

# Housing market activity and neighbourhood renewal in Northern Ireland

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## **How improvements to the housing stock in Northern Ireland are segmented by neighbourhood type and brownfield/greenfield locations.**

The housing market in Northern Ireland is facing significant pressures as a result of the economic downturn and the current public expenditure environment. This study examines where investment is taking place in the housing sector, during a period of crisis for the housing market. It identifies how far this investment is aligned with policy objectives relating to neighbourhood renewal and assesses whether investment is addressing the energy efficiency of dwellings.

The report looks at:

- spatial patterns of improvements to existing housing and new development activity;
- the role of private sector investment and public sector grants;
- the impact on neighbourhood renewal areas and disadvantaged locations;
- the alignment of investment with house prices and rents;
- the brownfield/greenfield split for new development;
- spatial patterns and targeting of policy initiatives.



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# Executive summary

Northern Ireland has been characterised in the past by some of the poorest housing conditions in the UK. Extensive public sector expenditure, notably through the Northern Ireland Housing Executive (NIHE) and in recent years, until 2007, a dynamic housing market with significant levels of new-build activity, have served to improve the quality of Northern Ireland's housing stock to the extent that the overall unfitness level reported in the preliminary findings from the NIHE 2009 House Condition Survey (NIHE, 2010a) fell from 3.4 per cent in 2006 to 2.4 per cent in 2009. Nevertheless, issues remain, and the policy emphasis has now shifted to achieving the Decent Home Standard that was introduced in 2004. The most recent statistics for Northern Ireland show that 23 per cent (162,100) of all homes in 2006 (across both public and private sector) failed to achieve the Decent Homes Standard. According to the NIHE Housing Market Review and Perspectives report for 2010–13 (NIHE, 2010b), more than four fifths of dwellings that failed did so on the basis of the thermal comfort criterion, disrepair and the lack of modern facilities and services, including energy efficiency.

In 2010, the Independent Commission on the Future for Housing in Northern Ireland made many recommendations for action to address housing concerns, among which is the need for:

- a programme to retro-fit existing homes, linked to wider energy-saving and efficiency and tackling fuel poverty;
- a better understanding of how investment in housing and communities affects economic outcomes;
- encouragement for private developers and housing associations to bring forward proposals for the productive use of brownfield sites; and
- sustainable levels of public and private investment to stabilise housing supply and support the creation of a mixed housing economy.

However, these challenges come at a time when the housing market in Northern Ireland is facing significant pressures as a result of the current economic downturn and a tight public expenditure environment. Evidence from various surveys of the UK housing market has shown that the downturn in the housing market has been deeper and sharper in Northern Ireland than in any other region, with a 37 per cent correction in price levels from peak to trough and the overall volume of transactions down by 60–70 per cent. According to Northern Ireland's strategic housing body, the NIHE, the main challenges facing the market are the need for significant investment in new social housing; improvement and maintenance of the existing housing stock across both the social and private sectors; and measures to help alleviate fuel poverty.

The main aim of this study is to examine the nature and sources of investment in the housing sector in Northern Ireland during 2009 through an analysis of first, improvements to the existing housing stock and second, the level of new development in the private sector. This study is important in:

- examining where investment is taking place in the housing sector, during a period of crisis for the housing market;
- identifying the extent to which this investment is aligned with policy objectives relating to neighbourhood renewal; and

- assessing whether investment is addressing issues pertinent to the Decent Homes Standard, notably the energy efficiency of dwellings.

The analysis within the report considers these issues at different spatial scales including change within neighbourhood renewal areas.

A number of key conclusions can be drawn from the study relating first to investment/improvements to the existing stock and second to the development of the new-build sector.

## Existing stock

- Belfast and the surrounding metropolitan area is the focus both of improvements to existing stock and of new private sector residential development in Northern Ireland. Belfast is the only urban centre equivalent in size and scale to the major cities in Great Britain. The concentration of activity in the Greater Belfast area reflects its dominance in the local market and works against the policy of achieving regional balance within Northern Ireland.
- The study shows that private finance is key in funding improvements to the existing housing stock through extensions to individual properties that in many cases will have been undertaken by either householders or individual (non-institutional) investors. Such improvement to the housing stock is important in supporting neighbourhood stability and retaining the existing population in neighbourhoods as people seek to improve their homes rather than moving house. These improvements may also be associated with the re-emergence of private renting as an important tenure in Northern Ireland. There is evidence, notably from Belfast, that a significant degree of this investment is occurring in Neighbourhood Renewal Areas (NRAs). This suggests that policy has had a measure of success in attracting private investment into improving the housing stock in deprived areas.
- The analysis for Belfast shows that housing extensions are found in both low-priced and high-priced neighbourhoods. Across all of west and north Belfast, average house price levels are in the lowest price bands, yet it is apparent that improvements are taking place in some of these areas, such as the Greater Shankill NRA. The analysis also indicates that improvements to property are taking place in the highest-priced neighbourhoods to the south and east of the city.
- There is a strong focus on improving energy efficiency through the installation of new heating systems and replacement of windows. The focus of activity is again centred on the Belfast City Council local government district (LGD), where 30 per cent of all recorded completions of such works occur. Funding for this has been primarily through the public sector and linked to particular programmes such as the UK Energy Saving Trust's Warm Homes Scheme. Significantly, many of these improvements are within the NRAs, demonstrating some policy success in addressing housing and energy requirements in the most deprived neighbourhoods and indeed the lowest-priced neighbourhoods based on average house prices and private sector rents.

## New build

- Private sector new-build activity in 2009 in Northern Ireland has declined to levels recorded in the early 1990s: 5,500 new homes for 2008–09. New private sector development activity in 2009 has been greatest in local authorities within the Greater Belfast area rather than within the city of Belfast. In this respect, an entirely different pattern emerges from that relating to improvements in the existing housing stock. The brownfield–greenfield split shows that the highest levels of brownfield development are found within Belfast and adjoining local authorities and in other major urban areas such as in

Derry/Londonderry. Elsewhere in more rural neighbourhoods, the pattern is reversed, with greenfield development prevailing often in the form of dispersed single family homes.

- The price structure of private sector new build highlights that some of the most expensive new development (prices in excess of £350,000) occurs outside of Belfast, on the north Antrim coast, where some new build schemes have skewed average prices. While this is a reflection of the demand that has been created in the second-home market in this area of high environmental quality, it also brings problems as high house prices can drive out local residents who can no longer afford to live in these areas. New build prices are also high in the northwest of the region where development in certain schemes has been targeted at the upper end of the market rather than the affordable homes sector. This reflects the current state of the housing market in Northern Ireland, where growth is driven by the detached homes market and transactions not requiring mortgage finance. In such conditions, it is increasingly important for the public sector to deliver affordable homes and housing for low-income groups, as recommended in the Independent Commission on the Future for Housing and established by the Department for Social Development/NIHE as a policy goal.
- In Belfast, private sector new build in 2009 focused on the city centre and those higher-priced neighbourhoods to the east and south of the city, with little activity in the north and west of the city and the NRAs. The different spatial patterns between improvements to existing property and new-build activity is an important finding from this study and has key messages regarding potential targeting of public sector new-build programmes to address any geographical imbalance.

This report provides a snapshot of the supply side of the housing market in 2009, probably the most difficult year for the housing market in Northern Ireland since the start of the 1980s.<sup>1</sup> Nevertheless, the messages that emerge from this analysis are mixed. On a positive note, there is investment in the existing housing stock from both the public and private sectors that seeks to improve the quality, standards and energy efficiency of the stock, including improvements to housing in some of the most deprived and low-priced neighbourhoods identified under the NRA policy. However, private sector new development tends to be in different locations, notably on brownfield sites within the city of Belfast, and although some of this is in high-profile regeneration areas, it is generally not in the most deprived wards, thereby limiting the scale of renewal within NRAs. Furthermore, with the current housing market decline, it will be increasingly difficult for the private sector to make a return on new development in NRAs. Hence, recommendations from this study include the need for a policy focus on the retro-fitting of the existing stock given the problems of delivering new build in sufficient numbers, on new development within the social housing sector to support action in NRAs and on incentives for private developers to work in partnership with the social sector to reduce potential market risks.

# 1 Introduction

The Northern Ireland housing market entered a period of steep decline in the latter half of 2007 within the context of the global economic crisis and an over-inflated residential market. This has been demonstrated by a fall in house prices, but more importantly a dramatic decline in the volume of sales both in the existing and new-build markets (see issues of the Northern Ireland Quarterly House Price Index). As in other parts of the UK, strategic planning policy in Northern Ireland anticipated continuing growth in supply to meet housing need targets. However, with a slow-down in new-build activity in both the public and private sector, it is apparent that housing need targets set by the devolved administration in Northern Ireland<sup>2</sup> will not be met in the interim. This has a significant impact on neighbourhood development, which has been identified as a priority for the devolved government in Northern Ireland through the *Strategy for Neighbourhood Renewal* (DSDNI, 2003) as a means for tackling segregation and deprivation.

This report investigates the link between investment in housing through both refurbishment activity and new build in the context of neighbourhood stabilisation/change at a local level and housing supply policy in Northern Ireland. To achieve this, the report analyses improvements (conversions, refurbishment, the completion of services such as changes in heating) to existing property and relates this spatially to deprivation indices and indicators of market activity (prices and rents) to identify the degree to which policy objectives in maintaining neighbourhood stability and improving the standard of the existing housing stock are being achieved. This is particularly pertinent given the context of Northern Ireland's divided community, which continues to experience a high level of segregation both socially and politically. The study also explores how housing supply is changing in Northern Ireland by examining the level of new-build registrations and their spatial location and nature (brownfield/greenfield) to assess the extent of potential overlap between new build and housing improvements in neighbourhoods that are being regenerated and the ability to address demand–supply imbalances.

This report draws specifically on two databases: one provided by the Northern Ireland Building Control Executive Committee for 'retro-fitting' completions (that is, extensions, conversions, services) and the second from the National House Building Council (NHBC) for new-build completions. The analysis is cross-sectional, referring specifically to one calendar year, 2009, but this provides a base-line context from which future comparative study can take place. A key characteristic of the data is the ability to analyse both new-build activity and conversions/refurbishments of property and explore spatial trends in this activity, including how it relates to areas of disadvantage using indicators such as the Northern Ireland Multiple Deprivation Index and NRAs. This analysis makes it possible to identify sites of potential neighbourhood change and to highlight locations where renewal, retro-fitting of properties and new development are occurring, including how this is split across brownfield and greenfield sites and supporting the assessment of how far different activities affect neighbourhood renewal areas.

## 2 Policy and market context: housing

Northern Ireland is a devolved region of the United Kingdom with a history of conflict and division. Indeed, events during the past century have served to make the province distinctive from the rest of the UK (Blair et al, 2007). More than 30 years of sectarian conflict has resulted in deep community division, expressed geographically in neighbourhoods across Northern Ireland and further reflected by diminished levels of investment into the region during the course of the 'Troubles'. Indeed, housing was one of the issues that promoted division during the 1960s; an early reform was the creation of a single housing body removing powers from local authorities to the newly constituted Northern Ireland Housing Executive in 1971. In 1998, extensive talks between political parties in Northern Ireland culminated in the emergence of the Belfast (or Good Friday) Agreement in 1998. The newly devolved Northern Ireland Executive was charged with delivering a new regional development strategy (RDS) that was concerned with 'tackling the problems of a divided society and social cohesion in urban, rural and border areas' (Belfast Agreement, 1998, p. 19).

Northern Ireland is one of the poorest-performing regions of the UK in terms of economic competitiveness, income levels and the percentage of the population that is economically inactive. It also has a high reliance on the public sector in terms of the budget subvention from Westminster, coupled with higher levels of public sector employment (see, for example, the report produced for InterTradeIreland (ITI, 2006) by the International Centre for Local and Regional Development). As a consequence, there has been a history of relative disadvantage in the province, with many neighbourhoods and wards experiencing high levels of deprivation and poor housing conditions, with fuel poverty prevalent. The preliminary findings of the Northern Ireland 2009 House Condition Survey (NIHE, 2010a) indicate that there were an estimated 17,500 unfit dwellings in Northern Ireland that year, representing a headline rate of 2.4 per cent compared with an unfitness rate of 4.9 per cent (31,600) in 2001 and 3.4 per cent (24,100) in 2006. This improvement is accounted for by the high rate of new-build construction (albeit now severely curtailed because of the global financial crisis), as well as improvement works in existing homes in the private sector (assisted by public grants expenditure) and continued investment in social housing in the years 2006 to 2009.

Current housing policy for Northern Ireland is set within the context of a housing market that is very volatile and that has experienced the impact of the financial crisis more acutely than other parts of the UK. In contrast to the last major housing market crisis in the UK in the early 1990s, the Northern Ireland housing market has been more vulnerable to the current crisis than any other region of the UK. This vulnerability stems from a market that was growing significantly in the 2000s through increased demand, due to demographic drivers and growth in household formation (initially leading to an estimated need for 160,000 new dwellings by 2015), coupled with supply-side constraints.

The initial estimate of new housing supply needed, developed through the use of Housing Growth Indicators as part of the RDS for Northern Ireland, was the subject of considerable debate and, following public examination in 2006, it was increased to a total of 208,000 new houses for Northern Ireland (from a 1998 baseline). As in other parts of the UK, there is an emphasis on densification and the RDS set a regional target of 60 per cent of new development, up to its first review in 2010, to be within the existing urban areas of cities and towns with a population of more than 5,000. The achievement of this regional target was to be determined through the development plan process using urban capacity studies to maximise the share of residential development that could be achieved within the urban footprint in order to reduce

greenfield development and enhance development potential within brownfield locations. Sites within the urban footprint that may count towards the regional target for housing are previously developed land or brownfield sites encompassing vacant or derelict lands; infill sites; land occupied by redundant or under-used buildings; industrial or commercial property that is abandoned or under-used; and other suitable sites, normally comprising undeveloped land within the urban footprint.

A report produced for the Northern Ireland Housing Executive in 2007, *The Northern Ireland Housing Market: Drivers and Policies* (Gibb et al, 2007), identified that supply-side constraints were, at that time, playing a significant role in current housing market dynamics in Northern Ireland. It is apparent that a combination of factors relating to planning (namely delays in area plan preparation, problems derived as a consequence of the plan-led system, the inadequacy of planning tools and delays in the processing of applications) have been instrumental to new-build delivery, to the extent that the effectiveness of the planning system must be considered as a key factor or driver influencing the housing market. The report indicated that while demand for housing will remain strong. However, there was evidence that households were facing increasing difficulty in accessing homes to buy and were therefore turning to alternative tenure options. Indicators such as increasing mortgage income multiples and interest as a percentage of repayments point towards increasing affordability problems for prospective buyers, with private sector wage levels well below the United Kingdom average and the prospect that the public sector economy will be scaled back. These factors posed particular threats for the housing market in Northern Ireland and there were concerns expressed in the report as to whether there were sufficient jobs and incomes high enough to sustain house prices and increase transaction levels, particularly in the first-time buyer category.

In Northern Ireland there is a growing imbalance in housing provision, with first-time buyers squeezed out of the market in the mid-2000s by rising prices and the role of investors. In 2005–06, many selling agents reported over a third, and in some instances more than half, of all sales stemming from investment activity. Consequently, house price levels escalated to the extent that, by 2007, average house prices in Northern Ireland were higher than in all other regions of the UK apart from London and the surrounding metropolitan area. The outcome was a highly exposed local market that collapsed from its high point in the third quarter of 2007 when the average house price was £250,586 to a low in the first quarter of 2009, when the comparative price was £156,857 – a peak-to-trough decline of 37.4 per cent, according to the Northern Ireland Quarterly House Price Index. To set this in context, average house prices declined to levels approximating those in late 2005 and early 2006. The current average house price in Northern Ireland (£163,459 in the second quarter of 2010) has recovered somewhat but the market is characterised by an uneven pattern of growth and low volumes of transaction, suggesting that the private housing market is likely to be operating at sub-optimal capacity for several years.

The preliminary findings from the Northern Ireland 2009 House Condition Survey (NIHE, 2010a) still reflect the impact of the previous housing boom, with a net increase in the housing stock of 35,000 dwellings (11,700 per annum) since 2006, and a slightly higher rate of growth in these three years than for the decade as a whole due to the high number of dwelling completions in 2006 and 2007 at the height of the housing boom. The report also highlights the relative decline of the owner-occupied sector to 64.9 per cent of the stock (including vacant property) compared with 66.5 per cent in 2006 and the corresponding growth of the private rental sector up to 19.2 per cent (including vacant stock). As articulated in the report of the Independent Commission on the Future for Housing in Northern Ireland (CIH, 2010), private sector completions in 2009 were 50 per cent lower than four years previously and according to the Northern Ireland Housing Executive were at levels last seen in the early 1990s.

On the future of housing in Northern Ireland, the Independent Commission has made an extensive range of recommendations, considered by many commentators as critical for informing forward action (CIH, 2010). Several of the findings are appropriate to this particular study, including recommendations for:



- a programme to retro-fit existing homes linked to wider energy-saving and efficiency in relation to fuel poverty;
- a better understanding of how investment in housing and communities affects economic outcomes;
- incentives offered by planners to encourage private developers and housing associations to bring forward proposals for the productive use of brownfield sites;
- a Northern Ireland housing strategy that includes in its priorities the attraction of sustainable levels of public and private investment to stabilise housing supply and support the creation of a mixed housing economy;
- a regional development strategy that assigns a central role to housing matters in the overall Northern Ireland framework.

In its Housing Market Review and Perspectives report for 2010–13, the Northern Ireland Housing Executive (NIHE, 2010b) recognises a difficult time ahead for housing in Northern Ireland, with significant pressures in the housing market as a result of the economic recession and the much tighter public expenditure environment. The review acknowledges that despite the further significant improvement in housing conditions recorded by the 2009 House Condition Survey (NIHE, 2010a), there remains an ongoing need for investment in new social housing and improvement in measures to help alleviate fuel poverty, which affected 34 per cent of households in Northern Ireland at the time of the 2006 House Condition Survey. Indeed, the 2009 House Condition Survey suggests that, given the subsequent substantial increases in fuel prices, more than 40 per cent of households are now likely to be in fuel poverty. A report for the Joseph Rowntree Foundation (Smith et al, 2009) indicated that various household types in Northern Ireland are estimated to pay between 17 and 30 per cent more for domestic fuel than those in Great Britain due to the lack of a truly competitive market.

The NIHE review and perspectives report also identified that the need for adequate funds to maintain and improve the existing social housing stock continues to be of great importance, with some 3,000 Housing Executive dwellings still requiring improvement works to bring them up to modern-day standards and 20,000 dwellings requiring heating conversions to ensure that they meet the Decent Home Standard, as well as a growing need for major repair schemes in the housing association sector. In 2006, 23 per cent (162,100) of all dwellings failed to achieve the Decent Home Standard and, according to the NIHE review and perspectives report, more than four fifths (84 per cent) of dwellings that failed to reach the standard did so on the basis of the thermal comfort criterion. Poor thermal efficiency in dwellings is one of the key factors contributing to fuel poverty.

Hence, Northern Ireland faces a range of challenges relating to pressure on housing supply, the energy efficiency of the housing stock and the adequacy of dwellings in light of the major concern about fuel poverty. This is at a time when the public sector provision of new homes remains low, with 1,072 completions in 2008–09, and the housing need figure rising from 31,908 in 2006 to 38,923 in 2009, suggesting a growing imbalance between supply and demand.

# 3 Policy context: planning and neighbourhood regeneration

The public policy landscape for planning and neighbourhood regeneration in Northern Ireland is fragmented. New institutional structures instigated under the Belfast Agreement have added to the dispersal of policy- and decision-making on matters relating to planning and development across a number of government departments. Currently, responsibility for development management and development plan lies with the Department of the Environment, neighbourhood renewal and urban regeneration with the Department for Social Development (DSD), and strategic (regional) planning with the Department for Regional Development.

In relation to neighbourhood renewal, government strategy focuses on the worst areas of social disadvantage. The approach, set out in *People and Place – A Strategy for Neighbourhood Renewal* and launched in 2003, was designed to be a long-term (seven- to ten-year) framework targeting communities throughout Northern Ireland that have been suffering the highest levels of deprivation. Neighbourhood renewal is a cross-government strategy that aims to encourage government departments to work in partnership with local people to tackle disadvantage and deprivation in all aspects of everyday life. Participating neighbourhoods come from the most deprived 10 per cent of wards across Northern Ireland and were identified using the Noble Multiple Deprivation Measure. In total, 36 NRAs throughout Northern Ireland with a combined population of approximately 280,000 (one person in six in Northern Ireland) were targeted for intervention – 15 in Belfast, six in Londonderry and 15 in other towns and cities across Northern Ireland. The strategy has two overarching goals, namely:

- to ensure that the people living in the most deprived neighbourhoods have access to the best possible services and to the opportunities that make for a better quality of life and improved prospects for themselves and their families; and
- to improve the environment and image of the most deprived neighbourhoods so that they become attractive places to live and invest in.

In this way, the strategy aims to close the gap between disadvantaged and affluent neighbourhoods in terms of quality of life and equality of opportunity.

The capacity of communities to engage has been assessed, for a considerable period, via various deprivation indices that include analysis of both economic and environmental factors in particular neighbourhoods, usually defined at specific spatial geographies either Super Output Area or Census Output Area levels. The Northern Ireland Multiple Deprivation Measure, produced by the Northern Ireland Statistics and Research Agency (NISRA), is a measure of multiple deprivation at the small area level. It is based on the idea of distinct components or domains of deprivation that can be recognised and measured separately. The domains used in the NISRA 2005 assessment covered the following issues: income deprivation; employment deprivation; health deprivation and disability; education, skills and training deprivation; proximity to services; living environment deprivation; and crime and disorder. The extent to which these issues are experienced by individuals living in an area is assessed with people being counted as deprived in one or more of the domains, depending on the number of types of deprivation that they



experience. From a policy context, the NRAs were established in the most deprived locations to deal with specific issues facing these neighbourhoods. The analysis that follows highlights how successful this policy has been in achieving greater investment by both the private and public sectors in improved housing in the NRAs.

## Approach to the study

This study seeks to address key emerging policy themes through an interpretation of the pattern of improvements to the existing housing stock and of the extent of new private sector development in Northern Ireland in 2009, with specific consideration of how both of these have affected deprived (NRA) areas.

This is considered under two main headings: first, the refurbishment, improvement or retro-fitting of property; and second, new development activity. The former is sub-divided into an analysis of dwelling extensions, signifying investment in the quality of the existing housing stock, and a review of measures to upgrade existing property, specifically to tackle energy/fuel poverty through providing insulation or changing the type of heating in the home. In many parts of Northern Ireland, there is still conversion of heating systems from coal to oil or gas central heating. The report uses the recently published (June 2010) Multiple Deprivation Measure for Northern Ireland as one of the background variables to analyse change.

# 4 Improvements to existing housing

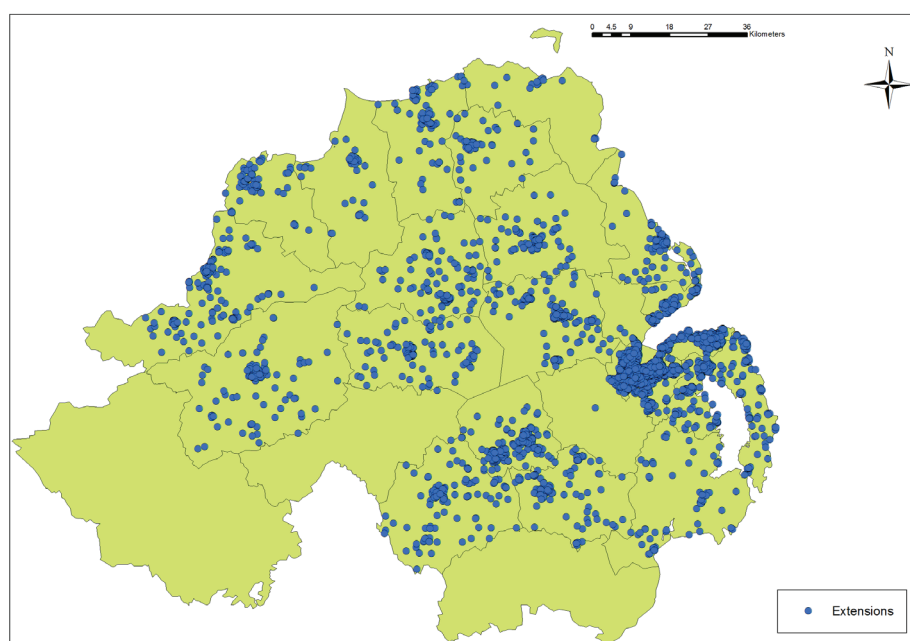
## Extensions

According to the Northern Ireland Planning Service (2008), extensions are alterations or changes made to homes to cater for changing domestic requirements, such as the provision of new rooms to a property. Extensions are a significant indicator of home improvement with the value of extensions being a method of improving residential property through the modernisation and revitalisation of the housing stock.

The geographical distribution of the 8,038 extensions in Northern Ireland in 2009 (Figure 1) shows a high concentration in Belfast and adjacent district councils – notably North Down, Ards, Castlereagh and Carrickfergus. Beyond the Greater Belfast area, other concentrations of extensions are apparent in the Craigavon and Armagh local authorities, Omagh in the west of the province, Derry City Council in the north-west, Coleraine in the north of the region, and Larne.<sup>3</sup> In rural locations, the incidence of housing improvement through the use of extensions is seemingly less prevalent.

Most extensions (88 per cent) are funded through private means on properties in private ownership. The data is probably capturing both an element of individual homeowner home improvement (which may support stabilisation of neighbourhoods) and also speculative improvement of property that may be let in the growing private rental sector. Recent reports by the Northern Ireland Housing Executive have highlighted a re-emergence of private renting as an important tenure in Northern Ireland, with more properties in this tenure than in the public rented sector. The analysis shows that in total 880 (11 per cent) of the completed extensions are in the 36 NRAs identified by the DSD for priority action. Although under-

**Figure 1: Completion of extensions in Northern Ireland**



*Data source:* Local Authority Building Control data.

*Map:* Land and Property Services, Permit No. 100154, © Crown copyright 2010

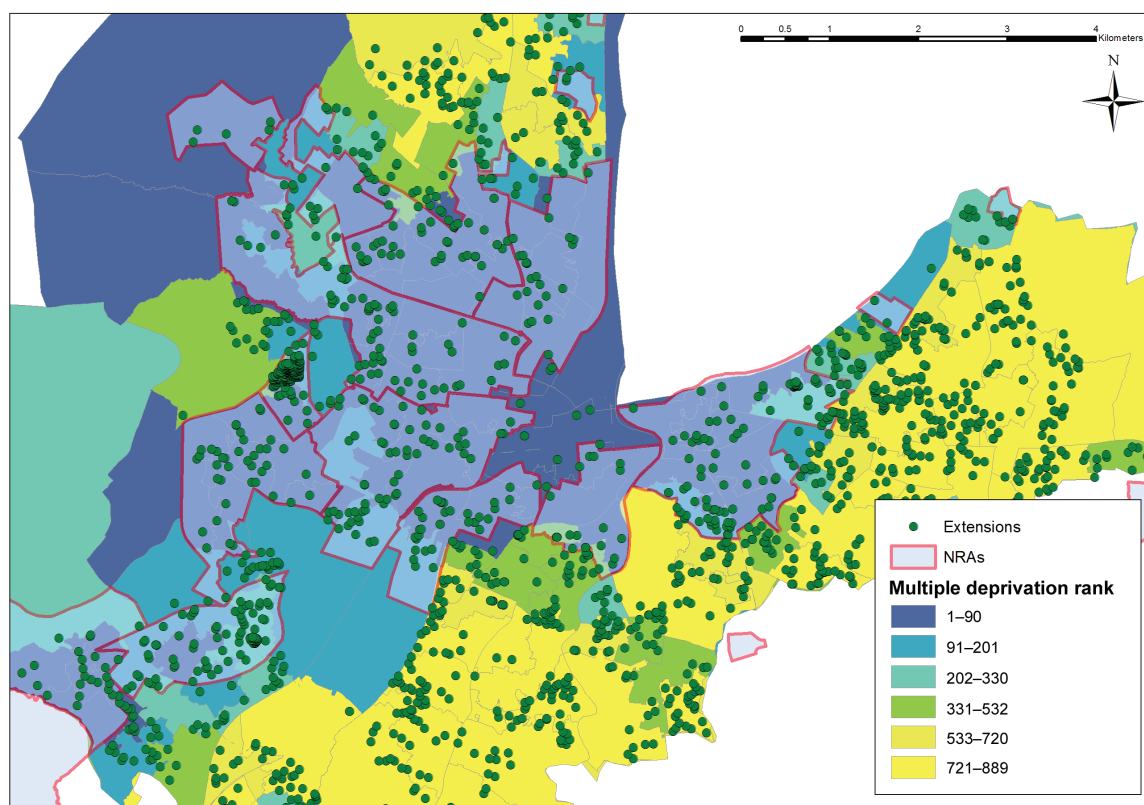
represented on a population basis, given the difficulty of obtaining investment in NRAs, the data suggests that there has been certain targeting of properties for improvement in NRAs, inferring a measure of policy success in seeking to regenerate from within.

The analysis also highlights the Belfast City Council local government area as a major focus for extensions, with a total of 2,115 completed extensions in 2009 or 26.3 per cent of the Northern Ireland total. Indeed, 692 of the extensions in NRAs occur within Belfast, making the city a significant case study for more detailed analysis.

The pattern of extensions within Belfast shows a wide distribution across the city (Figure 2), with evidence of an element of clustering linked to the arterial routes and more concentrated occurrences or nodes of activity that map across both deprived and more affluent neighbourhoods. In all, 501 extensions were completed in 2009 in the 90 most deprived Super Output Areas (SOAs) and 727 within the 201 most deprived SOAs. In comparison, 584 extensions were completed in the 721–889 least deprived SOAs. This pattern suggests that improvements to property are not exclusive to more affluent neighbourhoods and that renewal of the housing stock is occurring across neighbourhoods with different socio-economic profiles, including more deprived neighbourhoods. The evidence suggests that residents are staying in their neighbourhoods and improving their existing homes rather than moving house, which may reflect the difficult property market conditions outlined in Northern Ireland. In particular, there is a high concentration of extensions in west Belfast and other significant nodes in south-west Belfast, in the inner south of the city and in east Belfast.

Of particular significance is the clustering of housing extensions in NRAs in west Belfast. For example, the Greater Shankill NRA highlights a node of activity associated with the upgrading of property, in this case through public sector expenditure. Throughout other NRAs, it is apparent that private sector spending dominates in terms of improvement activity.

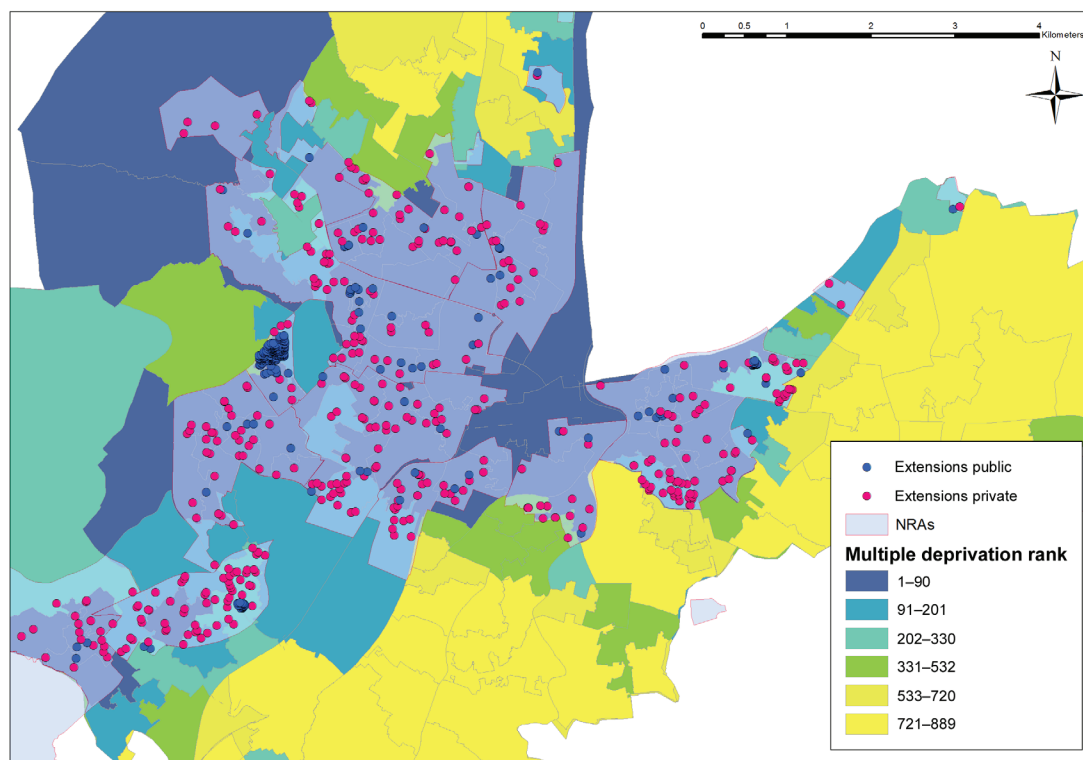
**Figure 2: Completion of extensions in the Belfast LGD in relation to NRAs**



Data source: Local Authority Building Control data.

Map: Land and Property Services, Permit No. 100154, © Crown copyright 2010

**Figure 3: Completion of extensions in public/private sector in the Belfast LGD in relation to NRAs**



*Data source:* Northern Ireland Building Control Executive.

*Map:* Land and Property Services, Permit No. 100154, © Crown copyright 2010

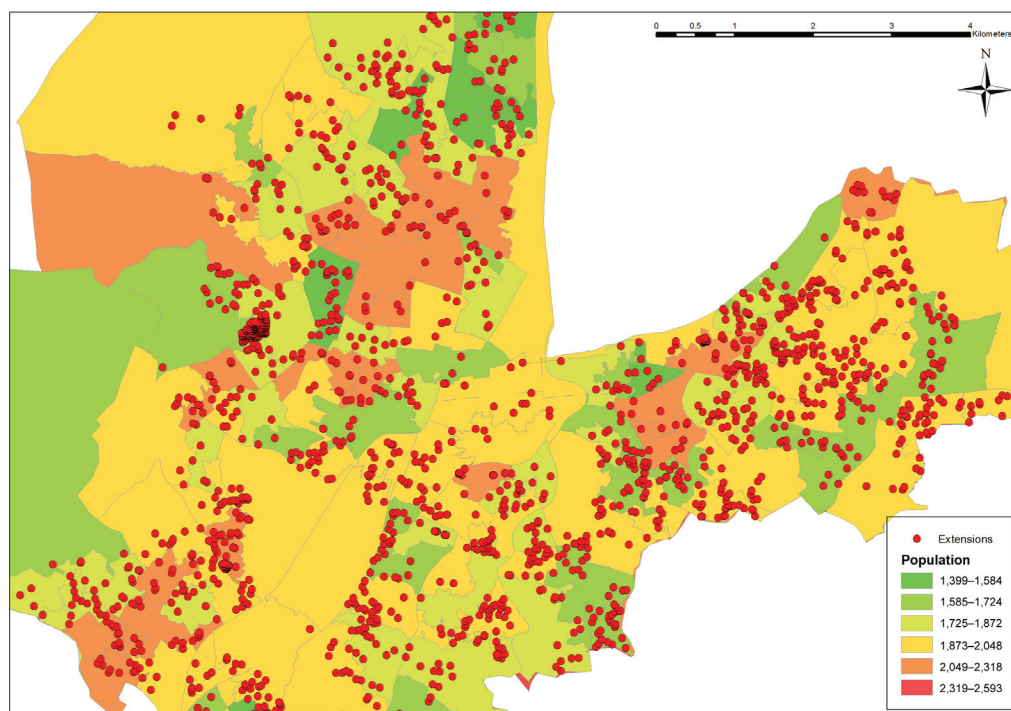
The number of extensions does not necessarily follow the areas of highest population, although there is significant overlap between population numbers and clusters of house extensions in the outer part of west Belfast, indicative of the pressure on housing in this sector of the city (Figure 4). In north Belfast, clusters of property extensions occur in both more and less populated neighbourhoods. In the south and east of the city, extensions to dwellings tend to occur in mid- to lower-density locations. In south Belfast, there is evidence of clustering of properties with extensions completed in 2009 in the University and Lisburn Road areas; this may reflect the strong rental market in this sector of Belfast.

Two extensively used key indicators of housing market performance are the sale price of open market transactions and the rental levels achieved. In analysing the pattern of extensions by price levels for 2009, this study uses sale transactions from the Northern Ireland Quarterly House Price Index, a survey that has been monitoring the province's housing market since the mid-1980s.

This analysis shows that in terms of price bands, housing extensions are associated with both lower- and higher-priced neighbourhoods. All neighbourhoods in west and north Belfast have average price levels within the lowest price bands, indicating that improvements are taking place in some of the lowest-priced locations within the city. For example, the Greater Shankill NRA, highlighted previously, is in the lowest house price band and provides evidence of investment activity through improvements to the housing stock despite difficult market conditions and the limited prospect of any short-term growth in housing capital values. The analysis indicates that improvements to property are also taking place in the highest-priced neighbourhoods to the south and east of the city, which, given market conditions, may point to householders choosing to remain in their neighbourhoods rather than seeking to trade up in the housing market (Figure 5).

Likewise, the pattern of extensions cuts across areas with a range of private renting costs, as shown through data supplied by PropertyNews.com.<sup>4</sup> This analysis shows that while the lowest rental rates occur in the west and north-west of the city and are consistent with the house price information, spatial

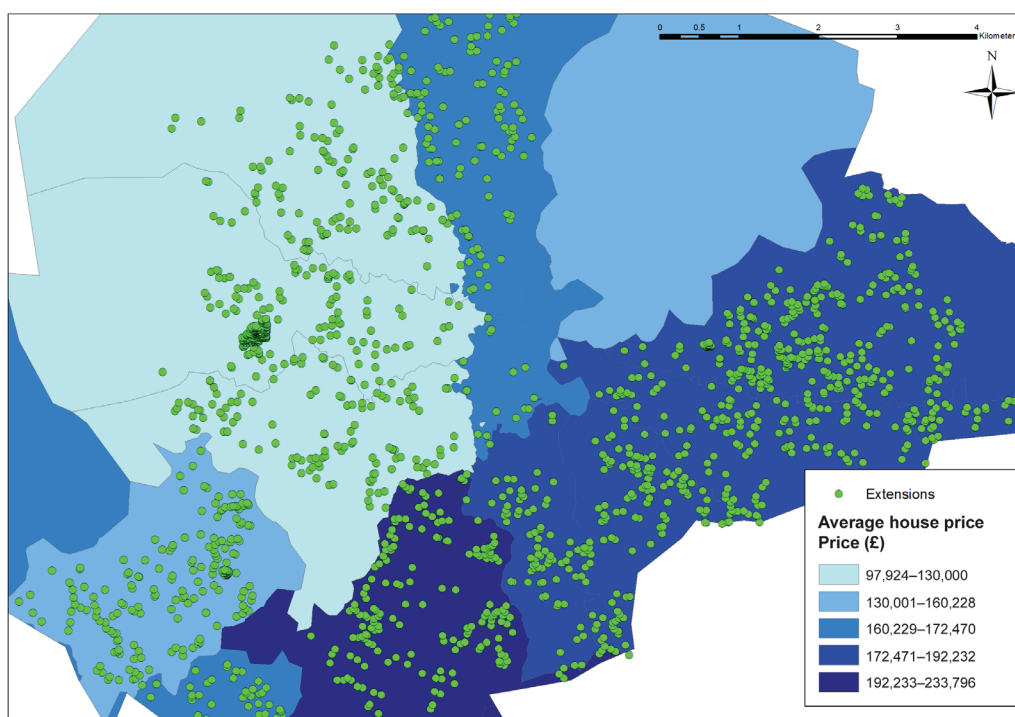
**Figure 4: Completion of extensions in the Belfast LGD in relation to population**



Data source: Local Authority Building Control data.

Map: Land and Property Services, Permit No. 100154, © Crown copyright 2010

**Figure 5: Completion of extensions in the Belfast LGD in relation to average house price**



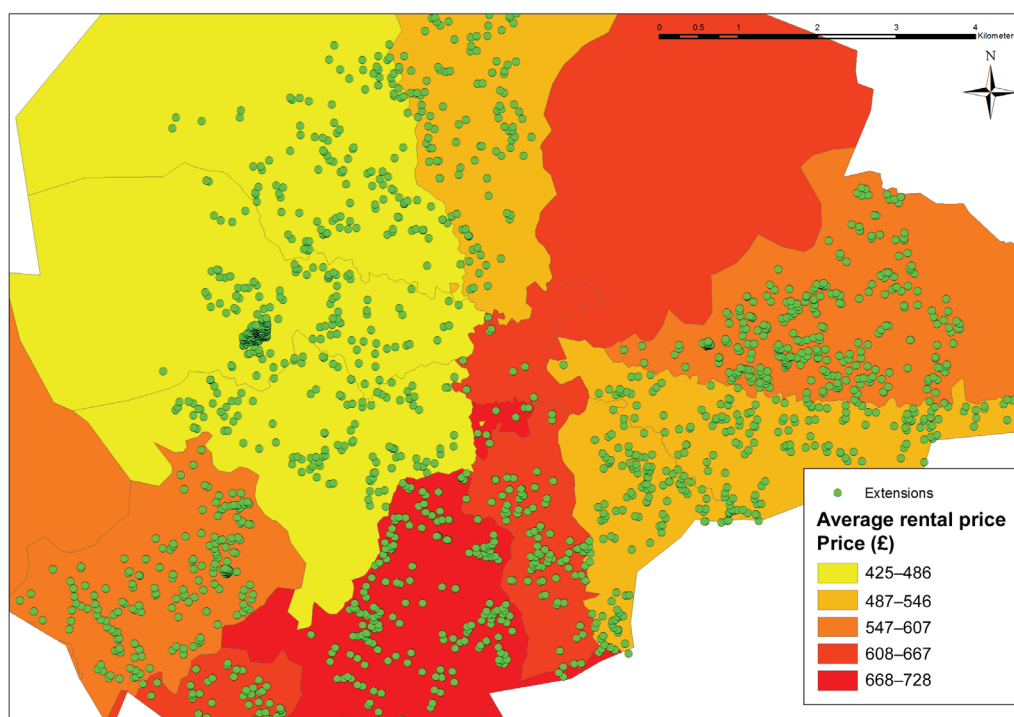
Data source: Local Authority Building Control data.

Map: Land and Property Services, Permit No. 100154, © Crown copyright 2010

differences are also apparent, with higher rental levels in NRAs to the west/south-west of the city indicating higher demand in the local market. In a large part of the east of the city, where extensions have significantly improved housing stock, rental values are in a lower band. The high-rent sector in the south of Belfast is also characterised by a significant cluster of extensions to properties notably in close proximity to the University precinct and along the Lisburn Road (Figure 6).



**Figure 6: Completion of extensions in the Belfast LGD in relation to average rental price**



Data source: Local Authority Building Control data.

Map: Land and Property Services, Permit No. 100154, © Crown copyright 2010

The inference that can be drawn from both sale price and rental evidence is that housing improvement is taking place across both high- and lower-valued neighbourhoods in spite of the economic recession.

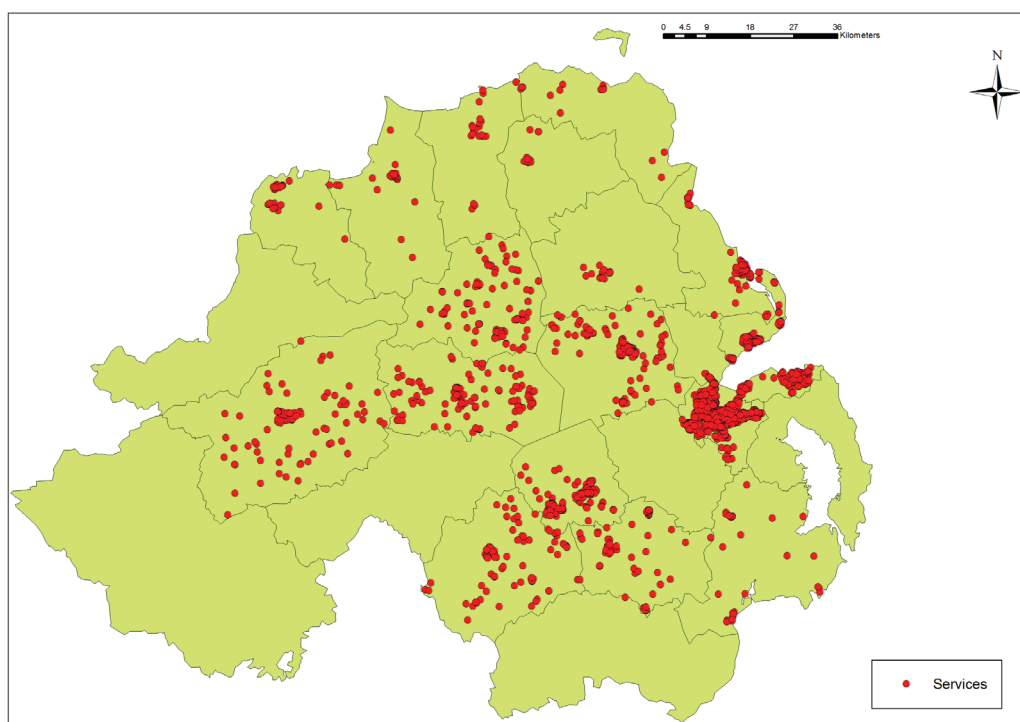
## Services

Another indicator of improvements to the existing stock is the extent of works to improve the energy efficiency of people's homes. There are three broad programmes that support improvements in the energy efficiency of the residential stock, sometimes, but not always, part funded through grant support. The first category includes upgrades in insulation and the installation of new heating systems (oil and gas), solar panels, level-access showers and new boilers. The second category is concerned with the conversion of heating systems from solid fuel to oil and/or gas, as well as conversion from Economy 7 to oil-fired central heating and/or gas. The third works programme includes internal improvements to properties and the installation of uPVC windows. This section reviews what is being achieved through these programmes to improve housing stock and the spatial characteristics of this activity. The combined outcomes of these programmes are recorded as 'service completions' as discussed below.

Across Northern Ireland, there were 5,738 service completions relating to energy efficiency works during 2009, equating to activity in less than 1 per cent of the total housing stock in the province. The spatial distribution of these works follows a pattern that is similar to that for extensions, with a focus of activity in the main urban centres and notably the Belfast City Council local government area (Figure 7). Indeed, there is an even higher concentration of this activity in Belfast, with 1,737 or 30 per cent of all recorded completions occurring here. In contrast with the analysis of extensions, a significant amount of this investment, either through energy improvement measures or heating system conversions, appears to have been funded through the public sector via Northern Ireland Housing Executive-led programmes.

The strong public sector lead is consistent with the policy objectives of tackling fuel poverty within Northern Ireland, although the overall rate of progress as indicated by this analysis is slow. However, the

**Figure 7: Completion of services in Northern Ireland**

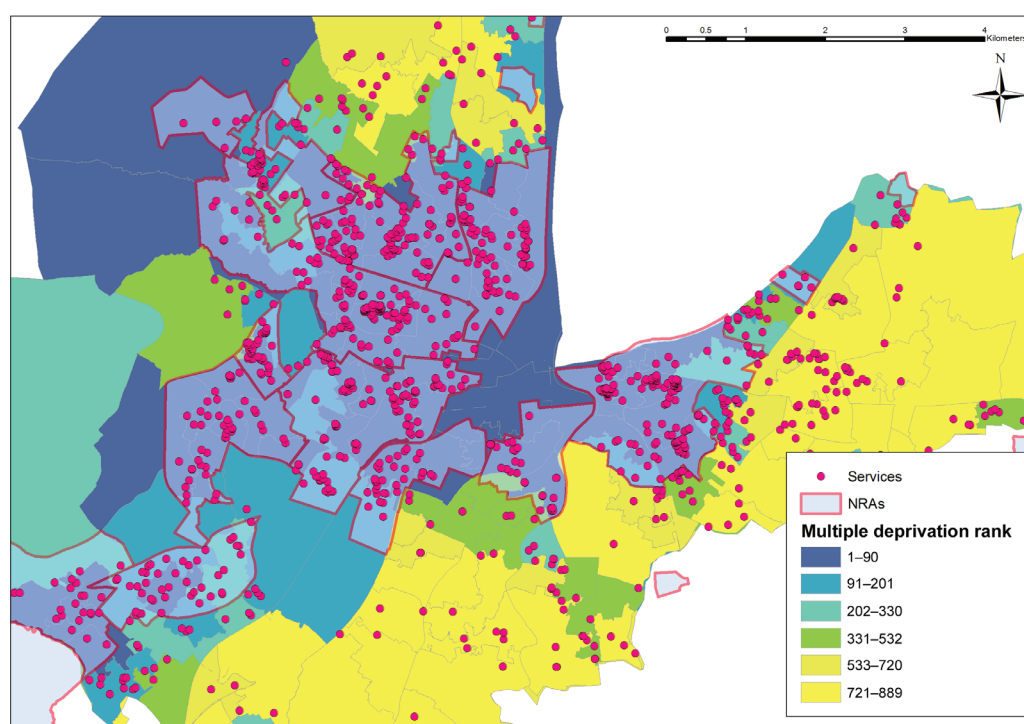


Data source: Local Authority Building Control data.

Map: Land and Property Services, Permit No. 100154, © Crown copyright 2010

analysis indicates that a significant number of service completions occur within the NRAs. For example, at the Northern Ireland level, 59 per cent of heating system conversions are within the designated NRAs and of these, 85 per cent are located within Belfast. In relation to completion of services in the Belfast City Council area, the analysis demonstrates a strong focus of activity within NRAs, notably in locations across the west and north of the city and in inner city east (Figure 8). The concentration of activity in NRAs is much more

**Figure 8: Completion of services in the Belfast LGD in relation to NRAs**



Data source: Local Authority Building Control data.

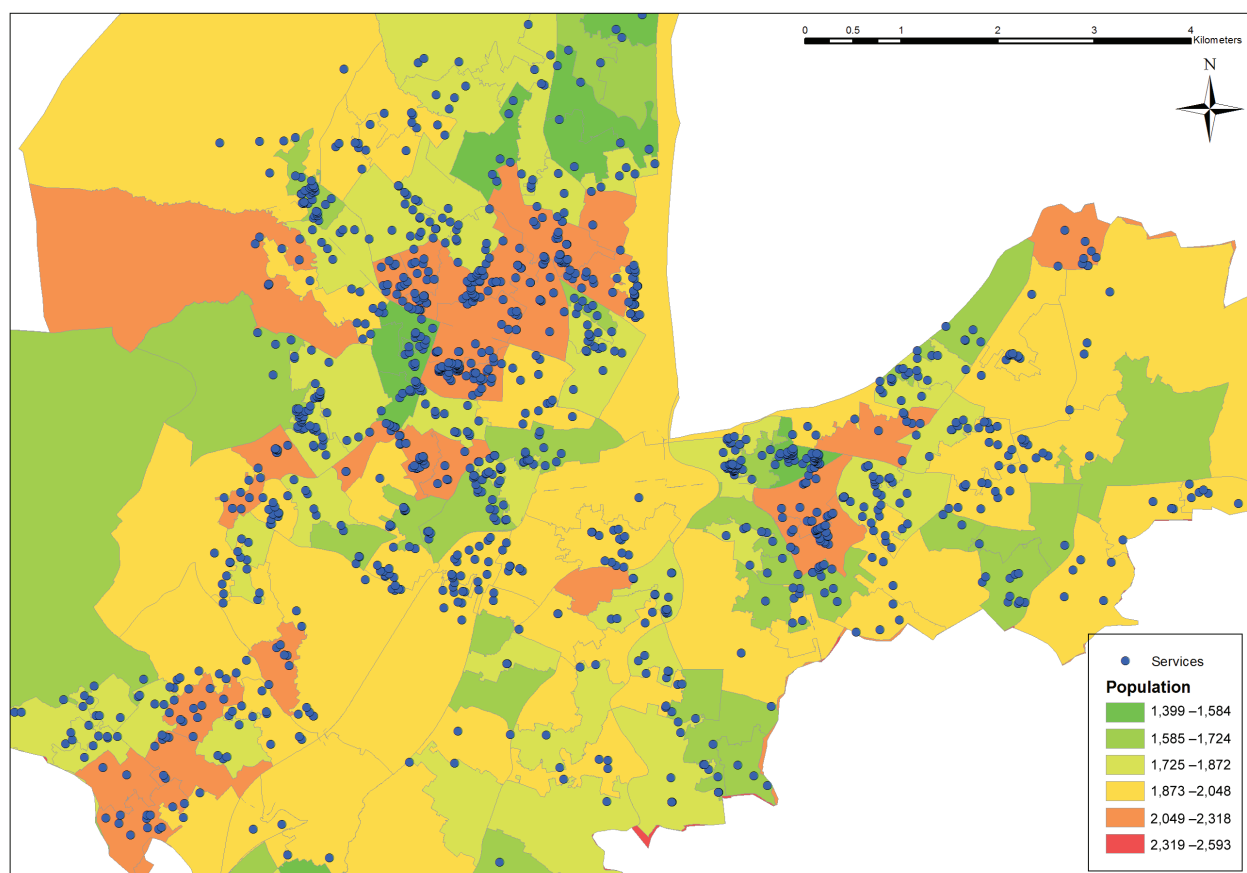
Map: Land and Property Services, Permit No. 100154, © Crown copyright 2010

pronounced than for extensions: 1,109 service completions in Belfast for 2009 were within the 201 most deprived SOAs, whereas there were only 140 service completions within the 20 per cent least deprived SOAs. These works have largely been achieved through public sector funding, with 80 per cent of service completions in the NRAs in Belfast funded by this route. Outside of the NRAs, the picture is one of much less activity overall and more dispersed activity in relation to heating system conversions and provision of new systems, although more localised clusters are apparent in affluent neighbourhoods in middle city wards in the east of Belfast. In the south of the city, the picture is highly dispersed.

There is a correlation between high levels of service completion and density of population within the Belfast City Council area, with dense clusters of works mapping on to high population areas, notably in neighbourhoods in the west and north-west of the city and inner-city east (Figure 9). However, this pattern is not entirely consistent, as clusters of service completions are also evident in some less populated neighbourhoods in inner-city east and to the north and north-west of the city.

The analysis indicates that most service completions in 2009 occur in properties with the lowest-priced neighbourhoods based on average sale price (Figure 10) and average private sector rent (Figure 11). The evidence suggests that there is a targeting of public sector expenditure aimed at tackling fuel poverty and related issues and that this is having an impact in those parts of Belfast with the lowest property prices and least potential to use the value of the asset to improve the property. The pattern is particularly evident by rental band, with most service completions occurring in the two lowest bands, although there are some service completions associated with properties in the middle band of the rental values in the south-west of the city and to a lesser degree in the east of Belfast. In the case of house prices, there is a tendency for service completions to occur in the lowest price bands, although there is also evidence of some activity in high-priced neighbourhoods in the east of the city.

**Figure 9: Completion of services in the Belfast LGD in relation to population**

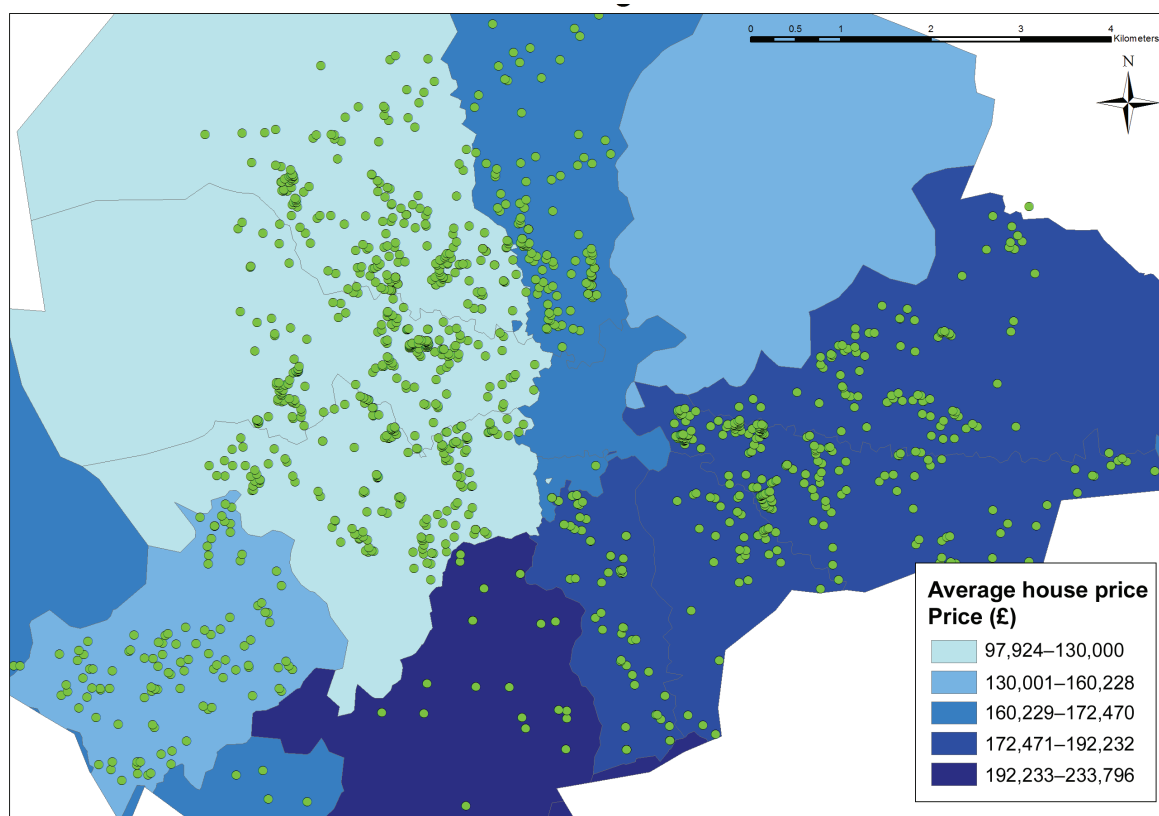


Data source: Local Authority Building Control data.

Map: Land and Property Services, Permit No. 100154, © Crown copyright 2010



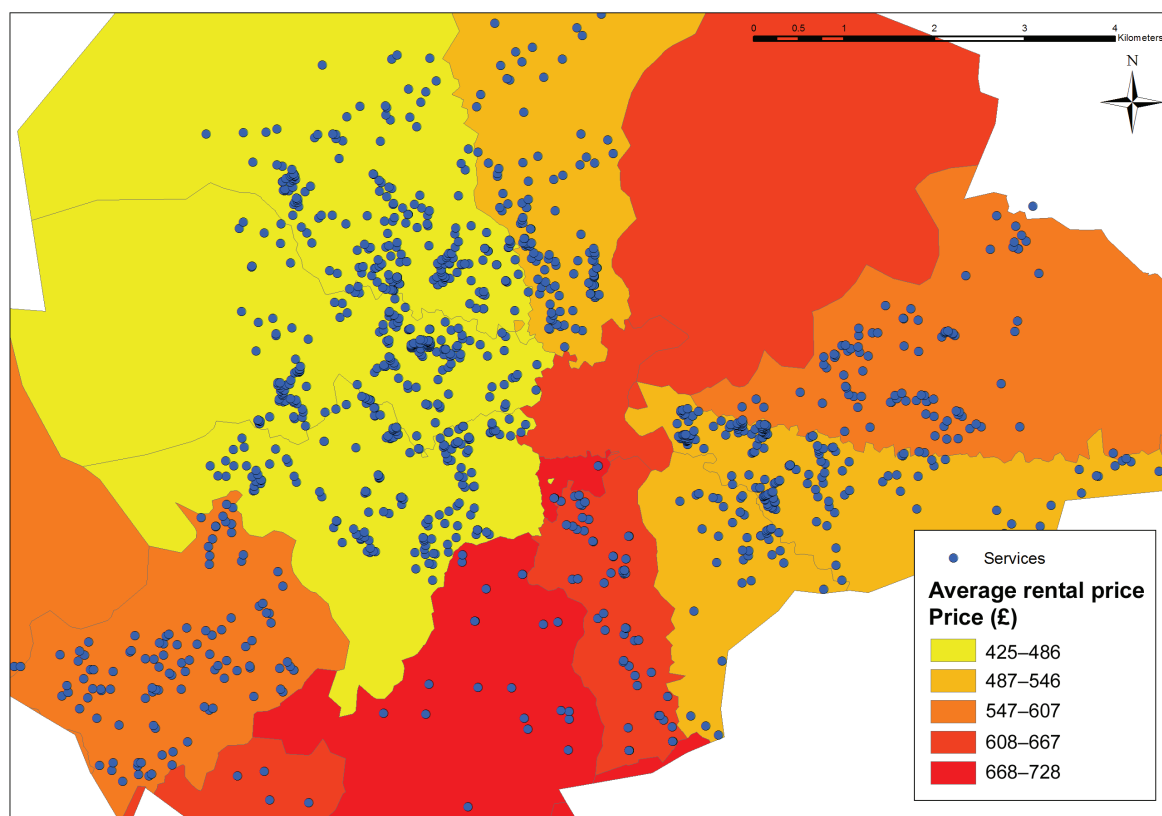
**Figure 10: Completion of services in the Belfast LGD in relation to average house price**



Data source: Local Authority Building Control data.

Map: Land and Property Services, Permit No. 100154, © Crown copyright 2010

**Figure 11: Completion of services in the Belfast LGD in relation to average rental price**



Data source: Local Authority Building Control data.

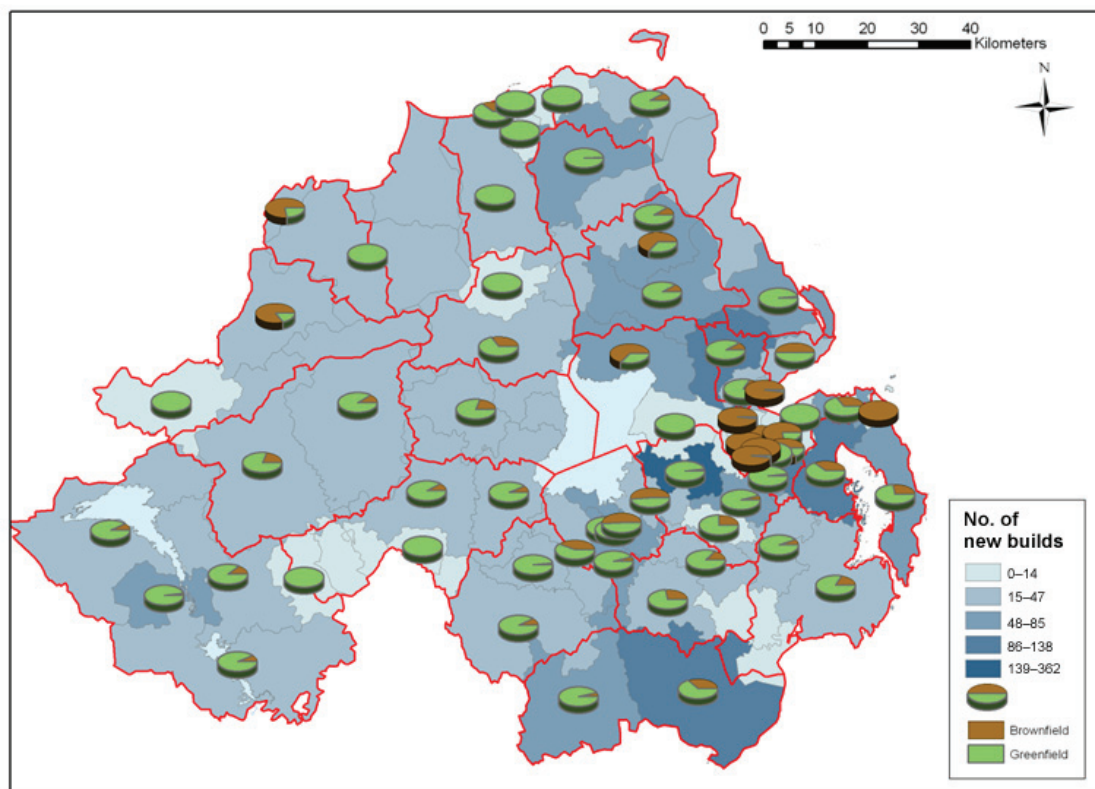
Map: Land and Property Services, Permit No. 100154, © Crown copyright 2010

## 5 New build

In addition to highlighting the need to improve existing stock, this report demonstrates the necessity for new housing in Northern Ireland to meet demand. While the number of new builds had been rising steadily prior to the financial crisis, demand for new housing has begun to tail off, reflected in the lower numbers of completions (5,500) in 2008–09. The pattern of new private sector development activity for 2009 (based on registrations with the NHBC) demonstrates a concentration of activity in the local authorities within the Greater Belfast area in the east of Northern Ireland, namely Lisburn to the south-west of Belfast and along the main transportation corridors of the M1 to Craigavon, and the A1 south to Newry, part of the Belfast-Dublin corridor. Significant development has been seen both to the east of Belfast in the Castlereagh and Ards local authority areas and to the north of Belfast in Newtownabbey (Figure 12). Across most of the west of the province the level of new development during 2009 has been low; the report has already highlighted that new-build activity in 2009 in Northern Ireland is back down to levels recorded in the 1990s.

The brownfield–greenfield split shows that the highest levels of brownfield development are found within Belfast and adjoining local authorities. In addition, other local authorities, outside of the Belfast Metropolitan Area, namely Craigavon, Derry and Strabane (in the north-west of Northern Ireland), the Antrim-Ballymena local authorities and Newry (in the south of Northern Ireland), have significant levels of brownfield development. This distribution is in line with expectations, namely high levels of brownfield

**Figure 12: Number of new-build properties in Northern Ireland split by brownfield/greenfield development**



Source: Data provided by NHBC.

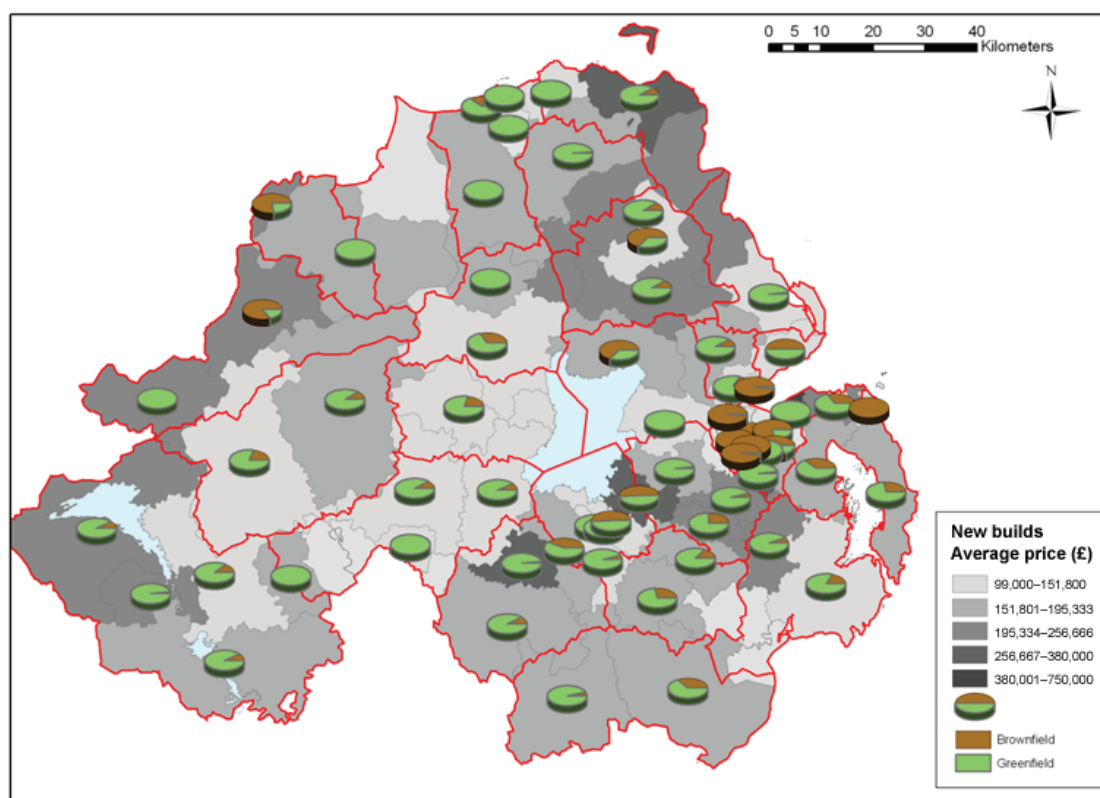
Map: Land and Property Services, Permit No. 100154, © Crown copyright 2010

development in the major urban areas of Northern Ireland associated with local regeneration initiatives. Elsewhere, in the more rural parts of the province, the pattern is reversed, with greenfield development prevailing.

In terms of the relationship between new-build activity and house prices, the spatial pattern is somewhat more complex. While there is evidence of higher-price new-build activity within the Greater Belfast area and the commuting belt to both the east and south-west of Belfast, there is also some lower-cost new development in the district councils to the north of Belfast (where prices are in the £90,000 to £150,000 range). Furthermore, the highest-priced new development (prices in excess of £350,000) occurs outside of Belfast, on the north Antrim coast, inflated by a limited number of high priced developments and the demand created in the second-home market in this area of high environmental quality (a situation that also brings problems of displacement of the local population as a result of high house prices). The price distribution also highlights that development in the north-west of the province has been targeted at the higher end of the spectrum (with prices in excess of £250,000) and not to the affordable homes end of the market. This reflects the state of the housing market in Northern Ireland (during 2009–10) where growth has been driven by demand for detached housing and properties bought without recourse to mortgage finance (Figure 13).

Although new-build activity is focused on Greater Belfast, the Belfast City Council area only attracted around 16 per cent of the total new-build activity for the whole of Northern Ireland. It is apparent that across large parts of west and north Belfast little new build occurred during 2009 (Figure 14). Locations, notably the NRAs, that attracted improvement works including both extensions and energy-related service completions (Figures 2 and 8) are virtually bereft of new private sector development. The one exception to this is a new development in the north-west of the city, adjacent to, but lying outside, the NRA. The high concentration of new build in the city centre reflects new apartment developments, many of which would have been part of regeneration schemes committed prior to the downturn in the housing market. The

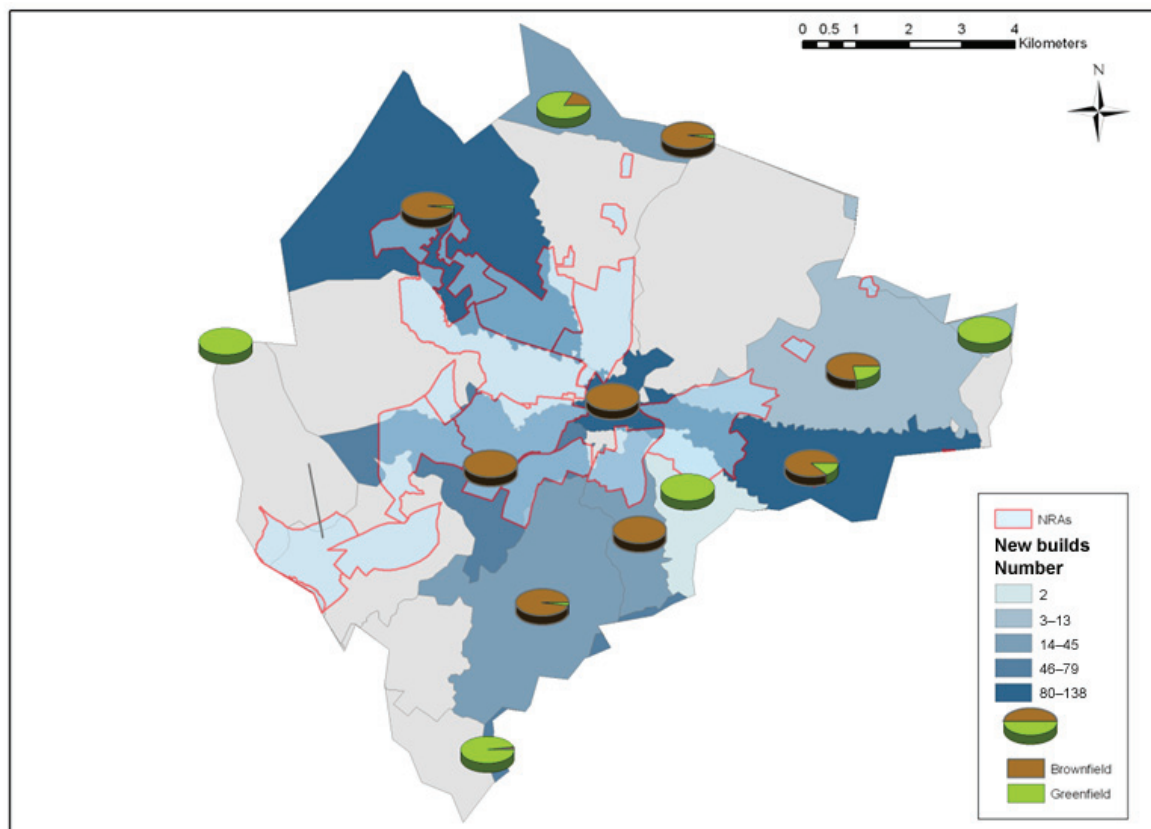
**Figure 13: Average price of new-build properties in Northern Ireland split by brownfield/greenfield development**



Source: Data provided by NHBC.

Map: Land and Property Services, Permit No. 100154, © Crown copyright 2010

**Figure 14: Number of new-build properties in Belfast LGD split by brownfield/greenfield development**



Source: Data provided by NHBC.

Map: Land and Property Services, Permit No. 100154, © Crown copyright 2010

focus of new private development on the city centre and neighbourhoods to the south and east of the city (Figure 14) suggests that new private sector development, particularly in a period of market retrenchment, is more likely to target higher-priced rather than lower-priced neighbourhoods. Within Belfast, there is a predominance of development on brownfield sites, although suburban neighbourhoods towards the periphery of the city are characterised by a higher percentage of greenfield development.

## 6 Conclusion

This study has examined the nature of investment in housing in Northern Ireland in 2009 through an analysis of information on improvements to the existing housing stock using a database compiled by the Northern Ireland Building Control Executive Committee and the level of new development in the private sector through data provided by the National House Building Council. A number of key conclusions can be drawn from the study.

The focus of activity is on the Greater Belfast area; in the case of improvements to existing homes, the focus is on the city of Belfast itself, while new development activity centres primarily on the surrounding local authority areas. Belfast is the only urban centre equivalent in size and scale to major cities in Great Britain and the consequent concentration of activity works against achieving the regional balance across Northern Ireland referred to in the report of the Independent Commission on the Future for Housing.

In terms of the existing housing stock, property extensions are in the main financed through the private sector rather than via public sector grants, with 88 per cent of extensions associated with properties in the private sector. This activity may have positive benefits through the consolidation of population in existing neighbourhoods, although it may also be indicative of the re-emergence of the private rental sector as an important tenure in Northern Ireland. The analysis suggests that the private sector is investing in the improvement of the housing stock and that a significant degree of this investment is in NRAs identified by the DSD for cross-departmental targeting.

The evidence presented in this report shows that within Belfast, where some of the most disadvantaged wards in Northern Ireland are found, improvements to property are not exclusive to the more affluent neighbourhoods and there is evidence of improvements within deprived neighbourhoods as measured by the Multiple Deprivation Index. In particular, there is a high concentration of extensions in west Belfast and other significant nodes in south-west Belfast, in the inner south of the city and also in east Belfast, again pointing towards some success in the targeting of NRAs, particularly through policy interventions. The analysis for Belfast shows that housing extensions are associated with both low- and high-priced neighbourhoods. Across all of west and north Belfast, average house prices are in the lowest price bands, yet it is apparent that improvements are taking place in some of these locations, such as the Greater Shankill NRA. The analysis indicates that improvements to property are also taking place in the highest-priced neighbourhoods to the south and east of the city, which would indicate that higher-income families are extending their properties rather than trading up in the market, thereby promoting greater stability in high-income neighbourhoods.

There are various works aimed at improving housing energy efficiency through the installation of new heating systems and replacement of windows – known as service completions. These measures aim to address the wider energy agenda and the specific need to address fuel poverty in Northern Ireland. The analysis shows a limited scale of achievement for 2009, with the number of boiler installations/heating system conversions for the year equating to activity in slightly less than 1 per cent of the total housing stock in the province. The focus of activity is again centred on Belfast City Council, where 30 per cent of all recorded completions were carried out in 2009, funded primarily through the public sector and linked to particular programmes such as the UK Energy Saving Trust Warm Homes Scheme. Many of these completions are within NRAs, demonstrating policy success in addressing housing and energy requirements in the most deprived neighbourhoods and indeed the lowest-priced neighbourhoods (based on average sale price and average private sector rental level). This type of property upgrade both addresses



the strategic aims of the NRA strategy in terms of environmental and quality-of-life improvements and has a positive impact on levels of fuel poverty experienced by some of the most disadvantaged communities.

Private sector new-build activity within Northern Ireland as a result of the housing market downturn is back to levels seen in the early 1990s, with around 5,500 new units completed in 2008–09. The focus of new private sector development activity for 2009 has been in the local authorities within the Greater Belfast area rather than within the city of Belfast and in this respect a different pattern emerges from that relating to improvements in the existing housing stock. The brownfield–greenfield split shows that the highest levels of brownfield development are found within Belfast and the adjoining local authorities and the major urban areas of Northern Ireland such as in Derry/Londonderry. Elsewhere, in more rural neighbourhoods, the pattern is reversed, with greenfield development prevailing, which has provoked debate regarding sprawl and specific policy statements on development in rural areas.

The price structure of private sector new build highlights that some of highest-priced new development (prices in excess of £350,000) occurs outside of Belfast, on the north Antrim coast, reflecting the demand that has been created in a number of small schemes orientated at the second-home market in this area of high environmental quality. The price distribution also highlights that the development in the north-west of the province has been targeted at the higher end of the market (with prices in excess of £250,000) and not at the affordable homes market. This reflects the state of the housing market in Northern Ireland (2009–10), where growth has been driven by the demand for detached homes. Under the present market conditions, it therefore becomes increasingly important, as recommended by the Independent Commission on the Future for Housing and established by DSD/NIHE as a policy goal, that the public sector delivers a greater volume of affordable housing well above that achieved in 2009, particularly as private sector development has declined. This is particularly apparent within the city of Belfast. The analysis in this report shows that in 2009 private sector new build focused on the city centre and those higher-priced neighbourhoods to the east and south of the city centre, with little activity in the north and west of the city and in the NRAs.

This report provides a snapshot of evidence on housing developments and improvements in Northern Ireland in 2009, probably the most difficult year for the housing market in Northern Ireland since the start of the 1980s. Nevertheless, the picture that emerges from this analysis is mixed. On the positive side, there is investment by both the public and private sectors that is helping to improve the quality, standards and energy efficiency of the existing housing stock, including housing in some of the most deprived and low-priced neighbourhoods as identified under the NRA policy. There are, however, regional imbalances apparent within Northern Ireland, with a focus of activity on Belfast. The pattern of private sector new development tends to differ from the pattern of improvements to the existing stock, notably within the city of Belfast, where new development is still occurring on brownfield sites and in some of the high-profile regeneration areas but not in the most deprived wards, thereby limiting the scale of renewal within the NRAs associated with new build.

With the current housing market decline, it will become increasingly difficult for the private sector to make a return on new development in NRAs, so the policy focus will need increasingly to promote sustainability, notably through retro-fitting existing housing stock to improve energy efficiency. The potential for community-based enterprises to undertake retro-fitting would create local employment prospects and lead to up-skilling of the population. New development within the social sector will need to be a complementary policy focus, albeit constrained by public sector expenditure rounds over the medium term, necessitating new innovative models of the public sector working with private developers.

# Notes

- 1 The early 1980s were marked by the ongoing 'Troubles' in Northern Ireland, which were exacerbated by de-industrialisation and the haemorrhaging of jobs and population from the region.
- 2 Housing needs targets are set by the NIHE through a net stock model.
- 3 The lack of observations in the south and notably south-west of Northern Ireland reflects the lack of use of postal codes. In Fermanagh in particular, the use of townlands is still common practice.
- 4 propertynews.com is a commercial company that lists property for sale and rent in Northern Ireland, the Republic of Ireland and internationally: [www.propertynews.com](http://www.propertynews.com)

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