SHAPING OUR FUTURE

Towards a Strategy for the Development of the Region

POPULATION AND HOUSING TECHNICAL REPORT

Regional Planning Division
Department of the Environment
Windsor House
Belfast
BT2 7LT

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POPULATION AND HOUSING TECHNICAL REPORT

1.0 INTRODUCTION

1.1 The purpose of this report is to set out the population and housing technical data which informed judgements on household growth and housing need for the Regional Strategic Framework.

2.0 REGIONAL POPULATION

The Historical Context

2.1 The Registrar General estimated the regional population as 1,663,300 in mid 1996. This was an increase of 61,900 (3.8%) from the Registrar General's estimated mid year population for 1991. With the exception of the 1960s, this relatively rapid growth was unprecedented in the past 150 years. It is estimated that the regional population now exceeds the previous recorded peak in 1841 immediately before the Famine. The regional population had declined by a quarter in the 50 years after 1841, stabilised in the next 50 years up to the 1930s, and subsequently has increased at an average rate of 6,500 per annum. The rate of growth has been fairly consistent in the Post War period with the exception of the 1970s when there was a small decline and above average growth in the 1960s and 1990s.

2.2

Table 1: Change in Regional Population, 1841 to 1996

Year	Total Population	Intercensal Change	Annual Change	Annual rate of change
1841	1,648,945			
1851	1,442,517	-206,428	-20,643	-1.25%
1861	1,396,453	-46,064	-4,606	-0.32%
1871	1,359,190	-37,263	-3,726	-0.27%
1881	1,304,816	-54,374	-5,437	-0.40%
1891	1,236,056	-68,760	-6,876	-0.53%
1901	1,236,952	896	90	0.01%
1911	1,250,531	13,579	1,358	0.11%
1926	1,256,561	6,030	402	0.03%
1937	1,279,745	23,184	2,108	0.17%
1951	1,370,921	91,176	6,513	0.51%
1961	1,425,042	54,121	5,412	0.39%
1966	1,484,775	59,733	10,806	0.76%
1971	1,536,065	51,290	11,398	0.77%
1981	1,532,619	-3,446	-345	-0.02%
1991	1,577,836	45,217	4,522	0.30%
1996	1,663,300	85,464	16,435	1.04%

Sources: For 1841 to 1991 the Census Reports and for 1996 the Registrar General's mid year estimate.
Note: The 1991 Census data and the 1996 Registrar General's mid year estimate are not directly comparable because of differences in definition.

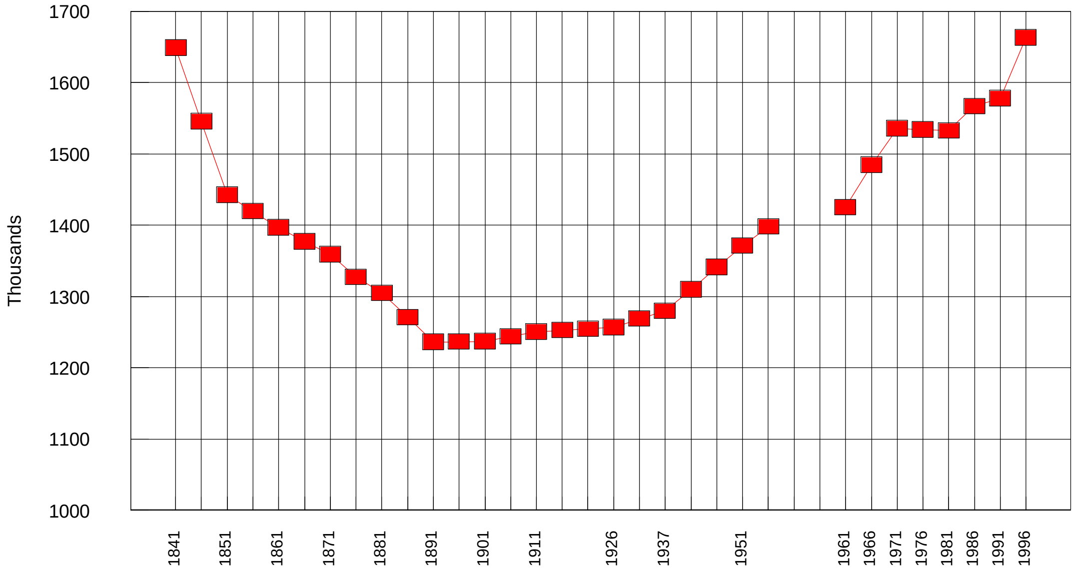


Diagram 1: Change in Regional Population, l841 to 1996

Change in the Regional Population, 1971 to 1996

2.2 The Region contains less than 0.5% of the population of the 15 countries of the European Union, just under 3% of the population of the United Kingdom and 32% of the population of the island of Ireland.

Over the past 25 years the regional population has grown by 127,000 that is by 8.3%. During this period there was considerable variation ranging from an estimated slight decline in the 1970s, modest growth in the 1980s and more rapid growth in recent years. In the 1981 to 1996 period Northern Ireland has experienced the third fastest regional growth of the eleven United Kingdom regions, in contrast with Scotland which has experienced a marginal population decline.

Table 2: Change in the Regional Population 1971 to 1996

Year	N.I. Total	N.I. Change	N.I. % Change	UK % Change
Mid 1971	1,534,600			
Mid 1976	1,524,000	-10,600	-0.7%	0.5%
Mid 1981	1,537,700	13,700	0.9%	0.2%
Mid 1986	1,567,000	29,300	1.9%	0.9%
Mid 1991	1,601,400	34,400	2.2%	1.7%
Mid 1996	1,663,000	61,600	3.9%	1.7%

Source: Regional Trends

The table indicates that, since the mid-1970s, population growth in Northern Ireland has consistently exceeded that of the UK as a whole and the regional rate of growth is now more than double the national rate.

3.0 COMPONENTS OF REGIONAL POPULATION CHANGE

The Components of Change

3.1 Regional population change is the product of three factors :-

- Births
- Deaths
- Migration

In developed economies, mortality is relatively stable and only changes slowly over time. Fertility varies significantly but these are generally related to identifiable longer term changes in society. Migration is by far the most volatile and is subject to substantial variation over a short period of time. It is worthwhile examining change in these three factors in the Region over the past 25 years because it not only explains the important demographic changes that have been taking place but it also illuminates the trends that may continue and where there is uncertainty.

3.2 Table 3 illustrated by Diagram 2 indicates changes over the past 25 years. The number of births has declined by about 15% since the early 1970s and the number of deaths over the same period has declined by around 10%. The net effect of these two factors has been a trend towards a slight reduction in the natural increase over the past 25 years. There have been marked changes in net migration ranging from a very considerable loss of almost 60,000 in the 1971-75 period to a modest net gain of just under 10,000 in the 1991-95 period.

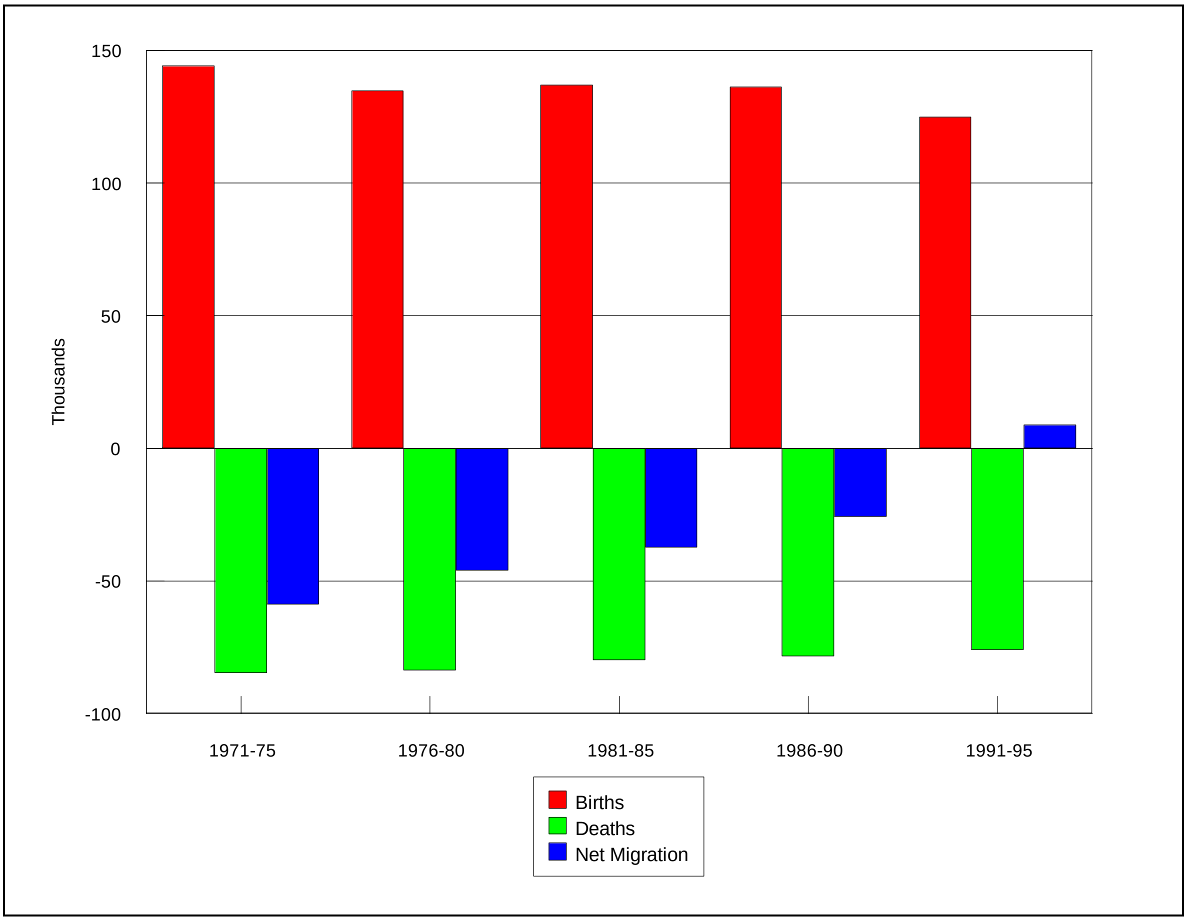
3.3

Table 3: Components of Regional Population Change, 1971 to 1995

Period	Births	Deaths	Natural Increase	Net Migration	Population Change
1971-75	144,249	84,741	59,508	-58,908	600
1976-80	134,794	83,750	51,044	-46,144	4,900
1981-85	136,913	79,860	57,053	-37,353	19,700
1986-90	136,363	78,482	57,881	-25,781	32,100
1991-95	124,895	76,141	48,754	8,746	57,500

Source: Registrar General’s Annual Reports

Diagram 2: Components of Population Change, 1971 to 1995



Regional Fertility

3.3 The previous section indicates the overall trends in the three demographic factors of births, deaths and migration in general terms. It is instructive to look at how each of these have changed in more detail as this will help to inform an understanding of the future size and shape of the regional population. Historically the Region has had a relatively high number of births reaching a Post War peak of 34,345 in 1964. Thereafter it declined markedly for a decade before stabilising in the 1980s at close to 28,000. In recent years the number of births has been declining again and is now below 25,000 per annum. Diagram 3 illustrates the change in the regional birth rate since 1971 relative to Great Britain. Not only does this show the clear long term decline of the regional birth rate but it also indicates a marked convergence in the two rates in the past decade. The Region however continues to have by far the highest birth rate of any region in the United Kingdom and the second highest of the 78 regions in the European Union, with a 1996 rate of 14.8 live births per thousand mid year population compared to 12.5 in Great Britain and 10.9 in the European Union.

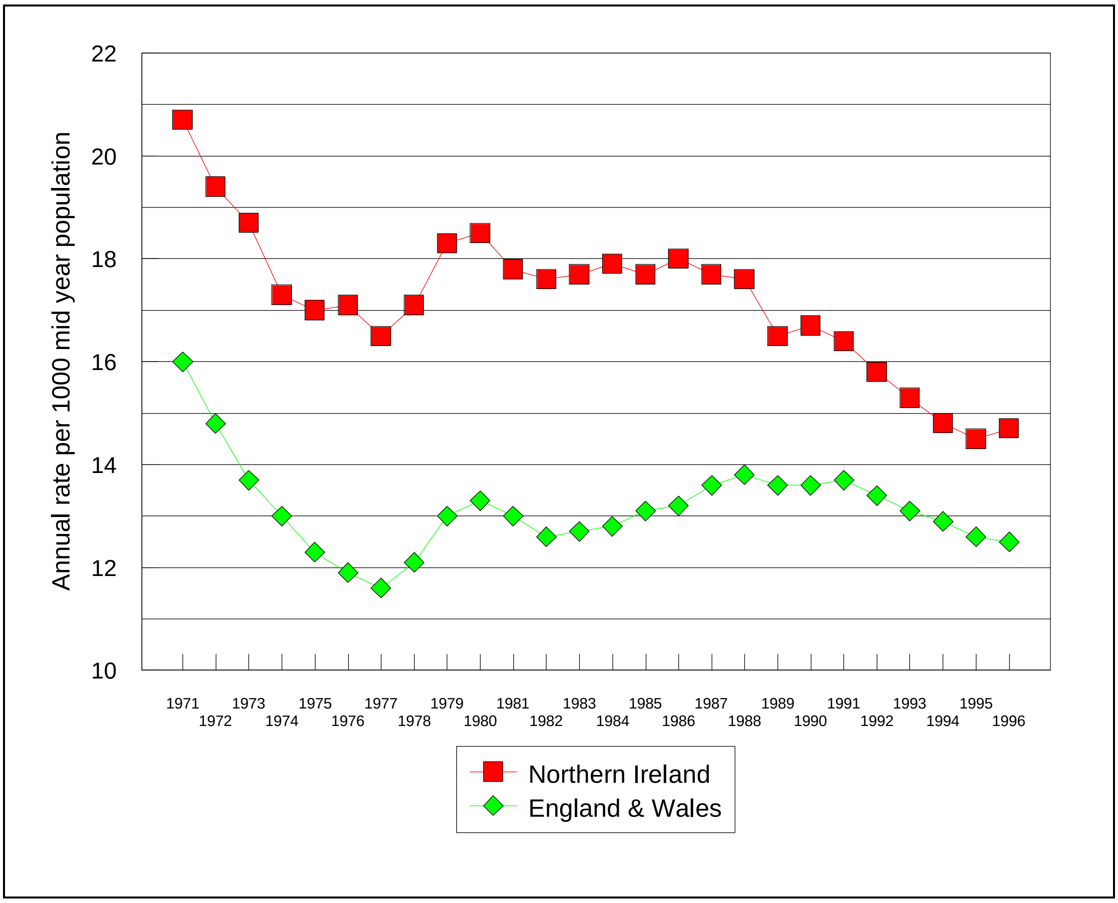


Diagram 3: Comparison of Birth Rates 1971-1996 - Northern Ireland and England and Wales

3.4 A careful perusal of fertility in the Region over the past 15 years indicates that there has been an underlying more rapid decrease than the absolute number of births would suggest. This is illustrated by Diagram 4 which demonstrates that the birth rate has consistently declined more markedly than the number of births and that fertility as measured by the total period fertility rate has experienced the most rapid decline. Even when the number of births marginally increased between 1981 and 1988 fertility declined by 8%. Between 1988 and 1996 the number of births decreased by 11% but underlying fertility by 18%. There is a very significant explanation which is the age structure of the population. The stabilisation of the number of births for a decade up to 1988 was entirely due to it being a period when the number of females of child bearing age was increasing rapidly, this in turn being largely the product of the Post War peak number of births in the late 1950s and 1960s. Once that larger group of females aged past their main child bearing time, the number of births recommenced a rapid decline.

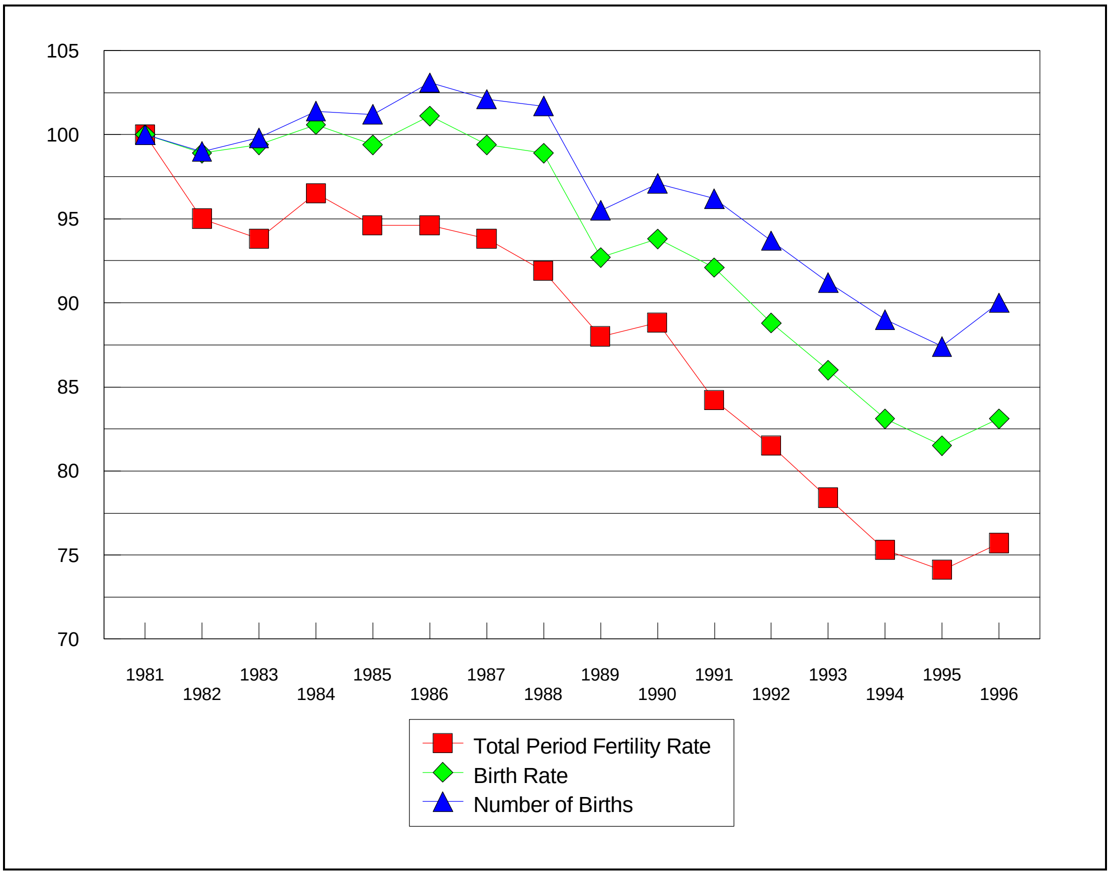


Diagram 4: Relative Changes in Fertility in Northern Ireland 1981 to 1996 (1981=100)

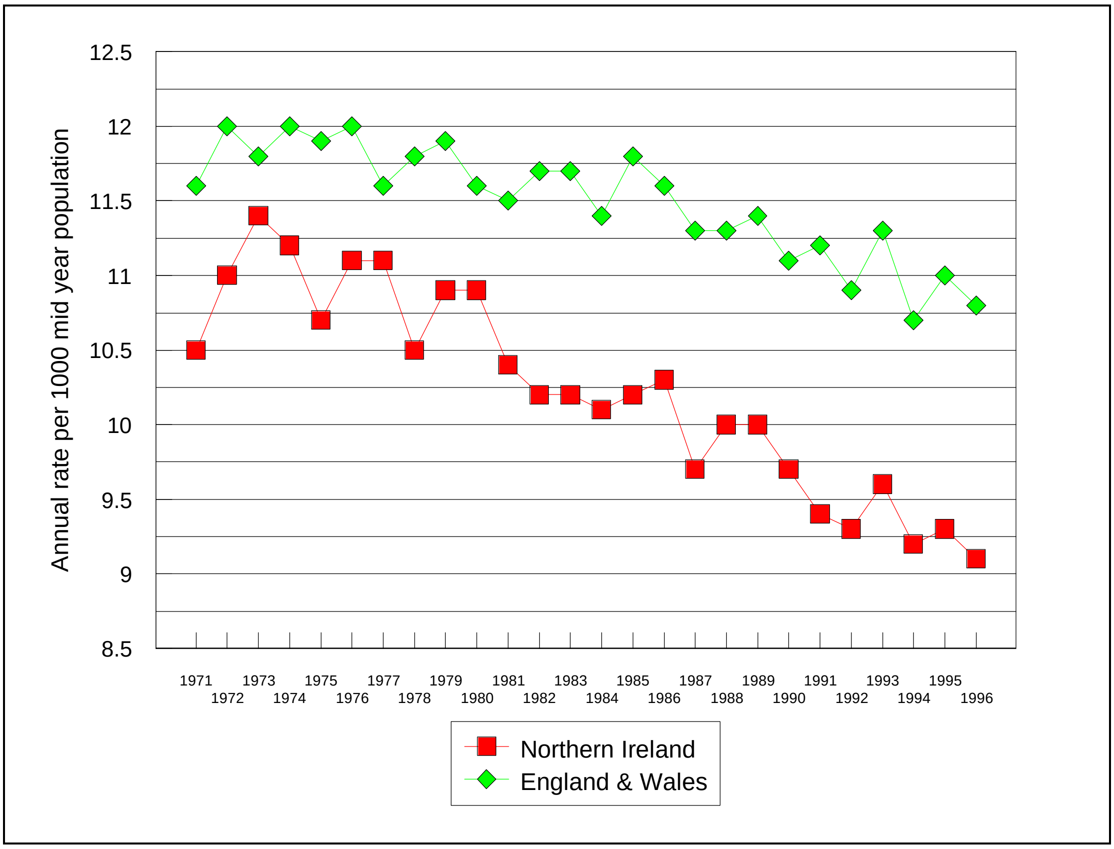
3.5 It is now evident that the Region's fertility has declined for some age groups to the same level as the United Kingdom. For the other age groups, the gap in their fertility has been rapidly narrowing. There is good reason for concluding that the Region is passing through a rapid period of demographic transition similar to the Republic of Ireland which during the 1980s changed rapidly from being a high fertility region to one conforming closely to the rest of Europe. If present trends continue the regional fertility will not be significantly different from that of Great Britain within the next decade. The Region's more youthful population however, can be expected to maintain a significantly higher birth rate for another generation.

3.6 In the past significant regional population growth was possible simultaneously with substantial net out migration because of high fertility. In the future population growth will be much more sensitive to net out migration. On the other hand it has been argued that a combination of high regional population growth with limited expansion of employment resulted in emigration. In future if, as expected the decline in the number of births continues, this will progressively feed through to a reduced number of entrants into the labour market after 2020 easing the need for emigration for economic reasons.

Regional Mortality

3.7 The second component of population change is mortality. This has been by far the most stable of the three components over the past 25 years characterised by a slow decline from a death rate of just over 11 per 1,000 mid year population in the early 1970s to just over 9 per 1,000 in recent years. The number of deaths annually in the Region has declined from around 17,000 in the early 1970s to slightly over 15,000 in recent years. Diagram 5 indicates the Regional death rate has always been below that of England and Wales with the gap tending to widen. The explanation again is the relatively youthful population of Northern Ireland. Other measures of mortality however, such as life expectancy or age specific mortality rates indicate that the Region has higher mortality than England and Wales but lower than Scotland.

Diagram 5: Comparison of Death Rates, 1971 to 1996 - Northern Ireland and England and Wales



It can be expected that the gradual improvement that has been a long term trend will continue, expressed in slowly increasing life expectancy. The decline in the crude death rate however, can be expected to level out as the population tends to age.

Regional Migration

3.8 The third and most variable factor in population change is migration. Diagram 6 illustrates how net migration has changed in the Region over the past 25 years. There were exceptional levels of emigration in 1974 and 1975 and again in 1980 and 1981 when it is estimated annual net out migration reached nearly 16,000. Since the early 1980s net migration has tended to decline with estimated modest net in migration in most years since 1990. There are probably three main explanatory factors; the prevailing political/troubled conditions at the time, the performance of the regional economy and the economic opportunities available in the traditional destinations of emigrants from the Region. This net in migration was an important factor in the rapid increase in the Region's population between 1991 and 1996 (Table 3).

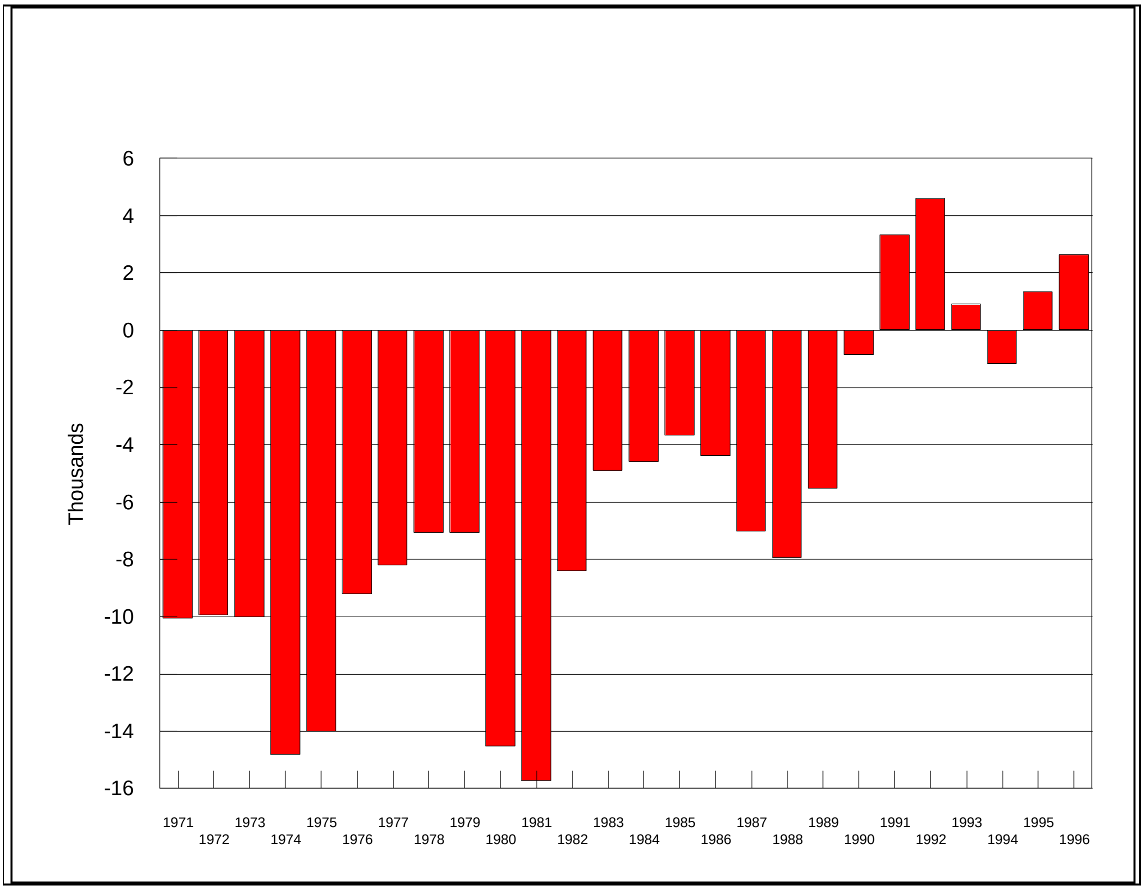


Diagram 6: Migration Balance for Northern Ireland, 1971 to 1996

3.9 Future levels of migration will depend on many factors related to social and economic conditions in the Region and opportunities elsewhere. If peace can be confidently established and the Region can build on recent economic progress, there is potential for future net out migration, to be relatively modest. There may even be potential for some net in migration as demonstrated both in the Region and in the Republic of Ireland in recent years, with many potential return migrants particularly from Great Britain. This is of significance not only for the future scale of population growth but also for the age structure of the Regional population and other aspects of the Region's economic and social life.

4.0 AGE STRUCTURE OF THE REGIONAL POPULATION

Regional Age Structure

4.1 Northern Ireland has the most youthful population in the United Kingdom and the second most youthful in the European Union after the Republic of Ireland. In 1994 over 24% of the Region's population was under 15 compared to 25% in the Republic of Ireland, 19.4% in the United Kingdom and only 17.6% in the 15 countries of the European Union. Conversely only 12.7% of the Region's population was 65 years of age or over compared to 13.4% in the Republic of Ireland, 15.8% in the United Kingdom and 15.4% in the European Union.

Table 4: Comparative Age Structure of the Regional Population 1994

	0-14 years	15-64 years	65+ years
Northern Ireland	24.1%	63.2%	12.7%
Republic of Ireland	25.3%	63.3%	11.4%
United Kingdom	19.4%	64.8%	15.8%
European Union	17.6%	67.0%	15.4%

Source: Regional Trends 32

Change in the Regional Age Structure, 1981 to 1996

4.2 Although the Region has about the youngest age structure in the European Union, the population structure is steadily ageing. In the period from 1981 to 1996 those aged under 16 years declined by 3.4% relative to the total population. Conversely the percentage aged 65 years or more has increased by 0.8% in the same period. Diagram 7 illustrates the change in the age structure in the 1981 to 1996 period.

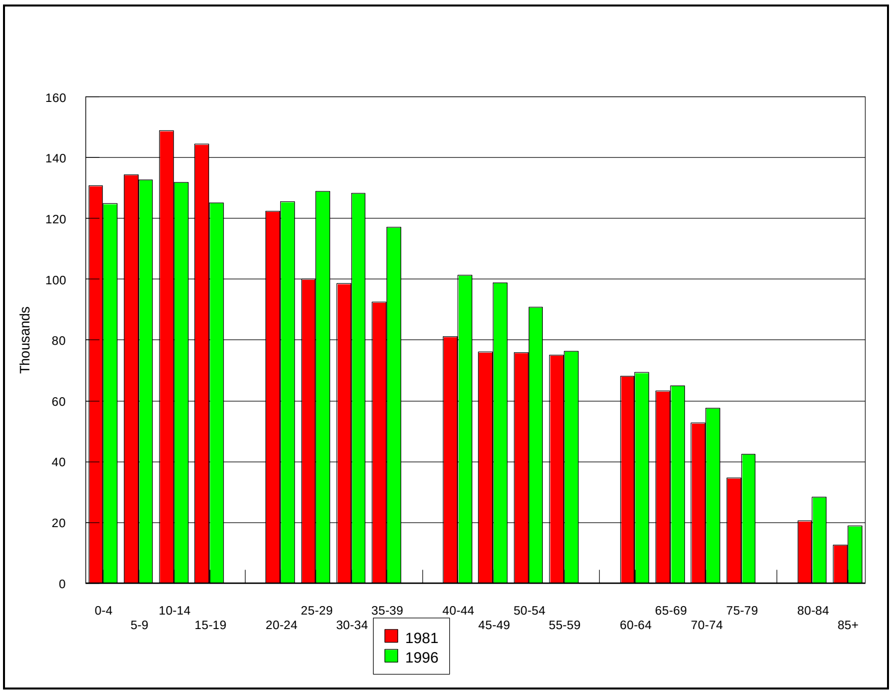


Diagram 7: Change in Age Structure of the Northern Ireland population, 1971 to 1996

4.3 Diagram 7 indicates the decline in the numbers of children of under 15 years of age, in the 1981 to 1996 period, the large increase in the number of young adults, the smaller increase in the numbers of those middle aged and the large increase in the numbers of the elderly. The relatively high number of births of the late 1950s and into the 1960s produced a large cohort which had by 1981 resulted in a large number of those in their teens. By 1995 however this larger group had moved on to become young adults. By the year 2025 they will be entering retirement.

4.4 The relatively young age structure of the Region's population has important implications for the future:

-firstly, it will potentially sustain a growing population even if regional fertility declines to around national and general European levels as now looks likely in the next few years;
-secondly, it will contribute to maintaining school and further education enrolments close to present levels for some time to come;
-thirdly, it will ensure a relatively large number of entrants to the labour market for the next couple of decades;
-fourthly, the overall working population can be expected to age significantly; and
-fifthly, it can be expected to result in a rapid increase in the retired population throughout the period up to 2025.

4.5 The Region will potentially benefit from a relatively young work force for another generation. It will also benefit over this period from having a remarkably low dependency rate, that is a large number of adults of working age relative to the numbers of children and the retired, when compared to the rest of the United Kingdom or Europe. Progressively however, it will almost certainly move towards having an age structure more typical of the rest of Europe. It can be argued that the Region has a unique opportunity over the next generation to improve its economic performance.

5.0 THE DISTRIBUTION OF THE REGIONAL POPULATION

Distribution of the Regional Population 1996

5.1 The Region's population lives in three broad settlement groups:-

- the Belfast Metropolitan Area, comprising the continuous built-up area of the City of Belfast and the adjoining urban parts of the District Council areas of Carrickfergus, Castlereagh, Lisburn, Newtownabbey and North Down;

- the network of urban hubs comprising Derry/Londonderry, Craigavon and the network of Regional Towns spread evenly across Northern Ireland which are administrative centres for their Districts; and

- the Rural Community comprising the network of small towns, villages, small rural settlements, and individual dwellings in the open countryside.

5.2 Using the control figure of the Registrar General mid-year estimate for 1996, it is estimated that approximately 36% of the Region's population live in the Belfast Metropolitan Area; 25% in Derry/Londonderry, Craigavon and the Regional Towns; and 39% in the Rural Community (Table 5). 21.6% of the population live in the open countryside in small rural settlements and dispersed dwellings, reflecting the strength of the Rural Community and the continuing importance of its role in the life of the Region.

Table 5: Distribution of the Regional Population 1996

Location	Population 1996	% of the Regional Population
Belfast City Council area	297,300	17.9
Carrickfergus urban	30,600	1.8
Castlereagh urban	54,800	3.3
Lisburn urban	76,300	4.6
Newtownabbey urban	62,600	3.8
North Down urban	70,350	4.2
Belfast Metropolitan Area	**591,950**	**35.6**
Derry/Londonderry,	84,200	5.1
Craigavon	53,750	3.2
The Regional Towns		
Towns 20,000-60,000	128,250	7.7
Towns 10,000-20,000	132,800	8.0
Towns under 10,000	20,100	1.2
Derry/Londonderry, Craigavon and the Regional Towns	**410,100**	**25.2**
Small towns	204,100	12.3
Villages	89,300	5.3
The Open Countryside	358,850	21.6
The Rural Community	**652,250**	**39.2**
Northern Ireland Total	**1,663,300**	**100.0**

5.3 Change in the Distribution of the Regional Population 1991-1996

There have been considerable shifts in the distribution of the Region's population since 1971 (Table 6)

Table 6: The Changing Distribution of Population 1971-96

Location	1971	1981	1991	1996	% Change 1971-96	% Change 1991-96
Belfast City Council area	416,679	314,270	279,237	297,300	-28.7	6.5
Carrickfergus urban	23,205	23,990	27,877	30,600	31.9	9.8
Castlereagh urban	59,700	55,181	52,982	54,800	-8.2	3.4
Lisburn urban	48,400	61,951	70,558	76,300	57.6	8.1
Newtownabbey urban	56,500	59,273	59,200	62,600	10.8	5.7
North Down urban	49,056	62,378	67,943	70,350	43.4	3.5
Belfast Metropolitan Area	**653,540**	**577,043**	**557,827**	**591,950**	**-9.4**	**6.1**
Derry/Londonderry	67,504	70,579	76,100	84,200	+24.7	+10.6
Craigavon	50,341	53,808	52,405	53,750	+6.8	+2.6
The Regional Towns	214,827	251,387	270,274	281,150	+30.9	+4.0
Derry/Londonderry, Craigavon and the Regional Towns	**332,672**	**375,774**	**398,779**	**419,100**	**+26.0**	**+5.1**
Small Towns	134,482	159,071	187,874	204,100	+51.8	+8.6
Villages	68,417	76,034	83,646	89,300	+30.5	+6.8
The Open Countryside	346,954	344,274	349,667	358,850	+3.4	+2.6
The Rural Community	**549,853**	**579,379**	**621,187**	**652,250**	**+18.6**	**+5.0**
Northern Ireland Total	**1,536,065**	**1,532,196**	**1,577,793**	**1,663,300**	**+8.3**	**+5.4**

These can be summarised as:

- population loss in a number of inner areas within the Belfast Metropolitan Area and the growth of the outer areas;

- the rapid growth of many of the larger Regional Towns during the 1970s, followed by a tailing off of growth during the 1980s and 1990s, due to pressures of dispersal of development into the countryside; and

- the rapid expansion of small towns and villages as the more mobile sections of the population expressed a preference for rural living environment.

5.4 The consequences of these population shifts and the resumption of population growth in the Region as a whole have been:-

- a trend towards a more even distribution of the Region's population between the three settlement groups - the Belfast Metropolitan Area; Derry/Londonderry, Craigavon and the Regional Towns; and the Rural Community;

- all three settlement groups are experiencing population growth, including a very significant reversal of the historic decline of population in the open countryside; and

- in recent years, all District Council areas are showing increases which are more closely grouped around the regional average reflecting more stable patterns of population and housing change compared to the more troubled times of the 1970s and 1980s (Table 7).

The main trends in the settlement groups are summarised in the paragraphs which follow.

Table 7: Population Change by Districts 1971 to 1996

Location	1971	1981	1991	1996	1971-96 % Change	1991-96 % Change
N Ireland	1,536,065	1,532,196	1,577,836	1,633,300	8.3%	5.6%
Antrim	33,998	45,016	44,516	49,100	44.4%	1305%
Ards	46,778	57,792	64,674	67,500	44.3%	5.8%
Armagh	46,449	49,223	51,817	53,000	14.1%	2.5%
Ballymena	48,998	54,814	56,641	588,100	18.6%	3.0%
Ballymoney	21,920	22,946	24,198	24,800	13.1%	2.7%
Banbridge	28,688	30,110	33,482	37,400	30.4%	13.7%
Belfast	416,679	314,270	279,237	297,300	-28.7%	4.3%
Carrickfergus	27,044	28,625	32,750	35,400	30.9%	9.8%
Castlereagh	64,406	60,785	60,799	64,200	-0.3%	5.3%
Coleraine	44,608	46,739	50,438	54,500	22.2%	9.1%
Cookstown	26,070	28,257	31,082	31,700	21.6%	2.4%
Craigavon	67,718	73,260	74,986	78,500	15.9%	5.2%
Derry	84,901	89,101	95,371	104,400	23.0%	10.6%
Down	46,951	53,193	58,008	61,400	30.8%	7.2%
Dungannon	42,606	43,883	45,428	46,900	10.1%	3.5%
Fermanagh	50,979	51,594	54,033	55,200	8.3%	2.3%
Larne	29,879	29,076	29,419	30,200	1.0%	2.6%
Limavady	23,809	26,964	29,567	31,200	31.0%	6.9%
Lisburn	70,694	84,007	99,458	108,400	53.3%	12.6%
Magherafelt	31,460	32,494	36,293	37,500	19.2%	3.8%
Moyle	13,979	14,396	14,789	14,900	6.6%	0.8%
Newry & Mourne	72,368	76,574	82,943	84,500	16.8%	2.2%
Newtownabbey	66,915	72,246	74,035	79,200	18.4%	7.7%
North Down	52,611	66,264	71,832	74,300	41.2%	4.7%
Omagh	41,175	44,288	45,809	47,200	14.6%	3.4%
Strabane	34,364	36,279	36,141	36,500	6.2%	1.0%

The Belfast Metropolitan Area

5.5 In the Belfast Metropolitan Area, the main trends have been:-

- a fall in population of around 100,000 between 1971 and 1991;

- a dramatic reduction in Belfast where the population of the City Council area fell by 102,000 (25%) between 1971 and 1981 mainly as a result of the 'troubles', and by a further 35,000 (11%) between 1981 and 1991, reflecting major redevelopment in inner urban areas;

- increase in the population in the outer parts of the Metropolitan Area by around 60,000 between 1971 and 1996; and

- stabilisation and growth of the population during the 1990s in the Metropolitan Area and Belfast City Council area by around 6%, slightly above the regional rate of increase of 5%.

Derry/Londonderry, Craigavon and the Regional Towns

5.6 The main trends have been:-

- rapid growth (13%) between 1971 and 1981 at a time when the population of the Region was static;

- buoyant growth of Derry/Londonderry (around 11%) in the 1990s;

- reduced rate of growth of Craigavon and the Regional Towns during the 1980s (6%) and 1990s (4%) and indications that the increasing dispersal of the Region's population, which started with the movement out of Belfast, had progressed to the Regional Towns; and

- the population of most of the Regional Towns in the Belfast city region remained virtually static during the 1980s and 1990s as people moved to the small towns and villages.

The Rural Community

5.7 The main trends have been:-

- growth in the population of the Rural Community by around 100,000 between 1971 and 1996 (Table 8);

- an accelerating growth rate for the Rural Community over the three time periods indicated in Table 8;

- concentration of growth in the small towns, villages and small rural settlements which grew by 45% between 1971 and 1996, while population in the open countryside increased by 3.4%;

- a contrast between the Belfast city region where population in the Rural Community grew by 32% between 1971 and 1996, and the remainder of Northern Ireland where the increase was 10% (Table 8); and

Table 8: Trends in the Rural Community

	1971	1996	
Belfast city region			
- Small Towns[1]	70,033	111,250	(+60%)
- Villages	21,746	32,450	(+49%)
- Open Countryside	118,760	133,750	(+13%)
Total	210,539	277,450	(+32%)
Rest of Northern Ireland			
	64,449	92,850	(+45%)
- Small Towns	46,671	56,50	(+22%)
- Villages	228,194	225,100	(-2%)
- Open Countryside			
Total	339,314	374,800	(+10%)

- increase in the population of small towns and villages in the Belfast city region by 57% and of the open countryside by 13%, reflecting dispersal from urban areas into the countryside.

Urban and Rural Population Density

5.8 There is a significant relationship between the size of urban community and population density. In 1991 in Belfast City it was 2,650 persons per square kilometre, in Londonderry 2,160 persons per square kilometre and in the next three largest urban communities (the Belfast Metropolitan Area parts of Castlereagh, Newtownabbey and Bangor) it exceeded 2,000 persons per square kilometre. In a number of the larger regional towns including Carrickfergus, Larne, Lisburn and Lurgan, population density was between 1,500 and 2,000 persons per square kilometre. It is easier to achieve sustainability objectives in the larger settlements because higher densities enable greater proximity of housing to a wider range of functions.

One of the distinctive features of the Region, which also has considerable significance for its future development is the size of the dispersed rural population. Over 350,000 people live in the open countryside at an average density in 1991 of 28 persons per square kilometre. While the dispersed settlement pattern is characteristic of all of the Region, the density of the population living in the countryside tends to be higher in the Belfast City Region (typically about 45 persons per square kilometre) and lowest in the

[1]Towns under 10,000 population with the exception of the Regional Towns of Ballycastle, Ballymoney, and Magherafelt.

more remote upland areas. In extensive parts Fermanagh and Moyle it is less than 10 persons per square kilometre. Significantly the highest rural densities are around Lough Neagh exceeding over 100 persons per square kilometre in some of the electoral wards on the western shores.

6.0 POPULATION PROJECTIONS

Projected Regional Population

6.1 The most recent population projection is that provided by the Government Actuary for the period 1996 to 2026. This makes a range of assumptions about mortality, fertility and migration, and makes projections by age groups from the base mid year estimate for 1996. Table 9 summarise these projections.

Table 9: Projected Regional Population, 1996 to 2026

Age	1996	2000	2005	2010	2015	2020	2026
0-9	257,600	249,200	234,400	218,000	207,200	201,900	194,100
10-19	257,900	260,800	256,300	244,800	230,100	213,700	201,700
20-29	254,400	240,800	229,600	233,200	228,900	217,500	200,500
30-39	245,400	253,500	250,100	234,000	221,900	225,500	218,200
40-49	200,000	211,900	236,300	247,800	244,500	227,700	216,800
50-59	167,300	182,400	191,500	205,600	229,600	240,900	235,300
60-69	134,300	136,700	150,500	167,800	176,900	191,200	217,900
70-79	100,200	103,200	102,800	107,800	120,000	136,100	146,500
80-89	42,400	44,300	48,000	51,800	54,000	59,400	70,700
‘90+	4,900	6,400	8,000	8,600	10,000	11,200	13,200
Total	1,663,300	1,689,100	1,708,000	1,718,300	1,724,200	1,725,100	1,714,900

Source: Government Actuary Projection, 1996

There are a number of significant features of these projections including:

-continuing increase in the population of the Region to a peak of 1,725,100 in 2020, and subsequent decrease to 1,714,900 in 2026;
-a reduction in the rate of increase from the rapid growth levels experienced in the early 1990s;
-the projected 24% decline in the number of children aged under 10 years over the 30 year period. This implies declining school enrolments and eventually declining numbers entering the job market;
-a slight increase in the number aged 10 to 19 up to 2000 followed by a steady decline. From 2000 to 2026 the numbers are expected to decline by 23%. Again this can be expected after about the year 2005 to contribute to declining numbers entering the job market;
-the population of working age is expected to change significantly differently from elsewhere in Europe. The percentage of the total population aged 20 to 59 years is expected to increase from 52% in 1996 to 53% by 2020, in contrast to the rest of Europe where a large increase in dependency is expected. This provides Northern Ireland with an exceptional opportunity to improve its relative economic performance; and
-a continuous, substantial increase in the numbers of the elderly (60 years or more) from 282,000 in 1996 to 448,000 in 2026 with major implications for the provision of housing, transport, and health services.

7.0 REGIONAL HOUSEHOLDS

Change in Regional Households

7.1 The Post War period has been characterised by a large increase in the number of households and a marked fall in the average size of households. Thus while the Region's population increased by 15% between 1951 and 1991, and the household population by 17%, the number of households increased by 57%, as the mean household size declined by 26%. (Table 10.)

Table 10: Change in Regional Households, 1951 to 1991

Year	1951	1961	1971	1981	1991
Total Population	1,370,921	1,425,042	1,532,196	1,532,196	1,577,836
Non-Household Population	50,979	46,588	46,281	37,303	37,583
% Non-Household Population	3.72%	3.27%	3.01%	2.43%	2.38%
Household Population	1,319,942	1,378,454	1,489,784	1,494,893	1,540,253
Number of Households	337,581	372,793	427,434	471,758	530,369
NI Mean Household Size	3.91	3.698	3.485	3.169	2.904

Source: Northern Ireland Census Reports for 1951, 1961, 1971, 1981, and 1991.

7.2 The main driving force behind the long-term growth in the number of households has been the rapid increase in one and two-person households due to social changes such as declining family size, an ageing population, the increasing incidence of marital breakdowns, and the growing independence of young people. In parallel with the growth in the numbers of small households, there has been a rapid decline in large households. Table 11, illustrated by Diagram 8, indicates an 88% increase in one-per households between 1971 and 1991, and a 29% increase in two-person households. By contrast, during the same period, there has been a 15% reduction in the numbers of households of 5 persons and over.

Table 11: Change in the Size of Households, 1971 to 1991

Household	Number of Households			Change	% of Total Households by Size Group			Change
Size	1971	1981	1991	1971-91	1971	1981	1991	1971-91
1 Person	63,903	85,238	119,980	56,077	14.95%	18.68%	22.74%	87.75%
2 Persons	104,590	113,627	135,395	30,805	24.47%	24.90%	25.67%	29.45%
3 Persons	77,513	75,801	87,998	10,485	18.13%	16.61%	16.68%	13.53%
4 Persons	70,504	80,662	89,917	19,413	16.49%	17.68%	17.05%	27.53%
5 Persons	46,346	49,975	52,411	6,065	10.84%	10.95%	9.94%	13.09%
6 Persons	27,522	29,361	25,943	-1,579	6.44%	6.43%	4.92%	-5.74%
7 Persons	15,848	10,778	9,215	-6,633	3.71%	2.36%	1.75%	-41.85%
8 Persons	9,942	5,648	3,907	-6,035	2.33%	1.24%	0.74%	-60.71%
9 Persons	4,847	2,758	1,590	-3,257	1.13%	0.60%	0.30%	-67.20%
10 or more Persons	6.419	2,500	1,152	-5,267	1.50%	0.55%	0.22%	-82.05%
Total Households	427,434	456,348	527,508	100,074	100%	100%	100%	+23.41%

Source: Northern Ireland Census Reports for 1971, 1981 and 1991

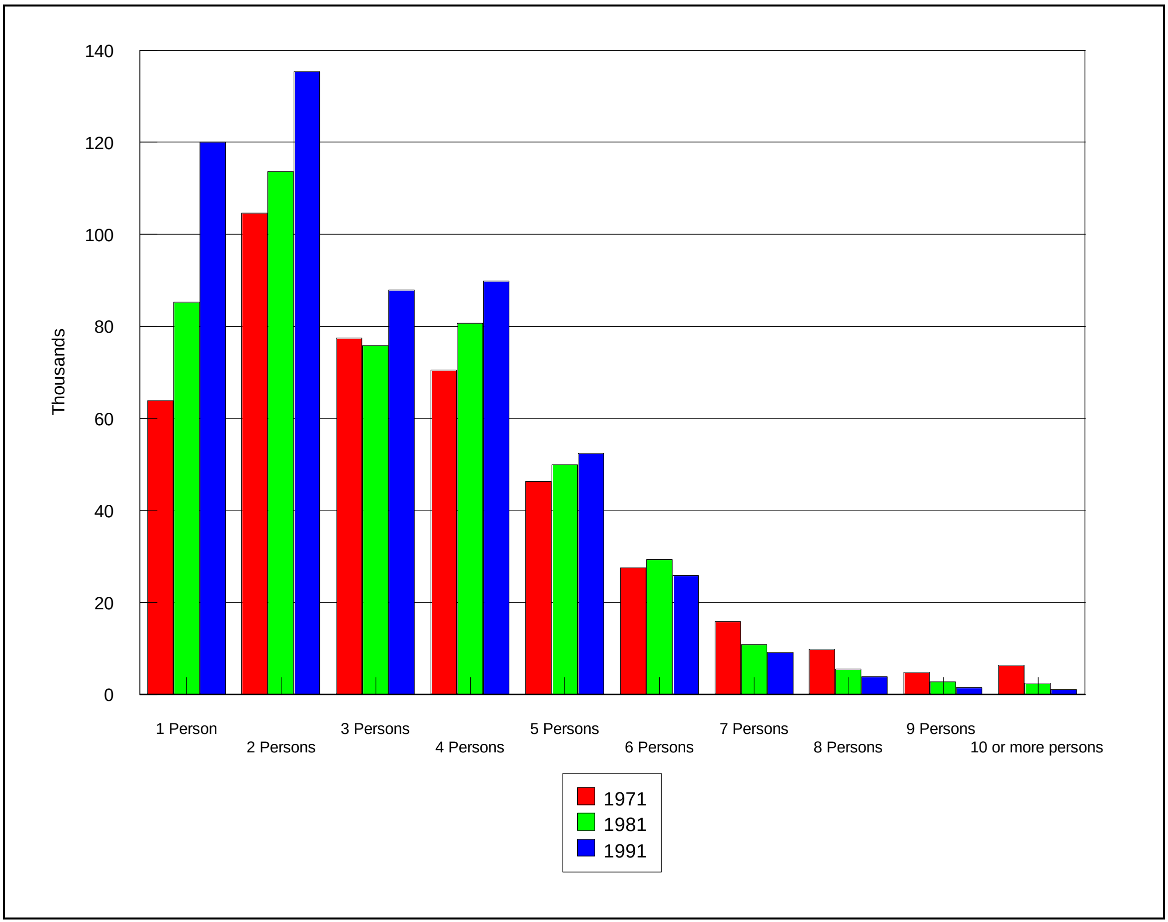


Diagram 8: Change in the Size of Regional Households 1971-1991

7.3 The rapid increase in the population of the Region between 1991 and 1996 was reflecteded in the growth in the numbers of households, to an estimated 580,000 by 1996.

Changes in the Mean Household Size

7.4 These trends have been reflected in the progressive reduction in mean household size from 3.91 in 1951 to 2.90 in 1991. This decline in the average size of household mirrors the trend in Great Britain, with a time lag of about 20 years. (Diagram 9.) The rate of decline was around 0.95% per year in the 1970s, dropping to 0.88% in the 1980s. Available evidence based on sample surveys (the NIHE House Condition Survey, and the Continuous Household Survey) suggests that the reduction of mean household size has continued into the 1990s.

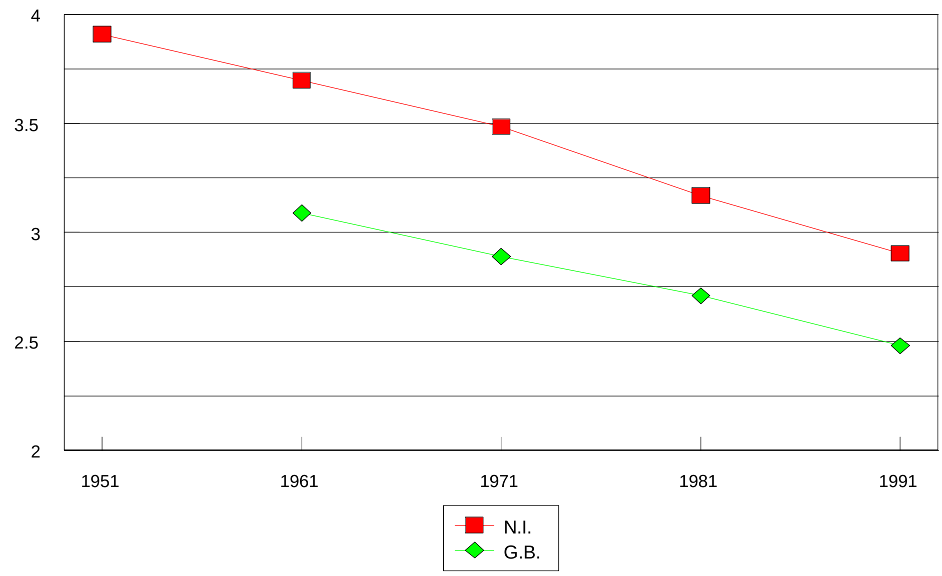


Diagram 9: Mean Household Size 1951-1991, Northern Ireland and Great Britain

7.5 The decline in mean household size is a long-established trend and experience in Great Britain and other European countries would suggest that further fall could be anticipated. This trend, together with the continued increase in population, means that further growth in the numbers of households, in particular small households, is expected. Long-term projection of trends which depend on the value and choices of both individuals and society as a whole can be difficult since these can vary in time and from place to place. However, to guide forward planning, assumptions have been made regarding the range of future change in household numbers, and a 'best estimate' has been made.

7.6 Three scenarios for future change in main household size have been tested:-

1. - continuation of the rate of decline in mean household size at around the high rate of recent years (0.85% per year): this would generate around 187,000 new households between 1996 and 2025, using the Government's Actuary's projection of population change;

2. - a moderation of recent trends to a rate of fall in MHS of 0.74% per year: this would generate around 162,000 new households between 1996 and 2025; and

3. - a rapid reduction in the rate of decline to around 0.63% per annum: this would generate around 140,000 new households to 2025.

7.7 A moderation of the trends of the recent past to a rate of fall in mean household size of 0.74% per year is regarded as the 'best estimate' using data presently available. It is considered that this reflects the force of established trends while taking account of social attitudes in Northern Ireland particularly with regard to the position of the family in the life of the Region. Current Government initiatives at national level to reinforce family living may also mitigate trends over time. The recent drop in the rate of decline in mean household size during the 1980s may point in this direction. This assumed rate of fall is similar to that in Great Britain in recent decades. The 2001 Census will enable population and household trends in the 1990s to be accurately established and long-term projections adjusted accordingly.

7.8 In the 'best estimate' projection 162,000 new households would be generated between 1996 and 2025 of which 85,000 would be formed by 2010. Allowing for vacancy in the housing stock and replacement of unfit dwellings, it is estimated that 200,000 new dwellings would be needed by 2025 (see Chapter 10), made up of 103,500 between 1996 and 2070, and 96,500 between 2010 and 2025. Table 15 documents these projections.

7.9 This precautionary approach to long-term projections, which by their nature are subject to more uncertainties, will help to support the objective of the Spatial Development Strategy to accommodate a larger share of residential development within existing urban areas. Providing for future housing growth based on projection of continuation of the higher levels of household formation of recent years, could result in over provision of greenfield housing lands, thereby detracting from the drive to regenerate the Region's cities and towns.

Table 12: Projected Regional Household Formation, 1996 to 2025

Year	Projected Total Population	Projected Household Population	Mean Household Size Median Projection	Number of Households Median Projection	Mean Household Size High Projection	Number of Households High Projection	Mean Household Size Low Projection	Number of Households Low Projection
1996	1,663,300	1,625,800	2.796	581,500	2.796	581,500	2.796	581,500
2000	1,689,100	1,651,600	2.714	608,500	2.702	611,500	2.726	606,000
2005	1,708,000	1,670,500	2.615	639,000	2.589	645,500	2.641	632,500
2010	1,718,300	1,680,800	2.520	666,500	2.481	677,500	2.559	657,000
2015	1,724,100	1,686,600	2.428	694,500	2.377	709,500	2.480	680,000
2020	1,725,100	1,687,600	2.339	721,500	2.278	741,000	2.403	702,000
2025	1,714,900	1,677,400	2.254	743,500	2.182	769,000	2.328	720,500
Change from								
1996-2000	25,800	25,800	-0.082	27,000	0.094	30,000	-0.070	24,500
2000-2005	18,900	18,900	-0.099	30,500	-0.113	34,000	-0.085	26,500
2005-2010	10,300	10,300	-0.095	27,500	-0.108	32,000	-0.082	24,500
2010-2015	5,800	5,800	-0.092	28,000	-0.104	32,000	-0.079	23,000
2015-2020	1,000	1,000	0.089	27,000	-0.099	31,500	-0.077	22,000
2020-2025	10,200	10,200	-0.085	22,000	-0.096	28,000	-0.075	18,500
1996-2025	51,600	51,600	-0.542	162,000	-0.614	187,500	-0.468	139,000
2000-2025	25,800	25,800	-0.460	135,000	-0.520	157,500	-0.398	114,500

Notes: The projected population is based on the Government Actuary's 1996 projection.
It is assumed that the non-household population remains at its 1991 size of 37,500.
In the median projection it is assumed that mean household size declines by 0.74% per annum.
In the high projection it is assumed that mean household size declines by 0.85% per annum.
In the low projection it is assumed that mean household size declines by 0.63% per annum.

7.10 The growth of households in the best estimate projection in Table 12 declines from around 6,750 per annum in the late 1990s, around 5,500 per annum between 2005 and 2010, and to around 4,500 per annum in the period from 2020 to 2025. This is a reflection of the Government Actuary's projection which anticipates a progressive reduction in the rate of population growth and a marginal decline in the population of the Region towards the year 2025.

8.0 REGIONAL HOUSING STOCK

The Regional Housing Stock, 1951 to 1996

8.1 The rapid Post War increase in the number of households has been matched by an equivalent growth in the housing stock as shown by Table 13. In the thirty years between 1961 and 1991 the housing stock increased by 184,000 from 389,000 to 573,000 to accommodate an additional 157,000 households formed in the same period. Allowing for unoccupied and vacant dwellings, this is virtually a one for one relationship between growth in the numbers of households and housing stock. While growth has been continuous it was most rapid during the 1960s and again in the 1980s.

Table 13: Change in the Regional Housing Stock and Households, 1951 to 1991

Year	1951	1961	1971	1981	1991
Total dw ellings	345,748	389,031	455,049	494,313	572,666
Vacant dw ellings	14,138	17,889	19,535	29,081	30,370
Unoccupied dw ellings			10,349	8,884	11,927
Total occupied dw ellings	331,610	371,142	425,165	456,348	530,369
Ow ner occupied households	N/A	155,889	196,090	225,621	330,198
Public rented households	N/A	78,880	147,980	179,192	155,817
Housing Ass. rented households	N/A	0	0	4,390	8,405
Private rented unfurnished h'hold	N/A	123,107	71,199	32,321	18,028
Private rented furnished h'holds	N/A	4,005	9,791	9,284	12,855
Other households	N/A	6,369	2,374	5,540	5,066
Total households	337,581	368,250	427,434	456,348	530,369
% Vacant dw ellings	4.1%	4.6%	4.3%	5.9%	5.3%
% Unoccupied dw ellings			2.3%	1.8%	2.1%
% Ow ner occupied households	N/A	42.3%	45.9%	49.4%	62.3%
% Public rented households	N/A	21.4%	34.6%	39.3%	29.4%
% Housing Ass. rented househol	N/A	0.0%	0.0%	1.0%	1.6%
% Private rented unfurnished h'h	N/A	33.4%	16.7%	7.1%	3.4%
% Private rented furnished h'hold	N/A	1.1%	2.3%	2.0%	2.4%
% Other households	N/A	1.7%	0.6%	1.2%	1.0%

The District Housing Stock, 1971 to 1996

8.2 Diagram 10 illustrates the changes in housing stock between 1971 and 1991 by District Council areas, arranged from the lowest growth to the highest growth. In contrast with a 64% increase in the housing stock in Lisburn, in Belfast it declined by 12%. The net effect was a reduction in the percentage of the Region's housing stock in the City of Belfast from 30% in 1971 to 20% as a result of population movement from the City. Generally the most rapid growth was in the towns within 40 kilometres of Belfast, but there was also a large growth in the housing stock of the three north western Districts of Derry, Limavady and Coleraine. In the more rural Districts the housing stock typically increased by about a quarter between 1971 and 1991. The growth in Limavady reflects inward migration from Derry District

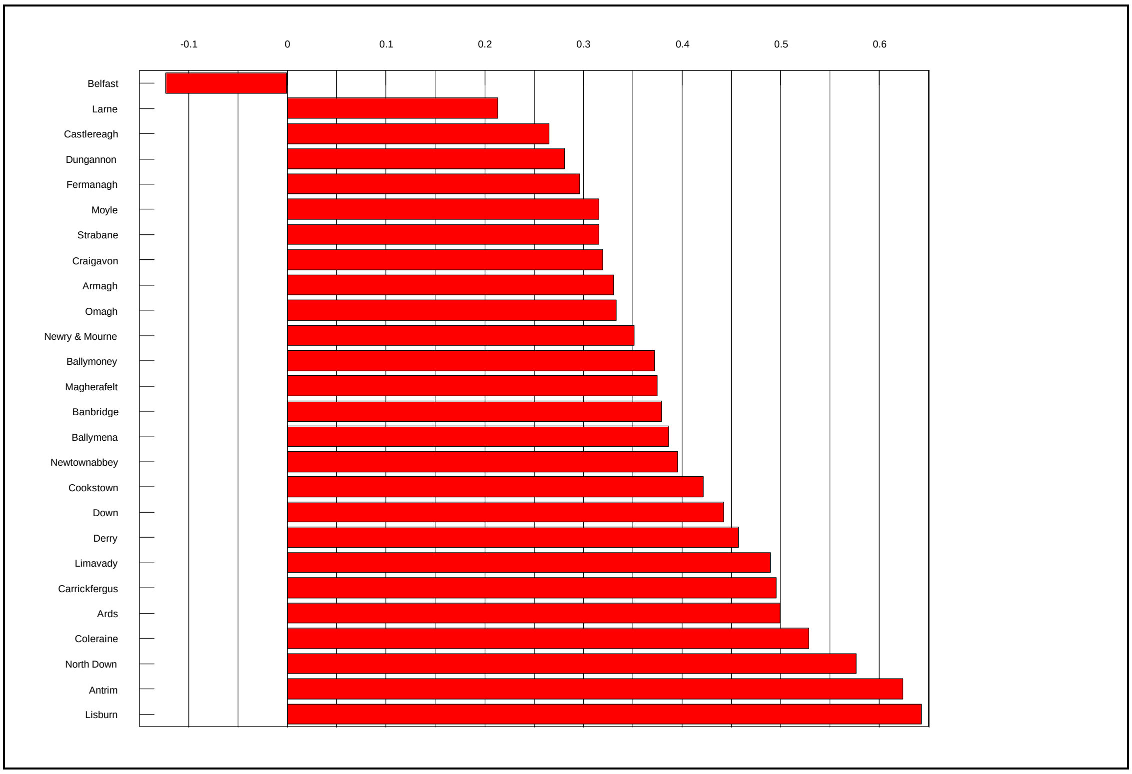


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Diagram 10: Change in Housing Stock by District, 1971 to 1991

Vacancy in the Housing Stock

8.3 Vacancy grew from 4.3% to 5.9% of the total housing stock between 1971 and 1981 but subsequently declined slightly to 5.3%. There remain considerable variations in vacancy across Districts, in 1991 ranging from as low as 2.9% in Castlereagh to as high as 8.1% in Moyle. It tends to be higher in the more rural Districts but is also above average in Belfast (5.9% in 1991). Since 1991 housing vacancy has settled at around 5%.

Housing Tenure

8.4 Not only were there major changes in the size of the housing stock, but there were also major shifts in housing tenure. On the basis of the various Census reports which recorded the tenure of households from the 1961 Census onwards, the public rented sector grew rapidly between 1961 and 1981 from 79,000 to 179,000 dwellings. Over the same period the owner occupied sector grew from 156,000 to 226,000. Approximately corresponding to the growth in public renting was the rapid decline in the private rental sector from 127,000 to only 42,000. Since 1981 however, there have been major changes in the previous trends. The size of the public rental sector has declined from 179,000 households in 1981 to 156,000 in 1991, the decline of the private rented sector eased (42,000 down to 31,000), and the growth of the owner occupied sector accelerated (226,000 up to 310,000). Diagrams 11 and 12 illustrate these changes.

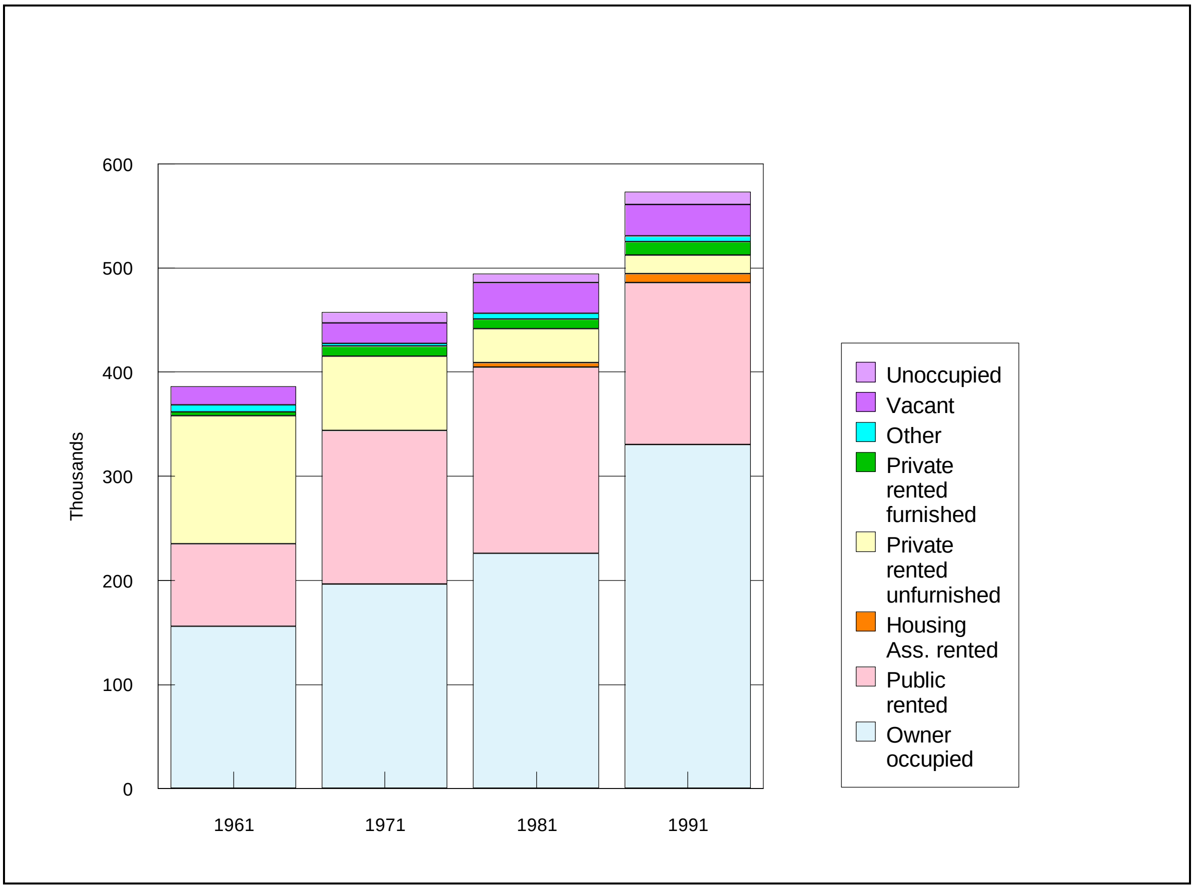
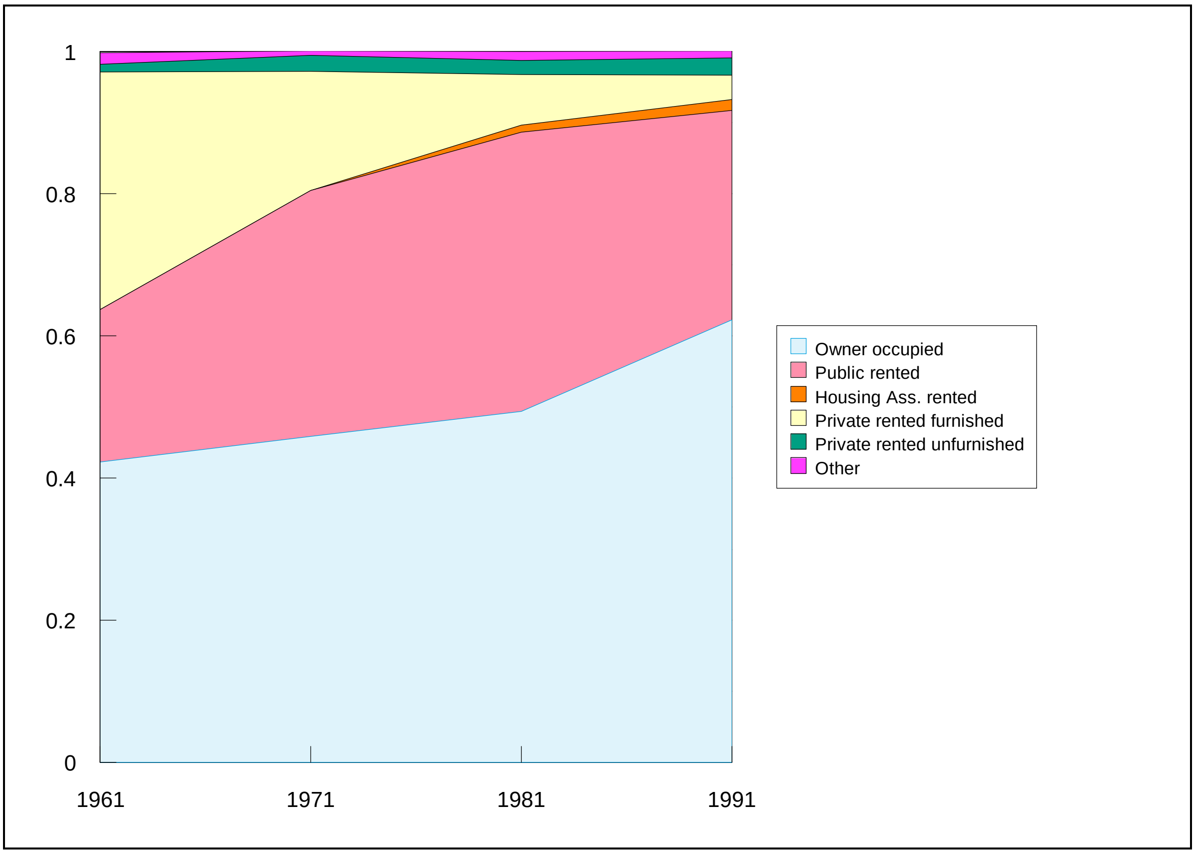


Diagram 11: Change in Housing Tenure by category 1961-1991



8.5 The 1961 to 1991 period was characterised by a continuous rapid increase in owner occupation as a proportion of the housing stock from 42% to 62%. Public renting after increasing from 21% in 1961 to 39% in 1981 subsequently rapidly declined to 29% in 1991. Private renting which had been the dominant type of tenure up to the 1940s, has declined continuously from 35% in 1961, to 19% in 1971, to 9% in 1981 and only 5% in 1991.

8.6 As Table 14 documents, the growth of the housing stock has continued steadily into the 1990s averaging 1.2% per annum. The owner occupied sector has continued to grow rapidly from 315,000 dwellings in 1987 to 401,000 by 1996. The public rented sector has declined continuously from 169,000 in 1987 to only 142,000 in 1996, while the private rented sector has stabilised at about 20,000. In the same period the small Housing Association rental sector has more than doubled to 14,500. The owner occupied sector now accounts for nearly 70% of all dwellings with the public rental sector now under 25%.

Year	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996
Total dw ellings	545,000	553,000	562,500	570,500	573,000	580,000	589,500	595,000	600,000	607,500
Vacant dw ellings	33,000	34,000	33,500	34,500	33,000	31,000	31,000	30,500	29,500	33,000
Occupied dw ellings	512,000	519,000	529,000	536,000	540,000	549,000	558,500	564,500	570,500	574,500
Ow ner occupied	315,500	322,500	335,500	347,500	354,000	363,500	374,500	385,500	389,000	399,000
Public rented	169,000	168,500	165,500	160,000	157,500	155,500	153,000	147,500	144,500	139,500
Housing Ass. rented	7,000	8,000	8,500	9,000	9,000	10,000	11,500	12,500	13,000	14,000
Private rented & Other	20,500	20,000	19,500	19,500	19,500	20,000	19,500	19,000	20,500	22,000
% Vacant dw ellings	6.1%	6.1%	6.0%	6.0%	5.8%	5.3%	5.3%	5.1%	4.9%	5.4%
% Ow ner occupied	61.6%	62.1%	63.4%	64.8%	65.6%	66.2%	67.1%	68.3%	68.2%	69.5%
% Public rented	33.0%	32.5%	31.3%	29.9%	29.2%	28.3%	27.4%	26.1%	25.3%	24.3%
% Housing Ass. rented	1.4%	1.5%	1.6%	1.7%	1.7%	1.8%	2.1%	2.2%	2.3%	2.4%
% Private rented & Other	4.0%	3.9%	3.7%	3.6%	3.6%	3.6%	3.5%	3.4%	3.6%	3.8%

Table 14: Change in the Regional Housing Stock, 1987-1996

Source: Housing Statistics, 1996/97, DOE.
Note: Data for 1995 and 1996 are estimates based on information provided by Rates Collection Agency.

8.7 Diagram 13 illustrates the tenure of the Districts' housing stock in 1996. Owner occupation tended to be lowest in the Districts with large urban populations particularly Belfast (57.2% of the total stock owner occupied) and Londonderry (57.6%), average (around 70%) in the more rural areas and highest in the Districts to the south of Belfast. North Down in 1996 had the highest proportion of owner occupation (82.6%). Conversely public rental was highest in the large urban Districts (in 1996 in Derry 35.2% of all dwellings were public rented and in Belfast 29.6%). The lowest proportion of public renting was in North Down (13.1%). In many of the more rural Districts in the west of the Region, it was also under 20%.

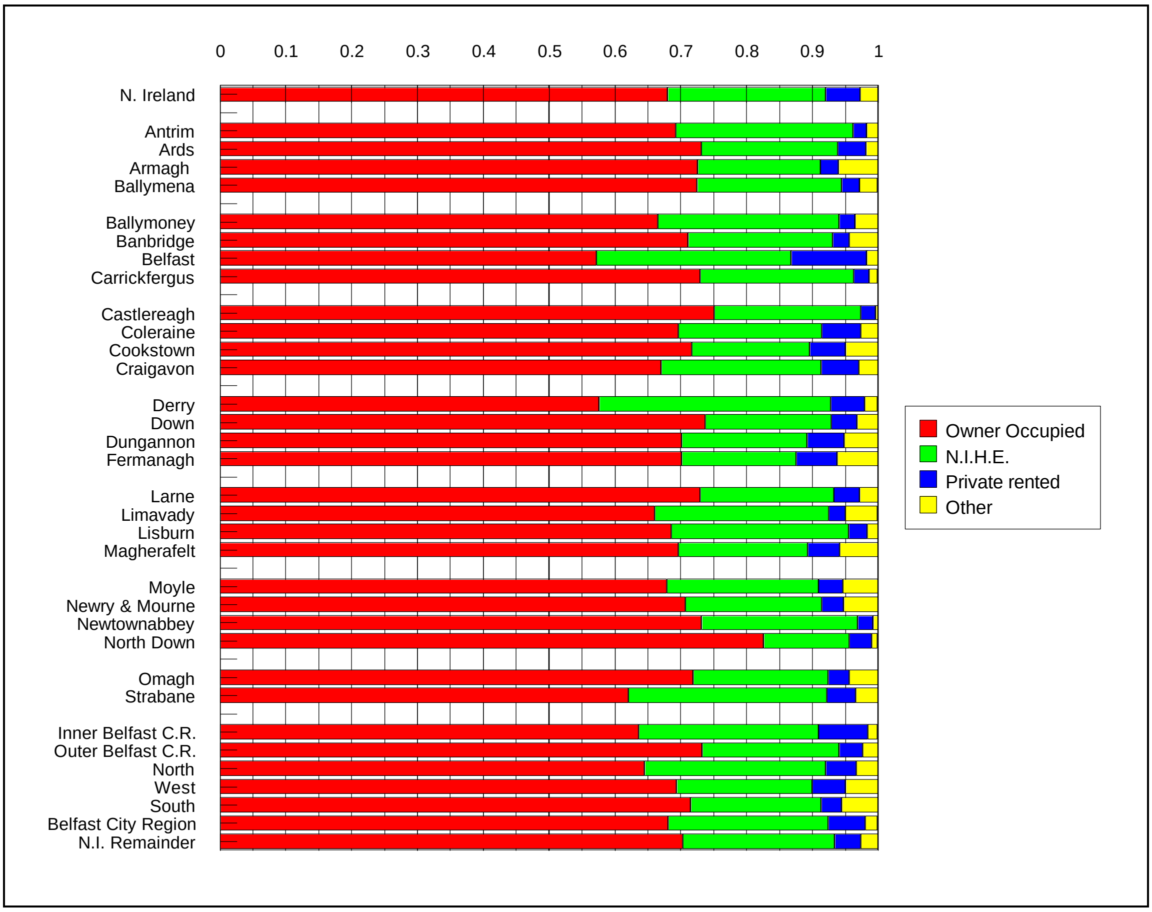


Diagram 13 - Housing Tenure by Districts 1996

8.8 The growth of home ownership has been an established trend across all Districts with only slight variations in the rate of change. Districts which traditionally had low levels of owner occupation however, such as Belfast, Derry, Strabane, Limavady and Ballymoney continue to have a lower proportion of people who own their own home. Conversely Districts such as North Down, Castlereagh and Ards where home ownership was traditionally higher, continue to have the highest proportions of home ownership. It is evident that owner occupation is now the preferred form of tenure for almost all. What remains uncertain is how much further the proportion of owner occupation can increase beyond its present level of about 70%. This will probably be the net effect of a range of factors including the future performance of the Regional economy, the cost of housing and future housing policy. On the basis of present trends described above owner occupation could exceed 80% by the year 2010.

9.0 THE DYNAMICS OF HOUSING STOCK CHANGE, 1971 TO 1996

9.1 Table 15 documents the dynamics of housing stock change in the Region in the period from 1971 to 1996. The change in the housing stock is the net result of a series of additions and deletions. By far the most important source of additions comes from new house building, but sub division of existing dwellings into flats and changes of use are also important sources. Deletions include demolitions, deterioration of existing dwellings into dereliction and conversion of multiple residential units into single dwellings.

Table 15: The Dynamics of Housing Stock Change, 1971 to 1996

Period	Completions					Demolition	Net other	Total
	Private	N.I.H.E.	H. Ass.	Other	Total	& Closed	changes	Change
1971 -75	21,539	32,568	383	635	55,115	-16,515	-14,100	24,500
1976-80	16,420	25,818	503	153	42,894	-14,185	-7,709	21,000
1981-85	25,251	16,538	2,495	498	44,782	-11,113	331	34,000
1986-90	36,118	9,063	2,932	18	48,131	-9,729	1,098	39,500
1991-95	28,736	4,993	3,406	71	37,600	-4,418	-2,182	31,000
1996	6,712	890	954	0	8,554	-1,066	512	8,000

Source: Derived from Department of the Environment (N.I.), Housing Statistics, 1981 to 1996/97

9.2 Table 15 indicates a tendency for the number of new dwellings completed to decline over the past 25 years, and a compensating decline in the number of demolitions and closures. When this is combined with other changes to the housing stock, there was modest growth in the total stock by about 4,500 through the 1970s, this accelerated averaging about 8,000 in the late 1980s but has been slightly less in most recent years. There has also been a major sectoral shift in house building away from the public sector to the private sector. Whereas in the 1970s the public sector was building about 60% of all new dwellings, by the 1980s this had declined to about 33% and in recent years to less than 20%.

9.3 Simultaneously there has been a very substantial transfer from the public to the private sector by the sale of dwellings by the Northern Ireland Housing Executive to tenants. Since 1979 over 70,000 dwellings have been transferred to owner occupation in this way, that is nearly 40 % of the total public rental sector which existed in 1979. The scale of transfers has continued at between 4,500 and 5,000 in recent years without any sign of easing.

9.4 There has also been a steady decline in the net loss from the housing stock due to demolitions, abandonment, changes of use, and sub divisions. In the early 1970s when the redevelopment programmes were at their peak and urban civil disorder was its most intense the net loss exceeded 6,000 annually. By the 1980s this was down to an annual net loss of only about 2,000. Since 1990 the net loss to the housing stock has been about 1,200 a year. It would appear that large scale redevelopment of older properties has largely run its course, with the main area of demolitions in recent years being within unpopular large Post War public authority housing estates. Refurbishment and limited replacement of housing stock reaching the end of its useful life will still be required.

Dwelling Completions

9.5 Diagram 14 illustrates the annual number of house completions in the Region since 1971. Generally public sector completions have tended to decline and private sector completions have tended to increase, with rapid growth in private sector development in the early 1980s. As a result from 1983 to 1989 the total number of completions each year consistently reached about 10,000. Subsequently however, this has declined to around 8,000. In 1994,1995 and 1996 the number of new dwellings started has been close to 10,000 which would imply that there will be some increase in house completions in the late 1990s. This is probably the result of the local 'feel good' factor, resulting from the improved performance of the regional economy, relatively low interest rates, and the cease-fires. While housebuilding rates fluctuate over time, and from place to place, in response to a variety of market factors, the long term housing need consistently reflects the growth in population and households (see Para 8.1). The proposed provision of housing land in 5 year phases with monitoring within a 2010 target will enable the accommodation of annual fluctuations in housebuilding rates.

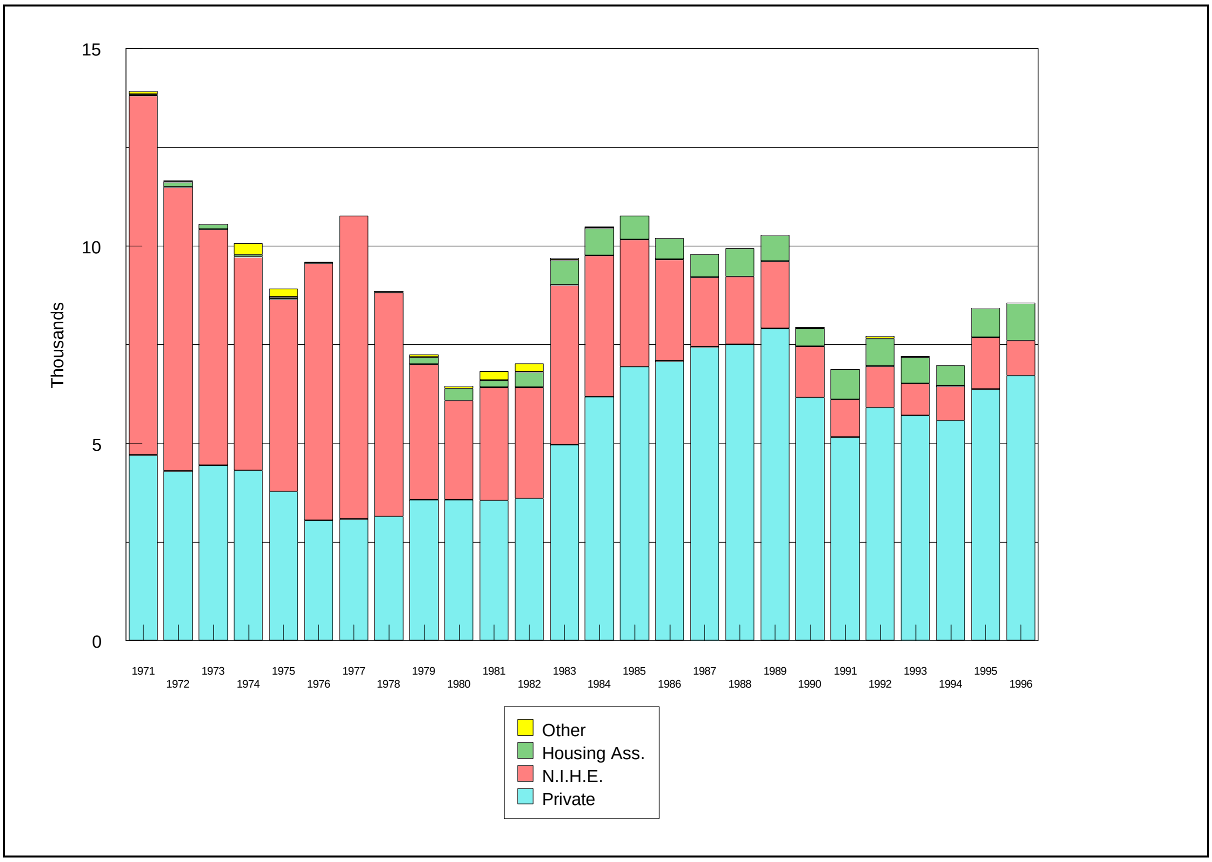


Diagram 14: Dwelling Completions, Northern Ireland, 1971-1996

Dwelling Starts

9.6 There is no consistent data for the number of new dwellings completed in Districts, but information is available for new dwelling starts. In the 16 years from 1981 to 1996 the largest number was in Belfast (21,600) although here there was a definite trend of declining annual numbers of dwelling starts. In both Lisburn and Derry Districts there were over 10,000 starts and there were also a large number in Ards (7,300 new dwelling starts), Coleraine (6,500), North Down (6,400), Craigavon (6,300) and Newry and Mourne (6,200). These eight Districts together accounted for almost two thirds of all new starts.

9.7 Diagram 15 indicates the rates of house building expressed as new dwelling starts per 1,000 population. This identifies Carrickfergus as having by far the highest rate of housing starts over the 1981 to 1996 period, averaging over 10 per 1,000 annually. Ards, Banbridge, Coleraine and Lisburn all averaged between 7 and 8 starts per annum over the period. The overall rate for the Region was 5.7 per 1,000, with Belfast and many of the more rural districts below the average rate.

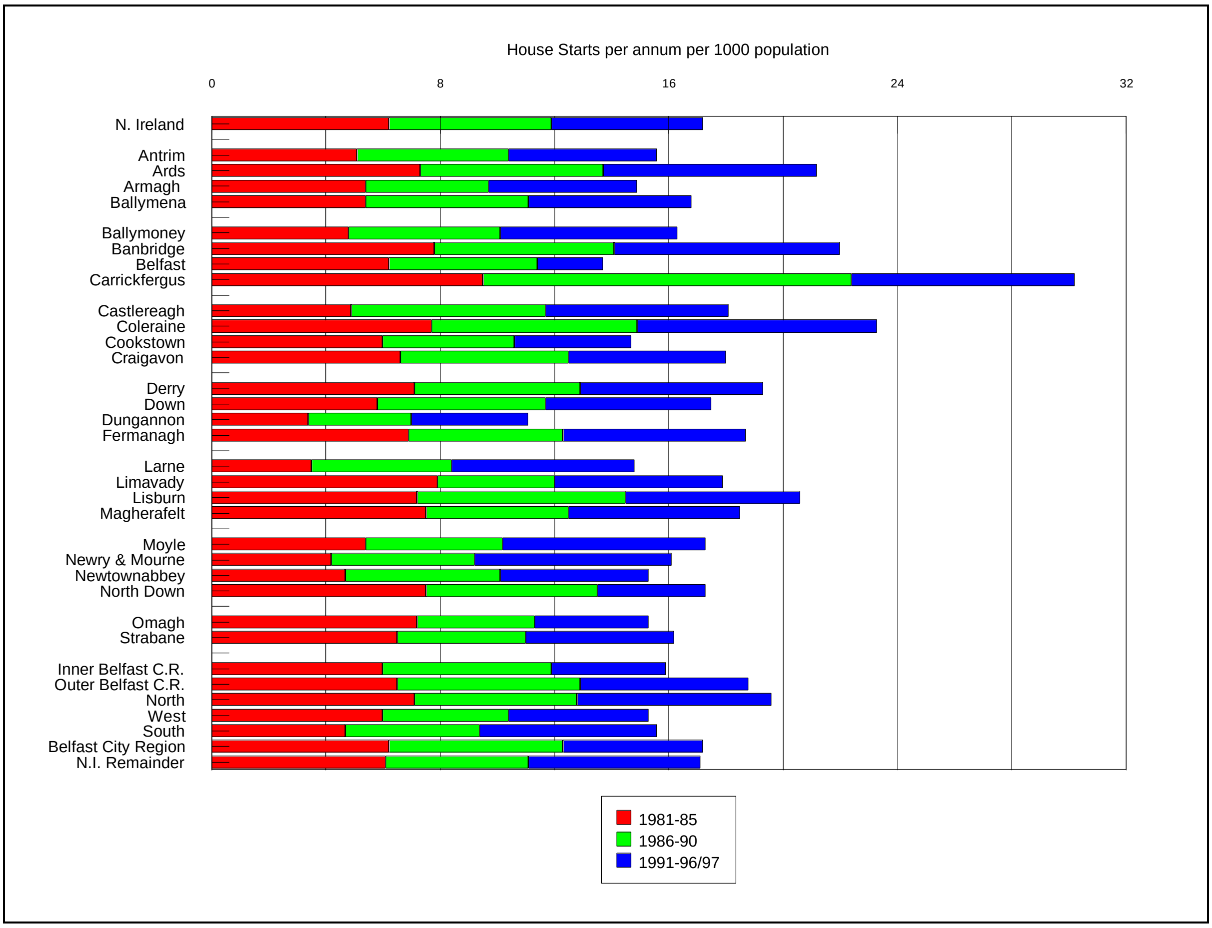


Diagram 15: Dwelling Starts by District 1981-1997

10.0 PROJECTED HOUSING NEED, 1996 TO 2025

10.1 The distribution of future housing development involved making a number of parallel and inter-related assessments:-
-making a best projection for the Region as a whole;
-deriving control figures for the 3 settlement groups - the Belfast Metropolitan Area; Derry/Londonderry, Craigavon and the Regional Towns; and the Rural Community;
-examining population trends in the Regional Towns, small towns, the small rural settlements and in the open countryside, including consideration of urban/rural interdependence;
-comparing population trends in the rural components of the Belfast city region and the rest of Northern Ireland; and
-working up housing allocation figures to the year 2010 for the Regional Towns and the Rural Community in each District.

10.2 Given the uncertainties involved in long-term projection the Department has not attempted to provide detailed figures for housing need below the regional level up to 2025. The approach adopted has been to set targets for housing growth for the period 1996-2010 for the settlement groups and for the Region's main settlements.

The Regional Housing Projections

10.3 Table 16 examines the projected housing need in the Region on the basis of recent trends and assumptions regarding future demographic, social and housing changes which are summarised as follows:-

✸the Government Actuary's most recent population projection, whereby the Regional population would peak at 1,725,000 by 2020, before easing down to 1,715,000 by 2025;
✸the Regional non household population remaining at its 1991 level of 37,500;
✸continued decline in mean household size (see Chapter 7.0);
✸the stabilisation of vacancy at 4% of the total housing stock throughout the period; and;
✸an annual net balance of 1,100 dwellings to be replaced due to varying types of changes to the housing stock.

Table 16: Projected Regional Housing Need 1996-2025

	Number of Households	**Vacant Dwellings**	**Dwelling Stock**	**New Replacements, Conversions, etc**	**Projected Housing Growth**
1996	581,500	26,000	607,500		
2010	666,500	28,000	694,500		
2025	743,500	31,000	774,500		
Change 1996-2010	**85,000**	**2,000**	**87,000**	**16,500**	**103,500**
Change 2010-2025	**77,000**	**3,000**	**80,000**	**16,500**	**96,500**
Change 1996-2025	**162,000**	**5,000**	**167,000**	**33,000**	**200,000**

10.4 On this basis 200,000 new dwellings would be required over the period from 1996 to 2025, made up of 103,500 required up to 2010, and 96,500 between 2010 and 2025. The greater part of this need would be the result of projected changes in society expressed in steadily declining mean household size. The second largest component of the projected new dwelling need would be net replacements of dwellings which become derelict and are otherwise lost to the housing stock. This will require a projected 33,000 new dwellings or about one sixth of the total. The least significant factor is the need which will be required for the projected population growth.

10.5 It is important to emphasise that this projection of housing growth is dependent on a number of factors which may be subject to variation. The long term nature of the changes in society and demography which are driving the growth in new households, implies however, that the number of new dwellings required can, with a considerable degree of confidence be expected to be within the range of 170,000 and 230,000.

10.6 On present trends, the private sector will be required to produce 160,000 dwellings for owner occupation out of an estimated need of 200,000 units.

11.0 HOUSING GROWTH IN THE SETTLEMENT GROUPS

11.1 Judgements on the scale of growth appropriate to each settlement group took account of the population trends between 1971 and 1996 as set out in Chapter 5, and the major spatial development issues arising from population, economic and social trends which are outlined below.

Belfast Metropolitan Area

11.2 The main spatial development issues are:-

-a fall in the population available to support services and facilities;
-parts of the inner and middle cities characterised by unbalanced population structures and disadvantaged communities;
-under-used community infrastructure in the inner and middle cities, while new infrastructure has been required to service growing housing areas on the edge of the urban area; and
-the increasing spread of suburban style housing into rural settlements and the countryside.

Derry/Londonderry, Craigavon and the Regional Towns

11.3 The main spatial development issues are:-

-high growth rate in Derry/Londonderry reflecting the continuing revitalisation of the City, particularly in the 1990s;
-many Regional Towns characterised by decline of inner urban communities and some outer estates;
-imbalance in urban communities as the more affluent and mobile move into rural settlements and the countryside; and
-dispersal of population which has inhibited the build-up of support for expansion in services and facilities, particularly in town centres.

The Rural Community

11.4 The main spatial development issues are:-

-the growing contrast in the role of the countryside between the Belfast city region, and the remainder of rural Northern Ireland; increasingly the countryside of the city region is taking on a dormitory role in contrast to the traditional role of a living, working countryside.
-pressure on infrastructure due to the dispersal of townspeople into rural settlements and the countryside;
-the effect of the scale and nature of new development on the character of villages, small rural settlements and local landscapes;
-the difficulty in absorbing a rapid influx of townspeople who regard the countryside as a residential amenity, into long-established and tightly-knit rural communities;
-dispersal of development away from the main transport corridors, making long distance commuting by car inevitable;

-the development of a settlement pattern which is not sustainable due to the growing dependence on the car for commuting to jobs and car travel to access services; and
-the adverse effects of commuting on the urban environment, particularly in the Belfast Metropolitan Area, especially inner areas faced with extreme parking pressures and congestion.

Housing Targets for the Settlement Groups 2010

11.5 The Spatial Development Strategy is designed to achieve the outcomes for the settlement groups set out below. The Strategy proposes an appropriate scale of growth for the three Settlement Groups as shown in Table 17.

Table 17: Housing Growth in the Settlement Groups 2010

Settlement Group	**Housing Growth 1996-2010 Number of Units**
Belfast Metropolitan Area	30,000
Derry/Londonderry, Craigavon and the Regional Towns	34,900
The Rural Community including small towns up to 10,000 population, villages and small rural settlements, and the open countryside	38,600
TOTAL	103,500

The Belfast Metropolitan Area

11.6 The Strategy seeks to achieve the following outcomes for the Belfast Metropolitan Area:

-a reinforced role as regional capital and focus of administration, commerce and specialised services;
-a stronger role for Belfast as an international City;
-a revitalised Metropolitan Area with a strong emphasis on development within the existing urban area, to support existing communities;
-a compact Metropolitan Area to protect the environmental setting; and
-the location of new development to reinforce better integration between land use and transportation.

11.8 Taking the desired outcomes into account, it is considered that the population in the Belfast Metropolitan Area in 2010 should be sustained at or around its present level. A target of an additional 30,000 housing units is therefore proposed to 2010. With the strong emphasis on housing within the existing urban area, achievement of this target should contribute to a revitalised Metropolitan Area capable of containing a population of around 600,000.

Derry/Londonderry, Craigavon and the Regional Towns

11.9 For this settlement group, the Strategy seeks to achieve:-

-reinforced roles as strong and relatively self-contained service centres for urban and rural communities across the Region;
-their development as compact towns with an emphasis on housing within the existing urban areas accessible to public transport, in order to promote regeneration, support communities and maximise use of existing infrastructure; and
-strengthened town centres as key foci of community life and service provision in locations acceptable to all sections of the community.

11.10 The Strategy aims to promote housing growth in Derry/Londonderry, Craigavon and the Regional Towns to accommodate:

-local housing need;
-mobile demand, particularly in the Belfast area; and
-increased provision to assist in stemming the dispersal of townspeople into the countryside, particularly in the Belfast city region, thus reducing the need to travel.

An overall target of an additional 34,900 units is proposed for Derry/Londonderry, Craigavon and the Regional Towns up to the year 2010. It is estimated that this target would enable the population in this group of towns to grow at a rate above the regional average, compensating for the loss of momentum experienced by many Regional Towns.

The Rural Community

11.11 The Strategy seeks to achieve the following outcomes for the Rural Community:

-to sustain the overall strength of the Rural Community living in small towns, villages, small rural settlements and the open countryside;
-to sustain and consolidate the role of small towns and villages as local rural service centres;
-to sustain a living, working countryside; and
-to constrain development in rural areas which are subject to the most intense pressures, especially from townspeople building houses in the open countryside

11.12 Taking these desired outcomes into account, a target of an additional 38,600 housing units is proposed for the Rural Community of small towns (below 10,000 population), villages, small rural settlements, and the open countryside by 2010.

12.0 REGIONAL HOUSING TARGETS FOR THE MAIN URBAN CENTRES

12.1 The first stage in setting regional housing targets for the main urban centres was to work up preliminary allocation figures taking account of size of the settlement (Appendix 1), population and housing trends, assessing potential for further growth, and evaluating the capacity of individual settlements and local environments to absorb further development.

12.2 These housing allocation figures were then adjusted to reconcile individual targets with the overall Spatial Development Strategy for Northern Ireland in order to give a strategic focus to future development, to help achieve regional cohesion and balanced growth, and to promote a sustainable pattern of development (see Chapter 5 of the Draft Regional Strategic Framework). The adjustment process took account of:-

-the overall regional population and housing projections;
-the control figures for the three settlement groups; and
-the comparative trends between towns and the rural community and, broadly, between eastern and western rural areas.

12.3 In making this reconciliation, individual targets were adjusted in order to:-

-promote regional balance and facilitate community choice;
-reinforce the role of the major and key service centres, including taking account of the estimated catchment areas associated with the major centres (Appendix 2);
-maintain a complementary and balanced relationship between the Regional Towns and smaller settlements;
-help to strengthen the role of the Regional Strategic Transport Network, and especially the key transport corridors;
-moderate the growth of small settlements which would result in unsustainable outcomes;
-encourage growth where necessary to maintain the capacity of a settlement or group of settlements to continue to self-generate; and
-constrain the growth in rural areas in the east which are under significant urban development pressures.

12.4 A broad evaluation framework (Table 18) was used to provide a comprehensive assessment to facilitate judgements on the allocation of housing growth to individual settlements, within the context of the overall Spatial Development Strategy for Northern Ireland set out in Chapter 5 of the Draft Regional Strategic Framework. This informed the judgements on the potential for future growth and the capacity of individual settlements to absorb further development.

Table 18 - Evaluation Framework for Regional Settlements

Resource Test	The existence of community assets and infrastructure including spare capacity.
Environmental Capacity Test	The environment setting of the settlement and its potential to accommodate future outward growth.
Transport Test	The potential for integrating land use and public transport to help reduce reliance on the private car.
Economic Development Test	The potential to facilitate an appropriate housing and jobs balance and to unlock any major strategic development opportunities.
Urban and Rural Character Test	The potential to maintain a sense of place, and to integrate new development in a way that did not detract from the character and identity of the settlement.
Community Services Test	The potential to underpin and where necessary reinforce the community service role and function of the settlement.
Social Equity Test	The potential to improve equality of opportunity and equity of treatment.

12.5 A broad assessment of the potential of each settlement was carried out, taking into account its role and function, and environmental, transport, infrastructure and social considerations (See the Profiles of the main urban centres in Part 2 of the Family of Settlements Report). These assessments informed judgements on the role of individual towns in the context of the core Guiding Principles set out in Chapter 3 of the Draft Regional Strategic Framework. On this basis, the Regional Towns were identified as major and key service centres and reflected the need to ensure a balanced distribution of major service centres, across the Region. Accordingly appropriate housing targets were set for each town within the overall control figure of 34,900 for the settlement group of Derry/Londonderry, Craigavon, and the Regional Towns (Table 19).

Table 19 - Housing Allocation 1996-2010 (numbers of dwellings)

DISTRICT	REGIONAL TOWN	RURAL COMMUNITY	DISTRICT TOTAL
Antrim	2,000	1,600	3,600
Ards	1,500	2,450	3,950
Armagh	1,100	2,250	3,350
Ballymena	2,300	1,750	4,050
Ballymoney	700	950	1,650
Banbridge	1,000	1,400	2,400
Coleraine	2,100	1,850	3,950
Cookstown	1,000	1,250	2,250
Craigavon	3,500	1,450	4,950
Derry/Londonderry	7,800	1,200	9,000
Down	1,000	3,000	4,000
Dungannon	1,000	2,100	3,100
Fermanagh	1,200	2,550	3,750
Larne	1,000	750	1,750
Limavady	1,000	1,150	2,150
Magherafelt	700	1,750	2,450
Moyle	300	650	950
Newry & Mourne	2,700	3,300	6,000
Omagh	2,000	1,650	3,650
Strabane	1,000	1,400	2,400
Belfast Metropolitan Area	30,000	4,150*	34,150
TOTAL Northern Ireland	64,900	38,600	103,500

* Relates to the rural parts of the Local Government Districts that comprise the Belfast Metropolitan Area.

13.0 THE RURAL COMMUNITY

13.1 The Regional control total for the Rural Community was allocated to District Council areas to facilitate a scale of local housing development that broadly conforms with the overall Spatial Development Strategy in the Regional Strategic Framework (Table 19). This will help to ensure that the total of housing land provision in all District Council areas matches the projected need for the Regional as a whole thus enabling better management of housing land supply to achieve strategic objectives.

13.2 The Spatial Development Strategy gives general guidance on the scale of development appropriate to small towns (below 10,000 population) and villages in the countryside. Some smaller settlements have been growing rapidly and need to be constrained in order to protect their identity and character and ensure that a sustainable form of development is promoted in harmony with the environment, services and infrastructure. In the Belfast city region the population of some smaller settlements has increased by up to 300% between 1971 and 1996. Other small settlements in the Region have barely grown or have been in decline and need to be reinvigorated with new housing to enable them to self-generate in future. The open countryside around many towns and some villages, and particularly in the Belfast city region, has been under pressure due to the movement of people from towns.

13.3 The allocation of the housing balance for the Rural Community between individual towns, villages, small rural settlements and the countryside in District Council areas will be the subject of consideration as part of the development plan process, within the context of the Regional Strategic Framework.

Appendix 1

Population of the Main Urban Settlements

Location	Settlement	1996 Population
Belfast Metropolitan Area (BMA)	City of Belfast	297,300
	Carrickfergus BMA	30,600
	Castlereagh BMA	54,800
	Lisburn BMA	76,300
	Newtownabbey	62,600
	North Down	70,350
BMA Total		591,950
Londonderry		84,200
The Regional Towns	Antrim	22,100
	Ballymena	28,500
	Coleraine	23,100
	Craigavon	53,750
	Newry	28,850
	Newtownards	25,700
Towns 20,000-59,999		182,000
	Armagh	14,750
	Banbridge	13,650
	Cookstown	10,700
	Downpatrick	10,300
	Dungannon	10,850
	Enniskillen	12,000
	Larne	17,600
	Limavady	11,500
	Omagh	19,050
	Strabane	12,400
Towns 10,000-19,999		132,800
	Ballycastle	4,150
	Ballyclare	9,200
	Ballymoney	8,350
	Ballynahinch	5,500
	Coalisland	4,050
	Comber	8,750
	Crumlin	4,300
	Donaghadee	4,850
	Dromore	4,100
	Kilkeel	6,550
	Magherafelt	7,600
	Newcastle	7,750
	Portrush	5,950
	Portstewart	6,900
	Randalstown	4,900
	Warrenpoint	6,450
Towns 4,000-9,999		99,350

Appendix 2

Estimated Catchment Populations of Major Service Centres

Major Service Centre	**1996 Population**
Antrim	80,000
Ballymena	150,000
Coleraine	100,000
Craigavon	160,000
Enniskillen	120,000
Newry	170,000
Omagh	100,000