, that maintains and enhances the quality of life of local communities, promotes opportunities for economic development, sustainable transport options and social integration, protects the cultural, built, natural heritage and environment and complies with relevant statutory requirements.”*

In addition to the above, the preferred development strategy option also *“protects lands surrounding the rail station, so that future development associated with same can take place in a planned and timely manner, while at the same time building on the existing strengths of Oranmore town, providing for the more immediate development needs.”*

2.3.12 Portumna Local Area Plan 2016-2022

This Local Area Plan (LAP) is a land use plan and overall strategy for the development of Portumna covering the period 2016-2022. The successful implementation of the plan should have a positive impact on Portumna, ensuring it develops in a sustainable manner and complements the implementation of the Galway County Development Plan 2015-2021. This Local Area Plan has been prepared by Galway County Council to provide a statutory framework for the future growth and development of Portumna.

Portumna is located in south-east County Galway, approximately 68km south east of Galway City, 31km south of Ballinasloe and 24km west of Birr. The town is recognised as the principle urban setting in south-east County Galway serving an extensive rural hinterland on either side of the county divide. Portumna is served by the N65, which acts as the main vehicular gateway to the town.

The Galway County Development Plan 2015-2021 identifies Portumna as a Key Town in the settlement hierarchy for the county. This entails it functioning as a self-sufficient service hub, offering a range services including health, community, finance, employment, educational and retail provision to a broad catchment population. The Core Strategy in the Galway County Development Plan has identified a target population growth of up to 230 persons for Portumna through to 2021, which results in a requirement for 9.72Ha of zoned land for residential purposes (based on 50% over-zoning).

The LAP is underpinned by a strategic vision which seeks *“to promote Portumna as a sustainable, self-sufficient and vibrant town, which maintains its unique character, capitalises on its existing cultural and tourism assets, while offering a pleasant environment for a growing community, for living, shopping, for education, business and recreation. This requires there to be a degree of balance whereby the environmental sensitivities of the area and Portumna Castle and Demesne, Portumna Forest Park and Lough Derg in particular are safeguarded, for present and future generations to come.”*

As part of the Development Strategy for the town, the following development strategy policy applies:

Policy DS 1 - Development Strategy: *“It is the overarching policy of Galway County Council to support and facilitate the sustainable development of the plan area in line with the preferred development strategy option, Option 3 - Consolidate Town Expansion & Promote Sequential Development with a Refined Plan Boundary which allows Portumna to develop in a manner, that maintains and enhances the quality of life of local communities, promotes opportunities for economic development, sustainable transport options and social integration, connectivity and social integration, protects the cultural, built, natural heritage and environment and complies with relevant statutory requirements.”*

The LAP notes that this option provides a more appropriate development envelope and greater certainty to the future growth of the town, including rationalised land use zonings to align with the Core Strategy. It also takes account of the infrastructural capacity within the town, with particular regard to water and wastewater availability and takes cognisance of flood risk areas.

2.3.13 Tuam Local Area Plan 2018-2024

This Local Area Plan is a land use plan and overall strategy for the development of Tuam over the period 2018-2024. The successful implementation of the plan will have a positive impact on Tuam ensuring that it develops in a sustainable manner and complements the implementation of the County Development Plan.

This Local Area Plan (LAP) has been prepared by Galway County Council to provide a statutory framework for the future growth and development of Tuam. The purpose of the LAP is to guide future development within the town in a sustainable and reasonable manner and to inform members of the public, the local community, stakeholders and developers of the policies and objectives that will shape the development of the town over the next six years.

Tuam is strategically located as a centre for growth in North Connaught, it has excellent connections to the motorway route from Limerick to Sligo as well as motorway linkages to Galway and Dublin and has the opportunity to develop as the focus for future development in North Connaught providing the infrastructure and services for its surrounding small towns/villages and rural lands.

The Core Strategy of the Galway County Development Plan 2015-2021 has identified a target population growth of up to 2,080 persons for Tuam to 2021, which results in a maximum requirement for 52.39Ha of zoned residential land. In terms of population growth, Tuam has experienced sustained growth patterns since the last Census period, the forecasted level of 2016 population growth in the County Development Plan of 8,600 persons was exceeded by 167 in the 2016 census figures. This is a trend worth considering for land allocation in the future.

This LAP is underpinned by a strategic vision, which seeks *“to promote Tuam as a thriving vibrant market town, providing a focus for future residential, economic & social development in a sustainable manner, encouraging new development and capitalising on the town’s unique historic identity and character, as well as its accessibility, thereby realising Tuam’s potential as well as supporting the surrounding rural hinterland.”*

As stated in the LAP in relation to the Development Strategy for Tuam:

Policy DS 1 - Development Strategy: *“It is the overarching policy of Galway County Council to support and facilitate the sustainable development of the plan area in line with the preferred development strategy option, Alternative 1 - Even Development with a Refined Plan Boundary, which allows Tuam to develop in a manner that maintains and enhances the quality of life of the local community, promotes opportunities for economic development, sustainable transport options, connectivity and social integration, protects the cultural, built, natural heritage and environment and complies with relevant statutory requirements.”*

The Plan notes that this approach promotes the consolidation of development within the plan area, supports sequential development of the remainder of the urban area from the centre outwards and ensures that serviced, residential lands close to the Town centre and public transport options are the primary focus for development in the short to medium term. This in turn will encourage reduced travel demands, more sustainable transport options and ease of access to community facilities, employment sources and retail and service provision within the

town centre. In addition to this, the land use zoning matrix provides further guidance on appropriate uses in the various zones.

2.3.14 Galway County Local Economic and Community Plan 2016-2022

The Galway County Local Economic and Community Plan 2016-2022 was completed to meet provisions under the Local Government Reform Act 2014, LECP Guidelines and LECP Circulars. As part of the preparation of the LECP for County Galway, a vision for the future of the County emerged through an extensive and inclusive consultation process. As stated within the Galway County LECP, this vision recognises the challenges posed by changes in demographic patterns brought about by social and economic pressures and the risks posed by geographic peripherality to the overall goal of creating *“an inclusive County with a clear sense of identity where we work together towards achieving the full economic, social, community, linguistic and cultural potential of County Galway and all its people through citizen engagement at a local level.”*

The Plan offers a road map to build on this vision and help meet both the challenges and the opportunities faced, as well as providing *“an overview of the socio-economic and cultural landscape of the County, an outline of the structures established to drive the Plan and the plan process itself, and the comprehensive and varied methods of citizen engagement which were used to develop a practical and realisable Action Plan.”*

In terms of demographic trends, it is asserted that County Galway has seen a steadily growing population over the past decade, with a growth rate of 10% between 2006 and 2011. The greater part of this population growth is found in the small urban centres and commuter catchment areas of Galway City. The majority of the population of County Galway (c.77%), live in rural areas. This compares with a national equivalent figure of 38% and a 61.9% figure for the West Region.

The Galway County LECP outlines the number of commercial organisations in the County accounting to 6,597, these are spread by municipal district as follows: Connemara 26%, Tuam 20%, Ballinasloe 15%, Athenry/Oranmore 18% and Loughrea 22%. There were 5,930 Enterprise Ireland supported jobs in Galway City and County in 2014, an increase of 181 on the previous year. It is worth noting the statistics presented for the Gaeltacht areas in Ireland, where there are 7,346 full-time and 4,220 part-time/seasonal jobs in Údarás na Gaeltachta assisted companies.

In relation to housing, the Plan notes that the majority of households (78.6%) in County Galway are found in owner-occupied dwellings, with a vacancy rate for County Galway at 19.4%, higher than the State at 14.5%. The high level of holiday homes and vacant houses contributes to the high vacancy rate within the County.

A series of themes and high level goals have been set within the LECP to achieve this overarching vision. These include:

Theme 1, Employment and Enterprise - Goal: *To enhance the quantity and quality of employment and enterprise opportunities throughout County Galway.*

Theme 2, Poverty and Social Inclusion - Goal: *To reduce the levels and prevalence of poverty, disadvantage, and social exclusion in County Galway.*

Theme 3, Education and Training - Goal: *To improve educational attainment levels within County Galway and to ensure that access to training and lifelong learning opportunities is available to all.*

Theme 4, Health and Wellbeing - Goal: *To improve the health and wellbeing of individuals and communities across County Galway.*

Theme 5, Community Safety - Goal: *To make County Galway a safer place to live for all its citizens.*

Theme 6, Towns, Villages, and Islands - Goal: *To revitalise and regenerate the towns, villages, and islands of County Galway and to improve the connectivity of communities, the built environment and public spaces.*

Theme 7, Balanced Sustainable Development - Goal: *To ensure that rural communities in County Galway are enabled to participate fully in economic and social development in their own area.*

Theme 8, Natural Environment - Goal: *To protect and sustain our natural environment for future social, cultural, and economic wellbeing.*

Theme 9, Culture and Language - Goal: *To ensure that the culture and language of County Galway remain a vibrant and unique part of our identity and are developed to their full potential.*

Theme 10, Harnessing our Natural Resources - Goal: *To harness and manage our natural resources to support our unique agriculture and marine related sectors in a balanced and sustainable manner.*

Furthermore, **OBJECTIVE 9 - HOUSING STRATEGY** seeks to “secure the implementation of the Housing Strategy 2015-2021, including the implementation of its policies and objectives and requirement to reserve a minimum of 10% of residential development for social and specialist housing”, and includes actions necessary to achieve this objective as follows:

9.1 Development of mixed tenure housing projects in areas of recognised demand in the County.

9.2 Rollout of active Estate Management Initiative to improve quality of life for residents of local authority estates.

9.3 Support for active resident and tenant engagement with landlords through support for residents' associations.

9.4 Pilot initiatives to break the cycle of disadvantage in socially disadvantaged families living in local authority estates.

9.5 Rollout of Strengthening Families Programme in key local authority estates and disadvantaged areas - 2 programmes per year.

9.6 Support for family learning and parent support targeting local authority estates throughout the County.

9.7 Work with SICAP implementers to ensure that council housing tenants are supported to meet their full personal, social potential as citizens, family, and community members.

9.8 Work with SICAP Implementers to pilot initiatives for tenant community support in selected disadvantaged areas or estates.

The final section of the Plan sets out the process by which the delivery of this Plan and the high level goals which underpin the vision will be turned into a reality through the implementation of practical objectives and actions. These actions have been identified through an intensive process of collaboration by communities and other stakeholders and formulated into this integrated Plan under the guidance of the Galway County Local Community Development Committee (LCDC) and the Economic Development & Enterprise Strategic Policy Committee (SPC) of Galway County Council.

2.3.15 Galway County Council Traveller Accommodation Programme 2019-2024

The Galway County Council Traveller Accommodation Programme 2019-2024 was adopted to meet provisions under the Housing (Traveller Accommodation) Act 1998 by Galway 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 Programme (2014-2018) and challenges faced, asserting that during the period of this Programme Galway County Council exceeded its overall targets in the programme with the accommodation needs of 262 households met during the period 2014-2018.

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, there is a Projected Need of 40 no. households, with a total estimated need of 111 no. homes (when allocating the existing need) for the period of 2019-2024. As expressed by most Traveller housing applicants, the preferred accommodation is for standard local authority housing or private rented accommodation. Accordingly, Galway County Council anticipates that the overall housing need will be met over the period of this Accommodation Programme predominantly through the provision of standard Local Authority Housing and through Housing Assistance Payment (HAP).

2.3.16 Galway Age Friendly Programme Strategy 2014-2019

The vision of the Galway Age Friendly Programme 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. As stated in the document, the overarching vision of this Strategy is as follows:

“Galway will be a place for all ages that prepares properly for and celebrates individual and population ageing through collaboration and the provision of appropriate services and supports. Galway will promote and respect older people’s engagement in economic, educational, social, cultural, community and family life and foster better solidarity between generations. The underlying value of this vision will include respect for equality, independence and diversity.”

This resulting Strategy for Galway outlines a collective response to the changing demographic situation across the city and county and reflects our ongoing commitment to the vision of Galway being a great county to grow up and grow old in. It provides the foundations for a place where everybody as they age are supported, connected, and valued for their contribution to community and family life.

In order to make this vision a reality, the Galway Age Friendly Alliance (comprising Galway City and Council), in partnership with the Galway Older Persons Council have identified 8 strategic priorities:

- 1. To promote a built and social environment which will enable people of all ages, but particularly the older members of our community, to be engaged and to feel and be safe both at home and out and about.*
- 2. To ensure that as far as possible, older people can get to where they need to go, when they need to do so.*
- 3. To facilitate all members of the community living at home in their own homes and communities for as long as possible.*

4. *To promote participation in social, economic, cultural, and public life for all members of the community.*
5. *To develop a partnership between the Alliance and NUI Galway, and particularly the University's two most relevant (to this strategy) centres, Project Life-course, and the Community Knowledge Initiative. This partnership will help to promote the concept of an age-friendly society and an age-friendly University, and thereby make Galway a flagship for the integration of practice and research in the areas of ageing and the family.*
6. *To promote the concept and the practice of inter-generational activities throughout our community and to create respect across the generations.*
7. *To work with the Older Persons Council, and other groups representing the older members of the community, by engaging in a two-way process of communication which will enhance progress in relation to the other strategic priorities. Through this process we will also ensure that older adults have the information they need to live full lives.*
8. *To support and promote all initiatives which will enable people to live healthier and active lives for longer.*

These strategic priorities, and the actions supporting them, are seen to be strongly supportive and enabling in relation to the vision of the Alliance and will help to ensure that all members of the community will continue to learn, develop and work throughout their lives, will be truly valued and respected, and that they will lead healthier and active lives for longer.

2.3.17 Galway County Council Vacant Homes Action Plan 2018-2021

Galway County Council's 'Vacant Homes Action Plan' has been prepared with reference to Pillar 5 of the Government's document Rebuilding Ireland: An Action Plan for Housing and Homelessness and takes into consideration the Vacant Housing Reuse Strategy 2018-2021, which is an overarching strategy setting out a vision for tackling residential vacancy issues. The reuse of existing buildings and reduction in vacancy is essential in order to tackle housing supply issues, as well as to ensure the continued growth and development of communities in both urban and rural areas.

The Action Plan states that, as of December 2018, there were approximately 3,000 applicants with Net Housing need on Galway County Council's Record of Qualified Households, and further notes that the Council have engaged in the Vacant Homes Pilot Survey, while surveying 10 of the allocated areas and also targeting other areas where Housing demand is acute. Additionally, the use of the Vacant Homes website (vacanthomes.ie), the derelict sites register, and local knowledge, will enable the Council to target homes that may be recoverable into the housing market.

In addition to the above, there are a number of initiatives and schemes which will help bring identified vacant units back into use, including: Buy and Renew Scheme, Repair and Lease Scheme, Long Term Leasing, Rental Accommodation scheme, Housing Assistance Payment, and Compulsory Purchase.



Section 03.

HOUSING MARKET DRIVERS

3.0 HOUSING MARKET DRIVERS

This section will identify the key factors driving the local housing market in County Galway 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. Population changes varied widely across the country ranging from a high of over 8% in Fingal to a low of -1.5% in Donegal. 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 Galway, the County saw a population increase of 2.4% (+4,266 persons) during this period, as the population increased to 179,390 from 175,124. However, the population in Galway city grew considerably faster than the surrounding county (4.2%).

Table 3. Population and its changing trends in 1991-2016

Year	1991	1996	2002	2006	2011	2016
Population	129,511	131,613	143,245	159,256	175,124	179,390
Actual Change	-	2,102	11,632	16,011	15,868	4,266
% of Change	-	1.6	8.8	11.2	10.0	2.4

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 had a moderate increase when comparing years 1996 and 2016, considerable fluctuations can be observed during these two past decades. There was a major increase of growth rate during 1996-2002 from 1.6% to 8.8%, which was then followed by a more moderate growth to 11.2 in 2006, and a slight drop to 10% in 2011. This was followed by a drop to 2.4% in 2016, resulting in a slight growth of the population.

There are noticeable differences between the age pyramids of the cities versus the counties. Dublin, Cork, and Galway City all appear similar; the main characteristic being the larger

number of young adults aged 20 to 40 and the relatively smaller number of children. In contrast the more rural counties of Leitrim, Galway, Donegal, and Roscommon also share similar features with fewer young adults and proportionally more older people. As summarised in the table below, while the young dependency ratio was steady over the intercensal period, the old age dependency ratio rose from 12.6% in 2011 to 14.5% in 2016.

Table 4. Age Dependency Ratios over 2011-2016

	2011	2016	Actual Change	% of Change
0-14 years	39693	40643	950	2.39
15-64 years	113441	112689	-752	-0.66
65 years and over	21990	26058	4068	18.50
Young Age Ratio (%)	22.7	22.7	-	-
Old Age Ratio (%)	12.6	14.5	-	-
Total Dependency Ratio	35.2	37.2	-	-

Source: CSO StatBank

Spatial distribution of the total age dependency within the County shows that the highest rates of age dependency are located in Cloonkeen (88.9%), Levally (85.3%), Movode (85.1%), and An Cnoc Bui (82.4%). On the other hand, the least rates of age dependency are located in Galway Rural (34.2%), Colmanstown (42.4%), Mountain (42.4%), and Baile an Teampaill (Part Rural) (44.5%).

As illustrated in the Figure below, moving from west towards east of the County and specifically to the northern ends of Galway East, an increase in the rate of age dependency can be observed. The lowest rates of age dependency are clearly distributed in the catchment area of major workplaces such as Galway City, Tuam, and Loughrea.

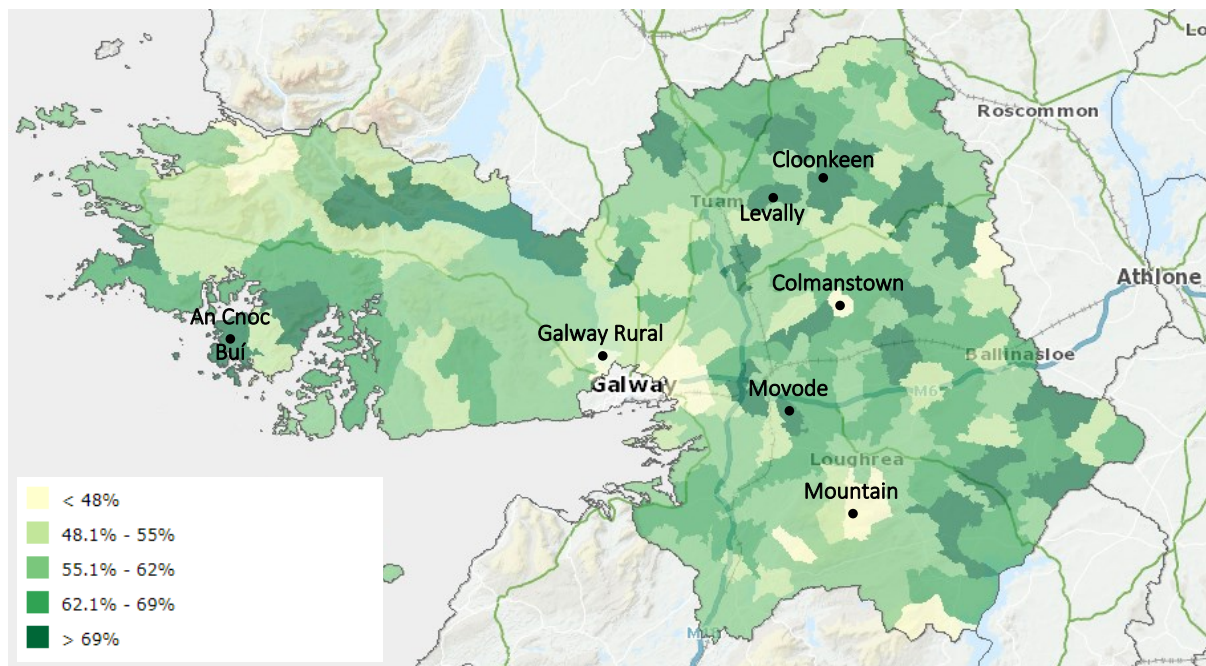


Figure 2. Age Dependency Ratios by Electoral Division - 2016

Investigating the age profile of the County over the Census 2011-2016 indicates that there was a considerable decline in the cohort aged 20-34 that equates an overall of -5,603 persons. On the other hand, greatest share of the population growth recorded for cohort aged 60-74, which was a total of +12,085 persons. It is noted that the cohort aged 0-4 years old also decreased by -1,604 persons.

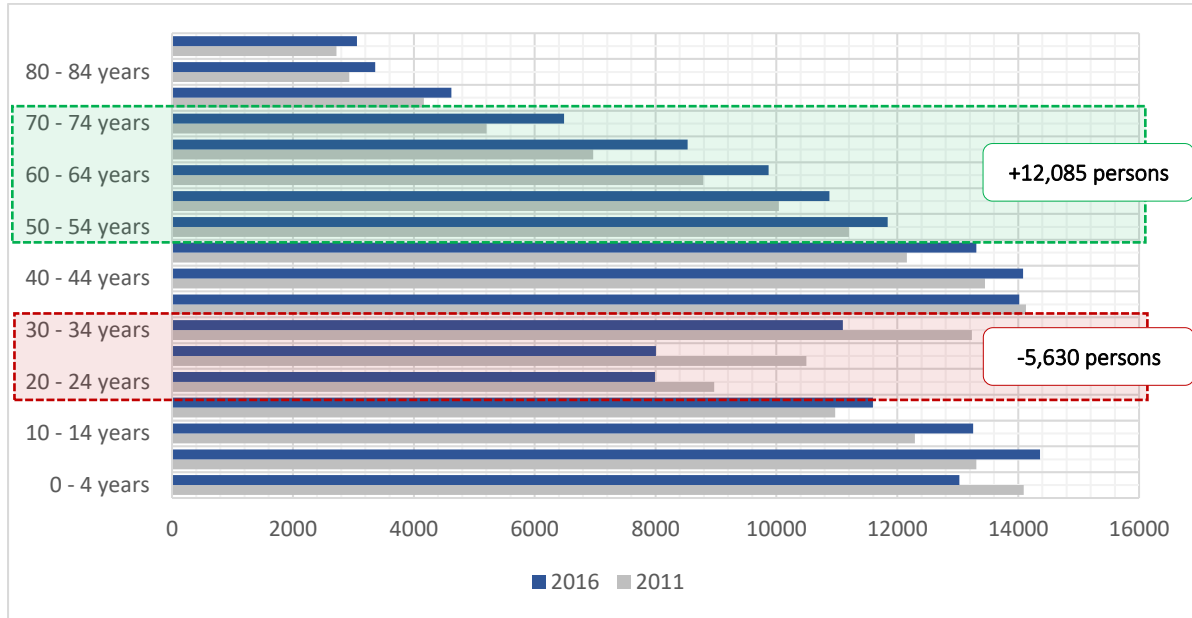


Figure 3. Population Change by Age Cohort in County Galway over 2011-2016

The population pyramid below (Figure 4) shows the County age distribution in more detail. A peak of births in 1980 shows up in the 40-44 age category, and another peak in the number of births occurred in 2009 and shows up in the 5-9 age category. The smaller numbers in both the 20-24 age category relates to a falling birth rate in that period while the lower number in the 25-29 age categories, and to some extent in the 30-34 are the result of high outward migration. Therefore, a steady growth of old population can be expected for the County in coming years.

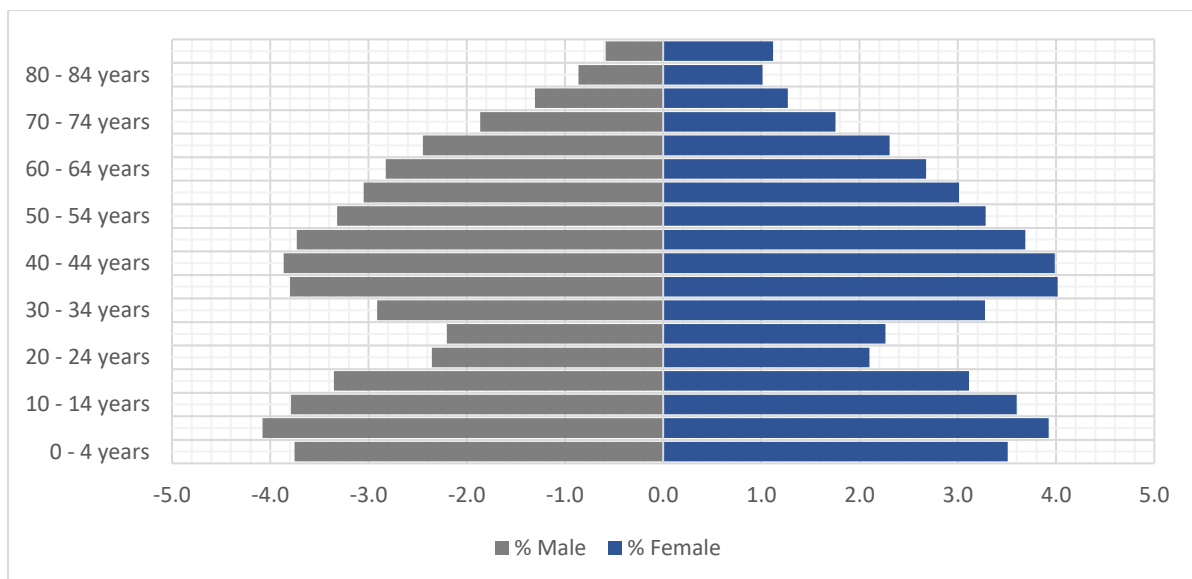


Figure 4. Population Age Pyramid of the County Galway - 2016

In general, Census shows that there are a greater number of older populations in the 42-51 years bracket, along the West coast of the country compared to the East coast. Galway City, however, has a population in the youngest age bracket, similar to other parts of the country with third level colleges. Within this context, County Galway had an average age of 38.1 in 2016 that is +1.3 more than 2011.

As it is mapped on the Figure below, ED's residing the youngest average age groups include Lackalea (31.2 years old), Tiaquin (32.8 years old), Ryehill (33.1 years old), and Killogilleen (33.6 years old). On the other hand, the ED's residing the oldest average age groups include Coos (49.2 years old), Leitir Breacáin (48.8 years old), Abhainn Ghabhla (47.1 years old), and Binn an Choire (46.7 years old). As it is shown, the Galway West is home to older age groups, while younger age groups are distributed within and close to the urban environment and major workplaces.

This also 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.

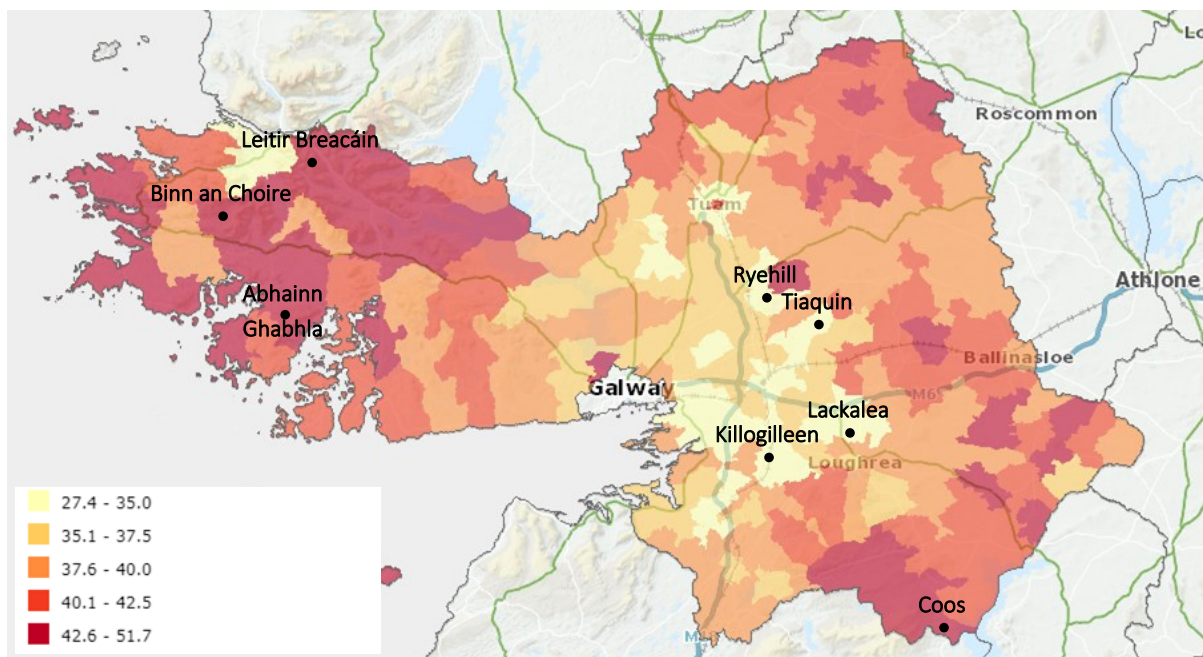


Figure 5. Average Age by Electoral Division - 2016

3.1.2 Population Distribution

In a bigger picture, the population of the Northern and Western Region is dispersed unevenly and has historically had a lower level of urbanisation compared to other regions. This weak urban structure is characterised by its location above all five existing cities in Ireland, which are south of a line from Dublin to Galway, and west of the two cities of Derry and Belfast in Northern Ireland.

In the County level and according to the CSO’s parameters, a total of 39,913 people (22.2%) were living in urban settlements in County Galway in 2016. 139,477 (77.8%) 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 22.6% and 77.4% respectively.

Table 5. Rural and Urban Population in County Galway over 2011-2016

	2011	2016
Total Population (Number)	175,124	179,390
Aggregate Town Area (Number)	39,546	39,913
Aggregate Rural Area (Number)	135,578	139,477
Percentage of population in Aggregate Town Area (%)	22.6	22.2
Percentage of population in Aggregate Rural Area (%)	77.4	77.8

Source: CSO StatBank

A more recently published report of the Census, “Urban and Rural Life in Ireland 2019”, uses a six-way urban/rural classification to examine social and economic characteristics of life in Ireland. These themes include income, housing, health, education, and commuting patterns are examined. Despite using different criteria, as shown in Figure 6 below, the County is mostly characterised by rural areas, including those under strong urban-based pressures. This is even more evident when moving towards Galway West.

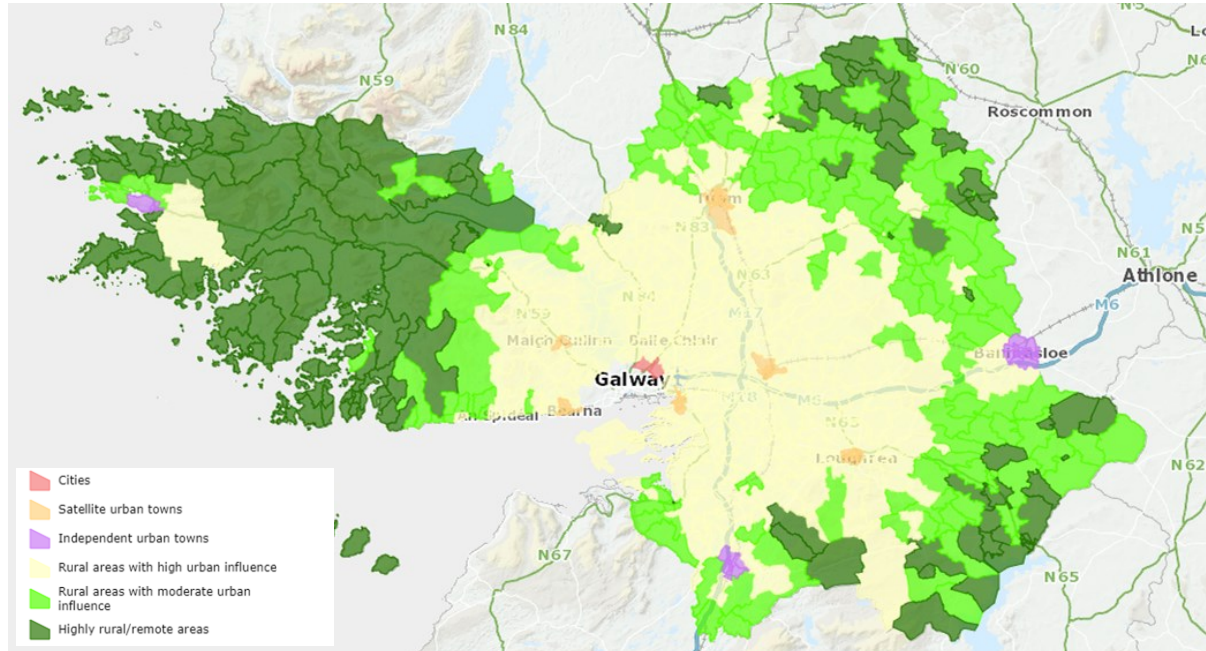


Figure 6. Indication of Area Type Classification by Small Area - 2016

Locating the population change over 2011-2016, as illustrated in Figure 7, indicates that Galway West had a bigger share of a declining population. While, growing population mostly occurred in Galway East and around the major workplaces, such as Galway City, and Tuam and along the high-speed access roads, such as M17 and M6.

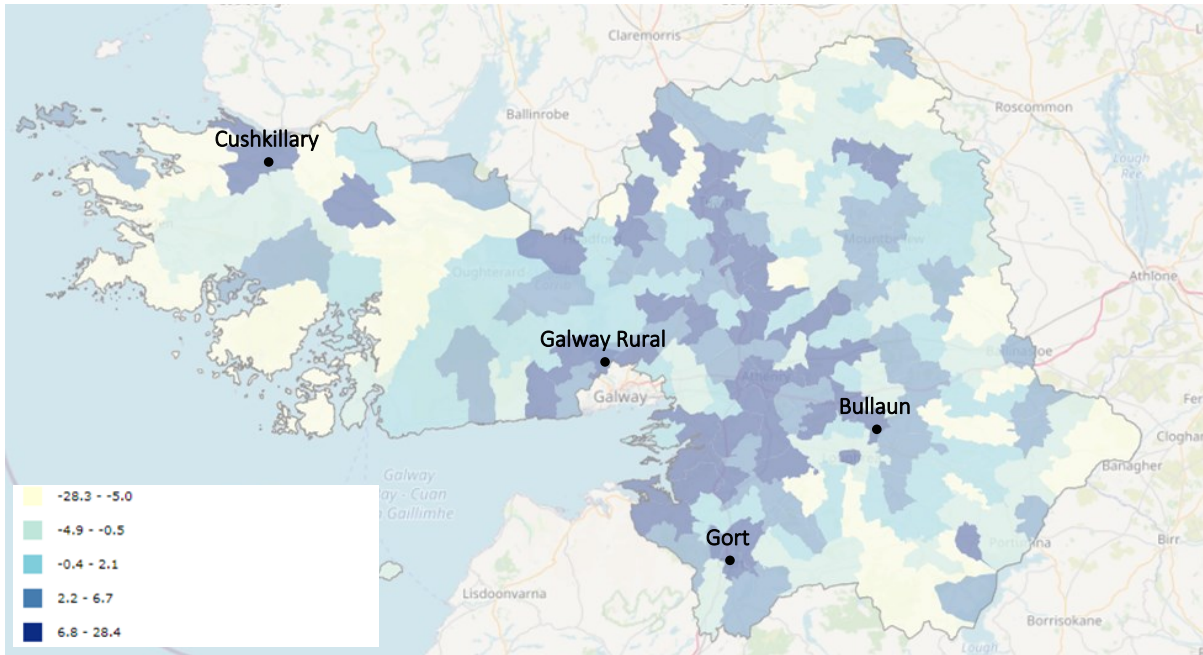


Figure 7. Percentage Change in Population Change by Electoral Division 2011-2016

The overall distribution of population in Census 2016 indicates that there are significant variances in population trends within ED’s throughout the County. However, as it is shown in Figure 8, Galway East contains the highest concentration of the total population along with the ED’s of Ballinasloe Urban (6,654 persons), Tuam Rural (6,033 persons), Loughrea Urban (5,542 persons), and Athenry (5,469 persons) as the most populated areas.

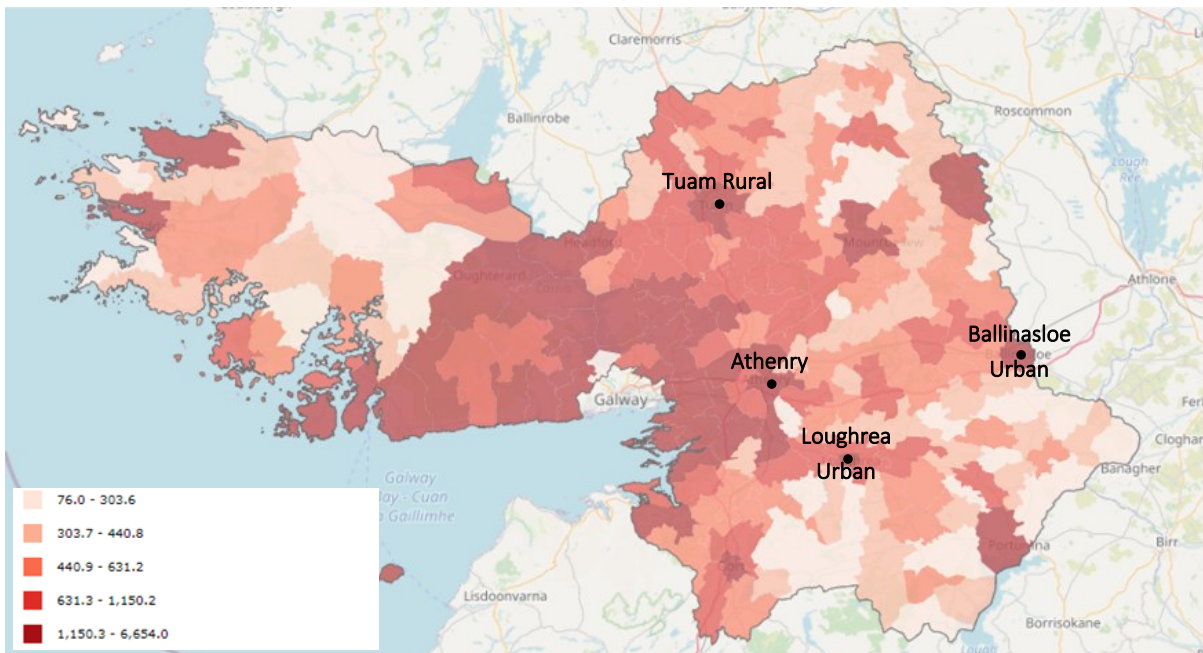


Figure 8. Spatial Distribution of Population in County Galway - 2016

As summarised in the Table 6 below, Athenry, Gort, and Loughrea experienced an overall rate of growth considerably higher than the county average between 2011 and 2016, with the population increasing by 11.49% from 11,656 persons in 2011 to 12,995 persons in 2016. Thereafter, the settlements identified as the Metropolitan Area had the greatest growth rate,

with the population growing by 4.33% from 7,894 persons in 2011 to 8,236 persons in 2016. Population changes across the various settlements identified in the settlement hierarchy is set out in the Table below. As it can be seen, Small Growth Towns and Villages had a number of declining settlements, with Clifden ranked amongst the highest rate of decline (-22.3%) followed by Portumna (-5.23), and An Spidéal (-5.20%). It is noted that the rural remainder experienced a slight growth of 1.75% over the intercensal period.

Table 6. Population Growth in County Galway 2011-2016

Settlement Typology	Settlement	Population CSO 2011	Population CSO 2016	Growth Rate 2011-2016 (%)
Metropolitan Area	Baile Chlair	1,217	1,248	2.55
	Bearna	1,878	1,998	6.39
	Oranmore	4,799	4,990	3.98
Totals		7,894	8,236	4.33
Key Towns	Ballinasloe	6,659	6,662	0.05
	Tuam	8,242	8,767	6.37
Totals		14,901	15,429	3.54
Strategic Potential	Athenry	3,950	4,445	12.53
Totals		3,950	4,445	12.53
Self-sustaining Towns	Gort	2,644	2,994	13.24
	Loughrea	5,062	5,556	9.76
Totals		7,706	8,550	10.95
Small Growth Towns	Clifden	2,056	1,597	-22.32
	Maigh Cuilinn	1,559	1,704	9.30
	Oughterard	1,333	1,318	-1.13
	Portumna	1,530	1,450	-5.23
	Headford	889	973	9.45
Totals		7,367	7,042	-4.41
Small Growth Villages	An Chearthrú Rua	814	786	-3.44
	An Spidéal	250	237	-5.20
	Ballygar	660	687	4.09
	Dunmore	577	600	3.99
	Glenamaddy	500	480	-4.00
	Kinvara	620	730	17.74
	Moylough	503	518	2.98
Totals		3,924	4,038	2.91
Rural Remainder		129,382	131,650	1.75

Source: Galway County Council

It is noted that in the settlements with a mostly declining population, such as Small Growth Towns and Villages, a few of the settlements had a considerable rate of growth, seemingly attracted most of the population growth within their categories. This includes Headford (9.45%), and Maigh Cuilinn (+9.3%) in the Small Growth Towns, and Kinvara (+17.74%), and Ballygar (+4.09%) in the Small Growth Villages.

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 7 presents the components of intercensal population change back to 2011, 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 below the Irish national average which is pushing the rate of population change in the County below the national figure.

Table 7. Components of Population Change and Average Annual Rates of County Galway 2011-2016

	2011	2016
Change in Population since previous census (Number)	15,868	4,266
Births (Number)	14,392	13,067
Deaths (Number)	5,994	5,975
Natural increase (Number)	8,398	7,092
Estimated net migration (Number)	7,470	-2,826
Average annual rates per 1,000 - Births (Number)	17.2	14.7
Average annual rates per 1,000 - Deaths (Number)	7.2	6.7
Average annual rates per 1,000 - Natural increase (Number)	10	8
Average annual rates per 1,000 - Estimated net migration (Number)	8.9	-3.2

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. With a growth rate of 3.4% over the same intercensal, the number of private households in County Galway increased from 60,952 in 2011 to 63,040 in 2016. However, the average household size remained unchanged at 2.8 over the intercensal period. Therefore, the County stood considerably above the national average by the growth rate of private households with a slightly greater household size.

Table 8. Average Number of Persons per Private Household 2011-2016

	2011	% of Total	2016	% of Total	% of Change
1-person household	14,069	23.1	14,725	23.4	4.7
2-person household	16,684	27.4	17,352	27.5	4.0
3-person household	10,457	17.2	10,379	16.5	-0.7
4-person household	10,114	16.6	10,874	17.2	7.5
5 and over-person household	9,628	15.8	9,710	15.4	0.9
All private households	60,952	100.0	63,040	100.0	3.4
All persons in private households	172,308	-	177,145	-	-
Average number of persons in private households	2.8	-	2.8	-	-

Source: CSO StatBank

As illustrated in the Table above, the pattern of family formation in County Galway is mostly characterised by two-person households (27.5%) followed by single-persons households (23.4%). However, the growth rate of different household size groups shows that 4-person households increased considerably (7.5%) over the same period. This is followed by single households (4.7%) and two-person households (4%). This represents a combination which maintains the average household size at where the county is standing, which is slightly above the State figure.

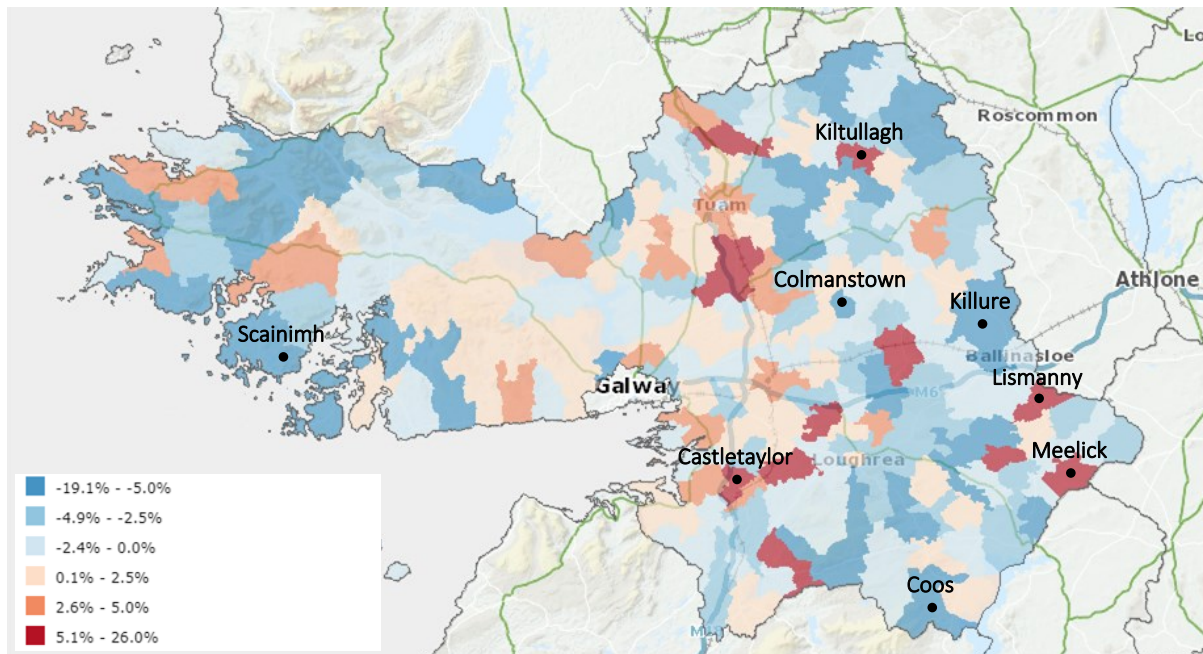


Figure 9. Percentage Change in Average Household Size by Electoral Division 2011-2016

CSO database on Census 2016 indicates that greatest average household sizes are located in Lackalea (3.59), Stradbally (3.4), Grange (3.35), Hillsbrook (3.33), while the least average household sizes are located in Inishbofin (2.09), Tuam Urban (2.22), Errislannan (2.29), Leitir Breacáin (2.3).

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 9, had occurred in Colmanstown (-14.8% from 2.84 to 2.42), Scainimh (-12 from 3.08 to 2.71), Coos (-11.6 from 2.49 to 2.20). 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 Meelick (+13.9 from 2.67 to 3.04), Lismanny (+11 from 2.63 to 2.92), Kiltullagh (+8 from 2.50 to 2.70), and Castletaylor (+7 from 2.99 to 3.2).

On the other hand, an insight to the spatial distribution of single households in settlements throughout the County (Figure 10) indicates that the greatest figures are located in Tuam (2,596 persons), Ballinasloe (2,081 persons), Loughrea (1,913 persons), and Oranmore (1,445 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 Williamstown (49.6%), An Spidéal (47.8%), and Woodford (45.8%).

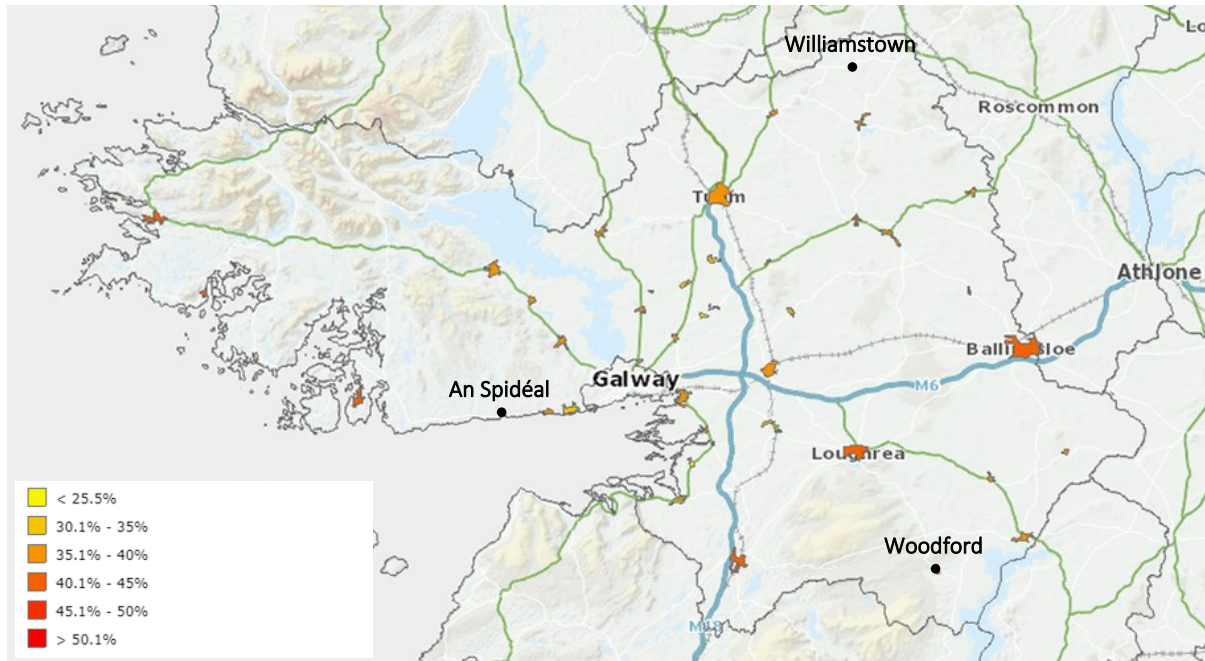


Figure 10. Single Population by Settlement - 2016

The spatial distribution of the average household size throughout the County represents the type of emerging demand in the housing market. In County Galway, the eastern side generally has a more dynamic demographic profile. Eastern ED's, specifically those which are located in the more accessible outskirts of Galway City, including Tuam, Loughrea, Ballinasloe, and Gort, have 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

Several population projection scenarios for County Galway have been investigated up to 2031, ranging from "non-intervention" to "policy-intervention" scenarios. While, non-intervention methods are performed as the evidence-based projection relying on demographic trending of the State or County, the policy-intervention method seeks to facilitate the national and regional planning policy to achieve a balanced compact pattern of growth. The results for 2022 and 2028 which mark the Plan period are summarised in the Table 9 below.

Table 9. Results of Population Projection in Different Scenarios

Scenario	Population 2022	Population 2028
Non-intervention - A	190,100-193,269	202,936-206,154
Non-intervention - B	207,329	212,415
Policy-intervention (Galway calcs - City calcs)	195,855	212,432
Policy-intervention (midway NPF target)	192,356	205,900
Policy-intervention (high NPF target)	195,056	211,100
ESRI Figures (Avg. ESRI NPF and ESRI Baseline)	187,831	198,750

Accordingly, two variations of the non-intervention scenario were explored. The first variation relies on the State projection figures provided by CSO StatBank, applying the growth rate of the State to the County 2016 onwards. The second variation utilises the Cohort Component Method (CCM) method, known as the best-in-class methodology for demographic projection. CCM in the following Strategy projects the population by age groups and sex using survival rates, net migration, and birth rates over the Plan period.

The policy-intervention scenario on the other hand relies on the NPF/RSES population targets, utilising these figures as the fixed variables to interpolate the required level of change per annum within the County. Different variations under this scenario were explored: (1) performing the calculation for both City and Galway using the NPF and RSES high population targets over the Plan period and estimating the County population by subtracting City from the overall figure, (2) taking the mid-way NPF population target and performing the calculations, (3) taking the high NPF population target and performing the calculations. Set out under the Council's provision guidance and local knowledge of the County, the third variation of policy-intervention scenario was selected for the purpose of HNDA and the Core Strategy.

With the ESRI research work "*Structural Housing Demand at County Level*" published on 14th December 2020, the "*Housing Supply Target Methodology for Development Planning*" published by DHLGH in December 2020, and the Ministerial Letter advising these publications as the most up to date approach towards demand projection, a third alternative was available for the population projection. In this alternative, ESRI NPF and ESRI Baseline figures were taken to calculate an adjusted population projection scenario for the County. However, as illustrated in the Table 9 above, while the non-intervention- and policy-intervention scenarios show more consistency, especially in the long-run up to 2028, the ESRI results stands out by a considerable deviation which is not fully reflective of the on-going demographic trends in the County. Therefore, the policy-intervention relying on the high NPF population target is taken as the preferred scenario for the following document.

However, this is complemented by applying the ESRI recommended method in calculating the housing demand, as to factor in housing supply and unmet demand into the equation (*see section 5. Determination of average households*). The following provides details on the population projection utilising the "Policy-intervention Scenario with High NPF population Target".

The NPF sets out a targeted pattern of growth for Galway to 2026 with the projected population to range between 300,000 to 308,500 persons. Specific population targets for Galway City are also set out in the RSES. As per Variation no. 5 of the City Development Plan 2017-2023, the target for the city is to reach a population of 102,900 by 2026, that is an increase of 23,000 people from the Census 2016 City and Suburbs population of 79,900. Longer term to 2031, the target for the city is to grow by a further 12,000 to 114,900 population. Taking the 308,500 as the anticipated population for Galway, the population projection of the County Galway will be as the following.

Table 10. Census and NPF Roadmap Figures

Settlement	Census 2016	NPF/RSES Population Target 2026	NPF/RSES Population Target 2031
City and Suburbs	80,000	23,000	12,000
Galway County	180,000	25,500	14,000
Total	260,000	48,500	26,000

Source: Galway County Council

In this policy intervention scenario, the above population targets are used as the fixed variables and then an interpolation of the required level of change per annum was developed from baseline year 2016 to NPF/RSES target years 2026 and 2031; thus, producing annualised figures over the period of 2022 and 2028 which is the lifetime of the Development Plan. The results are summarised in the Table 11 below.

Table 11. Projected Population Growth Over the Plan Period based upon NPF/RSES 2026 & 2031 Targets

Year	Total Population in County Galway	Annual Population Increase during Year	Annual Population Increase 2022-2028	Total Population Increase 2022-2028	Total Population Increase 2016-2028
2006	159,256	68.70%	-		
2011	175,124	69.90%	-		
2016	179,390	69.50%	-		
2017	182,001	1.46%	2,611		
2018	184,612	1.46%	2,611		
2019	187,223	1.46%	2,611		
2020	189,834	1.46%	2,611		
2021	192,445	1.46%	2,611		
2022	195,056	1.46%	2,611		
2023	197,667	1.46%	2,611		
2024	200,278	1.46%	2,611		
2025	202,889	1.46%	2,611		
2026	205,500	1.46%	2,611		
2027	208,300	1.36%	2,800		
2028	211,100	1.36%	2,800	18,655	31,710

3.2 Housing Price

3.2.1 Residential Property Price Index

According to the “Residential Property Price Index - August 2020” prepared by the CSO, residential property prices increased by 0.6% nationally in the year to August. This compares to a decrease of 0.6% in the year to July and an increase of 1.9% in the twelve months to August 2019. In Dublin, residential property prices saw a decline of 1.6% in the year to August with house prices decreased by 1.4% and apartments increased by 0.1%. The region outside of Dublin that saw the largest rise in house prices was the South-West at 5.2%, while at the other end of the scale, the Border saw a 2.7% decline.

In this context, residential property price index in the West increased by 1.7%, while as reported by Myhome.ie, a two-bedroom apartment in County Galway priced at €199,000 in 2020 Q3. This indicates a quarterly change of 4.74% and annual change of +5.71%, which indicates a moderate growth by standing slightly above the median price increase (4.55%) across the State. Noted that Dublin quarterly increase for the same type of apartment was 4% over this time.

This index for a four-bedroom semi-detached dwelling is recorded as €285,000 in the same period, which shows a quarterly change of +18.75% and an annual change of +9.62%. Although most counties had zero quarterly change, County Galway ranked highest followed by County Mayo (+13.33%), Sligo (+11.88%), and Clare (+7.69%). These trends show that family houses have a growing market in County Galway.

3.2.2 Median Price

Households paid a median price of €258,500 for a dwelling on the residential property market in the 12 months to August 2020. The highest median prices outside of Dublin were in Wicklow (€335,000) and Kildare (€307,500), while the lowest price was €108,000 in Leitrim.

In this spectrum and as reported by Daft.ie, households paid a median price of €310,085 for a dwelling within the West which had +1.8% increase to its last year record. As reported by Myhome.ie in 2020 Q3, households paid a median price of €240,000 for a dwelling in County Galway which indicated an annual change of +6.67%. This places County Galway amongst the highest median prices after Roscommon (+22.22%), Offaly (+10%), and Waterford (+8.82%).

3.2.3 Mean Price

Households paid a mean price of €294,881 for a dwelling on the residential property market in the 12 months to August 2020. The mean price in Dublin (€442,282) was the highest in any

region or county. Dún Laoghaire-Rathdown had the highest mean price in the Dublin region at €605,056, while South Dublin had the lowest at €360,616.

Outside of Dublin, the Mid-East was the most expensive region, with a mean price of €302,969. Wicklow was the most expensive county in the Mid-East region, with a mean price of €368,638. The Border region was the least expensive region in the year to August 2020, with a mean price of €145,513. Leitrim (in the Border region) was the least expensive county, with a mean price of €120,335.

Within this context and as recorded by Daft.ie property report, households paid a mean price of €205,411 for a dwelling in County Galway which indicates a year-on-year change of 2.6%. The breakdown of the mean price for different types of properties in August 2020 with Annual change of house prices over 2018-2020Q3 is summarised in the table below.²

Table 12. Average Asking Price for Different Types of Properties in County Galway 2018-2020Q3

	Single bed Apt.	Two-bed Apt.	Three-bed Apt.	Four-bed Apt.	Five-bed Apt.
Average Asking Price	75,000	91,000	120,000	247,000	273,000
Annual Change 2020 Q3	4.5%	0.6%	-2.9%	-4.3%	4.7%
Annual Change 2020 Q2	-5%	-9%	-6%	-6%	-11%
Annual Change 2020 Q1	12.6%	-1.3%	3.2%	11.9%	-0.3%
Annual Change 2019	11.9%	-2.6%	1.5%	7.4%	3.9%
Annual Change 2018	4.3%	9.9%	-1.0%	5.9%	-3.5%

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

As it is shown, except for the second quarter of 2020 with the outset of Covid-19 pandemic and the related economic turmoil, single-bed and five-bed houses pricing growth stood above the County figure in the third quarter of 2020. Single-bed apartments have a steady growth in price over 2018-2020Q1 with a sharp increase of +11.9% in 2019 followed by +12.6% in the first quarter of 2020. At the other end, five-bed house pricing experienced fluctuations over the same period with a considerable increase from -11% in 2020Q2 to 4.7% in 2020Q3.

3.2.4 Residential Property Rent Index

As asserted in the “Residential Tenancies Board; Rent Index - Q2 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 2020 Q2, including Dublin, Kildare, Wicklow, Meath, Cork, Galway, and Louth. With a standardised average rent of €1,075 in 2020 Q2, Galway County placed as the sixth expensive rental market

² The 2018-2019 records are used to prevent conflicting data due to the impacts of COVID-19 on the housing market in 2020.

in the State. Compared to the first quarter of 2020, there is more than 3% increase from €1,041, that regarding the impacts of COVID-19 on the housing market, indicates the strong demand for the rental market. The year-on-year change of the standardised average rent also proves an increase of 3.4% since last year.

Table 13. Rent Index in County Galway - 2020 Q2

Index Q2 2020	Standardised Average Rent Q2 2020	Standardised Average Rent Q1 2020	Q-on-Q Change (%)	Standardised Average Rent Q2 2020	Y-on-Y Change (%)
125	1,075	1,041	3.3	1,040	3.4

Source: Residential Tenancies Board; Rent Index Q2 2020, p. 21

Mapping the rate of change in weekly rents throughout the County indicates that Galway East and specifically along the access roads towards Galway City experienced greater changes with Ardamullivan leading the way (69.2% growth) followed by Killrerin (43.7%) and Milltown (32.8%) 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 Beagh (-27%), Maíros (-21.6%), and Creggs (-14.3%).

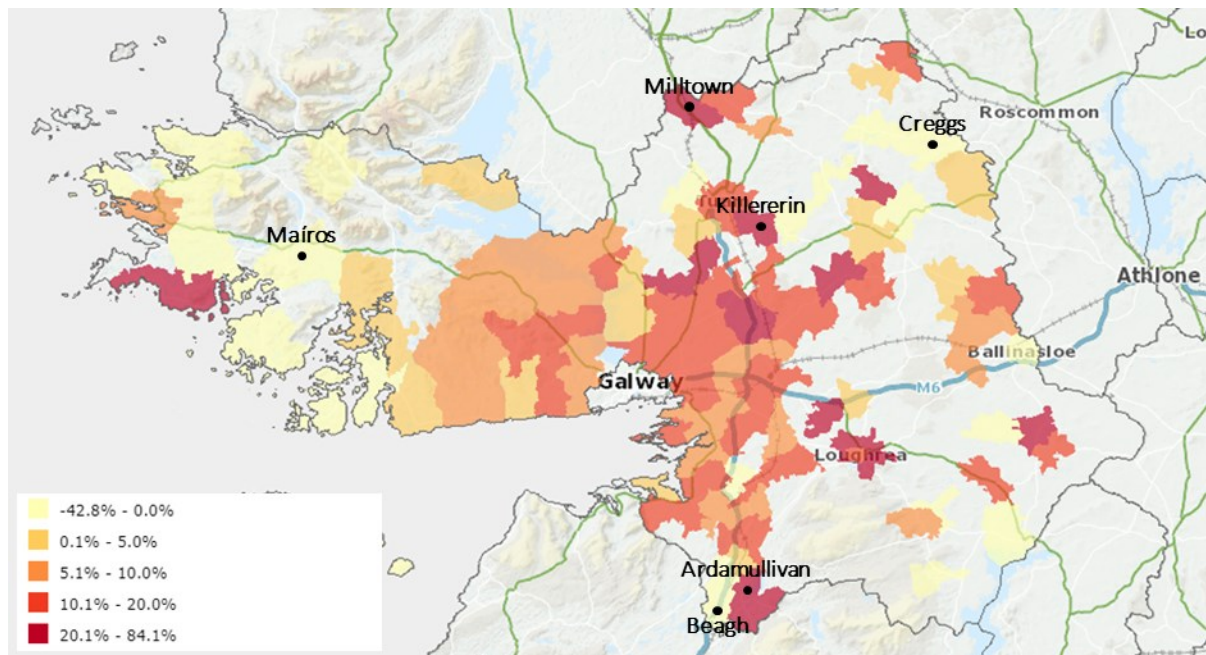


Figure 11. Percentage Change in Average Weekly Rent by ED's 2011-2016

3.2.5 Rent Pressure Zone

As set out within the map of “Designated Rent Pressure Zones - April 2020” by the Housing Agency, Athenry - Oranmore and Gort - Kinvara within County Galway are identified as Rent Pressure Zones throughout the County.

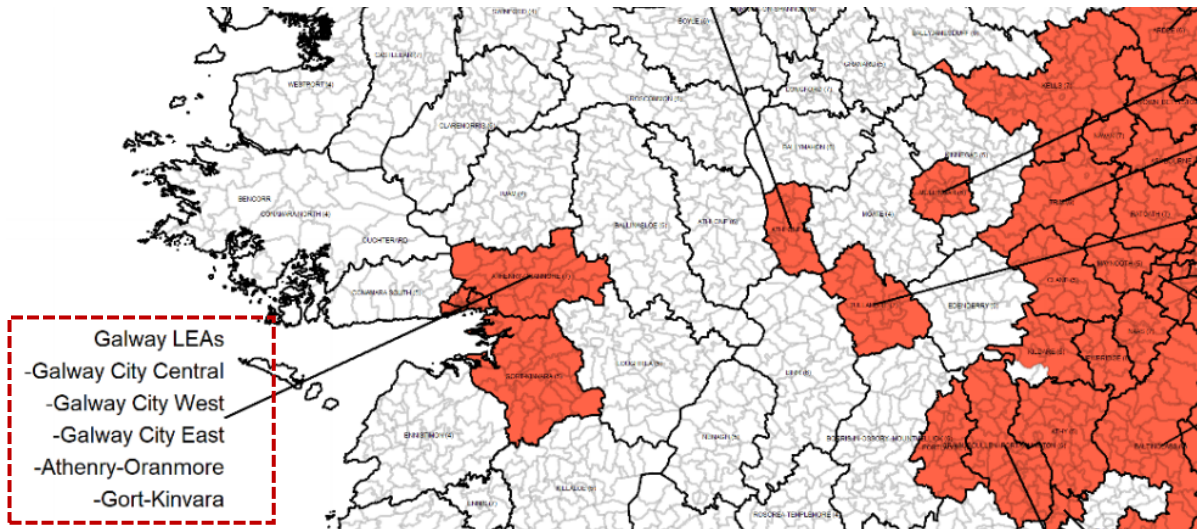


Figure 12. Rent Pressure Zones within the County Galway as Set by the Housing Agency

The high rental levels in these areas relative to other counties reflects the concentration of demand close to the country’s largest employment hubs, Galway City, and the access to public transport which again facilitates commuting to employment hubs. In 2016 there were 1,190 persons in the settlement of Oranmore who commuted to Galway city and suburbs which equates to 45.9% of persons at work and living in Oranmore. Thereafter, the largest commuter population resides in Athenry, where 658 persons commuted to Galway city and suburbs and this equated to 34.8% of persons at work and living in this settlement. This is followed by Tuam that had 675 commuters in 2016 and that equates 20.6% of persons at work and living in Tuam. Comparing the pressure zone map with the catchment area of the major employment hubs (see Figure 13) clearly illustrate the tight connection of Oranmore, Athenry, and Tuam with Galway City, where people commute to every day for work.

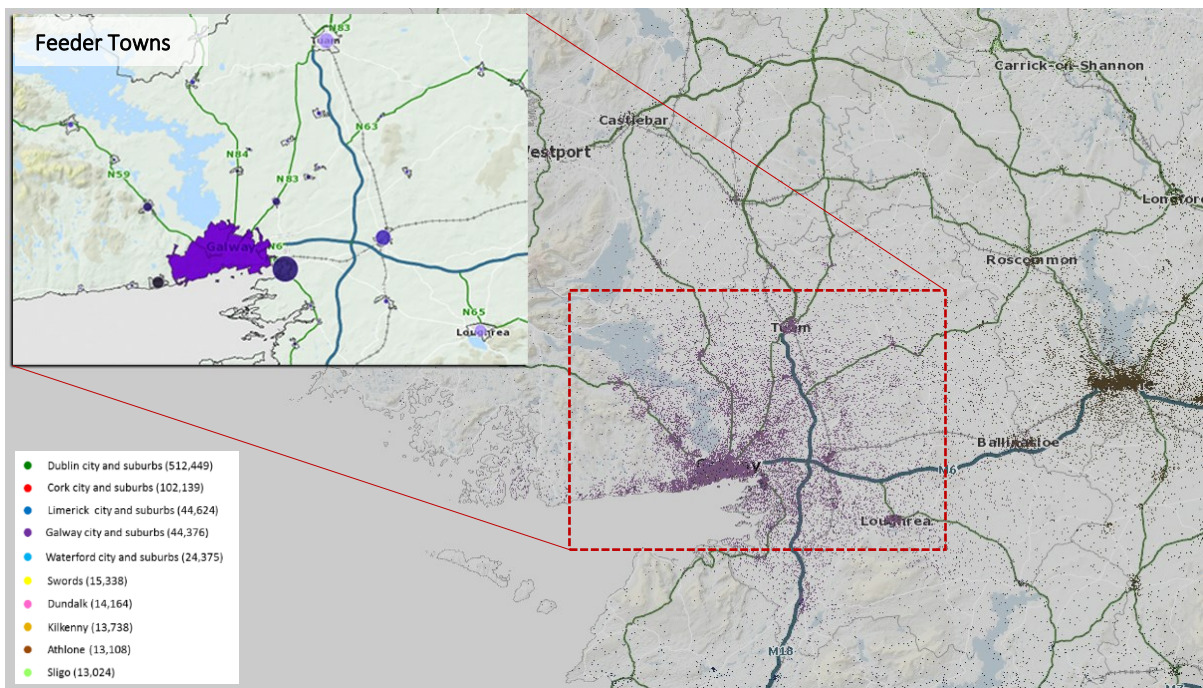


Figure 13. The Feeder Towns and the Catchment Areas of Major Workplace Locations in County Galway - 2016

3.3 Economic Trends

This section considers key economic indicators comparing County Galway 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 indicates 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 14 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 dropped slightly for the West region (i.e., Galway, Mayo, and Roscommon) in 2013, thus representing a decrease within the economic sector of the region. The region recovered in 2015, 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 14. 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
West	Gross Value Added (GVA) per person at Basic Prices (€)	28,335	28,809	25,749	27,173	29,677
	Gross Value Added (GVA) at Basic Prices (%)	8.0	8.0	7.0	6.9	5.5
	Population (%)	9.7	9.7	9.7	9.7	9.7
	Persons at work (%)	9.6	9.8	9.8	9.4	9.2
	GDP per person (€)	31,015	31,550	28,242	29,865	31,978

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 Galway. As it stands, the majority of the population in County Galway 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 manufacturing industry which experienced a significant rise as per the 2016 census, with a 20.7% increase from the 2011 census statistics, and a 11.3% increase in the professional services industry for the second highest growth between both censuses. There has been a fall in the proportion of people employed in public administration in County Galway at -7.1%, as well as the agriculture, forestry, and fishing industry with a -6.8% decrease from previous census.

Table 15. Persons at work in County Galway by Industry and Census year

Industry	2011	2016	% in 2016	Change %
Agriculture, forestry and fishing	5,908	5,505	7	-6.8
Building and construction	4,275	4,681	6	9.5
Manufacturing industries	10,139	12,239	16	20.7
Commerce and trade	14,088	14,133	19	0.3
Transport and communications	4,204	4,680	6	11.3
Public administration	3,726	3,461	5	-7.1
Professional services	17,272	19,203	26	11.2
Other	9,595	11,214	15	16.9
Total	69,207	75,116	100	8.5

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

3.3.3 Employment Profile

Table 16 and Table 17 below set out the current levels of employment and unemployment across County Galway, with the percentage of economically active people slightly lower at 96% than the previous census at 96.4%. There are variations between the employer/employee status band with a higher percentage of employees at 43.4% than employers at 10.6%, showing that the percentage of people that are employer/self-employed is lower than the number of employees, with a 11.9 percentage points difference in the increase between the employee category over the census periods and a decrease in the percentage of employers/self-employed at -2.9% over the census periods.

The unemployment percentage in County Galway has lowered from 11.3% for the 2011 census to 7.2% 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 19.9%, as well as the student population, which rose by 4.8% between the 2011 and the 2016 census.

Table 16. Population aged 15 years and over in the Labour Force by Age group and Census year

	2011	%	2016	%	% Change
All ages	69,207	100.0	75,116	100.0	8.5
15-24 years	4,042	5.8	4,134	5.5	2.3
25-34 years	16,983	24.5	14,626	19.5	-13.9
35-44 years	19,885	28.7	22,361	29.8	12.5
45-54 years	16,056	23.2	18,832	25.1	17.3
55-64 years	9,768	14.1	12,132	16.2	24.2
65 years and over	2,473	3.6	3,031	4.0	22.6

Source: CSO StatBank

Table 17. Population aged 15 years and over by Principal Economic Status and Census year

	2011	%	2016	%	%Change
All persons aged 15 years and over	135,431	100.0	138,747	100.0	2.4
Employer or own account worker	15,122	11.2	14,682	10.6	-2.9
Employee	53,762	39.7	60,186	43.4	11.9
Assisting relative	323	0.2	248	0.2	-23.2
Unemployed looking for first regular job	1,188	0.9	936	0.7	-21.2
Unemployed having lost or given up previous job	14,123	10.4	9,002	6.5	-36.3
Student or pupil	14,192	10.5	14,877	10.7	4.8
Looking after home/family	13,356	9.9	12,099	8.7	-9.4
Retired	17,161	12.7	20,569	14.8	19.9
Unable to work due to permanent sickness or disability	5,749	4.2	5,724	4.1	-0.4
Other economic status	455	0.3	424	0.3	-6.8

Source: CSO StatBank

3.3.4 Commuting Profile

As set out in Table 18 and Table 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 25.6% 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 8,879 people attend their education or employment outside of County Galway, thus affecting the employment profile and spending habits within the County.

Table 18. Population aged 5 years and over by Journey time to work, school or college and Census year

	2011	2016	% in 2016	% Change
Under 15 mins	35,951	38,214	34	6.3
¼ hour - under ½ hour	26,271	27,111	24	3.2
½ hour - under ¾ hour	20,055	22,008	20	9.7
¾ hour - under 1 hour	6,676	7,675	7	15.0
1 hour - under 1 ½ hours	5,374	6,748	6	25.6
1 ½ hours and over	1,789	2,131	2	19.1
Not stated	6,263	7,199	6	14.9
Total	102,379	111,086	100	8.5

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

Table 19. Population aged 15 years and over at work, school or college by Means of Travel and Census year

	2011	2016	% in 2016	% Change
All means of travel	67,610	73,896	100.0	9.3
On foot	3,404	3,442	4.7	1.1
Bicycle	515	628	0.8	21.9
Bus, minibus or coach	926	1,076	1.5	16.2
Train, DART or LUAS	226	302	0.4	33.6
Motorcycle or scooter	139	154	0.2	10.8
Motor car: Driver	45,269	50,043	67.7	10.5
Motor car: Passenger	2,419	2,759	3.7	14.1
Van	6,177	6,729	9.1	8.9
Other, incl. lorry	829	675	0.9	-18.6
Work mainly at or from home	4,763	5,065	6.9	6.3
Not stated	2,943	3,023	4.1	2.7

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 20. 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 (BPF)



Section 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. In Galway, the vacant housing stock including holiday homes, which totalled 78,043 in 2011, increased by 926 units to 78,696 in 2016, a marginal growth of 1.2 per cent. The small increase in the overall housing stock contrasts sharply with the growth of 407 vacant holiday homes over the same period which equates to 12.4% growth. It is noted that the overall vacancy rate had dropped from 19.3% in 2011 to 17.7% in 2016.

Table 21. Existing Housing Stock in County Galway - 2016

Housing Stock	Vacant Holiday Homes	Other Vacant Dwellings	Total Vacancy	% Vacancy
78,696	3,681	10,279	13,960	17.7

Source: CSO StatBank

Since the recession however, there has been a sustained rise in the number of residential units completed. The Table below indicates that the housing stock has increased by 2,736 units or 3.4% during the period 2016-2020 Q3. This figure also represents a 37.4% increase on the number of units completed over 2011-2016.

Table 22. New Dwelling Completion in County Galway over 2016-2020 Q3

Year	2016	2017	2018	2019	2020 (January-September)
Unit Completion	399	496	544	807	517

Source: ESRI published excel sheet, Jan. 2021

Census 2016 data shows that there were 10,279 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 21. 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 14, spatial distribution of housing stock throughout the County indicates that the major share of the stock is concentrated in the outskirts of Galway City with the highest rates in the western areas. This includes Bearna (1,388 units), An Cromptán (1,272 units), and

Oughterard (1,288 units). However, throughout the County, those ED’s with greater shares of the housing stock include Ballinasloe Urban (2,972 units), Loughrea Urban (2,735 units), Tuam Rural (2,576), and Athenry (2,205 units).

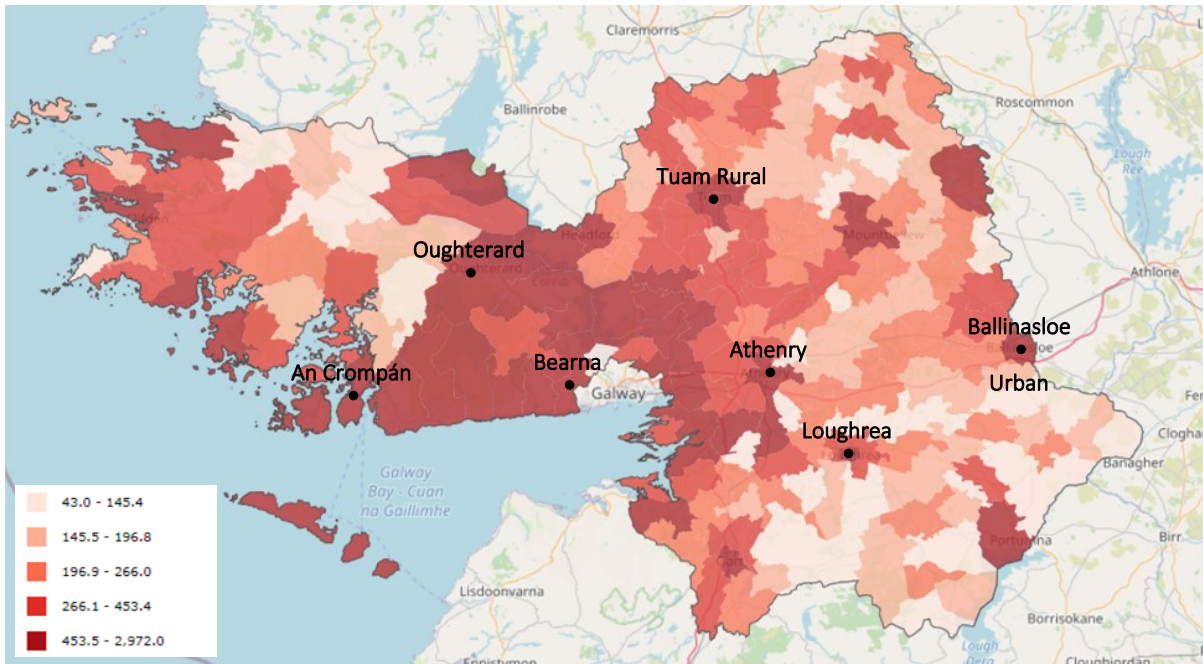


Figure 14. Spatial Distribution of the Housing Stock in County Galway - 2016

Comparing this housing stock with the previous Census data indicates that the housing stock increased marginally in the ED’s with higher rates of stock (see Table 23). Amongst these ED’s, Clarinbridge (+3.52%), Bearnna (+1.83%), and Loughrea (+1.48%) are recorded to have higher rates of growth.

Table 23. Housing Stock Change in Settlements with the Greatest Housing Stock in the County 2011-2016

	2011	2016	% Change
Ballinasloe Urban	2,927	2,972	+1.54
Loughrea Urban	2,695	2,735	+1.48
Tuam Rural	2,555	2,576	+0.82
Athenry	2,204	2,205	+0.05
Tuam Urban	1,923	1,944	+1.09
Oranmore	1,757	1,760	+0.17
Clarinbridge	1,421	1,471	+3.52
Gort	1,390	1,390	+0.00
Bearnna	1,363	1,388	+1.83

Source: CSO StatBank

However, throughout the County, Portumna recorded to have the highest growth of housing stock increasing with a sharp rate of +668.79% from 157 to 1,207 units over the intercensal period. Thereafter, the highest growth rates were experienced in Ceathrú an Bhrúnaigh (+15.2%), Galway Rural (+13.16%), and Ballynagar (12.24%).

On the other hand, spatialising the vacancy rates throughout the County indicates different results. As it is shown in Figure 15, highest rates of vacancy are located in Galway West and along the coast with Doonloughan (73%), Bunowen (62%), Errislannan (60%), and Cloch na Rón (60%) having the highest rates of vacancy in Census 2016.

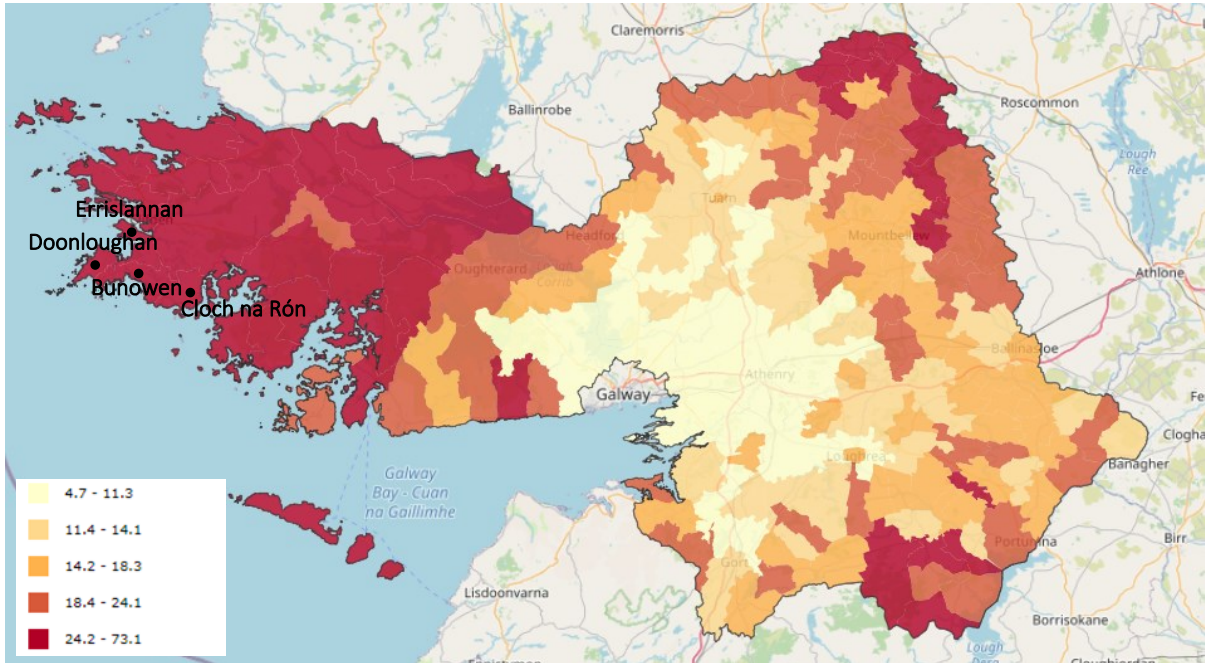


Figure 15. Spatial Distribution of the Housing Vacancy Rates in County Galway - 2016

By excluding the holiday homes and exploring the vacant dwellings within the County, as in Figure 16, it is evident that most of the vacant dwellings are stocked in northern ends of Galway East with Boyounagh (29%), Kilcroan (28%), Island (27%), Árainn (26%), and Cloonkeen (26%) having the highest vacancy rates respectively. These rates are standing considerably higher than the national figure which is 13 percent.

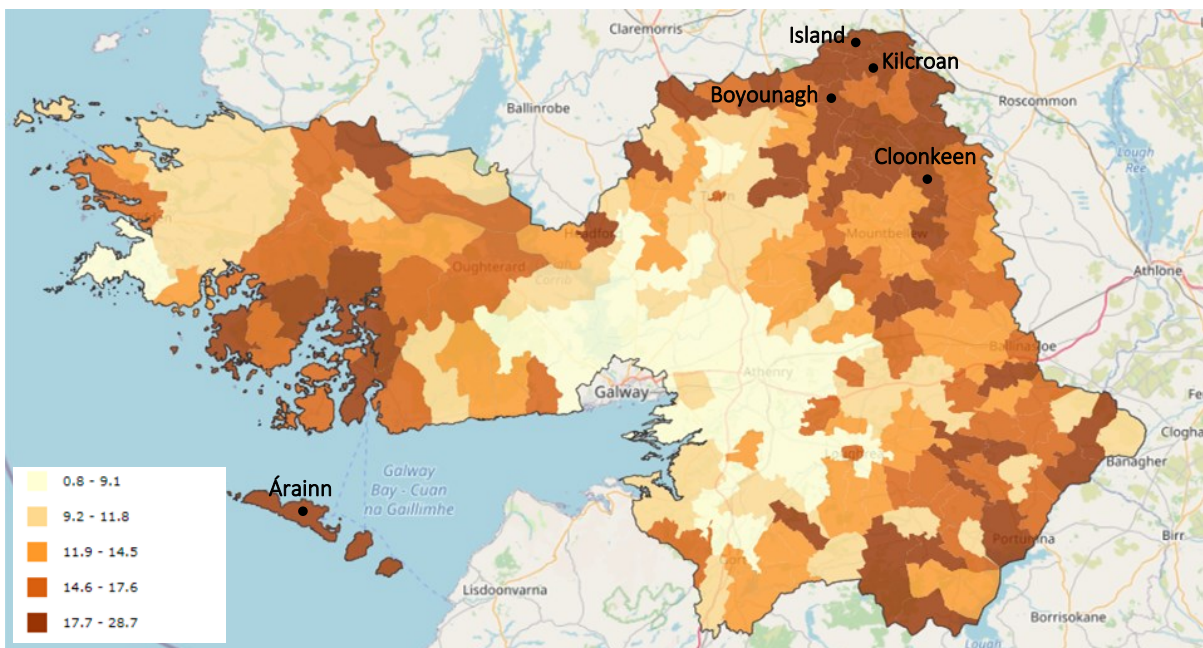


Figure 16. Housing Vacancy Rates Excluding Holiday Homes throughout the County - 2016

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.

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 Belleville, of which 72.7% of dwellings that were vacant in April 2011 were found to be occupied in April 2016. This was followed by Greethill (70.6%) and Cummer (64%). On the other hand, Kylemore had the least active market for vacant houses with a record of zero transactions. In general, as mapped on the Figure 17 below, ED's along the M18 and railway had more dynamic markets of vacant dwellings over 2011-2016.

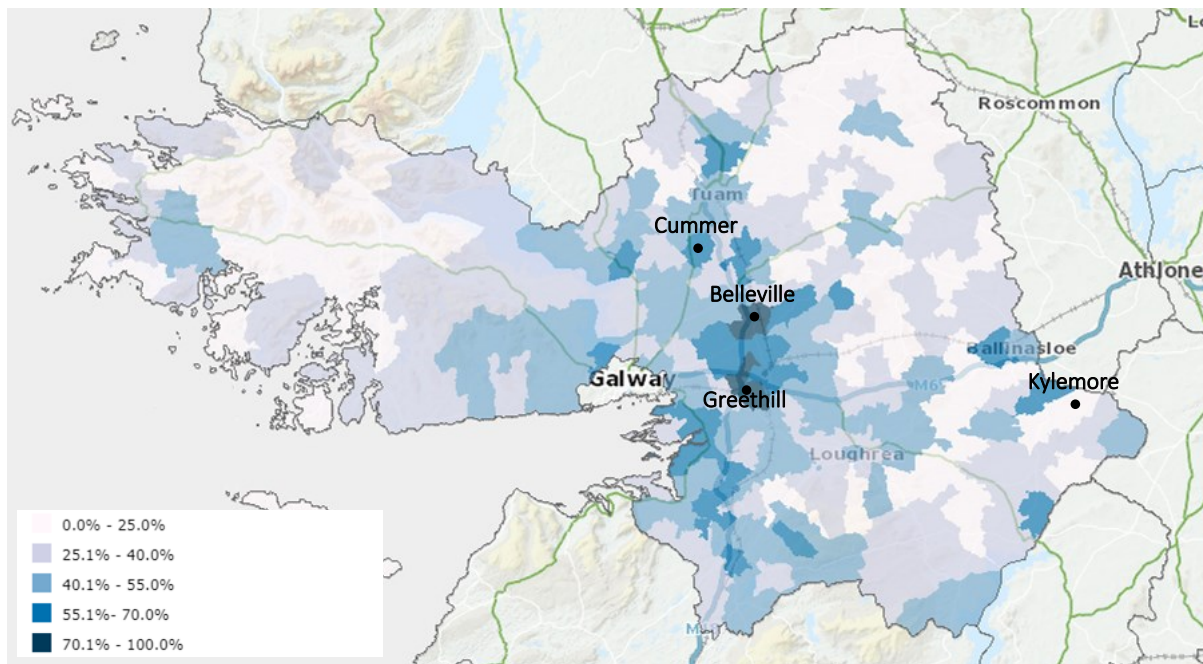


Figure 17. Distribution of dwellings that were vacant in 2011 and occupied in 2016

4.1.2 Housing Tenure

According to Census 2016, home ownership remains the dominant tenure in County Galway, where 76.7% of households are categorised as owner occupied units. However, the tenure trends over the decade to 2016 indicates that there was a 136.4% growth in the private rental market with an increase from 3,656 households in 2006 to 8,641 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 11.3% with increasing from 43,467 in 2006 to 47,872 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, 5% (3,128) of households were in the social housing in 2016.

Table 24. Housing Occupancy in County Galway - 2016

Type of Occupancy	Households	Households %
Owner Occupied (all)	48,358	76.7
Private Rental	8,641	13.7
Other Rental	3,128	5.0
Rent Free	1,381	2.2
Not Stated	1,532	2.4
Total	63,040	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 7%, while other rental housings which includes renting from Local Authority and a Voluntary Body had the greatest increase of all, growing from 1,260 households to 1,381. This indicates a growth rate of circa 9.6% over 2011-2016.

Table 25. Change of Housing Occupancy Type over the period of 2011-2016

	2011	%	2016	%	% of Change
Owner Occupied (all)	47,872	78.5	48,358	76.7	1.0
Private Rental	8,074	13.2	8,641	13.7	7.0
Other Rental	2,949	4.8	3,128	5.0	6.1
Rent Free	1,260	2.1	1,381	2.2	9.6
Not Stated	797	1.3	1,532	2.4	92.2
Total	60,952	100.0	63,040	100.0	-

Source: CSO StatBank

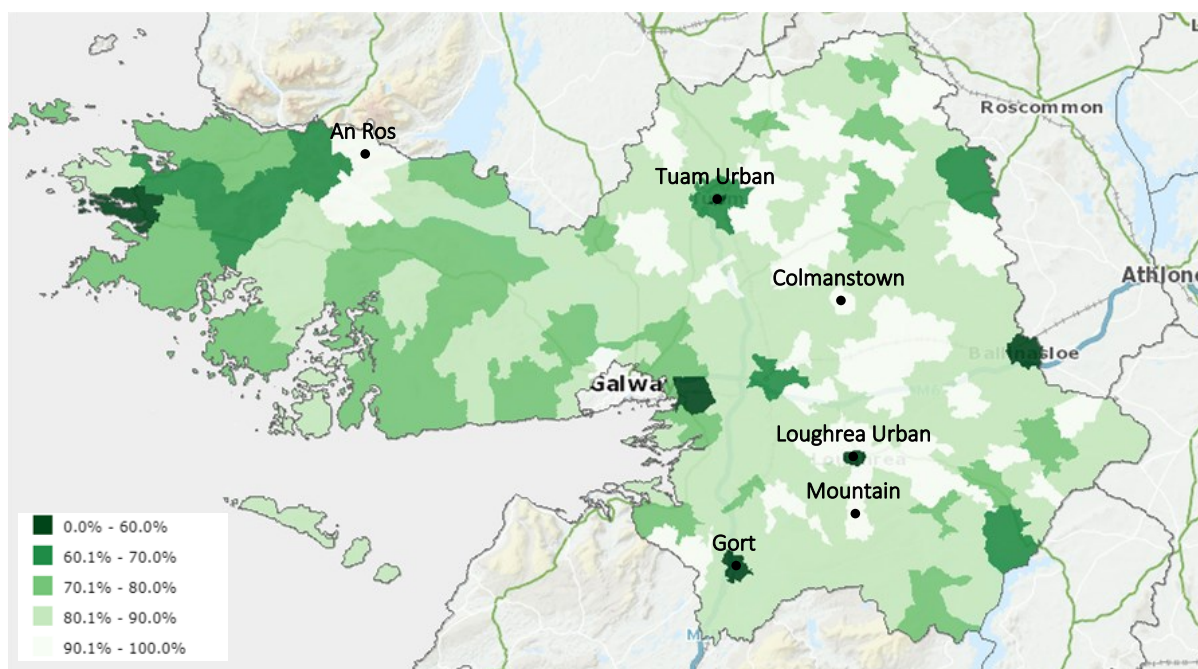


Figure 18. Spatial Distribution of Homeownership Rate by Electoral Divisions - 2016

As illustrated in Figure 18, homeownership is the most popular housing tenure throughout the County. However, in Galway East, specifically when moving away from the catchment area of Galway City, higher rates of homeownership can be seen, while lesser rates of homeownership can mostly be recognised either in the Galway City outskirts and along the high-speed roads and railways, or in the western ends of Galway West and along the coast.

Accordingly, the ED's with the highest rate of homeownership include: Colmanstown (98.1%), An Ros (97.1%), and Mountain (94.7%) which are marked with light green on the Figure 15 above, while the least rates of homeownership are located in Gort (48.6%), Tuam Urban (50.5%), and Loughrea Urban (52.6%) that are marked with dark green on the Figure.

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 Galway aided in the provision of an overall social housing stock of 652 units in 2019, which is 10% above the 2019 target for the County (110% target achieved by 2019). A breakdown of the County social housing stock provided in 2019-2020Q2 is summarised in the Table 26 below.

Table 26. Breakdown of Social Housing Activity in County Galway, 2019-2020Q2

Year	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
2019	100	18	27	145	7	152	33	14	47	54	12	387	652	591	110%	32
2020Q1	0	0	0	0	2	0	0	2	2	7	94	105	-	-	-	-
2020Q2	0	0	0	0	0	0	0	0	1	11	64	76	-	-	-	-

Source: Department of Housing, Planning & Local Government, Social Housing Delivery by Local Authority 2020

Since 2016, the total social housing delivery output for County Galway is 2,294 units, including first two quarters of 2020. The delivery of social housing in County Galway has increased by

21% (103 units) when comparing the output in 2019 to the 2016 figures. As asserted in the “Summary of Social Housing Assessments - 2019”, across the two Galway Authorities (Galway City and Galway County) there are a total of 3,146 households on the waiting list, a decrease of 401 households (11.3%) since June 2018. There is almost a 50/50 split between the two authorities, with 1,551 households within Galway City and 1,595 for Galway County. Overall, Galway accounts for just under 5% of the national total. Accordingly, there was 12.3 decline in the number of households on the waiting list in County Galway decreasing from 1,819 in 2018 to its 2019 figure. The household size of the 2019 figure is summarised in the Table 27 below.

Table 27. Household Size of Household on the Waiting List in County Galway, 2019

1 Adult	1 Adult, 1-2 Children	Couple, 1-2 Children	Couple	Couple, 3 or more Children	1 Adult, 3 or more Children	2 Adults	2 Adults, with Child/Children	Couple, 1 or more other adults, 1-2 Children	Couple, 1 or more other Adults	3 or more Adults	Couple, 1 or more other Adults, 3 or more Children	3 or more Adults, with Child/Children	Total
811	290	164	81	68	49	39	34	18	18	11	5	7	1,595

Source: Summary of Social Housing Assessments, 2019, pg. 34

As it is shown, more than half of the households (50.8%) in the 2019 waiting list are single households, followed by 2- to 4-person households (33.5%) which itself comprises of 1 adult with 1-2 children, couple with 1-2 children, and couples.

Breakdown of specific needs of these households can be found in Figure 19. Accordingly, 1,302 no. households are categorised with no specific requirements, while 293 no. households have various needs impacting their housing condition. Of which 21 no. households have a form of disability, 21 no. households are homeless, 59 no. are Travellers, and 68 no. are elderly.

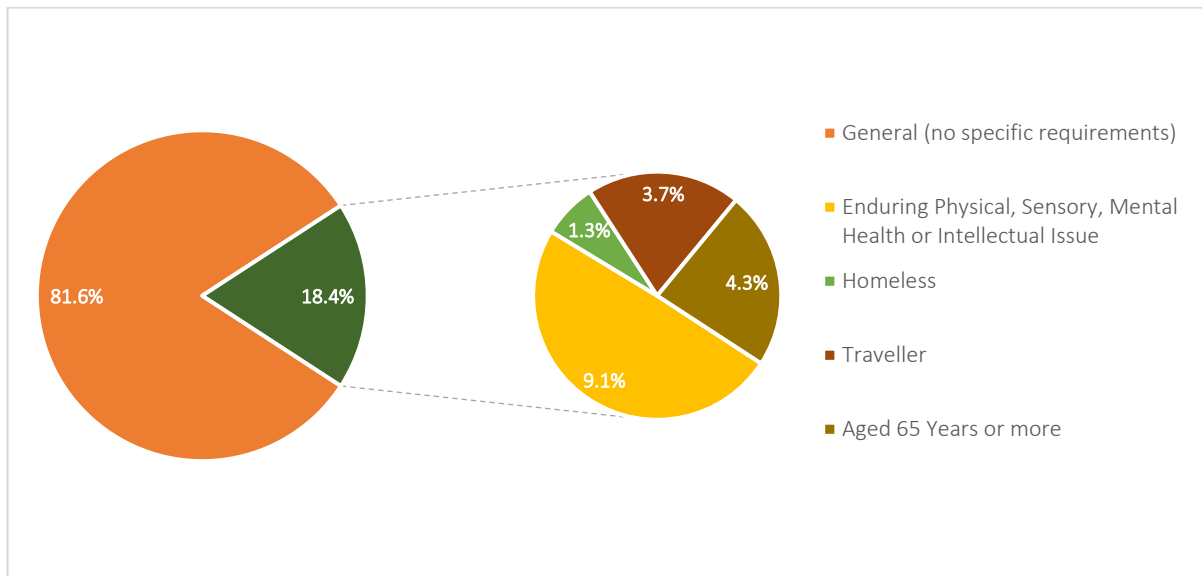


Figure 19. Main Needs of Household on the Waiting List in County Galway, 2019 (Source: Summary of Social Housing Assessments, 2019, pg. 38)

Spatial distribution of social housing across County Galway in 2016 is illustrated in the Figure 20 below. As it can be seen, social housing is mostly concentrated in key towns and self-sustaining towns. This is marked with deep blue on the Figure.



Figure 20. Spatial Distribution of Social Housing in County Galway - 2016

Historical trending of social housing delivery across key towns and self-sustaining towns of County Galway is summarised in the Table below.

Table 28. Spatial Distribution of Social Housing across Key Settlements of County Galway

Settlement	2016	2017	2018	2019	2020
Athenry-Ornamore Municipal District					
Athenry-Ornamore	15	30	48	36	42
Ballinasloe Municipal District					
Ballinasloe South	23	25	29	50	69
Ballinasloe North	4	7	6	11	12
Connemara Municipal District					
Connemara Centra	19	13	12	24	22
Connemara South-East	2	3	2	9	9
Connemara North-West	10	16	14	22	21
Connemara South-West	6	8	8	10	13
Loughrea Municipal District					
Loughrea and Environs	21	27	34	28	31
Gort and Environs	16	11	16	39	17
Portumna and Environs	5	11	7	16	23
Tuam Municipal District					
Tuam	23	25	58	60	66
Headford	6	3	3	9	12
Galway North	-	3	3	2	2
Galway North-East	6	9	17	8	9
Total	156	191	257	324	348

Source: Galway County Council

4.1.4 Type of Accommodation

As summarised in the Table below, profile of housing in Galway is dominantly characterised by houses/bungalows (95%), and the apartments comprise less than 4% 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 Galway follows the same pattern as it has. However, overlaying the spatial distribution of single-person households across the settlements with catchment area of major workplaces, and market of vacant houses over 2016-2016 indicates that housing market in settlements such as Tuam, Loughrea, Ballinasloe, and Gort will have a changing landscape. The change reflects not only in emergence of a growing rental market, but also in supplying more apartments and a tendency for smaller sized housing units.

Table 29. Type of Accommodation in County Galway 2011-2016

Type of Accommodation	2011	%	2016	%	% Change
Detached house	46700	77.0	48213	76.9	3.2
Semi-detached house	8394	13.8	8698	13.9	3.6
Terraced house	2612	4.3	2703	4.3	3.5
Flat or apartment in a purpose- built block	1519	2.5	1732	2.8	14.0
Flat or apartment in a converted house or commercial building	640	1.1	670	1.1	4.7
Bed-sit	52	0.1	35	0.1	-32.7
Not stated	727	1.2	678	1.1	-6.7
All households	60644	100.0	62729	100.0	3.4

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 491 unfinished developments, of which nearly 76% is occupied. As it can be seen in the Table below, there was a drastic fall in the number of unfinished developments from 2016 (598 units or 54.9% decline), and this is considerable for both occupied (210 units or 73.4% decline) and vacant unfinished developments (95 units or 81.2% decline).

Although, there was a considerable drop in the vacant unfinished developments (-81.4%) from 117 units in 2016 to 22 in 2016, converting the vacancy of unfinished developments into a ratio per 1,000 households reveals that Galway County with 60 vacant homes per a thousand households ranked relatively high. This analysis which was conducted by Rebuilding Ireland published in the "2017 Annual Progress Report on Actions to Address Unfinished Housing Developments" indicates that the 'highest ratio of vacant new homes arises in some midland, border and western counties with comparatively much lower levels in the main urban areas.

However, in overall terms, vacancy levels within unfinished developments are not significantly high or out of kilter with 'normal' vacancy levels' (pg. 9).

Table 30. Unfinished Housing Developments, 2016-2017

	2016		2017	
Occupied	286	26.3%	76	15.5%
Vacant	117	10.7%	22	4.5%
Near Complete	118	10.8%	52	10.6%
Wall Plate	59	5.4%	28	5.7%
DPC	35	3.2%	6	1.2%
Foundations	10	0.9%	3	0.6%
Not Started	229	21.0%	0	0.0%
Planning Expired	235	21.6%	304	61.9%
Total	1,089	100.0%	491	100.0%
Occupied Impacted	-	-	15	19.7

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

4.2.2 Housing Permissions

Table 31 illustrates the number of granted planning applications and granted number of units in County Galway since 2018 by quarter. As it can be seen, there was a slight growth of 1.96% in the overall number of granted applications increasing from 509 units in 2018 to 519 units in 2019. Breaking down the figures into granted units, however, there is a decline of 4.99% in the number of units dropping from 702 units in 2018 to 667 units in 2019. In a micro-level, quarterly figures show that the overall trends fluctuate with no specific pattern.

Table 31. Granted Planning Applications and Granted no. of Units in County Galway during 2018-2020 Q2

	2018				2019				2020	
Granted Applications	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2
Houses	116	106	133	127	149	115	130	105	136	42
Multi-development Houses	7	8	9	11	5	5	5	3	5	1
One-off Houses	109	98	124	116	144	110	125	102	131	41
Private Flats/Apartments	5	6	8	8	4	4	7	5	7	0
Total	121	112	141	135	153	119	137	110	143	42
% of Change	-	-7.4	25.9	-4.3	13.3	-22.2	15.1	-19.7	30.0	-70.6
Granted no. of Units	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2
Houses	256	257	229	335	168	126	337	124	234	50
Multi-development Houses	20	21	13	28	3	2	29	2	14	1
One-off Houses	109	98	124	116	144	110	125	102	131	41
Private Flats/Apartments	14	13	34	112	4	4	93	49	8	0
Total	143	132	171	256	151	116	247	153	153	42
% of Change	-	-7.7	29.5	49.7	-41.0	-23.2	112.9	-38.1	0.0	-72.5

Source: CSO StatBank

In terms of typology of the granted permissions, the single one-off dwellings are the dominant types with a slight growth over 2018-2020 Q1. On the contrary, a considerable decline (13.29%) can be spotted on the private apartments with a grant permission, where the total

number of granted units decreased from 173 units in 2018 to 150 units in 2019. Therefore, the overall profile of the granted permissions indicates that the housing market of County Galway is mostly characterised by single one-off dwellings (88.2%) followed by multi-development houses (7.7%).

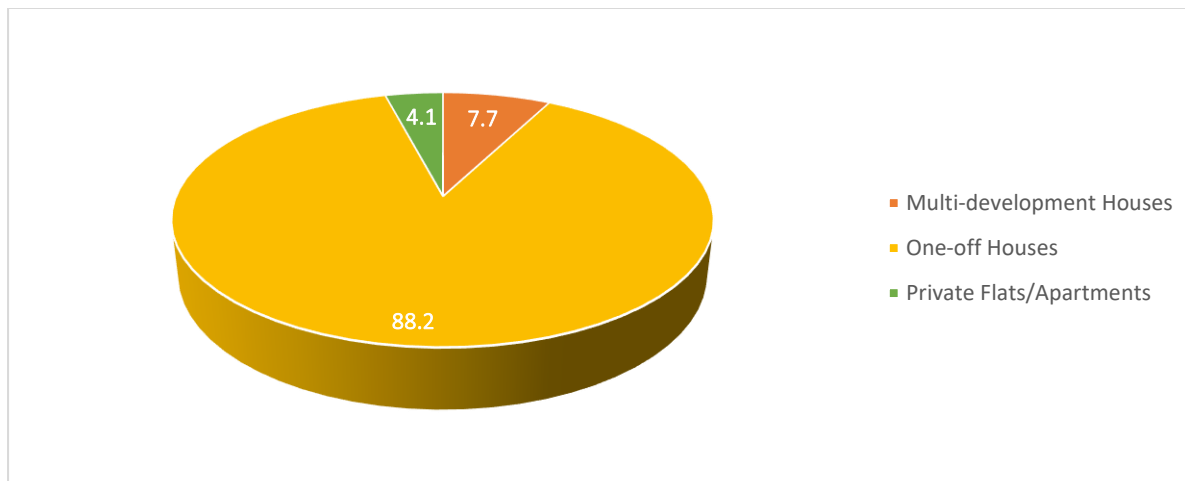


Figure 21. The Typology of Granted Permissions in County Galway, 2020Q1-2020Q2

4.2.3 Social Housing Pipeline

The latest data on the social housing in County Galway shows that a total number of 639 social housing units are in the pipeline with LA supplying the biggest share of the market (37.4%) followed by the private sector (33.2%) and AHB (26.8%). By the slight increase of apartment developments, a marginal growth of the Part V share in providing the social housing is also observable.

Table 32. A Breakdown of the Social Housing Pipeline in County Galway 2018-2020

	LA Planned without Part VIII approval	LA with Part VIII approval	LA Under Construction	AHB with Part VIII approval	AHB Under Construction	Part V Under Construction	Turnkey Contracts
No. of Units	135	10	94	94	77	17	212
% of Total	21.2	1.6	14.8	14.8	12.1	2.2	33.3

Source: Galway County Council

4.3 Land Acquisitions

As illustrated in the Figure below, the latest figures indicate that County Galway had 33 no. lands acquired by the Local Authority in 2019 which is a 266.7% growth when compared to 2018 figure (9 no. lands). On the other hand, the AHB's had a slight drop from 18 no. land acquisitions in 2018 to 14 land acquisitions in 2018, that is a 22.2% decline.

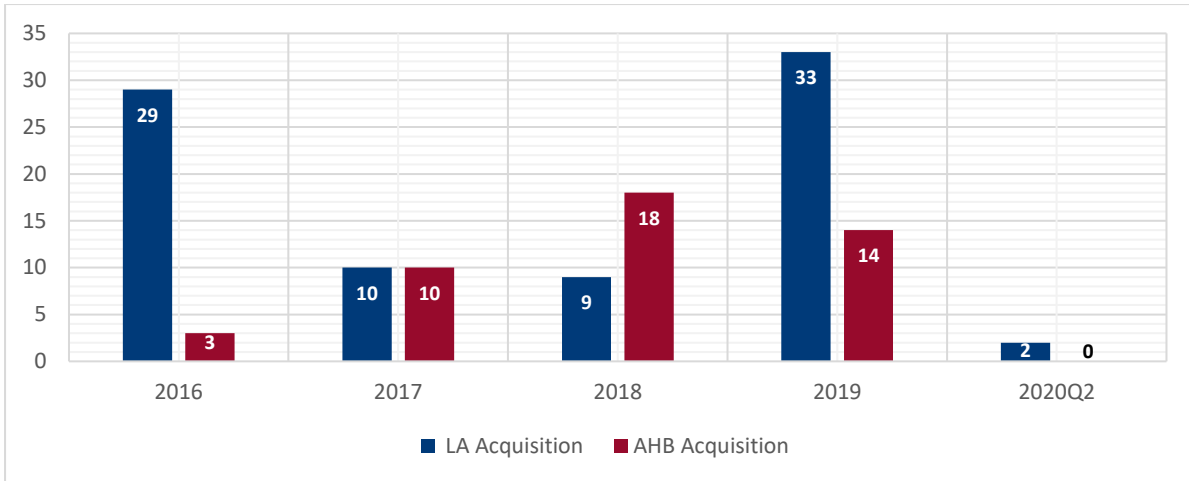


Figure 22. Acquisitions by Galway County Council and AHB 2016-2020Q2

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 and the most recent data provided by the County Council, the following sections focus on the land supply and their current zoning objectives within the County Galway. 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.

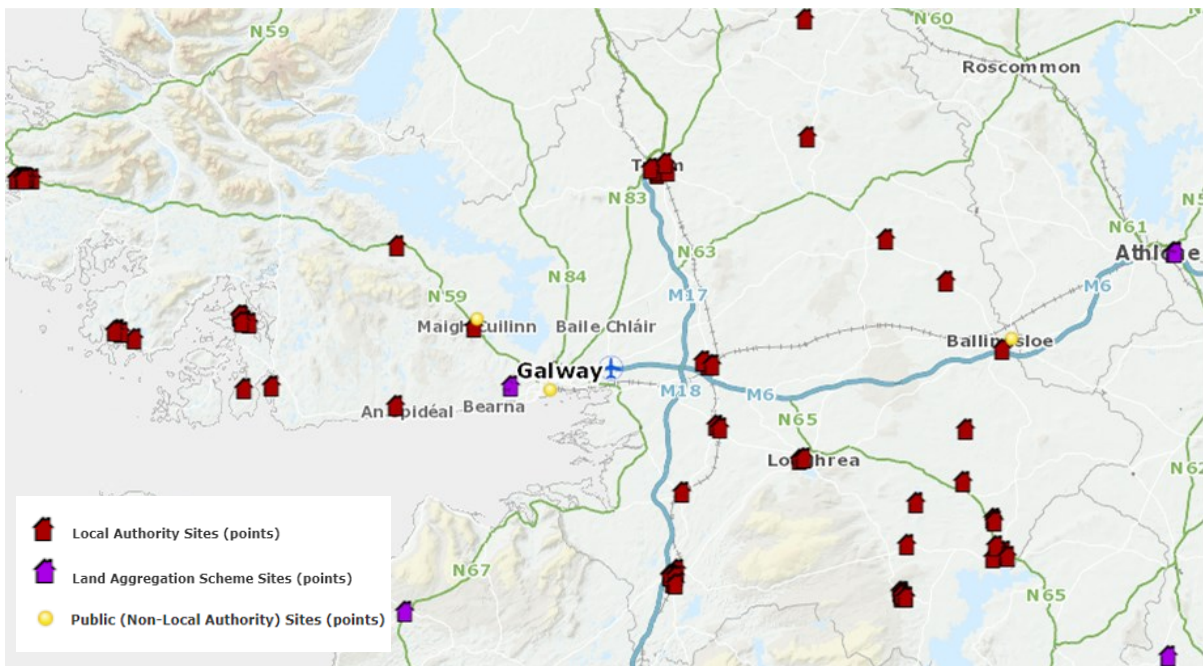


Figure 23. Spatial Distribution of Lands Acquisition in the County by LA, AHB, and Non-local Authority

4.3.1 Local Authority Sites

The details on the Local Authority Sites within the County Galway, including the zoning objectives and site area can be found in Table 33 below.

Table 33. Details of the Local Authority Sites in County Galway

Location	Site Area with Development Potential (ha.)	GREENFIELD	Zoning	SERVICED
Ardrahan North, Gort	1.67	No	None	Yes
Bullseye Wood, Woodford	6.28	Yes	None	Yes
Killimor, Magheramore	0.83	Yes	None	Yes
Carna, Rusheenamanagh	0.25	Yes	None	No
Courtney's Lane, Gort	0.50	Yes	Commercial/Town Centre	Yes
Sisters of Mercy, Gort	0.93	Yes	Commercial/Town Centre	Yes
Spiddal, Bohoona West	1.08	Yes	None	No
Williamstown	0.61	Yes	None	Yes
Kininha	3.31	Yes	None	No
Poolboy, Ballinasloe	8.21	Yes	Residential & Commercial	Yes
Maigh Cuillin	7.02	Yes	Residential, Community Facilities and Open Space & Recreation	Yes
Athenry (Raheen) 1	2.05	No	Residential	Yes
Athenry (Raheen) 2	1.04	-	-	-
Athenry (Raheen) 3	0.11	-	-	-
Cappira 2	1.06	-	-	-
Cappira 1	2.79	No	None	No
Carna 1	0.34	No	None	No
Carna 2	0.10	-	-	-
Carna - Sisters of Mercy	0.93	No	None	Yes
Clifden 1	1.45	Yes	Residential	Yes
Clifden 3	0.39	-	-	-
Clifden 5	0.00	-	-	-
Clifden 2	0.29	-	-	-
Clifden 4	0.84	-	-	-
Clifden 1, St. Josephs	0.64	No	Residential	Yes
Clifden (Tullyvoheen) 4	0.47	-	-	-
Clifden (Tullyvoheen) 3	6.55	-	-	-
Clifden (Tullyvoheen) 5	0.13	-	-	--
Clifden (Tullyvoheen) 2	0.04	-	-	-
Craughwell 2	0.17	Yes	None	Yes
Craughwell 1	0.02	-	-	-
Gort 2	0.45	-	-	-
Gort 1	0.19	No	Residential	Yes
Gort 3	0.22	-	-	-
Gort (Lavalley) 1	7.50	Yes	Residential	Yes
Gort (Lavalley) 2	0.89	-	-	-
Kilkerrin (Ballinasloe)	0.41	-	-	-
Loughrea - Pollroeback Park	0.50	No	Agricultural	Yes
Portumna (Parkmore) 3	1.33	-	-	-
Portumna (Parkmore) 2	0.19	-	-	-
Portumna (Parkmore) 1	1.13	-	-	-
Portumna (Parkmore) 5	0.39	-	-	-
Portumna (Parkmore) 4	0.12	-	-	-
Tirboy, Tuam	1.98	No	residential and Open Space/Recreation	Yes

Location	Site Area with Development Potential (ha.)	GREENFIELD	Zoning	SERVICED
Tuam Tirboy 2	0.14	-	-	-
Woodford 4	0.19	-	-	-
Woodford 2	0.30	--	-	-
Woodford 3	0.37		-	-
Woodford 1	0.24	No	None	Yes
Woodford 4	0.19	-	-	-
An Cheathrú Rua, Cullane	0.20	No	Residential	Yes
Rosmuc 6	0.15	-	-	-
Rosmuc 3	0.32	-	-	-
Rosmuc 2	0.21	-	-	-
Rosmuc 1	0.29	-	-	-
Rosmuc 4	0.10	-	-	-
Rosmuc 5	0.25	-	-	-
Tuam Parkmore	9.63	Yes	Residential & Recreation & Amenities	Yes
Ahascragh Phil Kelly	0.48	Yes	None	Yes
Caltra - Noel Kilroy	1.69	Yes	None	No
Gortnaraheen Part fund	0.25	Yes	None	No
Inishboffin (Middlequarter)	0.20	Yes	None	No
Abbey Village, Loughrea	2.03	No	None	Yes
Uachtar Ard, Co. Galway	7.27	Yes	Residential, Community Facilities & Town Centre	Yes
Rossaveal	0.11	Yes	None	No
Tuam - Sun Street Mary Tierney	0.10	No	Residential	Yes
Tynagh - Broderick Vol Hsng	0.04	No	None	Yes
Tuam, Weir Road	1.17	No	Residential	Yes
Loughrea - Bridget Loughnane	0.46	No	residential	Yes
Cloch na Rón (Roundstone) Fairgreen	0.79	Yes	None	Yes
Loughrea, Barrack Street	0.07	No	Town Centre	Yes
Kinvara, Co. Galway	0.63	Yes	Residential	Yes

Source: Rebuilding Ireland Web-GIS Dataset & Galway County Council

4.3.2 Non-local Authority Sites

The details on the Non-local Authority Sites within the County, including the zoning objectives, site area can be found in the Table below.

Table 34. Details of the Non-local Authority Sites in County Galway

Name	Owner	Calculated Area (ha)	Status
St Brigid's Hosp, Ballinasloe	HSE	0.00	Without Folio
Moycullen	Coillte	28.9	With Folio

Source: Rebuilding Ireland Web-GIS Dataset



Section 05.

**ESTIMATING HOUSING NEED
AND 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 2022-2028.

5.1 Determination of Average Household Size and Additional Household Requirements

This section outlines different methods that had been explored over the preparation of the HNDA. With respect to the “*A Model Housing Strategy and Step-by-Step Guide (Part V of the Planning and Development Act, 2000)*”, the first method is based upon two factors of population projection and projection of household size according to its historical trending. However, the second method is developed regarding the ESRI research work “*Structural Housing Demand at County Level (Dec. 2020)*”. However, instructed by the Local Authority, a third method is applied to the HNDA. This method is relying on the population projection and the projected household size by the NPF, i.e., an average of 2.5 by 2040 for the State. These methods are fully addressed in the following. Noted that the latter was utilised within the Core Strategy of the Development Plan.

5.1.1 Housing Demand Projection - Scenario 1

Several population scenarios for County Galway 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 Galway from baseline year 2016 to NPF/RSES target years 2026 and 2031; thus, producing annualised figures between the 2022 and 2028 lifetime of the Plan. The results are summarised in Table 11.

This sets out that the population of County Galway will increase by 18,655 people during the plan period to a total of 211,100 people in 2028. As mentioned earlier, Census 2016 results indicate that County Galway had a population to household ratio of 2.8 which is slightly 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 historical trends of household size in County Galway has undertaken to determine the evidence-based graduated reduction in average household size with an annualised rate of 0.81%, which is slightly more than the national average of 0.71%.

Table 35. Average Household Size Trends in County Galway 1996-2016

	1996	2002	2006	2011	2016
Private households	38,849	45,253	53,308	60,952	63,040
Persons in private households	131,613	138,275	155,271	172,308	177,145
Average number of persons in private households	3.4	3.1	2.9	2.8	2.8

Source: CSO StatBank

This rate has been applied to the average household size for County Galway from the 2016 Census to establish the trend adjusted average household size that has been projected during the Plan period. As shown in Table 36, the average household size is thus projected to be 2.5 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 Galway is expected to increase from 63,040 households in 2016 to 82,846 households in 2028 providing a total demand of 11,511 households, or the equivalent of 1,644 units per annum on average.

Table 36. Projected Households over the Plan Period

Year	Total Population in County Galway	Average Household Size in County Galway	No. of Households	No. of Anticipated Households per Annum	Total Anticipated Households 2022-2028	Average Anticipated Households per Annum 2022-2028
2006	159,256	2.91	53,308	-	-	
2011	175,124	2.83	60,952	-	-	
2016	179,390	2.81	63,040	-	-	
2017	182,001	2.79	65,298	2,258	-	
2018	184,612	2.76	66,777	1,479	-	
2019	187,223	2.74	68,276	1,499	-	
2020	189,834	2.72	69,795	1,519	-	
2021	192,445	2.70	71,335	1,539	-	
2022	195,056	2.68	72,894	1,560	-	
2023	197,667	2.65	74,475	1,581	-	
2024	200,278	2.63	76,077	1,602	-	
2025	202,889	2.61	77,699	1,623	-	
2026	205,500	2.59	79,344	1,644	-	
2027	208,300	2.57	81,083	1,740	-	
2028	211,100	2.55	82,846	1,763	11,511	1,644

5.1.2 Housing Demand Projection - Scenario 2

With respect to the ESRI research work “Structural Housing Demand at County Level” published on 14th December 2020, the “Housing Supply Target Methodology for Development Planning” published by DHLGH in December 2020, and the Ministerial Letter advising these publications as the most up to date approach towards demand projection, this projection has been revised. According to this method, the housing allocation over the Plan period is to be calculated by not only relying on the population projection, but also factoring in the two elements of housing supply and unmet demand in the county.

According to the ESRI published excel spreadsheet utilising the ESRI NPF method, an overall of 17,118 no. households over 2022-2028 is expected. This is 10,846 no. households when applying the ESRI Baseline method, as reflected within the Table 37 below. On the other hand, County Galway is facing an overcrowding and concealed housing demand of 56 units, while the latest published statistics on homeless by DHLGH (March 2021) indicates 231 persons are homeless in the County. This gives an overall unmet demand of 287. On the supply side, a total number of 2,688 units had been delivered over 2017-2020, as recorded on CSO StatBank. Applying these figures to the following formula,

$$\text{Housing Demand 2022-2028} = (\text{Total Projection 2017-2028} - \text{Unit Completions 2017-2021}) + \text{Total Unmet Demand}$$

The overall housing demand over the Plan period is expected to be 10,258 units, which equates to 1,465 housing units per annum over the Plan period (Table 37).

Table 37. Housing Demand Estimation over the Plan Period Utilising ESRI Methodology

	County Council	Annual Avg. Households	Total Households
A	ESRI NPF scenario projected new household demand 2017 to Plan end year, or quarter (pro-rata)	1,427	17,118
B	Actual new housing supply 2017 to most recent available year or quarter period to Plan commencement (estimated future delivery projected pro rata for 2020)	1070	4,011
C	Homeless households (latest data), and unmet demand as at most recent Census	N/A	287
D	Plan Housing Demand = A - B + C	2,232	13,394
E	Potential adjustment 1 to end 2026 portion of plan period to facilitate convergence to NPF strategy (where justified)	Mid-point between ESRI NPF and Baseline scenarios to 2026 in lieu of A above	Adjusted Total
E1	ESRI Baseline scenario projected new household demand 2017, to 2027	904	10,846
E2	Mid-point between A and E1 - ESRI NPF and Baseline scenarios, to 2027	1,165	13,982
E3	Adjusted Total Plan Demand calculation based on E2 in lieu of A above	1,465	10,258

This indicates a discrepancy of 1,253 no. units per annum when compared with the previous method, which can be explained through factoring in the two elements of housing supply and unmet demand in the ESRI method, resulting in a more accurate housing target.

5.1.3 Housing Demand Projection - Scenario 3

Instructed by the Local Authority, this scenario is based upon two factors of population projection and the expected average household size of 2.5 by 2040. Accordingly, with an expected population growth of 18,655 for County Galway over the Plan period, and an expected household size of 2.5 for the State in 2040, an overall housing demand of 7,469 units is anticipated for the County over 2022-2028.

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 0.923 has been applied to County Galway 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 38 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 Galway have an average annual disposable income of €22,714.55, or the equivalent of €473.33 per week.

Table 38. Calculation of the Distribution of Disposable Household Incomes (Annual and Weekly) during the Baseline Year

Decile	Average Weekly Income 2009-2010	Average Weekly Income 2015-2016	Change from 2009-10 to 2015-16	Assumed Annual Income Increase 2010-2016	Adjusted Average Weekly Income 2017	Households in Each Category 2015-16	Average Annual Income 2017	Galway County Deflator	Galway Average Annual Income 2017	No. Households in Galway 2015-2016
	€	€	%	%	€	%	€	-	€	-
1 st Decile	188.91	197.40	4.5	0.90	199.17	9.83	10,357.06	0.923	9,558.12	6,194
2 nd Decile	300.98	324.40	7.8	1.56	329.45	10.57	17,131.32	0.923	15,809.82	6,664
3 rd Decile	431.28	465.86	8.0	1.60	473.33	10.47	24,613.19	0.923	22,714.55	6,600
4 th Decile	549.20	593.56	8.1	1.62	603.15	10.44	31,363.73	0.923	28,944.36	6,581
5 th Decile	669.46	725.85	8.4	1.68	738.08	10.25	38,380.05	0.923	35,419.44	6,462
6 th Decile	802.56	865.88	7.9	1.58	879.54	9.94	45,736.24	0.923	42,208.18	6,268
7 th Decile	972.03	1,026.46	5.6	1.12	1,037.96	9.62	53,973.69	0.923	49,810.20	6,065
8 th Decile	1,183.82	1,215.55	2.7	0.54	1,222.07	9.65	63,547.44	0.923	58,645.44	6,084
9 th Decile	1,472.66	1,473.25	0.0	0.01	1,473.37	9.61	76,615.14	0.923	70,705.10	6,056
10 th Decile	2,289.38	2,229.05	-2.6	-0.53	2,217.30	9.62	115,299.70	0.923	106,405.57	6,065
Total	-	-	5.0	1.01	-	100.00	-	-	-	63,040

5.3 Calculation of Average Annual Household Disposable Income Distribution

To inform the projection of affordability in County Galway 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 39. Calculation of Average Annual Household Disposable Income Distribution in County Galway (€)

	2022	2023	2024	2025	2026	2027	2028
% Growth	2.9%	2.9%	2.9%	2.9%	2.9%	2.9%	2.9%
1st Decile	11,990.53	12,338.26	12,696.07	13,064.25	13,443.12	13,832.97	14,234.12
2nd Decile	19,833.20	20,408.36	21,000.21	21,609.21	22,235.88	22,880.72	23,544.26
3rd Decile	28,495.08	29,321.44	30,171.76	31,046.74	31,947.10	32,873.56	33,826.90
4th Decile	36,310.29	37,363.29	38,446.82	39,561.78	40,709.07	41,889.64	43,104.44
5th Decile	44,433.19	45,721.76	47,047.69	48,412.07	49,816.02	51,260.69	52,747.25
6th Decile	52,949.57	54,485.11	56,065.18	57,691.07	59,364.11	61,085.67	62,857.15
7th Decile	62,486.20	64,298.30	66,162.95	68,081.68	70,056.04	72,087.67	74,178.21
8th Decile	73,569.88	75,703.41	77,898.81	80,157.87	82,482.45	84,874.44	87,335.80
9th Decile	88,698.57	91,270.83	93,917.68	96,641.29	99,443.89	102,327.76	105,295.27
10th Decile	133,484.30	137,355.34	141,338.65	145,437.47	149,655.15	153,995.15	158,461.01

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 40. Calculation of Average Monthly Household Disposable Income Distribution in County Galway (€)

	2022	2023	2024	2025	2026	2027	2028
% Growth	2.9%	2.9%	2.9%	2.9%	2.9%	2.9%	2.9%
1 st Decile	999.21	1,028.19	1,058.01	1,088.69	1,120.26	1,152.75	1,186.18
2 nd Decile	1,652.77	1,700.70	1,750.02	1,800.77	1,852.99	1,906.73	1,962.02
3 rd Decile	2,374.59	2,443.45	2,514.31	2,587.23	2,662.26	2,739.46	2,818.91
4 th Decile	3,025.86	3,113.61	3,203.90	3,296.82	3,392.42	3,490.80	3,592.04
5 th Decile	3,702.77	3,810.15	3,920.64	4,034.34	4,151.34	4,271.72	4,395.60
6 th Decile	4,412.46	4,540.43	4,672.10	4,807.59	4,947.01	5,090.47	5,238.10
7 th Decile	5,207.18	5,358.19	5,513.58	5,673.47	5,838.00	6,007.31	6,181.52
8 th Decile	6,130.82	6,308.62	6,491.57	6,679.82	6,873.54	7,072.87	7,277.98
9 th Decile	7,391.55	7,605.90	7,826.47	8,053.44	8,286.99	8,527.31	8,774.61
10 th Decile	11,123.69	11,446.28	11,778.22	12,119.79	12,471.26	12,832.93	13,205.08

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 36) 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 41 below identifies the distribution of total households across each of the ten deciles during the plan period.

Table 41. Determination of Distribution of Total Anticipated Households per Decile

Range	% Households	2022	2023	2024	2025	2026	2027	2028
1 st Decile	9.83%	7,163	7,318	7,475	7,635	7,796	7,967	8,140
2 nd Decile	10.57%	7,706	7,873	8,043	8,214	8,388	8,572	8,758
3 rd Decile	10.47%	7,632	7,797	7,965	8,135	8,307	8,489	8,673
4 th Decile	10.44%	7,610	7,775	7,943	8,112	8,284	8,465	8,649
5 th Decile	10.25%	7,472	7,634	7,798	7,964	8,133	8,311	8,492
6 th Decile	9.94%	7,248	7,405	7,564	7,726	7,889	8,062	8,237
7 th Decile	9.62%	7,013	7,165	7,320	7,476	7,634	7,801	7,971
8 th Decile	9.65%	7,035	7,187	7,342	7,498	7,657	7,825	7,995
9 th Decile	9.61%	7,003	7,155	7,308	7,464	7,622	7,789	7,959
10 th Decile	9.62%	7,013	7,165	7,320	7,476	7,634	7,801	7,971
Total	100.00%	72,894	74,475	76,077	77,699	79,344	81,083	82,846

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 42. Distribution of Additional Households per Decile in County Galway (no. of households)

Range	% Households	2022	2023	2024	2025	2026	2027	2028
1 st Decile	10	153	155	157	159	162	171	173
2 nd Decile	11	165	167	169	172	174	184	186
3 rd Decile	10	163	166	168	170	172	182	185
4 th Decile	10	163	165	167	169	172	182	184
5 th Decile	10	160	162	164	166	169	178	181
6 th Decile	10	155	157	159	161	163	173	175
7 th Decile	10	150	152	154	156	158	167	170
8 th Decile	10	151	153	155	157	159	168	170
9 th Decile	10	150	152	154	156	158	167	169
10 th Decile	10	150	152	154	156	158	167	170
Total	100	1,560	1,581	1,602	1,623	1,644	1,740	1,763

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, 2,756 transactions occurred in County Galway 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 (19.3%), while the least transactions were in the €350,000-400,000 price band.

Table 43. Overview of House Sales in County Galway - 2019

Price Band (€)	Number of Transactions	% of Total Sales
0-100,000	363	13.2
100,000-150,000	352	12.8
150,000-200,00	531	19.3
200,000-250,000	469	17.0
250,000-300,000	447	16.2
300,000-350,000	265	9.6
350,000-400,000	125	4.5
400,000+	204	7.4
Total	2,756	100.0

Source: Residential Property Price Register, 2019

As part of the price assessment and projection for Galway, 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 44, 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 with light red in the Table.

Table 44. Historic Year-on-year Change in House Price Metrics in County Galway

Year	Annual Change in Average House Sale Prices (CSO)	Annual Change in Average House Sale Prices (Daft) ³	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	-18.0	-16.1	-15.6	-12.3	-20.0
2012	-11.0	-0.2	-9.5	-15.1	-9.4
2013	4.9	-7.6	-7.6	-5.7	-10.3
2014	7.9	13.4	39.4	-0.5	2.3
2015	2.9	13.6	-13.6	8.3	2.3
2016	8.2	10.6	10.6	12.3	17.6
2017	16.0	8.7	8.7	11.4	12.5
2018	9.0	7.4	7.4	14.3	11.1
2019	5.9	-1.1	-1.1	2.3	7.8

Source: CSO StatBank, Daft.ie Reports, Residential Property Price Register

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 45. Average House Prices by Various Sources of Data in County Galway 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	2.1	1.7	1.5

³ The rates in this column are directly copied from the Daft.ie House Price reports, while the next column consists of the rates which has been calculated utilising the average house prices by the same reports.

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 46. Calculation of Projected Distribution of Houses by Price Band in County Galway during the Plan Period

Price Band (×1000€)	Annualised Change	2020	2021	2022	2023	2024	2025	2026	2027	2028
0-100	0.230	13.35	13.45	13.46	13.37	13.19	12.91	12.53	12.07	11.52
100-150	0.130	11.90	11.01	10.12	9.24	8.37	7.53	6.72	5.94	5.21
150-200	0.147	18.21	17.11	15.97	14.79	13.61	12.42	11.24	10.09	8.99
200-250	0.128	15.82	14.61	13.40	12.21	11.04	9.90	8.82	7.78	6.81
250-300	0.299	17.37	18.48	19.53	20.49	21.35	22.07	22.63	23.01	23.21
300-350	0.441	11.42	13.47	15.79	18.38	21.24	24.35	27.69	31.23	34.94
350-400	0.198	4.48	4.39	4.28	4.14	3.98	3.79	3.58	3.36	3.12
400+	0.224	7.47	7.48	7.45	7.37	7.23	7.04	6.80	6.51	6.19
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 46) and the average price of each band. This reflects market changes during the Plan period as summarised in the Table below.

Table 47. Projected Growth Rate of House Prices in County Galway

Avg. price in each band (×€1000)	2020	2021	2022	2023	2024	2025	2026	2027	2028
1st Band: 50	1270860	1298716	1318099	1328077	1327958	1317316	1296093	1264928	1224125
2nd Band: 125	2830560	2657586	2478103	2293999	2107427	1920688	1736206	1556788	1384165
3rd Band: 175	6067409	5781883	5472078	5141352	4793886	4434484	4068540	3702693	3341390
4th Band: 225	6774129	6346683	5905508	5455187	5000891	4548101	4102542	3670790	3256839
5th Band: 275	9090783	9812002	10517948	11192998	11820808	12384910	12870005	13266251	13559635
6th Band: 325	7064053	8456175	10053355	11865609	13898068	16149675	18612868	21278765	24121809
7th Band: 375	3195774	3179846	3142341	3082779	3001351	2898920	2777128	2638998	2486638
Avg. Price	206.03	210.08	214.54	219.38	224.59	230.09	235.84	241.76	247.76
Annual Change (%)	1.79	1.96	2.12	2.26	2.37	2.45	2.50	2.51	2.48

As compared the indicative house price metrics in Table 47 with the average growth rate of house prices in the County over 2011-2019 in Table 45, the projected rates are aligned with the historical trends of housing prices in Galway. 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 48. Calculation of Projected House Price Bands during the Plan Period

Year	Projected Avg. Price Change	1st Price Band	2nd Price Band		3rd Price Band		4th Price Band		5th Price Band		6th Price Band		7th Price 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	1.79	101,795	101,796	152,692	152,693	203,589	203,590	254,486	254,487	305,384	305,385	356,281	356,282	407,178
2021	1.96	103,794	103,795	155,691	155,692	207,588	207,589	259,485	259,486	311,383	311,384	363,280	363,281	415,177
2022	2.12	105,996	105,997	158,994	158,995	211,992	211,994	264,991	264,992	317,989	317,990	370,987	370,988	423,985
2023	2.26	108,391	108,392	162,587	162,588	216,782	216,783	270,978	270,979	325,173	325,174	379,369	379,370	433,564
2024	2.37	110,961	110,962	166,442	166,443	221,923	221,924	277,403	277,404	332,884	332,885	388,365	388,366	443,845
2025	2.45	113,682	113,684	170,524	170,525	227,365	227,366	284,206	284,207	341,047	341,049	397,889	397,890	454,730
2026	2.50	116,523	116,524	174,785	174,786	233,046	233,047	291,308	291,309	349,569	349,570	407,831	407,832	466,092
2027	2.51	119,446	119,447	179,169	179,170	238,892	238,893	298,615	298,616	358,338	358,339	418,061	418,062	477,784
2028	2.48	122,411	122,412	183,616	183,618	244,822	244,823	306,027	306,029	367,233	367,234	428,438	428,440	489,644

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 Galway per decile is determined as per the following Table.

Table 49. Mortgage Capacity of Households per Decile (€) in County Galway based on Central Bank Rules

Decile	2022	2023	2024	2025	2026	2027	2028
1 st Decile	4,197	4,318	4,444	4,572	4,705	4,842	4,982
2 nd Decile	6,942	7,143	7,350	7,563	7,783	8,008	8,240
3 rd Decile	9,973	10,263	10,560	10,866	11,181	11,506	11,839
4 th Decile	12,709	13,077	13,456	13,847	14,248	14,661	15,087
5 th Decile	15,552	16,003	16,467	16,944	17,436	17,941	18,462
6 th Decile	18,532	19,070	19,623	20,192	20,777	21,380	22,000
7 th Decile	21,870	22,504	23,157	23,829	24,520	25,231	25,962
8 th Decile	25,749	26,496	27,265	28,055	28,869	29,706	30,568
9 th Decile	31,044	31,945	32,871	33,824	34,805	35,815	36,853
10 th Decile	46,720	48,074	49,469	50,903	52,379	53,898	55,461

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 50. 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
2022	1 st Decile	153	105,996	95,396	4,197	0	153
	2 nd Decile	165			6,942	0	165
	3 rd Decile	163			9,973	0	163
	4 th Decile	163			12,709	163	0
	5 th Decile	160			15,552	160	0
	6 th Decile	155			18,532	155	0
	7 th Decile	150			21,870	150	0
	8 th Decile	151			25,749	151	0
	9 th Decile	150			31,044	150	0
	10 th Decile	150			46,720	150	0
	Total	1,560			-	-	-
2023	1 st Decile	155	108,391	97,552	4,318	0	155
	2 nd Decile	167			7,143	0	167
	3 rd Decile	166			10,263	0	166
	4 th Decile	165			13,077	58	0
	5 th Decile	162			16,003	57	0
	6 th Decile	157			19,070	55	0
	7 th Decile	152			22,504	53	0
	8 th Decile	153			26,496	54	0
	9 th Decile	152			31,945	53	0
	10 th Decile	152			48,074	53	0
	Total	1,581			-	-	-
2024	1 st Decile	157	110,961	99,865	4,444	0	157
	2 nd Decile	169			7,350	0	169
	3 rd Decile	168			10,560	0	168
	4 th Decile	167			13,456	167	0
	5 th Decile	164			16,467	164	0
	6 th Decile	159			19,623	159	0
	7 th Decile	154			23,157	154	0
	8 th Decile	155			27,265	155	0
	9 th Decile	154			32,871	154	0
	10 th Decile	154			49,469	154	0
	Total	1,602			-	-	-
2025	1 st Decile	159	113,682	102,314	4,572	0	159
	2 nd Decile	172			7,563	0	172
	3 rd Decile	170			10,866	0	170
	4 th Decile	169			13,847	169	0
	5 th Decile	166			16,944	166	0
	6 th Decile	161			20,192	161	0
	7 th Decile	156			23,829	156	0
	8 th Decile	157			28,055	157	0

	9 th Decile	156			33,824	156	0
	10 th Decile	156			50,903	156	0
	Total	1,623	-	-	-	1,122	501
2026	1 st Decile	162	116,523	104,871	4,705	0	162
	2 nd Decile	174			7,783	0	174
	3 rd Decile	172			11,181	0	172
	4 th Decile	172			14,248	172	0
	5 th Decile	169			17,436	169	0
	6 th Decile	163			20,777	163	0
	7 th Decile	158			24,520	158	0
	8 th Decile	159			28,869	159	0
	9 th Decile	158			34,805	158	0
	10 th Decile	158			52,379	158	0
	Total	1,644	-	-	-	1,137	507
2027	1 st Decile	171	119,446	107,501	4,842	0	171
	2 nd Decile	184			8,008	0	184
	3 rd Decile	182			11,506	0	182
	4 th Decile	182			14,661	182	0
	5 th Decile	178			17,941	178	0
	6 th Decile	173			21,380	173	0
	7 th Decile	167			25,231	167	0
	8 th Decile	168			29,706	168	0
	9 th Decile	167			35,815	167	0
	10 th Decile	167			53,898	167	0
	Total	1,740	-	-	-	1,203	537
2028	1 st Decile	173	122,411	110,170	4,982	0	173
	2 nd Decile	186			8,240	0	186
	3 rd Decile	185			11,839	0	185
	4 th Decile	184			15,087	184	0
	5 th Decile	181			18,462	181	0
	6 th Decile	175			22,000	175	0
	7 th Decile	170			25,962	170	0
	8 th Decile	170			30,568	170	0
	9 th Decile	169			36,853	169	0
	10 th Decile	170			55,461	170	0
	Total	1,763	-	-	-	1,219	544

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 51. An Indication of Affordable House Prices (€) in County Galway per Decile

Decile	2022	2023	2024	2025	2026	2027	2028
1 st Decile	90,243	92,860	95,553	98,324	101,176	104,110	107,129
2 nd Decile	149,269	153,598	158,052	162,635	167,352	172,205	177,199
3 rd Decile	214,460	220,679	227,079	233,664	240,441	247,413	254,588
4 th Decile	273,279	281,204	289,359	297,750	306,385	315,270	324,413
5 th Decile	334,414	344,112	354,091	364,359	374,926	385,799	396,987
6 th Decile	398,510	410,066	421,958	434,195	446,787	459,744	473,076
7 th Decile	470,284	483,923	497,956	512,397	527,257	542,547	558,281
8 th Decile	553,702	569,760	586,283	603,285	620,780	638,783	657,308
9 th Decile	667,564	686,923	706,844	727,343	748,436	770,140	792,474
10 th Decile	1,004,631	1,033,765	1,063,744	1,094,593	1,126,336	1,159,000	1,192,611

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 42 and Table 46), the projected house price bands (see Table 48), the determination of households that can qualify for a mortgage (see Table 50) and the calculation of housing affordability (see Table 51).

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 household 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 52. 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
2022	1 st Decile	153	153	90,243	1 st & 2 nd Band	158,994	339	13.46	217	122	7.57
	2 nd Decile	165	318	149,269	3 rd & 4 th Band	264,991	256	10.12	163	93	5.76
	3 rd Decile	163	482	214,460	5 th & 6 th Band	370,987	280	15.97	257	22	-
	4 th Decile	163	644	273,279	7 th Band	423,985	145	13.40	216	-71	-
	5 th Decile	160	804	334,414	8 th Band	None	-	47.05	758	-	-
	6 th Decile	155	959	398,510							
	7 th Decile	150	1,109	470,284							
	8 th Decile	151	1,260	553,702							
	9 th Decile	150	1,410	667,564							
	10 th Decile	150	1,560	1,004,631							
Total	1,560	-	-	-	-	-	100.0	1,612	-	13.33	
2023	1 st Decile	155	155	92,860	1 st & 2 nd Band	162,587	341	13.37	218	123	7.53
	2 nd Decile	167	322	153,598	3 rd & 4 th Band	270,978	258	9.24	151	107	6.55
	3 rd Decile	166	488	220,679	5 th & 6 th Band	379,369	282	14.79	242	40	2.47
	4 th Decile	165	653	281,204	7 th Band	433,564	146	12.21	199	-53	-
	5 th Decile	162	815	344,112	8 th Band	None	-	50.38	823	-	-
	6 th Decile	157	972	410,066							
	7 th Decile	152	1,124	483,923							
	8 th Decile	153	1,277	569,760							
	9 th Decile	152	1,429	686,923							
	10 th Decile	152	1,581	1,033,765							
Total	1,581	-	-	-	-	-	100.0	1,633	-	16.55	
2024	1 st Decile	157	157	95,553	1 st & 2 nd Band	166,442	344	13.19	218	126	7.60
	2 nd Decile	169	327	158,052	3 rd & 4 th Band	277,403	260	8.37	139	121	7.34
	3 rd Decile	168	494	227,079	5 th & 6 th Band	388,365	284	13.61	225	59	3.56
	4 th Decile	167	662	289,359	7 th Band	443,845	147	11.04	183	-36	-
	5 th Decile	164	826	354,091	8 th Band	None	-	53.79	890	-	-
	6 th Decile	159	985	421,958							
	7 th Decile	154	1,139	497,956							
	8 th Decile	155	1,294	586,283							
	9 th Decile	154	1,448	706,844							
	10 th Decile	154	1,602	1,063,744							
Total	1,602	-	-	-	-	-	100.0	1,655	-	18.50	
2025	1 st Decile	159	159	98,324	1 st & 2 nd Band	170,524		12.91	217	57	3.40
	2 nd Decile	172	331	162,635	3 rd & 4 th Band	284,206		7.53	126	-205	-
	3 rd Decile	170	501	233,664	5 th & 6 th Band	397,889		12.42	208	-293	-
	4 th Decile	169	670	297,750	7 th Band	454,730		9.9	166	-504	-
	5 th Decile	166	837	364,359	8 th Band	None	-	57.24	960	-	-

	6 th Decile	161	998	434,195							
	7 th Decile	156	1,154	512,397							
	8 th Decile	157	1,311	603,285							
	9 th Decile	156	1,467	727,343							
	10 th Decile	156	1,623	1,094,593							
	Total	1,623	-	-	-	-		100.0	1,677	-	3.40
2026	1 st Decile	162	162	101,176	1 st & 2 nd Band	174,785	127	12.53	213	-86	-
	2 nd Decile	174	335	167,352	3 rd & 4 th Band	291,308	265	6.72	114	150	8.85
	3 rd Decile	172	507	240,441	5 th & 6 th Band	407,831	289	11.24	191	98	5.78
	4 th Decile	172	679	306,385	7 th Band	466,092	150	8.82	150	0	-
	5 th Decile	169	848	374,926	8 th Band	None	-	60.70	1031	-	-
	6 th Decile	163	1,011	446,787							
	7 th Decile	158	1,169	527,257							
	8 th Decile	159	1,328	620,780							
	9 th Decile	158	1,486	748,436							
	10 th Decile	158	1,644	1,126,336							
	Total	1,644	-	-	-	-		100.0	1,699	-	14.63
2027	1 st Decile	171	171	104,110	1 st & 2 nd Band	179,169	126	12.07	211	-85	-
	2 nd Decile	184	355	172,205	3 rd & 4 th Band	298,615	279	5.94	104	175	10.06
	3 rd Decile	182	537	247,413	5 th & 6 th Band	418,061	305	10.09	176	129	7.39
	4 th Decile	182	719	315,270	7 th Band	477,784	158	7.78	136	22	1.27
	5 th Decile	178	897	385,799	8 th Band	None	-	64.12	1118	-	-
	6 th Decile	173	1,070	459,744							
	7 th Decile	167	1,238	542,547							
	8 th Decile	168	1,405	638,783							
	9 th Decile	167	1,573	770,140							
	10 th Decile	167	1,740	1,159,000							
	Total	1,740	-	-	-	-		100.0	1,744	-	18.72
2028	1 st Decile	173	173	107,129	1 st & 2 nd Band	183,616	107	11.52	204	-97	-
	2 nd Decile	186	360	177,199	3 rd & 4 th Band	306,027	282	5.21	92	189	10.72
	3 rd Decile	185	544	254,588	5 th & 6 th Band	428,438	308	8.99	159	149	8.42
	4 th Decile	184	728	324,413	7 th Band	489,644	159	6.81	120	39	2.21
	5 th Decile	181	909	396,987	8 th Band	None	-	67.46	1192	-	-
	6 th Decile	175	1,084	473,076							
	7 th Decile	170	1,254	558,281							
	8 th Decile	170	1,424	657,308							
	9 th Decile	169	1,593	792,474							
	10 th Decile	170	1,763	1,192,611							
	Total	1,763	-	-	-	-		100.0	1,767	-	21.35

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 Galway, 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 Galway, including Athenry - Oranmore and Gort - Kinvara which were designated in July 2019.

Table 53. Rental Price Changes by Unit Type (€) in County Galway over 2010-2019

	One bed	Two bed	Three bed	Four-plus bed	All bedrooms	y-o-y Change
2019	759	990	1,025	1,211	1,048	7.05
2018	700	932	966	1,120	979	6.51
2017	663	872	922	1,045	919	5.84
2016	616	824	869	989	868	7.55
2015	588	766	801	919	807	6.46
2014	561	715	745	869	758	3.55
2013	537	692	725	835	732	0.05
2012	531	690	729	828	732	0.94
2011	543	687	716	817	725	-1.79
2010	550	696	737	829	738	-6.32
Average	605	786	823	946	830	-
Annual Change Rate	3.79	4.22	3.92	4.61	4.19	-

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 Galway over the plan period. The results are summarised in the Table below.

Table 54. Estimated Rental Prices by Unit Type (€) throughout the Plan Period in County Galway

	One bed	Two bed	Three bed	Four-plus bed
2019	759	990	1,025	1,211
2020	788	1,031	1,065	1,267
2021	817	1,075	1,107	1,325
2022	848	1,120	1,150	1,386
2023	880	1,168	1,195	1,450
2024	914	1,217	1,242	1,516
2025	948	1,268	1,291	1,586
2026	984	1,322	1,341	1,659
2027	1,022	1,378	1,394	1,736
2028	1,060	1,436	1,448	1,816

As illustrated in Table 50, 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 40), the number of households not meeting the *Affordability Criteria* for private rental over the Plan period has been identified as outlined in Table 55. The households cannot afford private rental are marked in red and are therefore considered to require social housing.

Table 55. Number of Additional Anticipated Household that Do not Qualify for a Mortgage and Cannot Afford Private Rental

	2022	2023	2024	2025	2026	2027	2028
1 st Decile	153	155	157	159	162	171	173
2 nd Decile	165	167	169	172	174	184	186
3 rd Decile	163	166	168	170	172	182	185
Total	482	488	494	501	507	537	544

5.11 Summary of Projected Social Housing Needs

The following section provides an overview of the anticipated social housing needs for Galway 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 56, it is expected that an average of 30.8% of the overall household over the Plan period does not qualify for a mortgage. A further investigation of these households with respect to the rental market indicates that this group cannot afford private rental either.

Table 56. Housing shortfall throughout the plan period in County Galway

	2022	2023	2024	2025	2026	2027	2028
Number of Additional Anticipated Households	1,560	1,581	1,602	1,623	1,644	1,740	1,763
Number of Additional Households not Qualified for a Mortgage	482	488	494	501	507	537	544
% of Additional Households not Qualified for a Mortgage	30.9	30.9	30.8	30.9	30.8	30.9	30.9
Number of Additional Households not Qualified for a Mortgage and cannot Afford Private Rental	482	488	494	501	507	537	544
Housing Shortfall (%)	30.9	30.9	30.8	30.9	30.8	30.9	30.9

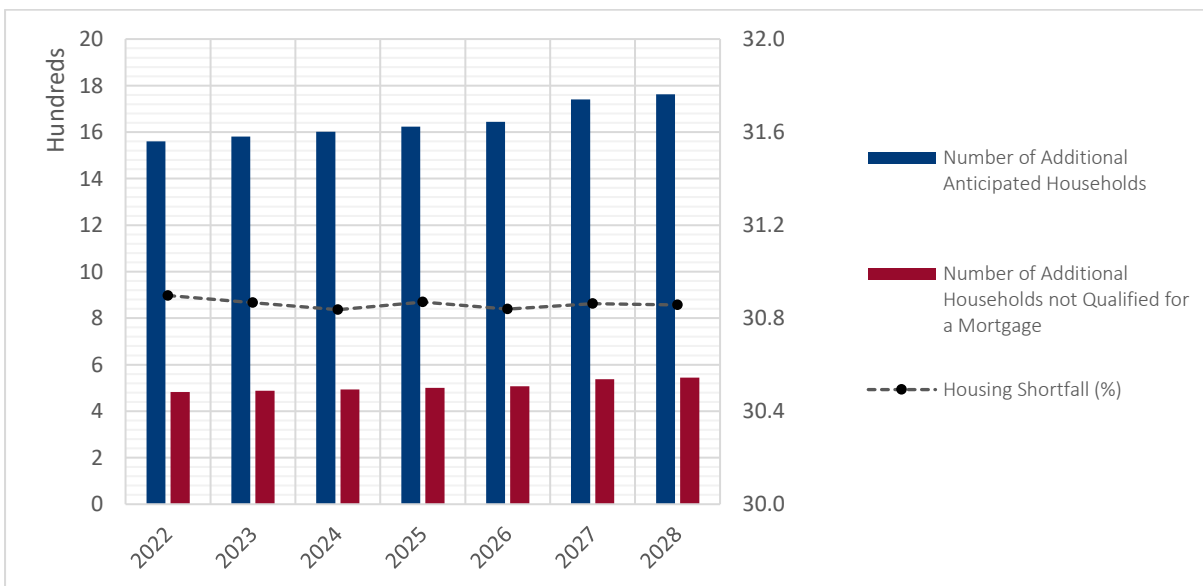


Figure 24. An Overview of Housing Requirements over the Plan Period

With an overall housing demand of 7,469 for County Galway over the Plan period, it is expected a total of 2,305 no. households to not qualify for a mortgage and cannot afford private rental either. To meet this shortfall in County Galway, an average of 329 no. social housing per annum over the Plan period is required.



Section 06.

ANALYSIS OF HOUSNG
REQUIREMENTS

6.0 ANALYSIS OF HOUSING REQUIREMENTS

6.1 Overview

The following section provides an overview of the overall housing requirements for County Galway having regard to the supply and demand analysis outputs which has been determined in the previous sections over the Plan period of 2022-2028.

As set out in Section 3.1, the indication of population projection based on a policy-intervention scenario shows that the population of Galway is expected to increase to 195,056 by 2022 and to 211,100 by 2028 with the latter including an increase of 31,710 to the County population in Census 2016. As outlined in Section 5.1, with an anticipated population growth of 18,655 over the Plan period and an average household size of 2.5, an increase of 7,469 households to 2028 is expected, i.e., 1,607 households per annum on average.

Studying the income profile of the county and calculating the mortgage capacity of the households in Galway as outlined in Sections 5.2 to 5.8 with regard to projection of affordable housing thresholds in the County determines that an average of 30.8 percent of the 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 2,305 households which are not qualified for a mortgage over the Plan period, also do not meet the affordability criteria for the private rental market. These households are therefore considered to require social and affordable housing, and this shortfall can be met by provision of an average of 329 no. social housing per annum over the Plan period.

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 25, the percentage of one-off dwelling granted permissions to the overall housing granted permissions was calculated. The results are summarised in the table below.

Table 57. Percentage of Granted One-off Dwelling Permissions to the Overall Granted Housing Permissions over 2006-2019

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
One-off Dwellings	368	490	363	158	143	89	67	53	49	91	108	151	138	143
Total Granted Housing Permissions	2602	2021	1539	2001	199	135	69	59	50	134	264	282	651	721
% One-off Dwellings	14.1	24.2	23.6	7.9	71.9	65.9	97.1	89.8	98.0	67.9	40.9	53.5	21.2	19.8

Source: CSO StatBank

Based upon this, a linear extrapolation of the number of granted planning applications for single one-off dwellings over 2006-2019 has been undertaken (see Figure 25). This identifies that approximately 58.9% of all granted residential units within any given year have been for single one-off dwellings.

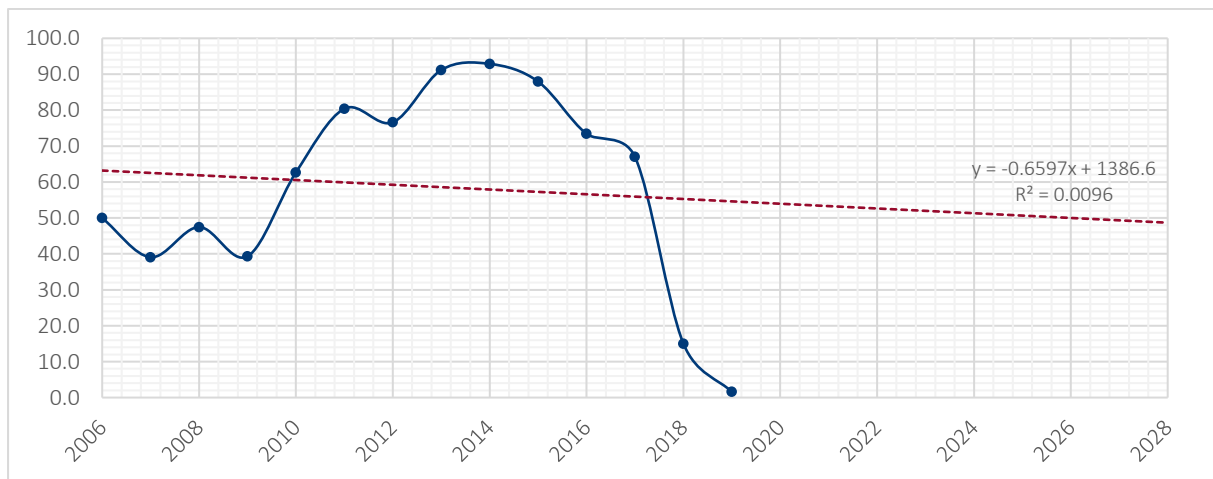


Figure 25. Granted Applications for Single One-Off Dwellings as a % of Total Granted Permissions for Residential Developments over 2006-2019

As determined in **Error! Reference source not found.**, it is projected a total number of 7,469 houses are required by the Plan period (2022-2028). Considering the approximate growth rate of 58.9% for single one-off dwellings, the indications of anticipated one-off houses would be as summarised in the Table below. It is estimated that a total of 4,399 single one-off houses is expected, which equate to an average 628 no. one-off dwellings per year over the Plan period.

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 2017-2028, a projection of the share of each cohort from the total households was also provided. The results are illustrated in Figure 26. As it can be seen, the smaller size households, including single- to two-person households, are forming more than half of the total ranging from 52.3% to 23.68% of the overall anticipated households over the Plan period, while bigger size households form the lesser half 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 36.

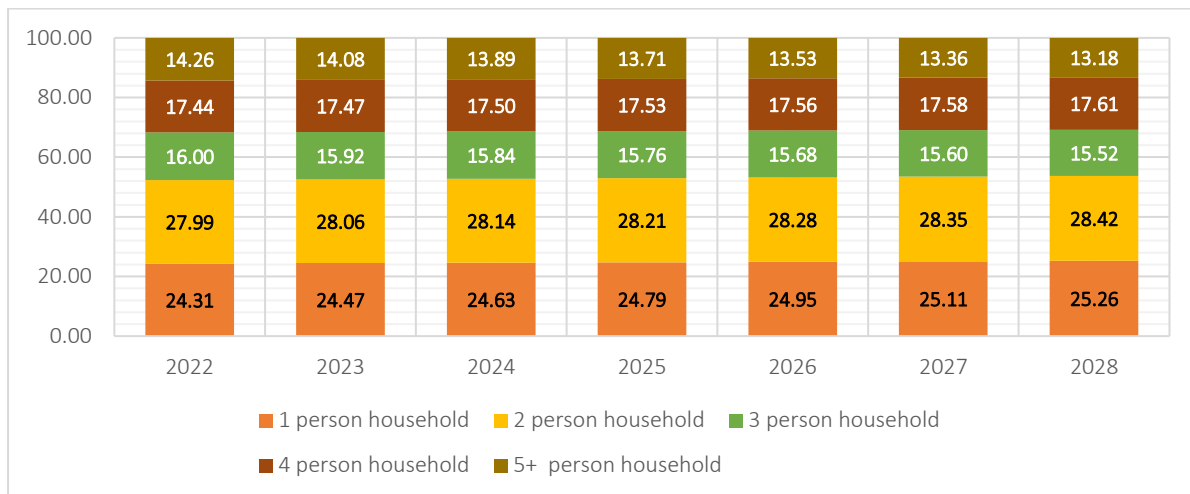


Figure 26. Projection of Household Size Cohorts Trending over the Plan Period

The indication of anticipated households in each cohort shows that four-person households are expected to have approximately 17% of the overall households followed by three-person households (15%). Comparing these outputs with Census 2016 indicate that the 2-person households are expected to have the greatest growth rate (28%), followed by single-person households (25%).

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 58. 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	182,001	42,801	50,241	29,825	31,455	27,678
2018	184,612	43,707	51,108	30,111	31,968	27,719
2019	187,223	44,623	51,976	30,391	32,481	27,752
2020	189,834	45,546	52,847	30,371	32,994	27,779
2021	192,445	46,478	53,720	30,939	33,508	27,800
2022	195,056	47,419	54,595	31,206	34,022	27,814
2023	197,667	48,368	55,472	31,468	34,536	27,823
2024	200,278	49,325	56,351	31,726	35,051	27,825
2025	202,889	50,290	57,232	31,979	35,565	27,822
2026	205,500	51,264	58,115	32,228	36,080	27,812
2027	208,300	52,294	59,054	32,501	36,628	27,823
2028	211,100	53,333	59,994	32,770	37,177	27,827

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 2022-2028, a projection of the share of each tenure type from the total households was also provided. The results are illustrated in Figure 28. 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 2028, it is expected that owner occupancy forms approximately 44% of the market, while private rental is anticipated to take almost 45% of the market.

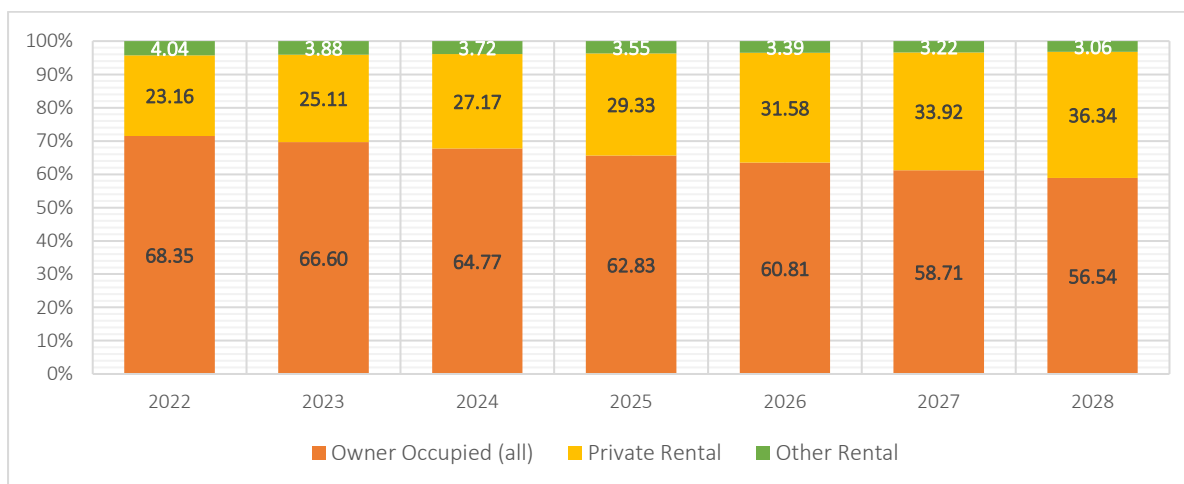


Figure 27. Estimated Share of Housing Tenure of the Projected Households over 2022-2028

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 59. Indication of Tenure Composition over the Plan Period

Year	No. of Anticipated Households	Owner Occupied (all)	Private Rental	Other Rental	Misc.
2017	182,001	137,518	27,339	8,764	8,380
2018	184,612	137,192	30,345	8,614	8,461
2019	187,223	136,619	33,620	8,451	8,533
2020	189,834	135,788	37,177	8,275	8,594
2021	192,445	134,688	41,027	8,087	8,643
2022	195,056	133,312	45,179	7,886	8,679
2023	197,667	131,655	49,640	7,672	8,700
2024	200,278	129,712	54,414	7,447	8,705
2025	202,889	127,484	59,500	7,211	8,694
2026	205,500	124,975	64,895	6,965	8,666
2027	208,300	122,302	70,656	6,715	8,627
2028	211,100	119,357	76,717	6,456	8,570

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 Western region and specifically County Galway is summarised in the Table below.

Table 60. Latest Number of Homeless in West and in County Galway - 2020

Year	2020							
	January	February	March	April	May	June	July	August
West	351	315	343	323	314	297	286	282
County Galway	313	285	314	291	280	263	258	254

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

6.5.2 Traveller Accommodation Programme 2019-2024

According to the Galway County Council Traveller Accommodation Programme 2019-2024, the Projected Need over the 5-year period of this Accommodation Programme is for 40 no. households which added to existing need gives a total estimated need of 111 no. homes. A breakdown of the housing provision for Travellers in Galway is provided in the Table below.

Table 61. Projected Traveller Accommodation Provision in County Galway⁴

Accommodation Type	2019	2020	2021	2022	2024	Total
Group Housing - Scheme Existing	1	1	1	1	1	5
New Group Housing	0	6	0	0	0	6
Permanent Halting Site Service Block - Existing	1	3	1	1	1	7
Local Authority Standard Housing	7	9	11	11	11	49
Rental Accommodation Scheme/Long term Leasing	1	0	1	0	1	3
Voluntary Housing	2	2	3	2	3	12
Purchase by Travellers	0	1	0	1	0	2
Housing Assistance Payment/Private Rented Accommodation with/out Rent Supplement	5	7	5	5	5	27
Total	17	29	22	21	22	111

Source: Galway County Council Traveller Accommodation Programme, 2019-2024, pg. 28

6.5.3 People with Disabilities

Provided by the Housing Agency in the ‘Summary of Social Housing Assessments - 2019’, the latest figures on people with disabilities and in need of specific housing and accommodation requirements within the County Galway is summarised in the Table 62 below.

Table 62. Breakdown of People with Disabilities in County Galway - 2019

Disability - Physical	Disability - Sensory	Disability - Mental Health	Disability - Other	Disability - Intellectual	Exceptional Needs or Compassionate Grounds
89	4	135	1	51	10

Source: Summary of Social Housing Assessments, 2019, pg. 36

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.

6.5.4 Housing for Older People

As cited by ‘Summary of Social Housing Assessments - 2019’, currently there are 68 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.

⁴ It is noted that the Table is copied from the Programme and year 2023 is missing from the original document.



Section 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 Galway, 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 Galway as set out in the Galway 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 Galway.
- 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 Galway 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 Galway 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.
- 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.
- To encourage the redevelopment of existing brownfield sites within established villages in the Gaeltacht area for potential residential developments in order to maximise the sustainable regeneration of underutilised/vacant lands and/or buildings in accordance with the pertaining zoning designation.
- In relation to rural housing, it shall be provided where it promotes the economic role of these areas, negates isolation, and promotes social inclusion and compact growth. 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 seek the creation of well-planned communities, where travel distances to education, work and services are reduced, walking and cycling are chosen for more commutes, and local renewable and low-carbon energy sources are integrated into infrastructure.
- 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 particularly in the Gaeltacht 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 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 Galway 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.



Section 08.

CONCLUSION

8.0 CONCLUSION

Downey Planning have prepared this Housing Strategy and HNDA on behalf of Galway 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 Galway;
- Identification of social and specific housing needs within County Galway;
- Identification and estimation of supply requirements to satisfy identified future needs within County Galway;
- 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 Galway.



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Cover photo: Connemara, Galway, Ireland