



NBEI-EDT North Market Research

## Housing need in Belfast

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**DELIVERING SOCIAL CHANGE  
THROUGH THE SOCIAL INVESTMENT FUND**

## Outline of the report

If NBEI is to consider the feasibility of a housing refurbishment programme it is important to analyse current housing need. It will also be critical to explore whether housing need is consistent across different parts of Belfast as well as develop a better understanding of local housing conditions in the SIF North area. Using secondary data taken from NINIS, and the most recent figures published by the Northern Ireland Housing Executive (NIHE) this report will identify not only who (in terms of users) would potentially benefit most from a housing refurbishment programme but also where (in terms of local geography) would it be most feasible and potentially where in North Belfast would it have the highest social impact. Using the University of Ulster Property Price Index 2016 the report will conclude by providing coverage on the latest Northern Ireland house prices, again with specific reference to North Belfast and the different property types that are found there (Apartment, terraced, semi-detached etc). Combined with information provided by local agents this should also help to highlight potential areas where a housing refurbishment programme would be most viable as well as effective in terms of meeting local housing need.

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## 1 Household tenure trends across Belfast

Table 1 shows tenure type by household for the different assembly areas of Belfast, the Belfast LGD as well as Northern Ireland.

**Table 1 Household Tenure by Households 2011**

Geography	All households	Owner occupied	Social rented	Private rented	Lives Rent Free
Belfast North AA	44,601	24,379	12,523	6,449	1,250
		<b>54.66%</b>	<b>28.08%</b>	<b>14.46%</b>	<b>2.80%</b>
Belfast West AA	36,580	20,005	11,865	3,717	993
		<b>54.69%</b>	<b>32.44%</b>	<b>10.16%</b>	<b>2.71%</b>
Belfast East AA	40,918	25,826	8,152	5,924	916
		<b>63.12%</b>	<b>19.92%</b>	<b>14.48%</b>	<b>2.24%</b>
Belfast South AA	46,630	26,401	7,192	12,133	904
		<b>56.62%</b>	<b>15.42%</b>	<b>26.02%</b>	<b>1.94%</b>
Belfast LGD	120,595	63,019	30,818	23,632	3,126
		<b>52.26%</b>	<b>25.55%</b>	<b>19.60%</b>	<b>2.59%</b>
Northern Ireland	703,275	474,751	104,885	106,016	17,623
		<b>67.51%</b>	<b>14.91%</b>	<b>15.07%</b>	<b>2.51%</b>

Source: NINIS 2011

The findings show how although owner occupation is the most popular tenure type in the Belfast LGD, this is lower than the Northern Ireland figure of (67.51%). Private sector renting represents (19.6%) of households, compared with (15.07%) across the whole of the province. The proportion of social housing (19.60%) in the Belfast LGD is higher than the Northern Ireland figure of (15.07%).

### 1.1 Housing tenure in the North Belfast Assembly Area (AA)

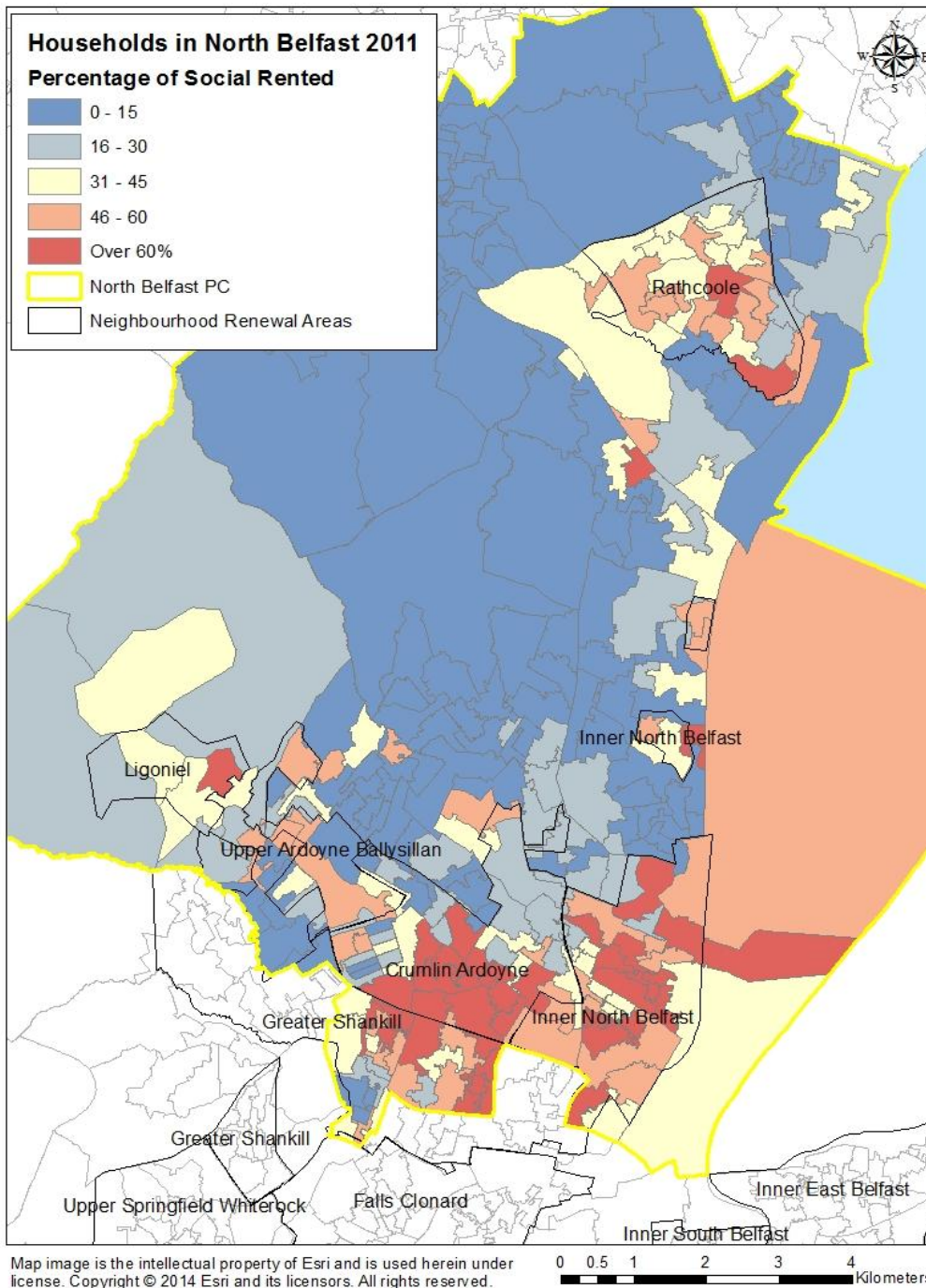
For the Belfast North AA, approximately (54.66%) of households are owner occupied and (28.08%) are social rented. These are both above the Belfast LGD figures of (52.26%) and (25.55%) respectively. However the proportion of households that are private rented (14.46%) is lower than Belfast's (18.60%). A closer look at household composition within the North Belfast AA reveals that;

- (13.61%) of households were comprised of a single person aged 65+ years;
- (13.80%) were lone parent households with dependent children; and
- (40.73%) of households did not have access to a car or van.

These proportions are higher than the figures recorded for the rest of the Belfast AA's which are (12.07%), (11.76%) and (40.07%) respectively. Census data would suggest that there are **higher proportions of single occupiers (both old and lone parent)** living in North Belfast. Figure 1 develops the tenure analysis by mapping social rented households across North Belfast at the small area geography. Based on the most recent census data, the map demonstrates **how higher proportions of social rented households (60% and above) are generally concentrated in government designated neighbourhood renewal areas (NRA's)**. This pattern is shown on the map by red shaded small areas based within or close to the Crumlin Ardoyne, Inner North and Rathcoole NRA's respectively.

Figure 1 also shows that there are small areas in North Belfast that demonstrate low proportions of social housing (0-15%). These are clustered in small areas located midway up and around the Antrim Road, specifically in electoral wards such as Cave Hill, Fitzwilliam and Chichester. This would suggest that generally in North Belfast, high proportions of socially rented households are found in the the most disadvantaged areas like the designated NRA's. Mapping this spatial distribution of this household type is useful as it can help to identify potential areas of housing need, although it tells us very little about demand. At the same time it is also important to acknowledge how **deep rooted sectarian divisions have over time, created highly distinct housing markets** across the North Belfast. This impact should be considered when using NIHE data to further examine housing demand.

**Figure 1 Household Tenure within North Belfast: Percentage of Social Rented**



Source: NINIS 2011

## 2 NIHE social housing demand across Belfast

To better understand housing demand (specifically for social rented accommodation) Table 2 shows a breakdown of projected social housing need across Belfast from 2013 – 2018. During this period the NIHE estimate a projected city wide social housing need of approximately 5,331 applicants. A **projected total of 1,058 applicants** (nearly 20% of this demand) are concentrated in North Belfast whilst the remaining 80% are spread across other parts of the city.

**Table 2 Social Housing Need Assessment (HNA) 2013 – 2018**

Belfast NIHE Area	5 Year Projected Social Housing Need	%
North Belfast	1058	19.8462
Greater West Belfast/Shankill	2368	44.4194
South and East Belfast	1905	35.7344
Total	5331	100

Source: Belfast District Housing Plan 2014

The NIHE also provide figures in their housing investment plan 2015-2019 that attempts to **differentiate between the different types** of social housing applicants. Table 3 provides a standard classification of the different household types of NIHE applicants.

**Table 3 NIHE Definition of Household Types**

<b>Single person</b>	1 person 16-59 years old
<b>Older person</b>	1 or 2 persons aged 16 or over, at least 1 over 60
<b>Small adult</b>	2 persons 16-59 years old
<b>Small family</b>	1 or 2 persons aged 16 or over, with 1 or 2 children
<b>Large family</b>	1 or 2 persons aged 16 or over, and 3 or more persons 0-15, or 3 or more persons 16 or over and 2 or more persons aged 0-15
<b>Large adult</b>	3 or more persons aged 16 or over with or without 1 person aged 0-15

Source: Belfast Housing Investment Plan 2015-2019

Table 4 provides a breakdown of the total number as well as percentage of social housing applicants per household type. Taken from March 2015, it also shows the number and also percentage of applicants that are classified as living in housing stress – which on the NIHE measure of housing unfitness represents a score of 30 points or more. Finally table 4 also shows the total number and percentage of NIHE housing allocations that were made for Belfast and each of its respective areas during the year ending March 2015.

**Table 4 Household composition of housing applicants across Belfast March 2015**

	Household Type	Single	Small Adult	Small Family	Large Adult	Large Family	Older Person	Total
North Belfast	Applicant	1,273	92	669	27	130	238	2,429
		52.41	3.79	27.54	1.11	5.35	9.80	
	App (HSS)	749	38	445	16	79	157	1,484
		50.47	2.56	29.99	1.08	5.32	10.58	
	Allocation	334	27	182	2	33	55	633

		<b>52.76</b>	<b>4.27</b>	<b>28.75</b>	<b>0.32</b>	<b>5.21</b>	<b>8.69</b>	
<b>West Belfast</b>	Applicant	1,883	137	1,527	59	234	438	4,278
		44.02	3.20	35.69	1.38	5.47	10.24	
	<b>App (HSS)</b>	<b>1,174</b>	<b>80</b>	<b>1,181</b>	<b>36</b>	<b>159</b>	<b>314</b>	<b>2,944</b>
		<b>39.88</b>	<b>2.72</b>	<b>40.12</b>	<b>1.22</b>	<b>5.40</b>	<b>10.67</b>	
	<b>Allocation</b>	<b>324</b>	<b>36</b>	<b>286</b>	<b>8</b>	<b>74</b>	<b>88</b>	<b>816</b>
	<b>39.71</b>	<b>4.41</b>	<b>35.05</b>	<b>0.98</b>	<b>9.07</b>	<b>10.78</b>		
<b>East Belfast</b>	Applicant	923	97	453	49	99	363	1,984
		46.52	4.89	22.83	2.47	4.99	18.30	
	<b>App (HSS)</b>	<b>440</b>	<b>39</b>	<b>203</b>	<b>23</b>	<b>51</b>	<b>213</b>	<b>969</b>
		<b>45.41</b>	<b>4.02</b>	<b>20.95</b>	<b>2.37</b>	<b>5.26</b>	<b>21.98</b>	
	<b>Allocation</b>	<b>258</b>	<b>25</b>	<b>122</b>	<b>3</b>	<b>18</b>	<b>77</b>	<b>503</b>
	<b>51.29</b>	<b>4.97</b>	<b>24.25</b>	<b>0.60</b>	<b>3.58</b>	<b>15.31</b>		
<b>South Belfast</b>	Applicant	1,770	140	544	42	139	289	2,924
		60.53	4.79	18.60	1.44	4.75	9.88	
	<b>App (HSS)</b>	<b>938</b>	<b>58</b>	<b>294</b>	<b>20</b>	<b>72</b>	<b>154</b>	<b>1,536</b>
		<b>61.07</b>	<b>3.78</b>	<b>19.14</b>	<b>1.30</b>	<b>4.69</b>	<b>10.03</b>	
	<b>Allocation</b>	<b>295</b>	<b>33</b>	<b>169</b>	<b>5</b>	<b>37</b>	<b>46</b>	<b>585</b>
	<b>50.43</b>	<b>5.64</b>	<b>28.89</b>	<b>0.85</b>	<b>6.32</b>	<b>7.86</b>		
<b>Total Belfast</b>	Applicant	5,849	466	3,193	177	602	1,328	11,615
		50.36	4.01	27.49	1.52	5.18	11.43	
	<b>App (HSS)</b>	<b>3,301</b>	<b>215</b>	<b>2,123</b>	<b>95</b>	<b>361</b>	<b>838</b>	<b>6,933</b>
		<b>47.61</b>	<b>3.10</b>	<b>30.62</b>	<b>1.37</b>	<b>5.21</b>	<b>12.09</b>	
	<b>Allocation</b>	<b>1,211</b>	<b>121</b>	<b>759</b>	<b>18</b>	<b>162</b>	<b>266</b>	<b>2,537</b>
	<b>47.73</b>	<b>4.77</b>	<b>29.92</b>	<b>0.71</b>	<b>6.39</b>	<b>10.48</b>		

Source: Belfast Housing Investment Plan 2015-2019

*Applicant – Housing applicants at March 2015*  
*App (HS) – Housing stress applicants at March 2015 (i.e. 30 points or more)*  
*Allocation – Annual allocations for year ending March 2015*

In March 2015, there were a total number of 11,615 applicants registered on the waiting list for social housing in Belfast. Just over (50%) which equated to 5,849 applicants were single people between 16-59 whilst (11%) 1,328 applicants were classified as being older people (1 or 2 persons aged 16 or over and at least 1 over 60). A total of 6,933 applicants were recorded as being in housing stress. For the year ending March 2015, the NIHE made a total of 2,537 allocations throughout Belfast. 1,211 (48%) of these were for single applicants whilst 266 (just over 10%) were for older people. These findings demonstrate an increase when compared with past figures taken from previous NIHE housing investment plans. It is also important to consider the breakdown of applicants for each of the local NIHE housing areas;

- The NIHE **North Belfast** area boundary extends from Whitewell in the north to the city centre in the south, Ligoniel/Crumlin Road in the west to the Shore Road in the east. The latest figures show that the demand for social housing in North Belfast continues to be very high and just over 60% of current applicants are living in housing stress. Of this total of 1,484 North Belfast applicants in housing stress, 50% are single, 29% are small families and 11% are older people. As highlighted in the previous section, the deep rooted sectarian divisions in Northern Ireland have

created highly distinct housing markets. The distribution of housing stress by religion has over time remained fairly constant and analysis presented in the Belfast District Housing Plan 2014 suggests that the nature of housing need differs between both communities. For example in predominantly CRN (Catholic Republican and Nationalist) communities, the two largest household groups are singles 54% and families 35%. In contrast, for PUL (Protestant, Unionist and Loyalist) communities, it is single applicants 43% and elderly 25%.

- **South Belfast** extends from the city centre in the north to Castlereagh Borough Council in the south, from West Link/Boucher Road in the west to the Ravenhill Road in the east. The main tenure is owner occupation; however private rental continues to be high. In the Lower Lisburn Road and University areas (Stanmillis/Holylands) there are high concentrations of HMOs which are predominantly inhabited by students. NIHE waiting list demand is consistent with single person households making up 61% of housing stress applicants.
- **East Belfast** extends from the Ravenhill Road in the west to Holywood in the north and Castlereagh Borough in the east and south. The fall in housing stress since figures published by NIHE 2009 can largely be accredited to the wider physical regeneration of inner East Belfast. In this area 22% of housing stress applicants was elderly households with 46% singles and 21% small families.
- **West Belfast** extends from the Falls-Shankill 'peace line' in the north to Poleglass/Twinbrook in the west and Westlink/M1 in the South to Hamill Street in the city centre, whilst the Shankill sector extends from Brown Square in the east to Glencairn in the west, the Crumlin Road in the north and Fall-Shankill 'peace line' in the south. The demand for social housing in West Belfast continues to be very high and 60% of total applicants requesting housing were in housing stress. Of these applicants in housing stress, 36% were general family groups, 47% were single applicants and 12% were older people.

## 2.1 Social housing demand in North Belfast

This report has already shown how deep rooted sectarian divisions have created highly distinctive housing markets across North Belfast. To better understand the social housing demand within this locality, the table in the Appendix shows a breakdown of household composition by applicants at within each common landlord area. Admittedly this is a significant amount of data, but clearly there are ***certain landlord areas that have received fewer social housing allocations than others across North Belfast***. Table 5 provides six examples below

**Table 5 NIHE applications and allocations by Common Landlord Area**

Common Landlord Area		Single	Small Adult	Small Family	Large Adult	Large Family	Older Person	Total
Ardavon	Applicant	4	1	0	0	0	34	39
	<b>App (HS)</b>	<b>2</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>24</b>	<b>27</b>
	<b>Allocation</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
Cavehill	Applicant	157	9	55	3	11	36	271
	<b>App (HS)</b>	<b>108</b>	<b>3</b>	<b>36</b>	<b>3</b>	<b>8</b>	<b>27</b>	<b>185</b>
	<b>Allocation</b>	<b>8</b>	<b>0</b>	<b>2</b>	<b>0</b>	<b>1</b>	<b>4</b>	<b>15</b>
Cliftonville	Applicant	218	10	111	6	27	32	404

	<b>App (HS)</b>	<b>133</b>	<b>6</b>	<b>84</b>	<b>4</b>	<b>18</b>	<b>24</b>	<b>269</b>
	<b>Allocation</b>	<b>40</b>	<b>4</b>	<b>12</b>	<b>0</b>	<b>2</b>	<b>11</b>	<b>69</b>
Grove	Applicant	20	5	11	0	1	7	44
	<b>App (HS)</b>	<b>7</b>	<b>0</b>	<b>2</b>	<b>0</b>	<b>0</b>	<b>5</b>	<b>14</b>
	<b>Allocation</b>	<b>1</b>	<b>0</b>	<b>2</b>	<b>0</b>	<b>1</b>	<b>1</b>	<b>5</b>
Oldpark	Applicant	56	1	53	2	10	7	129
	<b>App (HS)</b>	<b>33</b>	<b>1</b>	<b>33</b>	<b>2</b>	<b>8</b>	<b>3</b>	<b>80</b>
	<b>Allocation</b>	<b>3</b>	<b>0</b>	<b>9</b>	<b>0</b>	<b>2</b>	<b>1</b>	<b>15</b>
Skegoneill-Fortwilliam	Applicant	33	6	18	1	2	22	82
	<b>App (HS)</b>	<b>17</b>	<b>2</b>	<b>5</b>	<b>0</b>	<b>1</b>	<b>12</b>	<b>37</b>
	<b>Allocation</b>	<b>15</b>	<b>0</b>	<b>11</b>	<b>1</b>	<b>2</b>	<b>6</b>	<b>35</b>
Whitewell-Fairyknowe	Applicant	63	11	49	0	10	12	145
	<b>App (HS)</b>	<b>39</b>	<b>4</b>	<b>33</b>	<b>0</b>	<b>8</b>	<b>8</b>	<b>92</b>
	<b>Allocation</b>	<b>7</b>	<b>1</b>	<b>10</b>	<b>0</b>	<b>1</b>	<b>0</b>	<b>19</b>

Source: Belfast Housing Investment Plan 2015-2019

These examples show that in certain landlord areas there **have been less NIHE housing allocations for applicants that are single**. In these same areas there **have also been fewer allocations for applications that are made by older people**. For example in Ardavon, during the year ending 2015, 34 older people applied to the NIHE, yet 0 (zero) homes were allocated. 24 of these same 34 applicants were also classified as living in housing stress. Similarly in Whitewell-Fairyknowe, 12 older people applied to the NIHE and none were allocated a property whilst in Cavehill 36 applications were made and only 4 allocations were made. In both these cases over 75% of the applicants were classified as living in housing stress. These results demonstrate how **in certain parts of North Belfast there is a shortfall in NIHE allocations for single and older applicants**. These observations were confirmed when speaking to a local North Belfast MLA who also pointed out that there is an **increasing shortage of affordable housing for individuals or families with disabilities**.

*“The vast bulk of my constituency case work is housing. It boils down to one key reason – demand for housing in North Belfast completely outstrips supply. Another issue needing urgent attention is the lack of wheelchair accessible properties for the increasing number of families in North Belfast with disabilities. In terms of areas, Ardoyne appears to be particularly bad but this is an issue across North Belfast and Belfast in general – there are over 100 households in the Belfast and greater Belfast area on the waiting list for wheelchair accessible accommodation because their current property cannot be adapted to meet their needs”*

North Belfast MLA

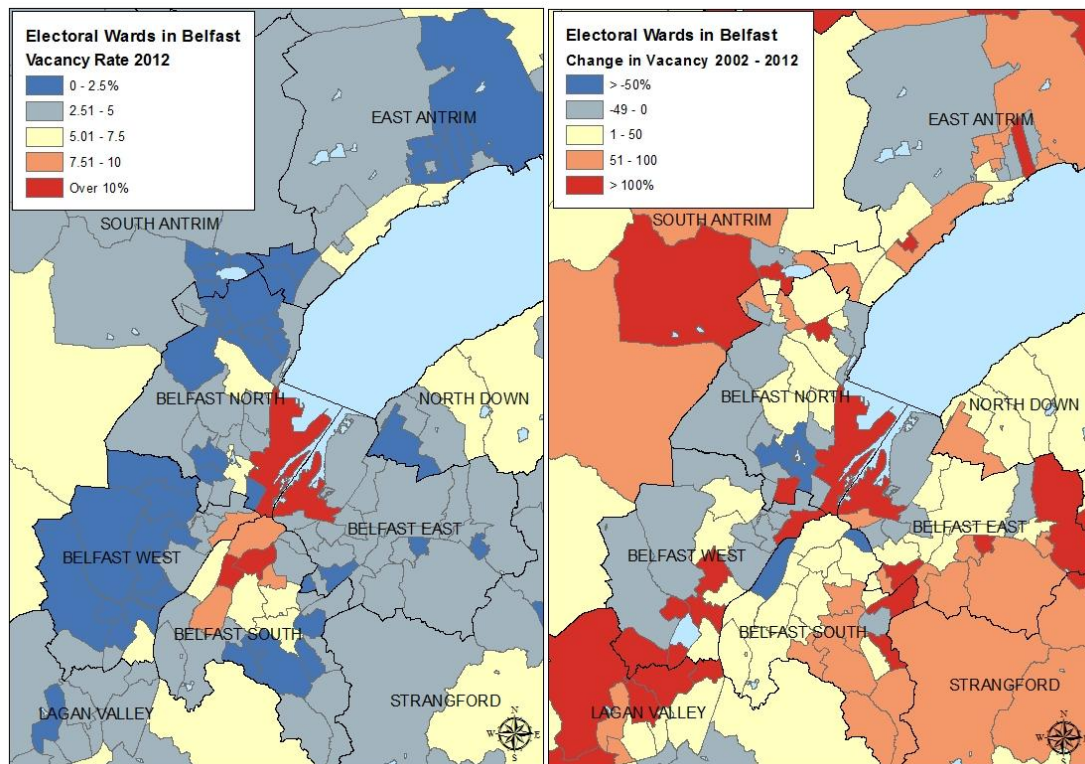
### 3 Vacant housing stock across Belfast

A rise in the number of vacant homes is a growing problem that affects many areas across the UK and Ireland. Despite widespread anxiety about a shortage of housing supply, according to recent government statistics published in 2015, there are currently 610,123 empty homes in England alone. Of these, 205,821 have been unoccupied for six months or more. In comparison Scotland had 31,884 whilst Wales has 23,171 in what is officially defined as "long-term" emptiness.



In Northern Ireland, the NIHE recently released the 'Empty Homes Strategy' to try and tackle the growing problems linked to high vacancy rates such as wider disinvestment and economic decline. Despite the publication of this strategy, **very little research has been completed that identifies which areas are most affected by high vacancy**. Using the most recently published government data on housing stock from 2012, Figure 2 maps vacancy rates for electoral wards across Belfast as well as the change in vacancy for these same wards in 2002 – 2012.

**Figure 2 Vacancy rates for electoral wards in Belfast 2012**



Source: NINIS 2012

The maps in Figure 2 demonstrate how in 2012 high vacancy rates were found in inner city areas such as the Duncairn ward in North Belfast. The vacancy rate for this ward in 2012 was nearly 19% which equated to 573 homes. From 2002 – 2012 the vacancy rate increased in this ward alone by 378 homes. Crumlin was another ward in North Belfast whose vacancy rate doubled during this period from 56 in 2002 to 113 in 2012. Inner city wards were not the only areas that experienced an increase in the number of vacant homes. Figure 2 shows how there are also pockets of increasing vacancy in wards located on and beyond edge of the Belfast urban area, in more affluent parliamentary constituencies such as North Down, Lagan Valley and South Antrim.

Over the same period there are other wards in North Belfast that have similarly experienced a reduction in their vacancy rates. For example in 2002, the vacancy rate in the Cliftonville ward was 6% which equated to 123 homes. In 2012 this number fell to 52 – a total reduction of over 50%. The Waterworks ward is another example where vacancy dropped during this same period by 57%, which equals reduction 354 homes. **These findings signal that there is no vacancy trend throughout Belfast, although clearly there are some electoral wards (such as Duncairn and Crumlin) that are being more affected over time than others.** Unfortunately there is no data available at a finer spatial grain (SOA's or SA's) to

locate precisely which inter ward areas are most affected by high vacancy but this is work that could be completed on the ground or with help from local estate agents.

## 4 House prices across Belfast

The current Belfast housing market reflects the overall Northern Ireland perspective of higher average prices over both the annual and quarterly time periods. The most recent University of Ulster Property Price index for Q2 in 2016 shows how annual performance has been strong with the current average price (£169,577) up by 11.1%. During this period all of the major property types have experienced considerable increases in average price with terraced/townhouses (£113,198) and apartments (£137,572) demonstrating the highest growth rates followed by semi-detached houses (£178,943), detached houses (£288,506) and detached bungalows (£208,442).

**Table 6 Change in property prices across Northern Ireland Q1 - Q2 2016**

Area	Q1 Price 2016	Q2 Price 2016	% Change
North Belfast	110,895	104,620	-5.66
West Belfast	118,835	120,859	1.70
East Belfast	180,423	187,027	3.66
South Belfast	213,127	217,948	2.26
Belfast	166,627	169,577	1.77
Northern Ireland	152,629	158,528	3.86

Source: University of Ulster Property Price Index 2016 Q2

Likewise, quarterly performance reinforces the strength of the Belfast market with an overall increase in average sale price of 1.77%. In common with the annual performance, the strongest growth is apparent in the terrace/townhouse, semi-detached house and apartment sectors.

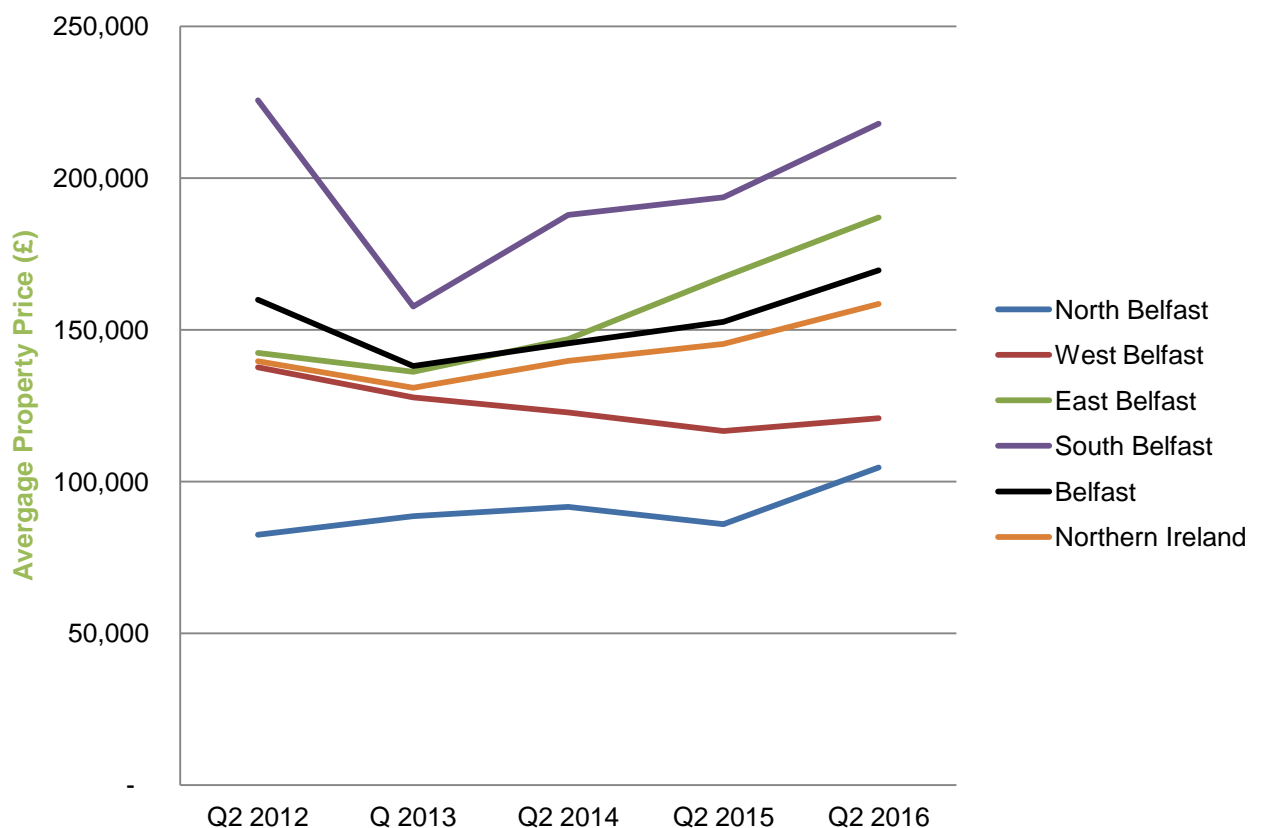
- For **North Belfast** the overall average price (£104,620) is somewhat below that for the first quarter of 2016 but terraced/townhouses are slightly higher (£71,738) while semi-detached houses (£117,297), detached houses (£170,496) and apartments (£72,743) have all reduced average price levels relative to the first quarter.
- In **West Belfast**, the overall average price (£120,859) is up on the previous quarter but with variable movements across the main property types terrace/townhouses (£85,552), semi-detached houses (£121,126), detached houses (£245,738) and apartments (£112,413).
- In **East Belfast**, the average price (£187,027) is significantly higher than the first quarter average, terraced/townhouses average (£111,060), semi-detached houses £196,746, detached houses £281,519 and apartments £136,725 respectively.
- **South Belfast** (£217,948) maintains its status as the highest priced sub-market in the city. The average price of terrace/ townhouses has increased to (£171,072), semi-detached houses to (£228,163) and detached houses to (£364,016). For apartments the average price is (£162,984).

Figure 3 shows since Q2 in 2012 private property prices across Northern Ireland have followed a fluctuating trend. Despite this fluctuating trend, since Q2 in 2015, all areas across the province have experienced a marked increase in their average property prices. During

last year average property prices in North Belfast increased by £18,660. This increase of 21.71% was significantly greater than West Belfast (3.62%), East Belfast (11.74%), South Belfast (12.57%) and the total Belfast figure of (11.12%).

**Figure 3 Average house prices across Northern Ireland for Q2 2012 - 2016**

Area	Q2 2012	Q 2013	Q2 2014	Q2 2015	Q2 2016
North Belfast	£82,507	£88,623	£91,681	£85,960	£104,620
West Belfast	£137,686	£127,724	£122,802	£116,639	£120,859
East Belfast	£142,393	£136,147	£146,962	£167,381	£187,027
South Belfast	£225,592	£157,636	£187,897	£193,616	£217,948
Belfast	£159,925	£138,043	£145,551	£152,609	£169,577
Northern Ireland	£139,633	£130,864	£139,720	£145,390	£158,528



## 5 Key findings on housing need in Belfast

- The gap between demand and supply within Belfast's social housing sector is widening. In light of this trend, the most recent housing investment plan indicates the NIHE are carefully monitoring the impact of welfare reform proposals on local housing waiting lists. In terms of supply, this recent plan also suggests how the NIHE will 'continue to review the requirement and availability of one bed properties'. This could be related to North Belfast, which in demographic terms has been shown in this report to contain the highest proportion of single occupiers (both old and lone parent) compared to West, East and South Belfast.

- In terms of Belfast's geography of social housing, the highest proportions of social rented households (60% and above) were shown to be concentrated in government designated neighbourhood renewal areas (NRA's). This was particularly the case in North Belfast. Such concentration does not always translate into areas of greatest housing need/demand but it can potentially identify and target small areas that would benefit the most from an increase in affordable housing supply.
- Deep rooted sectarian divisions in Northern Ireland have created highly distinct housing markets and need. The distribution of housing stress by religion has over time has remained fairly constant and analysis presented in the Belfast District Housing Plan 2014 suggests that the nature of housing need certainly differs between both communities. For example in predominantly CRN (Catholic Republican and Nationalist) communities, the two largest household groups are single applicants 54% and families 35%. In contrast, for PUL (Protestant, Unionist and Loyalist) communities, it is single applicants 43% and older people 25%.
- This report has also shown how in certain parts of North Belfast there has recently been a shortfall in NIHE allocations for single and older applicants, particularly in NIHE landlord areas such as Ardavon, Cavehill, Cliftonville, Grove, Old Park, Skegoneill-Fortwilliam and Whitewell-Fairyknowe. These growing concerns around the widening gap between affordable housing supply and demand were reiterated by a local North Belfast MLA, who also stressed that there is an increasing shortfall in affordable housing options for individuals or families with disabilities.
- Despite the release of the NIHE's empty homes strategy very little research has been completed in Belfast that identifies areas that are most affected by high vacancy. This report has shown that there is currently no clear spatial vacancy trend across Northern Ireland. Although since 2000 it has shown that some electoral wards like Duncairn or Crumlin in North Belfast have much higher vacancy rates than other wards in the vicinity. Further research on this theme of vacancy is important as it could help NBEI to identify properties that could be purchased cheaply and refurbished in line with some of the growing housing needs previously identified in this report. For example lone parent families, older people or tenants with a disability.
- Finally this report has shown since Q2 in 2012 private property prices across Northern Ireland have followed a fluctuating trend. During last year average property prices in North Belfast increased by £18,660. This increase of 21.71% was significantly greater than West Belfast (3.62%), East Belfast (11.74%), South Belfast (12.57%) and the total Belfast figure of (11.12%). Compared to Q1 (2016) the average housing price in Q2 for North Belfast fell 5.66%, terraced/townhouses were slightly higher (£71,738) whilst semi-detached houses (£117,297), detached houses (£170,496) and apartments (£72,743) have all reduced in average price.

## 6 References

Northern Ireland Housing Executive (2014) *Belfast District Housing Plan 2014*, Belfast, NIHE

Northern Ireland Housing Executive (2015) *Belfast Housing Investment Plan 2015-2019*, Belfast, NIHE

University of Ulster, (2016) *University of Ulster Property Price Index 2016, Q2*, Belfast, University of Ulster.

## 7 Appendix

### NIHE applications and allocations by Common Landlord Area for North Belfast

Common Landlord Area		Single	Small Adult	Small Family	Large Adult	Large Family	Older Person	Total
<b>Alliance</b>	Applicant	7	1	2	0	0	0	10
	App (HS)	3	1	0	0	0	0	4
	Allocation	2	1	0	0	1	2	6
<b>Ardavon</b>	Applicant	4	1	0	0	0	34	39
	App (HS)	2	1	0	0	0	24	27
	Allocation	0	0	0	0	0	0	0
<b>Ardoyne</b>	Applicant	123	9	59	0	6	16	213
	App (HS)	89	4	47	0	2	10	152
	Allocation	26	2	29	0	4	2	63
<b>Ballysillan</b>	Applicant	53	9	27	4	5	9	107
	App (HS)	18	4	15	2	3	5	47
	Allocation	7	3	12	0	5	0	27
<b>Carlisle-Multis</b>	Applicant	44	1	0	0	1	0	46
	App (HS)	27	0	0	0	1	0	28
	Allocation	22	1	0	0	0	0	23
<b>Carlisle-New Lodge</b>	Applicant	155	7	76	3	7	7	255
	App (HS)	99	5	59	2	5	5	175
	Allocation	26	3	6	0	2	4	41
<b>Carrick Hill</b>	Applicant	19	0	9	1	2	5	36
	App (HS)	15	0	8	0	1	3	27
	Allocation	8	0	1	0	0	1	10
<b>Cavehill</b>	Applicant	157	9	55	3	11	36	271
	App (HS)	108	3	36	3	8	27	185
	Allocation	8	0	2	0	1	4	15
<b>Cliftondene</b>	Applicant	6	1	11	0	0	1	19
	App (HS)	5	0	7	0	0	1	13
	Allocation	1	0	0	0	1	0	2
<b>Cliftonville</b>	Applicant	218	10	111	6	27	32	404
	App (HS)	133	6	84	4	18	24	269
	Allocation	40	4	12	0	2	11	69
<b>Duncairn Gardens</b>	Applicant	18	1	3	0	0	1	23

	App (HS)	13	0	2	0	0	0	15
	Allocation	4	0	0	0	0	0	4
<b>Fairhill-Waverley</b>	Applicant	14	1	11	2	3	1	32
	App (HS)	9	1	4	1	1	1	17
	Allocation	1	0	5	0	1	1	8
<b>G'borough-M'collyer</b>	Applicant	21	1	8	0	3	9	42
	App (HS)	4	0	1	0	0	6	11
	Allocation	18	2	7	0	1	4	32
<b>Glandore</b>	Applicant	9	3	8	0	2	0	22
	App (HS)	4	1	7	0	1	0	13
	Allocation	0	0	0	0	0	0	0
<b>Graymount-Shore Cres.</b>	Applicant	38	4	6	0	5	6	59
	App (HS)	14	2	1	0	0	1	18
	Allocation	18	1	8	0	0	2	29
<b>Grove</b>	Applicant	20	5	11	0	1	7	44
	App (HS)	7	0	2	0	0	5	14
	Allocation	1	0	2	0	1	1	5
<b>Ligoniel-Glenbank</b>	Applicant	17	0	7	1	1	5	31
	App (HS)	9	0	3	1	0	4	17
	Allocation	11	1	4	0	0	4	20
<b>Lower Oldpark</b>	Applicant	24	2	10	2	2	0	40
	App (HS)	11	0	6	0	1	0	18
	Allocation	25	2	14	0	2	1	44
<b>Mount Vernon</b>	Applicant	5	0	3	0	0	3	11
	App (HS)	4	0	1	0	0	0	5
	Allocation	4	1	2	0	0	2	9
<b>Mount Vernon Multis</b>	Applicant	9	0	0	0	0	0	9
	App (HS)	3	0	0	0	0	0	3
	Allocation	25	1	0	0	0	1	27
<b>Newington-Limestone</b>	Applicant	30	1	38	1	9	13	92
	App (HS)	16	0	28	0	7	8	59
	Allocation	8	0	6	0	4	5	23
<b>Oldpark</b>	Applicant	56	1	53	2	10	7	129
	App (HS)	33	1	33	2	8	3	80
	Allocation	3	0	9	0	2	1	15
<b>Rosewood-Crumlin Rd.</b>	Applicant	3	0	0	0	0	0	3
	App (HS)	3	0	0	0	0	0	3
	Allocation	0	0	0	0	0	0	0
<b>Skegoneill-Fortwilliam</b>	Applicant	33	6	18	1	2	22	82
	App (HS)	17	2	5	0	1	12	37
	Allocation	15	0	11	1	2	6	35
<b>Sunningdale</b>	Applicant	15	2	10	0	1	1	29
	App (HS)	7	1	3	0	0	1	12
	Allocation	2	0	0	0	0	0	2
<b>Torrens</b>	Applicant	11	2	21	1	7	2	44

	App (HS)	8	2	16	1	5	2	34
	Allocation	1	0	5	0	1	0	7
<b>Upr. and Lwr. Duncairn</b>	Applicant	32	0	6	0	2	1	41
	App (HS)	7	0	1	0	1	1	10
	Allocation	21	3	18	0	0	0	42
<b>Upper Ligoniel</b>	Applicant	45	1	43	0	10	4	103
	App (HS)	32	0	35	0	7	3	77
	Allocation	11	0	12	0	1	1	25
<b>Westland</b>	Applicant	7	1	3	0	1	1	13
	App (HS)	3	0	2	0	0	1	6
	Allocation	1	0	5	0	0	0	6
<b>Wheatfield</b>	Applicant	11	2	6	0	1	2	22
	App (HS)	3	0	1	0	1	1	6
	Allocation	13	0	0	1	1	0	15
<b>White City</b>	Applicant	6	0	5	0	1	1	13
	App (HS)	4	0	5	0	0	1	10
	Allocation	5	1	2	0	0	2	10
<b>Whitewell-Fairyknowe</b>	Applicant	63	11	49	0	10	12	145
	App (HS)	39	4	33	0	8	8	92
	Allocation	7	1	10	0	1	0	19