

Wicklow County Development Plan

Interim Housing Strategy

2022-2028

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1. Introduction

1.1 Statutory Background

This document sets out Wicklow's Interim Housing Strategy for the period 2022 - 2028, which is the likely lifetime of the new Wicklow County Development Plan.

The preparation of a Housing Strategy is a requirement under the Planning and Development Act 2000 (as amended). Section 94 of the Act requires that *'each planning authority shall include in any development plan it makes in accordance with Section 12 a strategy for the purpose of ensuring that the proper planning and sustainable development of the area of the development plan provides for the housing of the existing and future population of the area in the manner set out in the strategy'*.

The procedures for the preparation of a Housing Strategy are set out in the Act. In particular, the Act specifies that the Housing Strategy will:

- Estimate the existing and likely future need for housing in the area, and ensure that sufficient zoned and serviced land is made available to meet such needs;
- Ensure that housing is available for persons who have different levels of income;
- Ensure that a mixture of house types and sizes is developed to reasonably match the requirements of the different categories of households, including the special requirements of elderly persons and persons with disabilities;
- Counteract undue segregation between persons of different social backgrounds;
- Provide that as a general policy a specific % (not exceeding 10%) of the land zoned in the Development Plan for residential use, or for a mixture of residential and other uses, shall be reserved for those in need of social housing in the area.

Thus the Housing Strategy encompasses both the role of the Authority as the provider of social and special housing and its broader land use planning responsibilities.

The National Planning Framework acknowledges that the housing sector is more complex since the requirement for housing strategies was introduced under the Planning and Development Act 2000. Accordingly the NPF has identified that an enhanced methodology is required - Housing Need Demand Assessment (HNDA). Objective 37 of the NPF provides for a HNDA to be undertaken in each local authority area in order to ensure long-term strategic housing needs are met.

The purpose of the HNDA is to:

- Assist local authorities to develop long-term strategic views of housing need across all tenures;
- Provide a robust evidence base to support decisions about new housing supply, wider investment and housing related services that inform an overall national housing profile;
- Inform policies about the proportion of social and affordable housing required;
- Provide evidence to inform policies related to the provision of specialist housing and housing related services.

The HNDA is required to be integrated into the development plan review process where planning authorities give notice of review of a development plan in accordance with section 11(1) of the 2000 Act, after the date of Circular 14/2021 (14 April 2021). As the notice of the review of the Wicklow County Development Plan occurred before the date of this circular, the HNDA is not being carried out at this time. It will however be carried out in due course, and should it identify that amendment of the County Development Plan is necessary to reflect its outcomes, the plan will be varied accordingly. Therefore until this exercise is completed, this Housing Strategy is to be considered an 'interim' one.

1.2 Context

In the drafting of this Housing Strategy, regard has been taken of the following national, regional and local policy documents:

- Project Ireland 2040: National Planning Framework (NPF)(2018)
- 'Implementation Roadmap for the NPF' (2018)
- Housing Supply Target Methodology for Development Planning, Guidelines for Planning Authorities' (2020)
- Programme for Government: Our Shared Future (2020)
- Eastern & Midland Regional Assembly: Regional Spatial & Economic Strategy 2019-2031
- Part V of the Planning and Development Act 2000 – Guidelines for Planning Authorities (DoEHLG 2000)

Project Ireland 2040: National Planning Framework (NPF)

The NPF predicts that between 2018 and 2040, an average output of at least 25,000 new homes will need to be provided in Ireland every year to meet people's needs for well-located and affordable housing, with increasing demand to cater for one and two-person households. Within this figure, there is a wide range of differing housing needs that will be required to be met. The Framework states that achieving this level of supply will require increased housing output into the 2020s to deal with a deficit that has built up since 2010. To meet projected population and economic growth as well as increased household formation, annual housing output will need to increase from 30,000 to 35,000 homes per annum in the years to 2028 and will be subject to monitoring and review.

The NPF identifies a number of national core principles to guide future housing as follows.

National Core Principles to Guide Housing

- Ensure a high standard quality of life for future residents as well as environmentally and socially sustainable housing and placemaking through integrated planning and consistently excellent design.
- Allow for choice in housing location, type, tenure and accommodation in responding to need.
- Prioritise the location of new housing provision in existing settlements as a means to maximising better quality of life for people through accessing services, ensuring a more efficient use of land and allowing for greater integration with existing infrastructure.
- Tailor the scale and nature of future housing provision to the size and type of settlement where it is planned to be located.
- Integrate housing strategies where settlements straddle boundaries (county and/or regional).
- Utilise existing housing stock as a means to meeting future demand.

(Source: National Planning Framework, 2018)

Implementation Roadmap for the NPF (July 2018)

Subsequent to the publication of the NPF in 2018, a NPF 'Roadmap' circular was issued to all planning authorities, setting out projected county population ranges (in the format of minimum and maximum parameters), for both 2026 and 2031. These population projections, set out in Appendix 2 of the NPF Roadmap, have subsequently been incorporated into the statutory Regional Spatial and Economic Strategies (RSEs) adopted by each of three Regional Assemblies.

For Wicklow the 2026 and 2031 projections are 155,000 - 157,500 and 160,500 – 164,000 respectively, from the 2016 base of 142,500.

The 'Roadmap' specifies that scope for 'headroom', not exceeding 25%, can be considered to 2026 in those counties where projected population growth is projected to be at or above the national average baseline, including County Wicklow.

Housing Supply Target Methodology for Development Planning

Under Section 28 of the Planning & Development Act, 2000 (as amended), the '*Housing Supply Target Methodology for Development Planning, Guidelines for Planning Authorities*' were issued on 18th December 2020.

These Guidelines are intended to assist in providing the required consistent and coherent approach to be taken by planning authorities in incorporating national and regional population and housing projections into their statutory functions.

The methodology utilises research undertaken by the ESRI – '*Regional Demographics and Structural Housing Demand at a County Level*' (Dec 2020). The ESRI research model enables structural household demand levels for each local authority area to be set out under the four different scenarios for each year to 2040. The identified NPF '50:50 City' scenario is the recommended housing demand scenario to be used by planning authorities in their planning functions in order to plan for the provision of housing to meet projected levels of demand in their administrative area, in accordance with the NPF strategy.

The NPF '50:50 City' scenario results in an alternative spatial distribution, where population growth is more evenly distributed between the Eastern and Midland regional assembly area and the rest of the country and where counties with larger cities attract higher inflows. The scenario captures two core national policy objectives - aiming to have population growth more evenly distributed throughout Ireland and less focused on Dublin and its surrounding area, and also taking advantage of the potential of cities to accommodate more compact growth and to drive regional development.

Programme for Government: Our Shared Future 2020

'Programme for Government – Our Shared Future' launched in 2020, emphasises the role of the private housing stock, addresses the challenges of viability, access to finance, land availability, infrastructure delivery, building standards, quality and regulation, as well as sufficient skilled labour capacity.

The key housing priorities guiding the Programme for Government are as follows:

- Homelessness
- Affordable home ownership
- Public and social housing
- Land Development Agency
- Rent reform and cost rental
- Planning and Reform

Specifically, the Programme for Government provides for an expansion in the stock of social housing by 50,000 dwellings over five years, the launch of a new affordable homes programme and the upgrading of 500,000 existing dwellings by 2030. The Affordable Housing Act 2021 provides statutory underpinning for three affordable schemes:

- local authorities delivering affordable homes for sale on public land,

- a shared equity scheme, and
- the cost rental support model.

Regional Spatial and Economic Strategy 2019 (RSES)

The RSES recognises that housing affordability and supply issues are impacting upon health and wellbeing, due to overcrowding, with people residing in substandard accommodation or becoming homeless. The slow growth of housing stock compared to rates of population growth and household formation has led to an increase in the average number of persons per household to around 2.8 in the Region, based on the 2016 census, which saw a reversal of the long-term decline in the average household size. The RSES points out that there is a need to incentivise mobility in the housing market, to address social isolation among older people and to offer more choice by way of an increased supply of accommodation for all life stages. The RSES highlights the importance of housing quality to secure positive health outcomes.

The RSES provides that a further allowance of transition population targets (NPO 68¹ in the NPF) by way of up to 20% of the targeted growth in the city being transferred to other settlements in the Metropolitan Area Strategic Plan (MASP) shall apply only to the three Metropolitan Key Towns in the MASP namely Bray, Maynooth and Swords, and only if they can demonstrate compact growth on high capacity planned or existing public transport corridors. In accordance with NPO 68, the Regional Assembly in July 2020 approved the 'transfer' of population growth of 13,000 from the city to the metropolitan area settlement of Bray, of which 9,500 would be to that part of Bray located in Co. Wicklow.

1.3 Review of the 2016 - 2022 Housing Strategy

The 2016-2022 Housing Strategy set out the following objectives. A brief review of whether each objective has been achieved is set out below.

1. **HS1** *To ensure the delivery of sufficient new homes to accommodate the growth of the County to 158,000 persons in 2022.*

In accordance with the Regional Planning Guidelines for the GDA (2010), the 2016-2022 County Development Plan set out a target population for 2022 of 158,000 and target housing stock of 69,822.

The 2011 Census showed that the population of Wicklow was 136,640 and had a housing stock of 54,351.

Census 2016 revealed that the County's population was 142,425, with a housing stock of 54,986. Therefore in order to meet the 2022 targets as set out in the 2016 County Development Plan, further population growth of 15,675 and housing stock growth of 14,836 units would have been required during the 2016-2022 period (or 2,473 units per annum).

¹ National Policy Objectives 68 of the NPF states: 'A Metropolitan Area Strategic Plan¹ may enable up to 20% of the phased population growth targeted in the principal city and suburban area, to be accommodated in the wider metropolitan area i.e. outside the city and suburbs or contiguous zoned area, in addition to growth identified for the Metropolitan area. This will be subject to:

- any relocated growth being in the form of compact development, such as infill or a sustainable urban extension;
- any relocated growth being served by high capacity public transport and/or related to significant employment provision; and National Policy Objective 9, as set out in Chapter 4.

Table 1.1 Completions 201-2020 County Wicklow

CSO House Completions 2011 – 2020												
2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	Average 17-20	Total 11-20	Average 11- 20
218	149	138	155	293	354	479	589	1116	1,046	808	4,537	454

Source: CSO

Between Q1 2017 and Q4 2020, 3,230 units have been completed which is an average of 808 units per year.

Although the number of units is well below the target identified in the 2016 County Development Plan, the data shows that the County has seen a consistent increase in the number of housing completions year on year since 2012.

2. **HS2** *To ensure that houses are delivered in the locations required, to implement a balanced settlement strategy that provides for growth towns of varying sizes throughout the County.*

A review of housing commencements and completions in the County revealed that between 2016 and the end of 2020, a total of 3,230 units had been completed with a further 2,650 estimated to have commenced / be under construction as of the end of 2020. Of the units completed, 1,860 units or 58% were located in the County’s higher level settlements (Bray, Wicklow-Rathnew, Arklow, Blessington and Greystones-Delgany), while 71% of those units under construction are located in these same towns. The towns of Newtownmountkennedy, Rathdrum and Ashford also recorded high numbers of commencements and completions.

3. **HS3** *To ensure sufficient zoned land is available in all growth settlements to meet projected housing demand.*

The housing target in the 2016 County Development Plan for 2022 was 69,822, an increase of 15,471 units. Of the 15,471 units, 13,473 were targeted to be developed in settlements. The housing yield of land zoned in Local Area Plans (Bray, Wicklow-Rathnew, Arklow, Greystones-Delgany & Kilcoole, Blessington, Newtownmountkennedy and Rathdrum), at the time of adoption of the 2016 County Development Plan, was 23,513 units. Land zoned as part of the settlement plans which formed part of the County Development Plan had capacity for a further 4,369 units. Therefore there was adequate land zoned to cater for the housing target.

4. **HS4** *To ensure that water services are or will be available during the currency of the plan, sufficient to meet the housing demand.*

The table below, taken from the 2016 – 2022 housing strategy, shows the estimated number of housing that would have been possible to develop given the infrastructure capacities as of September 2015.

Town	Total housing yield of zoned land ²	Total housing yield of serviced land ³
Bray	4,689	2,086
Wicklow / Rathnew	5,640	5,640
Arklow	4,000	0
Greystones/ Delgany	3,767	2,000
Blessington	1,840	0
Newtown	1,706	750
Ashford	858	858
Aughrim	287	0
Baltinglass	521	75
Carnew	365	0
Dunlavin	840	0
Enniskerry	470	300
Kilcoole	782	250
Rathdrum	1,089	300
Tinahely	231	50
Avoca	120	0
Donard	37	37
Kilmacanogue	151	151
Newcastle	211	0
Roundwood	195	0
Shillelagh	83	0
Total	27,873	12,497

The table illustrates that a number of settlements had infrastructure deficiencies. Given the housing target of 15,471 units up to 2022, of which 13,473 were targeted to be developed in the urban settlements, there was inadequate serviced land available (enough land serviced to accommodate c. 93% of the urban housing growth targeted). The deficiencies in Arklow and Blessington, both of which were targeted for significant growth, have not been addressed to date and this has impacted on the delivery of housing in these settlements. Infrastructure deficiencies have also impeded development in Aughrim, Dunlavin, Tinahely and Avoca.

5. **HS5** *To ensure that investment in infrastructure is distributed in a balanced manner around the County, with priority given to designated growth towns.*

There has been limited major investment in infrastructure between 2016 and 2021:

- (a) IW is making a significant investment in the Vartry Water Supply Scheme to ensure a safe and sustainable water supply for the north Wicklow and south Dublin area, estimated at c. €150m and due for completion in 2021. The project includes *inter alia* the construction of a new water treatment plant at Vartry, the construction of a new 4km pipeline from Vartry and Callowhill and the upgrade / replacement of other infrastructure. The scheme will ensure that water complies with water quality standards set out in the EU Drinking Water Directive and the national Drinking Water Regulations. The project will also ensure that this critical water supply network can operate safely through any intense rainfall events

² As of Sept 2015, including the amended zoning provisions of the adopted County Development Plan 2016-2022

³ as of Sept 2015

- (b) Arklow / Ballyduff Water Treatment Plant Upgrade – Irish Water has invested €5 million in a new water treatment plant that serves 13,000 customers from a combination of both ground and surface water sources which has improved the water quality in the area and further secured the water supply.
- (c) Irish Water, working in partnership with Wicklow County Council, has invested €650,000 to upgrade the water treatment plant in Avoca, Co. Wicklow.
- (d) The new plant has been designed to provide an ultimate treatment capacity for a PE (population equivalent) of up to 36,000 and construction work commenced in August 2021.

6. **HS6** *To require that 10% of all zoned land developed for residential use, or for a mixture of residential and other uses, shall be devoted to social housing.*

In accordance with Policy Objective HD4 of the County Development Plan 2016-2022, the Planning Authority has required that 10% of all zoned land developed for residential use, or for a mixture of residential and other uses, is devoted to social housing.

7. **HS7** *To require all applicants for permission that will include social housing to engage in meaningful pre-planning discussions with both the Housing and Planning Authorities, in order to establish at the outset the location, house size and house design requirements of both Authorities.*

Applicants for developments including social and / or affordable housing have generally engaged in pre-planning discussions with both the Housing and Planning departments, in order to establish at the outset the location, house size and house design requirements of the Local Authority.

8. **HS8** *To require the highest standard of design in all new social development or development containing an element of social housing, in accordance with the development standards set out in the County Development Plan and the DoEHLG social housing guidelines.*

The highest standard of design has been required in all new social / affordable development or development containing an element of social / affordable housing, in accordance with the development standards set out in the County Development Plan and the DoEHLG social housing guidelines. All new social housing are to NZEB (Nearly Zero Emissions Building) standard.

9. **HS9** *To encourage proposals from developers to satisfy Part V obligations which are directed toward special need categories – namely, elderly accommodation, traveller accommodation, specialised accommodation for the homeless and specially adapted accommodation for persons with disabilities – where the proposal is related to an identified local need and is consistent with other policies of the Development Plan.*

Developers have been encouraged, as part of the Part V obligations, to deliver housing that addresses special need categories – namely, elderly accommodation, traveller accommodation, specialised accommodation for the homeless and specially adapted accommodation for persons with disabilities – where the proposal is related to an identified local need and is consistent with other policies of the Development Plan.

1.4 Approach

The approach adopted is summarised below:

- Project the number of expected household formations in the County for the period of the Development Plan, which will be Q3 2022 to Q2 2028. The methodology for translating population targets into housing targets is set out in Ministerial Guidelines 'Housing Supply Target Methodology for Development Planning' (DHLGH December 2020).
- Project the levels and distribution of household disposable incomes across these households over the period in question. This involves the application of available national income data to Wicklow and the characterisation of different income groupings across households within the County.
- Assess housing affordability in the County over the period, based on the income projections made.
- Project the levels and distributions of house prices over the period. A distribution of house price bands is then constructed which is matched up with the above-mentioned affordability bands.

1.5 Methodology and Data Sources

In preparing the strategy, reference was made to the following guidelines and data sets⁴:

- Department of the Environment, Heritage and Local Government guidelines – “Part V of the Planning and Development Act 2000 – Housing Supply – A Model Housing Strategy and step-by-step guide”, December 2000;
- Implementation Roadmap for the NPF (July 2018);
- Housing Supply Target Methodology for Development Planning, Guidelines for Planning Authorities (December 2020);
- CSO Census data;
- CSO quarterly data on house completions;
- CSO income data;
- House price data from the Property Price Register.

Where data was available on a national basis only, enabling assumptions were necessarily made regarding how - if at all - the position in Wicklow departed from national trends. In all cases where standard national projections (either in population, incomes or prices) were used, care was taken to make whatever adjustment might render the dataset more appropriate to the particular circumstances of Wicklow. Notwithstanding this issue of the application of (adjusted) national data to the County specific context, a principal concern throughout the preparation of this strategy has been that all available datasets should be identified and accessed, and that any inference or interpretation drawn from that data should be clearly stated, well-reasoned, and well founded.

In relation to house price data in particular, the Planning Authority has constructed its own forecasts of house price trends. Due to the unknown impact of external factors on the economy, such as COVID-19 and Brexit, at the time of drafting this strategy (2020 / 2021), it is not possible to source predictions upon which there is consensus.

Therefore in order to make the analysis robust, the 'best case' scenario (in terms of housing affordability) is utilised for the analysis. Similarly, with regard to predicting the growth of disposable income a 'best case'

⁴ This strategy was drafted in mid 2015 and utilised data available at that time. For example, Census data utilised is from 2011.

position is used for analysis, as the combination of these scenarios (i.e. assuming growth in disposable income⁵, with moderate house price growth) would give the least justification for seeking the maximum 10% social housing (or 20% social and affordable housing in certain circumstances) under Part V.

⁵ The disposable income is determined by calculating the average income between 2000 and 2017 based on CSO data.

2. Estimating Housing Demand

2.1 Population Trends

The most up to date population data is the 2016 Census. According to the 2016 census, the population of the state was 4,761,865, an increase of 173,613 persons compared with 2011. This represents an increase of 3.8 % over a 5 year period, or slightly under 0.8 % on an annual average basis. The population change is driven by three elements - births, deaths and net migration (immigration less emigration). The decrease in the population growth rate is due largely to a fall in the state's births rate.

Table 2.1: Population of State 1996 -2016

State	Population	% Change
1996	3,626,087	
2002	3,917,203	8.03%
2006	4,239,848	8.24%
2011	4,588,252	8.22%
2016	4,761,865	3.78%

Source: CSO Population at Each Census 1841 to 2016

The 'Eastern Region' of the Eastern and Midlands Region, made up of counties Kildare, Louth, Meath and Wicklow, had a population of 688,857 in 2016. This represents around 14.5% of the population of the State. It too has seen a decreasing trend in population growth over a 5 year period between 2011 and 2016, decreasing from 11.38% between 2006 and 2011 to 5.33% 2011-2016.

Table 2.2: Population of Eastern Region 1996 -2016

Eastern Region	Population	% Change
1996	439,573	
2002	514,446	17.03%
2006	586,627	14.03%
2011	653,984	11.48%
2016	688,857	5.33%

Source: CSO Census of Population 1996, 2002, 2006, 2011 and 2016

Wicklow's population increased from 136,640 in 2011 to 142,425 in 2016. This represents an increase of 4.2%; while this is lower than previous intercensal growth rates, it is slightly higher than the State's growth rate.

Table 2.3: Population of Wicklow 1996 -2016

Wicklow	Population	% Change
1996	102,683	
2002	114,676	11.68%
2006	126,194	10.04%
2011	136,640	8.28%
2016	142,425	4.23%

Source: CSO Census Population 1996, 2002, 2006, 2011, 2016

In accordance with national and regional policy, the draft Wicklow 'Core Strategy' 2022 – 2028 sets out the following population and housing targets.

Table 2.4 Population Targets County Wicklow 2026, 2031

	2016	2026	2031	Total growth 2016-2031
County Wicklow plus 25% headroom (2026 only)	142,425	155,000 - 157,500 158,144 – 161,269	160,500 – 164,000	18,075 – 21,575
plus MASP allocation (2031)			170,000 – 173,500	27,575 – 31,075
of which Bray (min)				9,500

Source: NPF, NPF Roadmap, RSES, WCC, Wicklow CDP

2.2 Housing Stock Requirements

The methodology for translating population targets into housing targets is set out in Ministerial Guidelines 'Housing Supply Target Methodology for Development Planning' (DHLGH December 2020).

Table 2.5 Housing Demand NPF Roadmap / Ministerial Guidelines 2017-2031

County Wicklow	Total	Per annum
ESRI NPF scenario projected new household demand 2017 to 2031	10,976	732
Actual new housing supply 2017-2019	2,190	730
Homeless households, and estimated unmet demand as at Census 2016	150	
Housing demand 2020 - 2031	8,936	745

Source: Appendix 1 'Housing Supply Target Methodology for Development Planning Guidelines for Planning Authorities' (DHLGH, 2020).

Methodology is provided in the guidelines to establish the housing demand up to 2026, taking into account the 25% 'headroom' up to 2026 that is afforded to County Wicklow in the NPF 'Roadmap'. In addition, further guidance and data has been provided by the Department into the crafting of the population and housing targets for the development plan 6-year period, which integrates the +25% for 2026 methodology as well as units completed / estimated to be completed by the time the plan is adopted.

In accordance with said guidance, the following table sets out the housing target for the plan period i.e. up to Q2 2028.

Table 2.6: Housing supply targets for Q3 2022 – Q2 2028

	County Wicklow	Annual average households	Total Households
A	ESRI NPF scenario project new household demand 2017 to Q2 2028	716	8,238 ⁶
B	Actual new housing supply 2017 to Q3 2022	976	4,634 ⁷
C	Homeless households and unmet demand		150
D	Plan housing demand = Total (A-B+C)		3,754
E	Potential adjustment 1 to end 2026 portion of plan period to facilitate convergence to NPF strategy	Mid-Point between ESRI NPF and baseline scenarios to 2026 in lieu of A above	Adjusted total demand
E1	ESRI baseline scenario projected new household demand 2017 to Q4 2026	796	7,960
E2	ESRI NPF scenario projected new household demand to Q2 2028	1,111	1,111
E3	Mid-Point between A-E2 (ESRI NPF and baseline scenarios, to Q4 2026	754	7,544
E4	Adjusted total demand calculation based on E + E3 in lieu of A above	695	4,171
F	Potential adjustment 2 to end 2026 portion of plan period to facilitate convergence to NPF strategy, applicable where B exceeds or is close to D (where justified)	Mid-point between ESRI NPF and baseline scenarios to 2026 in lieu of A above, plus up to 25%	Adjusted Total Demand
F1	E3 +25%	943	9,429
F2	Remainder plan period demand to Q2 2028	1,111	1,111
F3	Adjusted Total Demand calculation based on E3 in lieu of A above and F1 + E2	1,009	6,056

In this regard, the housing demand up to for the period Q3 2022 to Q2 2028 is 6,056 units.

Taking into account

- the overall target for 2016-2031 of 11,126 (as shown on Table 2.5 above)⁸;
- the units already completed up to 2020 (3,230);
- the estimated unit completions for 2021 and the first half of 2022 (1,404);
- the calculated housing delivery target units between Q3 2022 and Q2 2028 (6,056);

the growth remaining for the Q3 2028 - Q4 2031 period appears unreasonably low, at 436 units over a 3 ½ year period or 125 units per annum. However, it is assumed well before 2028, growth targets will be reviewed / revised and new targets will be provided for the post 2028 period.

⁶ Source: DHLGH - ESRI

⁷ Source: Completions 2017-2020 (3,230) PLUS estimate of completions 2021 (936) and Q1+Q2 2022 (468)

⁸ 10,976 + 150

Table 2.7 Housing Demand NPF Roadmap / Ministerial Guidelines 2022, 2028, 2031

County Wicklow	Units delivered 2017-2020	Estimated completions 2021 + Q1/Q2 2022	Q3 2022 – Q2 2028	Q3 2029 – Q4 2031	Total
New housing demand	3,230	1,404	6,056	436	11,126

Neither the NPF 'Roadmap' nor the 2020 Guidelines take account of the additional population allocation to Bray as per the MASP. This equates to 3,820 units⁹, and assuming they will be delivered over a 9.5 year period from Q3 2022 to Q4 2031¹⁰, this equates to 402 units per annum. This will be assumed to be delivered in a linear even manner and no 'front loading' for 2026 is provided for as per the MASP:

Table 2.8 Housing Demand NPF Roadmap / Ministerial Guidelines 2028, 2031+MASP

County Wicklow	Units delivered 2017-2020	Estimated completions Q1 2021 – Q2 2022	Target Q3 2022 – Q2 2028	Target Q3 2028 - 2031	Total
New housing demand	3,230	1,404	8,469	1,843	14,946

Table 2.9 Annual housing delivered / delivery targets 2017-2031

Year	Completions	Estimated completions up to Q2 2022	Targeted completions Q3 2022 – Q4 2031
2017	479		
2018	588		
2019	1,116		
2020	1,046		
2021		936	
2022		468	706
2023			1,411
2024			1,411
2025			1,411
2026			1,411
2027			1,411
2028			969
2029			528
2030			528
2031			528

⁹ Using the same ratio of population: housing units as provided for in the guidelines

¹⁰ This is in accordance with the RSES which indicates that this additional allocation is for the period up to 2031 (medium term) and takes into account that development projects on the two identified 'strategic sites' in Bray (Bray Golf Club and Fassaroe) comprising in excess of 1,500 units are at an advanced stage as of Q3 2021

Having established the population and housing growth parameters for the County for the plan period (to Q2 2028) and the longer term period of end Q4 2031, these targets must then be allocated to the various settlements / aggregate settlement groups as established in the Wicklow settlement hierarchy (see Chapter 3 of the Development Plan).

Housing growth rates targeted for each settlement / settlement tier are reflective of the respective position of each settlement or groups of settlement in the overall hierarchy, the tier designation and any growth parameters associated with same as may be provided in the NPF or RSES, and the capacity of that settlement / settlement tier for growth having regard to the asset based assessment.

In a small number of cases, the targeted housing growth rate has had to take account of significant legacy housing developments already in train, which would result in a higher growth rate than may have been appropriate for the settlement given its position in the hierarchy and asset capacity.

Level	Settlement	Justification
1 2	Bray	Key Towns are identified for growth rates of c. 35% having regard to their identification on the RSES and are towns suitable for higher levels of growth.
	Wicklow - Rathnew	
3	Arklow	Towns in Level 3 are targeted for growth rates of 25%-30%, with slight variations based on capacity / past trends. It is estimated that growth in Greystones – Delgany will exceed this target range before the end of the plan period due to legacy housing developments under construction.
	Greystones - Delgany	
	Blessington	
4	Baltinglass	Towns in Level 4 are generally targeted for growth rates around 20%-25%. Newtownmountkennedy (at c.65%) and Rathdrum (at c.45%) will significantly exceed this target due to legacy housing developments under construction. The goal for these towns is to limit further development, other than for town centre infill / regeneration. It is estimated that growth in Kilcoole will exceed this target range before the end of the plan period due to legacy housing developments under construction.
	Enniskerry	
	Kilcoole	
	Newtownmountkennedy	
	Rathdrum	
5	Ashford	Towns in Level 5 are generally targeted for growth rates of 15%-20%. Ashford (at c.60%) will significantly exceed this target due to legacy housing developments under construction. The goal for this town is to limit further development, other than for town centre/ infill / regeneration.
	Aughrim	
	Carnew	
	Dunlavin	
	Tinahely	
6	Avoca	Towns in Level 6 are generally targeted for growth rates of 10%-15%.
	Donard	
	Kilmacanogue	
	Newcastle	
	Roundwood	
	Shillelagh	
7 - 9 10	Villages / clusters Open countryside	Growth rate of 5%-10% identified as appropriate for rural villages and open countryside.

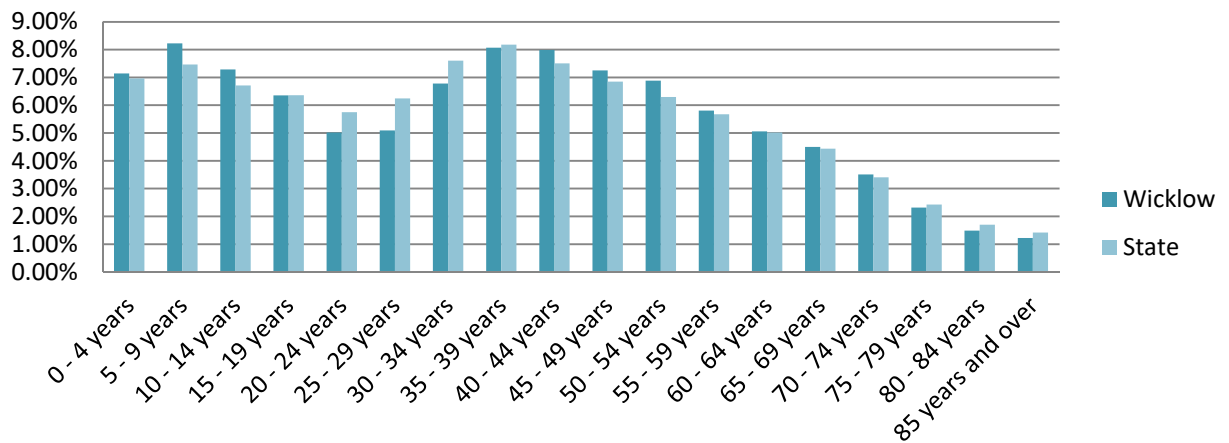
Level	Settlement	Housing Stock 2016	Completions 2017-2020	Estimated completions 2021-Q2 2022	Housing Growth Q3 2022-Q2 2028	Housing Growth Q3 2028-Q4 2031	Total Housing Growth 2016-2031
1	Bray	11,232	165	100	4,026	771	5,062
2	Wicklow - Rathnew	5,456	650	200	1,267	275	2,392
3	Arklow	5,406	165	100	790	166	1,221
	Greystones - Delgany	6,766	875	400	508	170	1,953
	Blessington	1,914	5	40	393	81	519
4	Baltinglass	903	46	40	85	24	195
	Enniskerry	648	34	40	36	15	125
	Kilcoole	1,451	97	20	140	30	287
	Newtownmount -kennedy	1,222	250	100	433	99	882
	Rathdrum	669	132	100	68	31	331
5	Ashford	2,390	255	90	129	41	515
	Aughrim						
	Carnew						
	Dunlavin						
	Tinahely						
6	Avoca	1,534	46	30	114	28	218
	Donard						
	Kilmacanogue						
	Newcastle						
	Roundwood						
	Shillelagh						
7-9 10	Villages / clusters Open countryside	15,395	510	134	478	117	1,249
	Total	54,968	3,230	1,404	8,467	1,848	14,949

2.3 Demographic and Occupancy Trends (2016)

The demand for housing and the type of housing that will be required in the County will be influenced by the age profile of the County and its household composition.

2.3.1 Age Structure

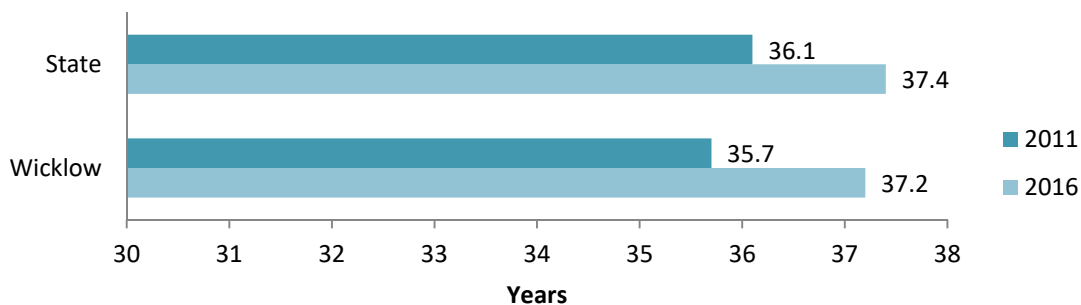
Fig. 2.1 2016 Age Cohorts for Wicklow and the State



Source: CSO Population 2011 to 2016

- The percentage of persons under 19 in Wicklow is 29% compared to 27.5% for the State;
- The percentage of persons under 24 in Wicklow is 34% compared to 33.2% for the State;
- The percentage of persons between 25-44 in Wicklow is 28% compared to 29.5% for the State;
- The percentage of persons between 45-64 in Wicklow is 25% compared to 23.8% for the State;
- The percentage of persons over 65 in Wicklow is 13% compared to 13.4% for the State.

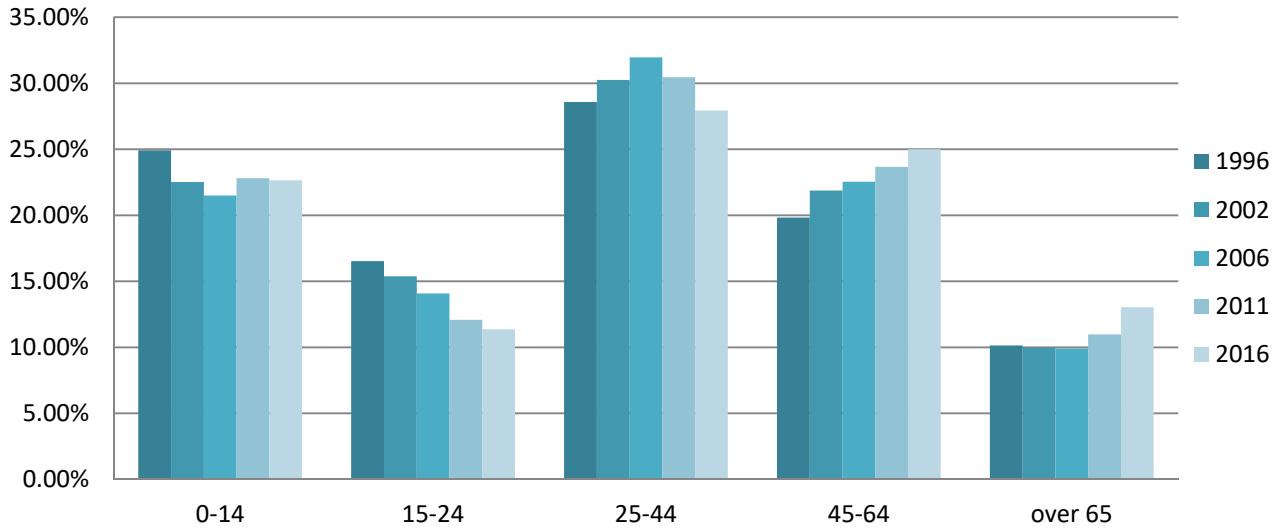
Fig. 2.2 Mean Average Age 2011-2016



Source: CSO Census 2011 and 2016

The age profile for Wicklow between 1996 and 2016 indicates an increase in the older age profile for the county. This can be seen in the mean average age of the county which has increased from 35.7 in 2011 to 37.2 in 2016.

Fig. 2.3 Age Cohorts County Wicklow 1996-2016



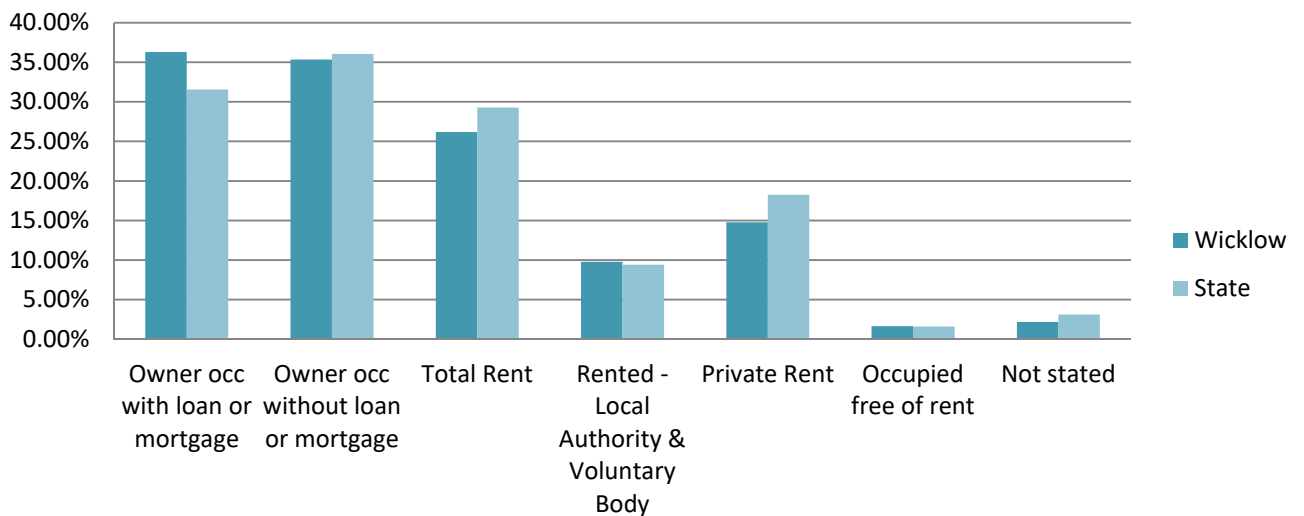
Source: CSO Census Population 1996, 2002, 2006, 2011, 2016

The graph above illustrates the notable decline in the 15-24 age cohort. Since 2006, there has also been a decline in the 25 – 44 age cohort. In contrast, there has been a steady increase in the 45-64 age cohort. Since 2006, there has been a gradual increase in the over 65s.

2.3.2 Housing Tenure

County Wicklow has a higher rate of owner occupied houses than the regional or national average; with c. 71.5% of households occupying their own homes either with or without a mortgage (the regional average is 64.9% and state average is 67.5%). This represents a slight decline from 2011 when home ownership rates were 73% for Wicklow and 70% for the state. Wicklow has a lower rate of renting (all forms of renting) than the State average, and this is mainly due to a lower rate of renting from private landlords, as the rate of renting from the Local Authority is in fact slightly higher in Wicklow than the national average.

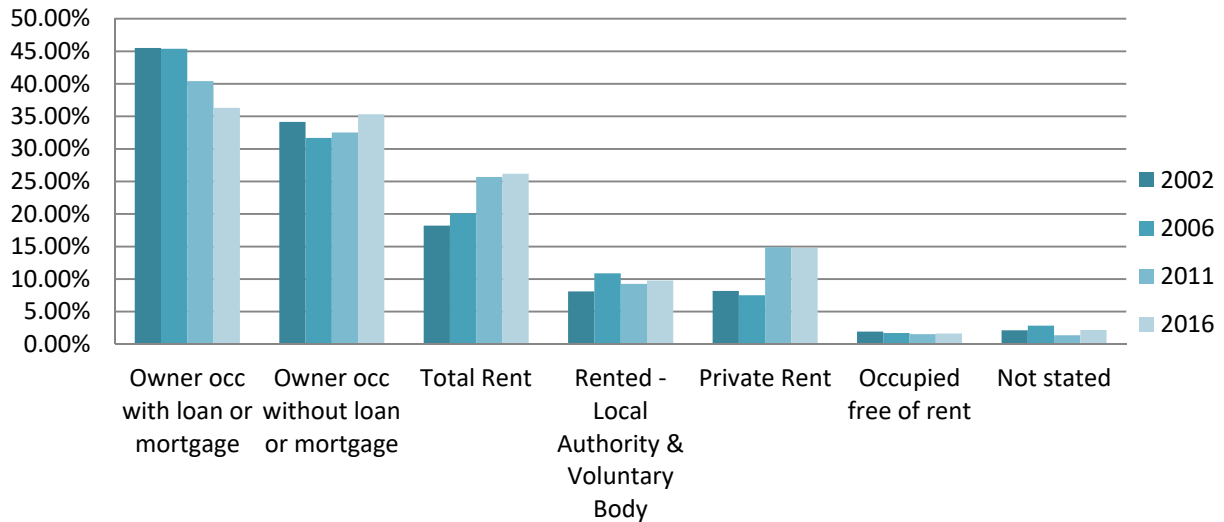
Fig. 2.4 Housing Tenure 2016



Source: CSO Private Households in Permanent Housing Units 2011 to 2016

With respect to changes in tenure since 2002, the starkest change continues to be the increased rate of people renting, particularly renting from private landlords. There is also a notable decrease in the number of owner occupiers paying mortgages.

Fig 2.5 Wicklow Housing Tenure 2002-2016



Source: CSO, Private Households in Permanent Housing Units 2002, 2006, 2011 and 2016

2.3.3 Household Size

Table 2.11 Average Household Size

	1971	1981	1991	2002	2006	2011	2016
Wicklow	3.95	3.71	3.41	3.07	2.89	2.83	2.87
State	3.94	3.68	3.34	2.95	2.81	2.73	2.75

Source: CSO Average Number of Persons per Private Household in Permanent Housing Units 1971 to 2016

Census 2016 revealed that the average number of persons per household recorded an increase for the first time since 1966. In 2011 there were on average 2.73 persons per household. This increased to 2.75 in 2016. Despite this, it is assumed that in the medium to long term, the average number of persons in private households will once again decline due to wider demographic trends associated with lower fertility rates and an ageing population. The National Planning Framework indicates that the average household size is expected to decline to 2.5 persons by 2040.

Nationally, the growth in household size was confined to the urban areas (i.e. settlements with a population of 1,500 persons or more) with an increase from 2.64 to 2.69. However in rural areas, the downward trend in the average number of persons per household continued in the 2011-2016 intercensal period (2.87 to 2.84).

Table 2.12 illustrates the breakdown of household size in County Wicklow relative to the state average. As can be seen, Wicklow has a lower percentage of one and two person households than the state. However, the County has a higher percentage of three, four and five person households than the state average.

Table 2.12 Private Households by Size

	1 person	2 person	3 person	4 person	5 person plus
Wicklow	20.1%	27.8%	18.5%	18.9%	14.5%
State	23.4%	28.5%	17.4%	16.9%	13.5%

Source: CSO Private Households 2011 to 2016

2.3.4 Housing Stock

The total housing stock in County Wicklow in 2016 was 54,986. This represented an increase of 635 units compared with 2011. The vacancy rate declined from 9.9% in 2011 to 8.1% in 2016. This compares with the State's vacancy rate which declined from 14.5% to 12.3% over the same period.

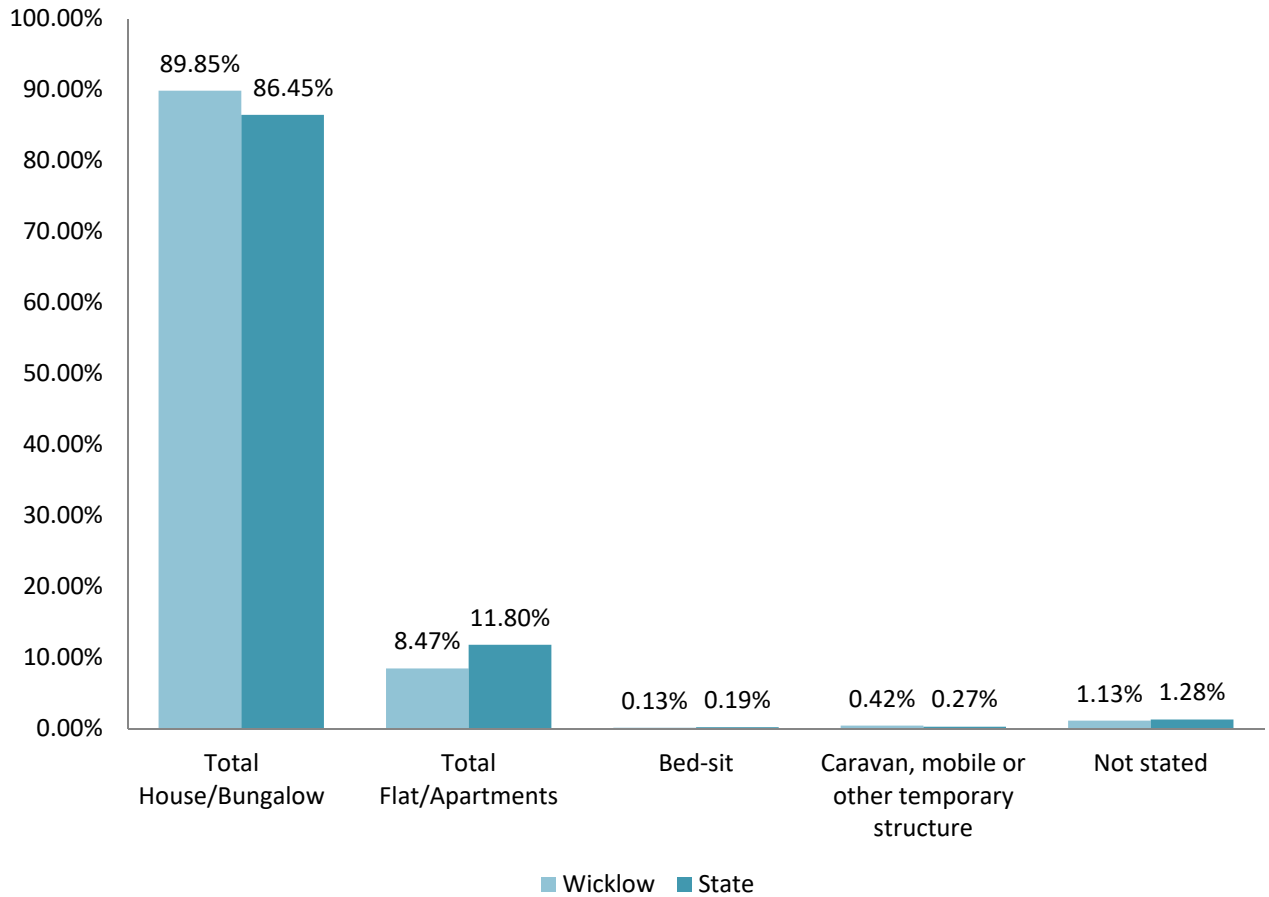
As stated in the National Vacant Housing Reuse Strategy¹¹ a vacancy rate of between 2.5% and 6% is considered normal in a properly functioning housing market. This vacancy rate allows for dwellings under renovation, in between tenancies (in both public and private housing stock) and those dwellings left vacant while being sold.

2.3.5 Housing Type

In terms of the type of housing, the majority of accommodation (almost 90%) in the County comprises dwelling houses¹². This is higher than the state average which is 86.4%. As of 2016 there were 4,170 apartments / flats in the County which equates to approximately 8.5% of private households, lower than the state average of 11.8%.

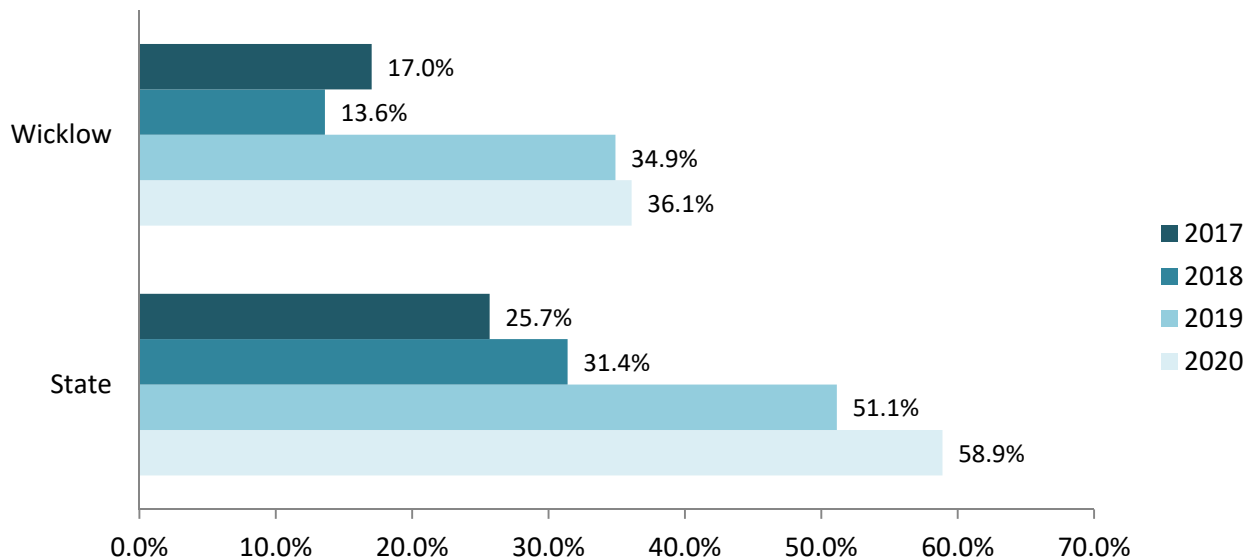
¹¹ <https://www.gov.ie/en/publication/9f259-national-vacant-housing-reuse-strategy/>

¹² This includes detached, semi-detached and terraced.



Source: CSO, Census 2016

Planning permission data indicates a growing trend towards the provision of more apartments as a percentage of total new housing applications. As Fig. 2.7 illustrates, between 2017 and 2020, permission for new apartments in the County increased from 17% to 36.1%. This compares with the state average of 25.7% in 2017 to 58.9% in 2020.

Fig 2.7 Planning permission for flats/apartments 2017-2020

Source: CSO Planning Permissions Granted for New Houses and Apartments ¹³

2.3.6 Implications for Housing Strategy

- With respect to age structure, the steady increase in the proportion of the County that is over 45 will in due course, require additional provision to be made for housing suitable for 'empty nesters' and older persons in need of specially adapted housing or housing with relevant services.
- At the other end of spectrum, the proportion of those in the 15-24 age cohort has been falling, which may suggest an easing off in pressure for new 'starter homes' from those already resident in the County during the lifetime of this strategy, as these are likely to be the persons seeking such housing up to 2028.
- However, given the increase in population in the under 14 age cohort, this easing off is unlikely to continue beyond 2028, when this large cohort is likely to start needing housing of their own.
- Notwithstanding the modest increase in household size between 2011 and 2016, it is likely that household size will start to fall again. The National Planning Framework indicates that the average household size is expected to decline to 2.5 persons by 2040. Accordingly, provision should be made in housing plans for more 1 and 2 bedroom units. However, it needs to be borne in mind that c. 69% of all 2 person households (or 40% of all 1 and 2 person households) are either a husband and wife or cohabitating couple household with no children and while a proportion of these may be 'empty nesters', there is a strong likelihood that many of such households could expand to 3 or 4 person households within the lifetime of this strategy.
- The increase in renting from the private sector does not necessarily imply an increased demand for this type of housing, but instead a lack of finance to purchase and a lack of supply of new homes on the market. Any housing strategy must ensure that there is adequate supply of zoned and serviced land to address the supply side as the demand appears to be there – the obstacle to be addressed being funding for both the developer and the purchaser.

¹³ <https://www.cso.ie/en/statistics/construction/planningpermissions/>

3. Household Incomes & Projections

3.1 Estimated Distribution of Household Disposable Incomes

Household incomes are a key determinant of affordability, as set out in Section 93(1) of the Act. With rising house prices, an important measure of house price affordability is the ratio of house prices to disposable income.

Income distribution (i.e. the proportion of households in certain income groups), rather than average income is utilised as it allows more meaningful comparisons to house prices. The income distribution for Wicklow was developed as follows:

- The CSO Household Budget Survey for 2015-2016 (which is undertaken every 5 years) was used as the starting point to determine household income distribution for the life time of strategy. It contains the estimated data on total income and disposable income of household on a national level.
- This distribution was then adjusted on the basis of assumptions made about the gap between Wicklow and national levels of household income. To adjust this to a county level an inflated / deflated rate is used to estimate disposable income in Wicklow. Wicklow's average annual household disposable income data was obtained by using CSO Quarterly Accounts for 2016 and County Income and Regional GDP from 2016. This had updated disposable income data for 2016, including a new inflator / deflator of 0.9775 for the county.

Table 3.1: Estimate of Wicklow's Average Annual Household Disposable Income by gross household income deciles 2016¹⁴

Income range	Average weekly disposable income (State)	Adjusted weekly disposable income (State)	% of households in each decile	Average annual disposable income (State)	Wicklow deflator 2016	Average annual household disposal household income Wicklow 2016	Number of households in Wicklow 2016
	2015-2016	2016		2016			
1st decile	€197.4	€207.09	9.83%	€10,768.80	0.9775	€10,526.69	4835
2nd decile	€324.4	€340.33	10.57%	€17,697.06	0.9775	€17,299.18	5202
3rd decile	€465.86	€488.73	10.47%	€25,414.15	0.9775	€24,842.77	5152
4th decile	€593.56	€622.70	10.44%	€32,380.60	0.9775	€31,652.59	5138
5th decile	€725.85	€761.49	10.25%	€39,597.44	0.9775	€38,707.18	5044
6th decile	€865.88	€908.39	9.94%	€47,236.52	0.9775	€46,174.52	4893
7th decile	€1,026.46	€1,076.86	9.62%	€55,996.68	0.9775	€54,737.72	4735
8th decile	€1,215.55	€1,275.23	9.65%	€66,312.14	0.9775	€64,821.26	4749
9th decile	€1,473.25	€1,545.59	9.61%	€80,370.50	0.9775	€78,563.55	4728
10th decile	€2,229.05	€2,338.50	9.62%	€121,601.81	0.9775	€118,867.86	4735
			100.00%				49211

Source: CSO Household Budget Survey 2015-2016 & Quarterly Accounts

¹⁴ Due to rounding, numbers presented in Table 3.1 and throughout other tables within this documents may not add up precisely to the totals provided and percentages may not precisely reflect the absolute figures

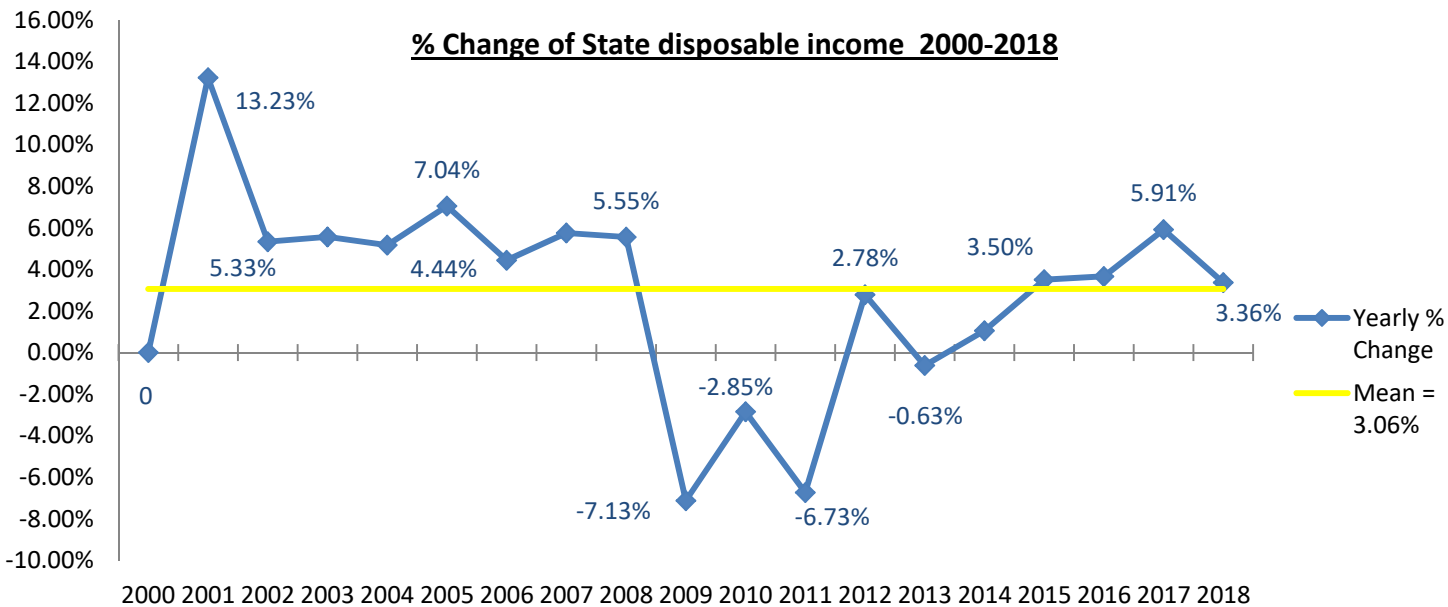
CSO Quarterly Accounts for 2017 -2020 were used to determine household disposable income for the same period.

Table 3.2: Percentage change of disposables income 2017 - 2020

Year	2017	2018	2019	2020
% Change of total disposable income	7.44%	4.53%	4.89%	7.32%

Source: CSO Quarterly Accounts

In terms of projecting household disposable income over the period of the strategy and up to 2031, assumptions will be based upon CSO Quarterly Account from 2000-2018 on a State level. This period has seen the rise and fall of the economy during and post Celtic tiger period. It is a good insight on how income has been affected over a long period of time and allows us to calculate average growth of disposable income.



Source: CSO

The chart shows the fluctuation of disposable income growth during and post 'Celtic tiger'. Over this period the mean disposable income growth rate within the state was slightly over 3.0% per annum.

Taking into account the current economic uncertainty as a result of COVID 19 and Brexit, an average of 2% disposable income growth is assumed for 2021 and 2022. An average of 3% disposable income growth is assumed thereafter for the purposes of this housing strategy.

3.2 Projected Household Disposable Income Distribution in Wicklow

Tables 3.3 and 3.4 set out the projected household disposable income distribution in Wicklow 2016 – 2024 and the percentage projected household disposable income distribution in Wicklow 2024 - 2028 respectively.

Table 3.3: Projected Household Disposable Income Distribution in Wicklow 2016 -2024

	2016	2017	2018	2019	2020	2021	2022	2023	2024
% change		7.44	4.53%	4.89%	7.32%	2.00%	2.00%	3.00%	3.00%
1st decile	€10,526.69	€11,309.87	€11,822.21	€12,400.32	€13,308.02	€13,574.18	€13,845.67	€14,261.04	€14,688.87
2nd decile	€17,299.18	€18,586.24	€19,428.19	€20,378.23	€21,869.92	€22,307.32	€22,753.46	€23,436.07	€24,139.15
3rd decile	€24,842.77	€26,691.07	€27,900.18	€29,264.50	€31,406.66	€32,034.79	€32,675.49	€33,655.75	€34,665.43
4th decile	€31,652.59	€34,007.54	€35,548.09	€37,286.39	€40,015.75	€40,816.07	€41,632.39	€42,881.36	€44,167.80
5th decile	€38,707.18	€41,586.99	€43,470.88	€45,596.61	€48,934.28	€49,912.97	€50,911.23	€52,438.56	€54,011.72
6th decile	€46,174.52	€49,609.90	€51,857.23	€54,393.05	€58,374.62	€59,542.11	€60,732.95	€62,554.94	€64,431.59
7th decile	€54,737.72	€58,810.20	€61,474.30	€64,480.40	€69,200.36	€70,584.37	€71,996.06	€74,155.94	€76,380.62
8th decile	€64,821.26	€69,643.96	€72,798.83	€76,358.70	€81,948.15	€83,587.12	€85,258.86	€87,816.62	€90,451.12
9th decile	€78,563.55	€84,408.68	€88,232.39	€92,546.95	€99,321.39	€101,307.82	€103,333.97	€106,433.99	€109,627.01
10th decile	€118,867.86	€127,711.63	€133,496.97	€140,024.97	€150,274.80	€153,280.29	€156,345.90	€161,036.28	€165,867.36

Table 3.4: Percentage Projected Household Disposable Income Distribution in Wicklow 2024 -2028

	2024	2025	2026	2027	2028
% change		3.00%	3.00%	3.00%	3.00%
1st decile	€14,688.87	€15,129.53	€15,583.42	€16,050.92	€16,532.45
2nd decile	€24,139.15	€24,863.32	€25,609.22	€26,377.50	€27,168.83
3rd decile	€34,665.43	€35,705.39	€36,776.55	€37,879.85	€39,016.24
4th decile	€44,167.80	€45,492.83	€46,857.62	€48,263.35	€49,711.25
5th decile	€54,011.72	€55,632.07	€57,301.03	€59,020.07	€60,790.67
6th decile	€64,431.59	€66,364.54	€68,355.47	€70,406.14	€72,518.32
7th decile	€76,380.62	€78,672.04	€81,032.20	€83,463.16	€85,967.06
8th decile	€90,451.12	€93,164.66	€95,959.60	€98,838.38	€101,803.53
9th decile	€109,627.01	€112,915.82	€116,303.30	€119,792.40	€123,386.17
10th decile	€165,867.36	€170,843.38	€175,968.69	€181,247.75	€186,685.18

4. Affordability Analysis

The following section presents the results of a detailed housing demand and affordability assessment (as specified in the 2000 Model Housing Strategy and Step-by-Step Guide) for the area for the period of the housing strategy.

It is important to note that the Model Housing Strategy was predicated on the concept of house purchase affordability and does not address the issue of rental affordability, an issue which is of increasing importance.

Using the 'annuity formula' set out in the Part V guidance, it is possible to project the value of a house that the various cohorts of the population will be able to afford.

The assessment is based on the following assumptions:

1. That no more than 35% of disposable income is to be spent on the cost of a mortgage.
2. Loan –To –Value ratio is 90%.
3. Terms of the loan are 25 years.
4. Annual Percent Rate of Interest (APR) of 4%.

The annuity formula used:

$$PV = Pt \left[\frac{1 - (1 - i)^{-n}}{i} \right]$$

Where

<i>PV</i>	=	total loan size (no greater than 90% of Market Value – Section 93(1))
<i>Pt</i>	=	monthly repayment amount
<i>i</i>	=	monthly interest rate
<i>n</i>	=	number of months over which the loan is to be paid. (25 years loan = 12*25 = 300 months)

Tables 4.1 and 4.2 present the affordability threshold calculations made using the annuity formula.

Table 4.1 Maximum affordable house prices by disposable income band 2016-2024

	2016	2017	2018	2019	2020	2021	2022	2023	2024
1st decile	€64,630.33	€69,438.83	€72,584.41	€76,133.78	€81,706.78	€83,340.91	€85,007.73	€87,557.96	€90,184.70
2nd decile	€106,211.14	€114,113.25	€119,282.58	€125,115.50	€134,273.95	€136,959.43	€139,698.62	€143,889.58	€148,206.27
3rd decile	€152,526.27	€163,874.23	€171,297.73	€179,674.19	€192,826.34	€196,682.86	€200,616.52	€206,635.02	€212,834.07
4th decile	€194,336.27	€208,794.89	€218,253.29	€228,925.88	€245,683.25	€250,596.92	€255,608.86	€263,277.12	€271,175.44
5th decile	€237,649.07	€255,330.16	€266,896.61	€279,947.86	€300,440.04	€306,448.84	€312,577.82	€321,955.15	€331,613.81
6th decile	€283,496.00	€304,588.10	€318,385.95	€333,955.02	€358,400.53	€365,568.54	€372,879.91	€384,066.30	€395,588.29
7th decile	€336,071.17	€361,074.87	€377,431.56	€395,887.96	€424,866.96	€433,364.30	€442,031.58	€455,292.53	€468,951.31
8th decile	€397,980.74	€427,590.51	€446,960.36	€468,816.72	€503,134.10	€513,196.79	€523,460.72	€539,164.54	€555,339.48
9th decile	€482,353.77	€518,240.89	€541,717.21	€568,207.18	€609,799.94	€621,995.94	€634,435.86	€653,468.94	€673,073.00
10th decile	€729,808.71	€784,106.47	€819,626.50	€859,706.23	€922,636.73	€941,089.46	€959,911.25	€988,708.59	€1,018,369.85

Table 4.2 Maximum affordable house prices by disposable income band 2024-2028

	2024	2025	2026	2027	2028
1st decile	€90,184.70	€92,890.24	€95,676.95	€98,547.26	€101,503.68
2nd decile	€148,206.27	€152,652.45	€157,232.03	€161,948.99	€166,807.46
3rd decile	€212,834.07	€219,219.09	€225,795.66	€232,569.53	€239,546.62
4th decile	€271,175.44	€279,310.70	€287,690.02	€296,320.72	€305,210.34
5th decile	€331,613.81	€341,562.22	€351,809.09	€362,363.36	€373,234.26
6th decile	€395,588.29	€407,455.94	€419,679.62	€432,270.01	€445,238.11
7th decile	€468,951.31	€483,019.85	€497,510.44	€512,435.76	€527,808.83
8th decile	€555,339.48	€571,999.66	€589,159.65	€606,834.44	€625,039.48
9th decile	€673,073.00	€693,265.19	€714,063.15	€735,485.04	€757,549.60
10th decile	€1,018,369.85	€1,048,920.94	€1,080,388.57	€1,112,800.23	€1,146,184.24

5 House Prices & Rents

Given the measure of affordability now established for Wicklow over the strategy period, the remaining element required to complete the assessment of social housing need in the County is to make some estimate of the prices at which new housing will be introduced over the life of the strategy.

As set out above, as the principal function of this strategy is to determine if it will be necessary for the Local Authority to intervene in the housing market and require developers to dedicate lands / units for social housing, this strategy would be most defensible if a situation were to be considered where incomes grow steadily but house price growth is moderate, following longer term trends rather than extreme peaks and troughs, as this would give the least justification for seeking the maximum 10% social housing.

The housing market in Ireland has seen considerable volatility in prices in the past decade. From the time of economic downturn, both house prices and rents fell markedly and by 2013 prices were below 2007 levels. This time saw both housing supply and housing completions drop dramatically in contrast to population and housing demand.

The economic recovery from 2013 has led to rapid increase in both rental and house prices. Counties like Wicklow have experienced an acceleration in house prices and rents due to acute supply shortages and a tightening of credit availability. Housing supply has not kept up with demand and only in recent time has seen an upward turn in house completions; this and inward migration has added more pressure on housing/rental market.

5.1 Rental Market

The issue of affordability in the private rental sector was not addressed in detail in the Model Housing Strategy which was focused primarily on affordable house ownership. As a result, it does not provide any guidance on how to assess rental affordability at Local Authority level. It is expected that the forthcoming Ministerial Guidelines on Housing Needs Demand Assessment (HNDA) will provide guidance in this respect.

There has been a steady increase in the number of people renting in County Wicklow. By 2020 the average rent for all property types in the county was €1,293 (CSO / Residential Tenancies Board). This represents an increase of 51.8% on the average rental price in 2011.

The eastern side of the county had the highest rental price in 2020. Greystones has the highest average monthly rents at €1,686, which is 24.5% higher than Bray at €1,354.

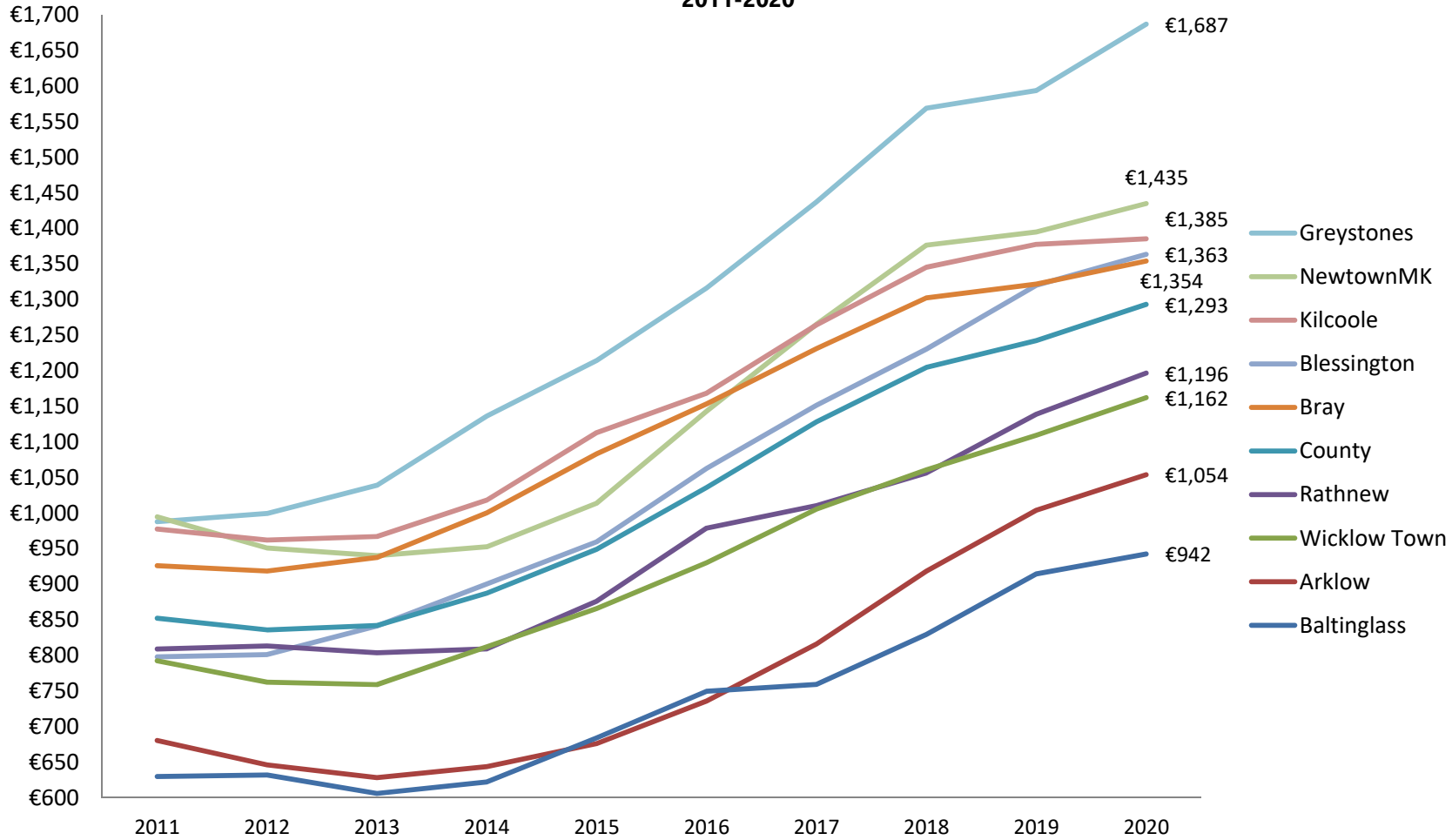
In general all parts of the county have seen rental increase between 2011 - 2020 with the highest percentage increase in monthly rental price in both Blessington (70.84%) and Greystones (70.78%).

Table 5.1 Average monthly rents in Wicklow between 2011 and 2020

Average Monthly Rents	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Baltinglass	630	632	606	622	684	749	759	829	914	942
Arklow	680	646	628	644	676	736	816	918	1004	1054
Wicklow Town	792	762	759	812	866	930	1005	1060	1109	1162
Rathnew	809	813	803	809	876	979	1010	1056	1138	1196
Bray	926	918	937	1000	1083	1153	1231	1302	1321	1354
Blessington	798	801	841	900	959	1062	1151	1230	1320	1363
Kilcoole	977	962	967	1018	1113	1168	1264	1345	1377	1385
Newtownmountkennedy	994	951	940	952	1014	1143	1265	1376	1395	1435
Greystones	988	999	1039	1136	1214	1316	1437	1568	1593	1687
County	852	836	842	887	949	1036	1128	1204	1242	1293

Source: CSO/ RTB Average Monthly Rent Report

Fig. 5.1 Residential Tenancies Board Average Monthly Rents Within Wicklow 2011-2020



Source: CSO/ RTB Average Monthly Rent Report

5.2 Housing Market

Like the rental market in County Wicklow, house prices have also seen sharp increase during the period 2010 to 2020. Taking the crude measurement of 'average house price' based on the total value of sales divided by total number of sales between 2010 and 2020, average prices rose by 35.6%. In 2010, the average house price was €241,745. This increased to €327,721 in 2020 (CSO/Residential Property Price Register). This compares to the State which saw 38% increase over the same period.

All regions in Wicklow have experienced increase in house prices, with the highest increases in Greystones (35%) and Bray (27%). Analysis of property prices shows a difference between the east and west of the County. In 2020 the mean property prices for all types of house on the eastern seaboard ranged from €337,061 to €492,824 (Wicklow Town, Bray and Greystones) compared to the west where the prices range from €180,956 to €286,770 (Baltinglass and Blessington).

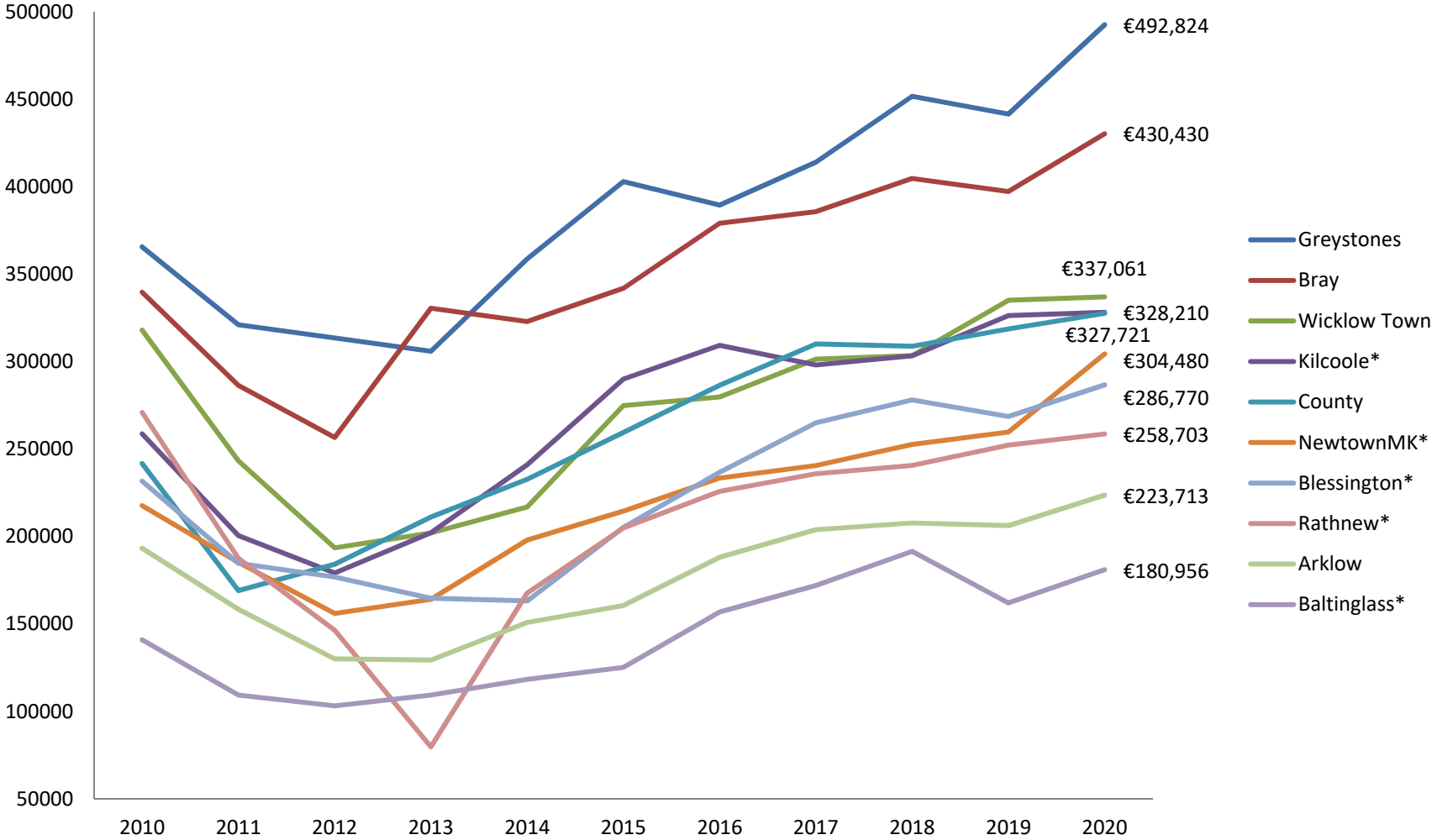
Table 5.2 Mean property sale prices for all type of properties in Wicklow 2010 to 2020 (€)

Mean Sale Price	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Baltinglass*	140,917	109,303	103,114	109,250	118,292	125,156	156,796	171,967	191,535	161,949	180,956
Arklow	193,332	158,372	129,944	129,255	150,850	160,519	188,143	203,880	207,738	206,249	223,713
Rathnew*	270,969	187,500	146,350	79,694	167,672	204,947	225,826	235,940	240,698	252,316	258,703
Blessington*	231,703	184,669	176,811	164,709	163,165	205,192	236,792	265,036	278,125	268,698	286,770
NewtownMK*	217,697	185,235	155,945	164,024	198,014	214,523	233,424	240,586	252,710	259,776	304,480
Kilcoole*	258,728	200,504	179,127	202,139	241,072	290,078	309,388	298,130	303,372	326,363	328,210
Wicklow Town	318,048	243,264	193,505	202,087	216,949	274,902	279,825	301,494	303,440	335,123	337,061
Bray	339,748	286,420	256,662	330,606	322,996	341,972	379,233	85,888	404,871	397,384	430,430
Greystones	365,734	321,123	313,646	306,024	358,829	403,073	389,632	414,136	451,892	441,741	492,824
County	241,745	169,034	184,159	211,138	232,781	259,545	286,551	310,173	308,847	318,763	327,721

Source: CSO Market-based Household Purchases of Residential Dwellings /RPPR and Wicklow County Council

* All towns denoted are estimated yearly prices calculated by Wicklow County Council using data from Residential Property Price Register.

Fig. 5.2 Mean Property prices for all types of residential property within Wicklow 2010-2020



Source: CSO Market-based Household Purchases of Residential Dwellings /RPPR and Wicklow County Council
 * All towns denoted are estimated yearly prices calculated by Wicklow County Council using data from Residential Property Price Register

5.3 Proportion of Houses in each band 2020

In accordance with the guidance set out in *Part V of the Planning and Development Act, 2000 – Housing Supply – A Model Strategy and Step by Step Guide (DoEHLG 2000)*, data has been collected on the number of houses that are available in price bands, that is, the number of houses that are available in the market within certain price ranges.

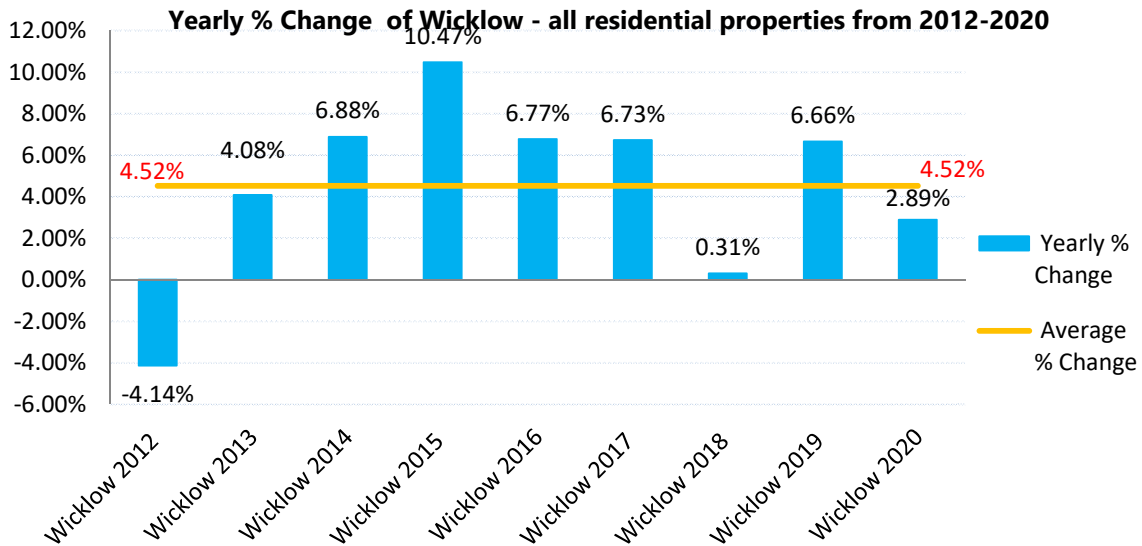
Table 5.3 House Proportion of Houses in each Band 2020

	Band 1	Band 2	Band 3	Band 4	Band 5	Band 6	Band 7	Band 8	Band 9	Band 10
Price band (000's €)	Under 99,999	100-149	150-199	200-249	250-299	300-349	350-399	400-449	450-499	500+
2020 % of Wicklow units in each band	2.71%	4.21%	8.54%	14.76%	13.67%	16.03%	10.44%	6.57%	6.63%	16.44%

Source: Residential Property Price Register

5.4 Estimated Property Prices

In projecting property prices over period of the strategy and up to 2031, assumptions will be based upon Residential Property Price Register for Wicklow for all residential property prices. Looking at the yearly percentage change for the period 2011-2020, the average property price rose by 4.52% in County Wicklow. This compares to the national average including Dublin over the same period of 5.22% and national average excluding Dublin of 4.33%.



Source: Residential Property Price Register

The chart shows the annual change in property prices for all residential properties in the County. On average this came in at 4.52%. With so much uncertainty regarding the economic outlook as a result of COVID 19 and Brexit, 4% growth rate is assumed for 2021 up to 2028.

Table 5.4 House price band inflation Wicklow 2019-2028

Year	Av price increase/decrease	Band 1		Band 2		Band 3		Band 4		Band 5		Band 6		Band 7		Band 8		Band 9		Band 10
2019	-	99,999	100,000	149,999	150,000	199,999	200,000	249,999	250,000	299,999	300,000	349,999	350,000	399,999	400,000	449,999	450,000	499,999	500,000	500,000
2020	4%	103,999	104,000	155,999	156,000	207,999	208,000	259,999	260,000	311,999	312,000	363,999	364,000	415,999	416,000	467,999	468,000	519,999	520,000	520,000
2021	4%	108,159	108,160	162,239	162,240	216,319	216,320	270,399	270,400	324,479	324,480	378,559	378,560	432,639	432,640	486,719	486,720	540,799	540,800	540,800
2022	4%	112,485	112,486	168,728	168,730	224,972	224,973	281,215	281,216	337,458	337,459	393,701	393,702	449,944	449,946	506,188	506,189	562,431	562,432	562,432
2023	4%	116,985	116,986	175,478	175,479	233,971	233,972	292,463	292,465	350,956	350,958	409,449	409,450	467,942	467,943	526,435	526,436	584,928	584,929	584,929
2024	4%	121,664	121,665	182,497	182,498	243,329	243,331	304,162	304,163	364,995	364,996	425,827	425,829	486,660	486,661	547,493	547,494	608,325	608,326	608,326
2025	4%	126,531	126,532	189,797	189,798	253,063	253,064	316,328	316,330	379,594	379,596	442,860	442,862	506,126	506,128	569,392	569,394	632,658	632,660	632,660
2026	4%	131,592	131,593	197,388	197,390	263,185	263,186	328,982	328,983	394,778	394,780	460,575	460,576	526,371	526,373	592,168	592,169	657,965	657,966	657,966
2027	4%	136,856	136,857	205,284	205,285	273,712	273,714	342,141	342,142	410,569	410,571	478,998	478,999	547,426	547,428	615,855	615,856	684,283	684,285	684,285
2028	4%	142,330	142,331	213,495	213,497	284,661	284,662	355,827	355,828	426,992	426,994	498,158	498,159	569,323	569,325	640,489	640,490	711,654	711,656	711,656
% of Wicklow units in each band	-	2.71%	4.21%		8.54%		14.76%		13.67%		16.03%		10.44%		6.57%		6.63%		16.44%	

6. Conclusion

Affordability for each year of the strategy is set out in the following tables. The purpose of this analysis is to determine what proportion of new private housing developed will require to be devoted to social housing. As set out above, as the principal function of this strategy is to determine if it will be necessary for the Local Authority to intervene in the housing market and require developers to dedicate lands / units for social housing, this strategy assumes incomes grow steadily but house price growth is moderate, following longer term trends rather than extreme peaks and troughs, as this would give the least justification for seeking the maximum 10% social housing (or 20% social and affordable in certain circumstances).

6.1 Affordability Index 2021

Year	Range	%	No. of houses required	Running total	Affordability by each decile	Household band position	Upper band position	House price in band upper value	No. of units required within each band	% of units projected to be provided in each band	No. of units projected to be provided in each band	Housing shortfall i.e. no. of households not meeting affordability criteria	Housing shortfall as % of total housing units required
2021	1st decile	9.83%	92	92	83,341	Band 1	1	108,159	151	2.71%	25	125	13.40%
-	2nd decile	10.57%	99	191	136,959								
-	3rd decile	10.47%	98	289	196,683	Band 1 & 2	2	162,239	88	4.21%	39	48	5.14%
-	4th decile	10.44%	98	387	250,597	Band 2 & 3	3	216,319	95	8.54%	80	16	1.66%
-	5th decile	10.25%	96	483	306,449	Band 3 & 4	4	270,399	92	14.76%	138	-46	-
-	6th decile	9.94%	93	576	365,569	Band 4 & 5	5	324,479	85	13.67%	128	-43	-
-	7th decile	9.62%	90	666	433,364	Band 5,6 & 7	7	432,639	154	26.47%	248	-94	-
-	8th decile	9.65%	90	756	513,197	Band 7 & 8	8	486,719	52	6.57%	62	-9	-
-	9th decile	9.61%	90	846	621,996	Band 8 & 9	9	540,799	18	6.63%	62	-44	-
-	10th decile	9.62%	90	936	941,089	Band 9 & 10	10	None	200	16.44%	154	47	-
-	Total		936						936				20.20%

6.2 Affordability Index 2022

Year	Range	%	No. of houses required	Running total	Affordability by each decile	Household band position	Upper band position	House price in band upper value	No. of units required within each band	% of units projected to be provided in each band	No. of units projected to be provided in each band	Housing shortfall i.e. no. of households not meeting affordability criteria	Housing shortfall as % of total housing units required
2022	1st decile	9.83%	115	115	85,008	Band 1	1	112,485	193	2.71%	32	161	13.71%
-	2nd decile	10.57%	124	239	139,699								
-	3rd decile	10.47%	123	362	200,617	Band 1 & 2	2	168,728	112	4.21%	49	63	5.33%
-	4th decile	10.44%	123	485	255,609	Band 2 & 3	3	224,973	122	8.54%	100	22	1.86%
-	5th decile	10.25%	120	605	312,578	Band 3 & 4	4	281,215	118	14.76%	173	-56	-
-	6th decile	9.94%	117	722	372,880	Band 4 & 5	5	337,458	109	13.67%	160	-52	-
-	7th decile	9.62%	113	835	442,032	Band 5 & 6	6	393,701	90	16.03%	188	-98	-
-	8th decile	9.65%	113	948	523,461	Band 6,7 & 8	8	506,188	173	17.01%	200	-26	-
-	9th decile	9.61%	113	1,061	634,436	Band 8 & 9	9	562,431	24	6.63%	78	-54	-
-	10th decile	9.62%	113	1,174	959,911	Band 9 & 10	10	None	233	16.44%	193	40	-
-	Total		1174						1174				20.90%

6.3 Affordability Index 2023

Year	Range	%	No. of houses required	Running total	Affordability by each decile	Household band position	Upper band position	House price in band upper value	No. of units required within each band	% of units projected to be provided in each band	No. of units projected to be provided in each band	Housing shortfall i.e. no. of households not meeting affordability criteria	Housing shortfall as % of total housing units required
2023	1st decile	9.83%	139	139	87,558	Band 1	1	116,985	234	2.71%	38	196	13.87%
-	2nd decile	10.57%	149	288	143,890								
-	3rd decile	10.47%	148	436	206,635	Band 1 & 2	2	175,478	136	4.21%	59	76	5.42%
-	4th decile	10.44%	147	583	263,277	Band 2 & 3	3	233,971	148	8.54%	120	28	1.96%
-	5th decile	10.25%	145	727	321,955	Band 3 & 4	4	292,463	143	14.76%	208	-65	-
-	6th decile	9.94%	140	868	384,066	Band 4 & 5	5	350,956	132	13.67%	193	-61	-
-	7th decile	9.62%	136	1,004	455,293	Band 5 & 6	6	409,449	110	16.03%	226	-117	-
-	8th decile	9.65%	136	1,140	539,165	Band 6,7 & 8	8	526,435	210	17.01%	240	-30	-
-	9th decile	9.61%	136	1,275	653,469	Band 8 & 9	9	584,928	29	6.63%	94	-65	-
-	10th decile	9.62%	136	1,411	988,709	Band 9 & 10	10	None	270	16.44%	232	38	-
-	Total		1411						1411				21.25%

6.4 Affordability Index 2024

Year	Range	%	No. of houses required	Running total	Affordability by each decile	Household band position	Upper band position	House price in band upper value	No. of units required within each band	% of units projected to be provided in each band	No. of units projected to be provided in each band	Housing shortfall i.e. no. of households not meeting affordability criteria	Housing shortfall as % of total housing units required
2024	1st decile	9.83%	139	139	90,185	Band 1	1	121,664	236	2.71%	38	198	14.03%
-	2nd decile	10.57%	149	288	148,206								
-	3rd decile	10.47%	148	436	212,834	Band 1 & 2	2	182,497	137	4.21%	59	78	5.51%
-	4th decile	10.44%	147	583	271,175	Band 2 & 3	3	243,329	150	8.54%	120	29	2.06%
-	5th decile	10.25%	145	727	331,614	Band 3 & 4	4	304,162	144	14.76%	208	-64	-
-	6th decile	9.94%	140	868	395,588	Band 4 & 5	5	364,995	133	13.67%	193	-59	-
-	7th decile	9.62%	136	1,004	468,951	Band 5 & 6	6	425,827	111	16.03%	226	-116	-
-	8th decile	9.65%	136	1,140	555,339	Band 6,7 & 8	8	547,493	212	17.01%	240	-28	-
-	9th decile	9.61%	136	1,275	673,073	Band 8 & 9	9	608,325	29	6.63%	94	-65	-
-	10th decile	9.62%	136	1,411	1,018,370	Band 9 & 10	10	None	258	16.44%	232	27	-
-	Total		1411						1411				21.61%

6.5 Affordability Index 2025

Year	Range	%	No. of houses required	Running total	Affordability by each decile	Household band position	Upper band position	House price in band upper value	No. of units required within each band	% of units projected to be provided in each band	No. of units projected to be provided in each band	Housing shortfall i.e. no. of households not meeting affordability criteria	Housing shortfall as % of total housing units required
2025	1st decile	9.83%	139	139	92,890	Band 1	1	126,531	239	2.71%	38	200	14.20%
-	2nd decile	10.57%	149	288	152,652								
-	3rd decile	10.47%	148	436	219,219	Band 1 & 2	2	189,797	139	4.21%	59	79	5.61%
-	4th decile	10.44%	147	583	279,311	Band 2 & 3	3	253,063	151	8.54%	120	31	2.17%
-	5th decile	10.25%	145	727	341,562	Band 3 & 4	4	316,328	146	14.76%	208	-63	-
-	6th decile	9.94%	140	868	407,456	Band 4 & 5	5	379,594	135	13.67%	193	-58	-
-	7th decile	9.62%	136	1,004	483,020	Band 5 & 6	6	442,860	112	16.03%	226	-115	-
-	8th decile	9.65%	136	1,140	572,000	Band 6,7 & 8	8	569,392	214	17.01%	240	-26	-
-	9th decile	9.61%	136	1,275	693,265	Band 8 & 9	9	632,658	29	6.63%	94	-64	-
-	10th decile	9.62%	136	1,411	1,048,921	Band 9 & 10	10	None	247	16.44%	232	15	-
-	Total		1411						1411				21.97%

6.6 Affordability Index 2026

Year	Range	%	No. of houses required	Running total	Affordability by each decile	Household band position	Upper band position	House price in band upper value	No. of units required within each band	% of units projected to be provided in each band	No. of units projected to be provided in each band	Housing shortfall i.e. no. of households not meeting affordability criteria	Housing shortfall as % of total housing units required
2026	1st decile	9.83%	139	139	95,677	Band 1	1	131,592	241	2.71%	38	203	14.36%
-	2nd decile	10.57%	149	288	157,232								
-	3rd decile	10.47%	148	436	225,796	Band 1 & 2	2	197,388	140	4.21%	59	80	5.70%
-	4th decile	10.44%	147	583	287,690	Band 2 & 3	3	263,185	152	8.54%	120	32	2.27%
-	5th decile	10.25%	145	727	351,809	Band 3 & 4	4	328,982	147	14.76%	208	-61	-
-	6th decile	9.94%	140	868	419,680	Band 4 & 5	5	394,778	136	13.67%	193	-57	-
-	7th decile	9.62%	136	1,004	497,510	Band 5 & 6	6	460,575	113	16.03%	226	-113	-
-	8th decile	9.65%	136	1,140	589,160	Band 6 & 7	7	526,371	89	10.44%	147	-58	-
-	9th decile	9.61%	136	1,275	714,063	Band 7,8 & 9	9	657,965	157	13.21%	186	-30	-
-	10th decile	9.62%	136	1,411	1,080,389	Band 9 & 10	10	None	236	16.44%	232	4	-
-	Total		1411						1411				22.33%

6.7 Affordability Index 2027

Year	Range	%	No. of houses required	Running total	Affordability by each decile	Household band position	Upper band position	House price in band upper value	No. of units required within each band	% of units projected to be provided in each band	No. of units projected to be provided in each band	Housing shortfall i.e. no. of households not meeting affordability criteria	Housing shortfall as % of total housing units required
2027	1st decile	9.83%	139	139	98,547	Band 1	1	136,856	243	2.71%	38	205	14.53%
-	2nd decile	10.57%	149	288	161,949								
-	3rd decile	10.47%	148	436	232,570	Band 1 & 2	2	205,284	141	4.21%	59	82	5.80%
-	4th decile	10.44%	147	583	296,321	Band 2 & 3	3	273,712	154	8.54%	120	34	2.37%
-	5th decile	10.25%	145	727	362,363	Band 3 & 4	4	342,141	148	14.76%	208	-60	-
-	6th decile	9.94%	140	868	432,270	Band 4 & 5	5	410,569	137	13.67%	193	-56	-
-	7th decile	9.62%	136	1,004	512,436	Band 5 & 6	6	478,998	114	16.03%	226	-112	-
-	8th decile	9.65%	136	1,140	606,834	Band 6 & 7	7	547,426	90	10.44%	147	-57	-
-	9th decile	9.61%	136	1,275	735,485	Band 7,8 & 9	9	684,283	158	13.21%	186	-28	-
-	10th decile	9.62%	136	1,411	1,112,800	Band 9 & 10	10	None	225	16.44%	232	-7	-
-	Total		1411						1411				22.70%

6.8 Affordability Index 2028

Year	Range	%	No. of houses required	Running total	Affordability by each decile	Household band position	Upper band position	House price in band upper value	No. of units required within each band	% of units projected to be provided in each band	No. of units projected to be provided in each band	Housing shortfall i.e. no. of households not meeting affordability criteria	Housing shortfall as % of total housing units required
2028	1st decile	9.83%	95	95	101,504	Band 1	1	142,330	169	2.71%	26	142	14.69%
-	2nd decile	10.57%	102	198	166,807								
-	3rd decile	10.47%	101	299	239,547	Band 1 & 2	2	213,495	98	4.21%	41	57	5.90%
-	4th decile	10.44%	101	400	305,210	Band 2 & 3	3	284,661	107	8.54%	83	24	2.48%
-	5th decile	10.25%	99	500	373,234	Band 3 & 4	4	355,827	103	14.76%	143	-40	-
-	6th decile	9.94%	96	596	445,238	Band 4 & 5	5	426,992	95	13.67%	132	-37	-
-	7th decile	9.62%	93	689	527,809	Band 5 & 6	6	498,158	79	16.03%	155	-76	-
-	8th decile	9.65%	94	783	625,039	Band 6 & 7	7	569,323	62	10.44%	101	-39	-
-	9th decile	9.61%	93	876	757,550	Band 7,8 & 9	9	711,654	110	13.21%	128	-18	-
-	10th decile	9.62%	93	969	1,146,184	Band 9 & 10	10	None	146	16.44%	159	-13	-
-	Total		969						969				23.07%

6.9 Summary & Conclusion

Affordability for each year of the strategy is set out in the tables above and is summarised below.

Year	2021	2022	2023	2024	2025	2026	2027	2028
New Household Formations	936	1174	1411	1411	1411	1411	1411	969
No. not meeting affordability criteria	189	245	300	305	310	315	320	224
% not meeting affordability criteria	20.20%	20.90%	21.25%	21.61%	21.97%	22.33%	22.70%	23.07%

It is therefore concluded that there is justification for seeking the maximum 10% (or 20% in certain circumstances) of land zoned for residential use, or for mixed of residential and other uses, to be reserved for the provision of social (and affordable) housing.

7. Housing Supply

Section 2.2 of this Strategy outlines the population and housing demand projections for the County up to 2031. These were prepared in accordance with the methodology for translating population targets into housing targets as set out in Ministerial Guidelines 'Housing Supply Target Methodology for Development Planning' (DHLGH December 2020).

Table 7.1 Housing Demand NPF Roadmap / Ministerial Guidelines 2022, 2028, 2031

County Wicklow	Units delivered 2017-2020	Estimated completions Q1 2021 – Q2 2022	Target Q3 2022 – Q2 2028	Target Q3 2028 - 2031	Total
New housing demand	3,230	1,404	8,467	1,848	14,949

It has also been shown that there will be significant affordability issues and that the Local Authority will be required to intervene in new developments to the maximum permitted extent of 10% (or 20% in certain circumstances). Intervention at this level, assuming all developments between 2021 and 2025 are eligible development with respect to Part V at the 10% rate, and all developments post 2026 are eligible at 20% rate, could yield up to 1,350 units up to 2031. In reality, the yield would be expected to be much lower given the number of housing developments that would, due to the number of houses or size of the site be exempt from Part V requirements¹⁵.

7.1 Zoned Land

The County Development Plan 2022-2028 sets the population and housing targets for the County up to Q2 2028. However, it only provides 'zoning' for 13 settlements, the remainder of the settlements having their own stand-alone 'Local Area Plans', which will be reviewed after the adoption of the County Development Plan.

It is planned that these LAPs will be adopted following the adoption of the County Development Plan. Each LAP will cover a period of 6 years and zoning will be provided on the basis of the land needed to meet a 6 year horizon. The horizons utilised for each plan will also be cognisant of the fact the LAPs have the potential to be extended to last for up to 10 years, but no plan will include a timeline beyond 2031.

The zoning provisions of each Local Area Plan and Small Town Plan will be crafted on the basis of ensuring that the population and housing unit targets can be fulfilled. In accordance with national policy, 30% of the housing target will be delivered as compact growth i.e. within the existing built up area.

Table 7.2 to follow shows the housing growth targets for all the towns in the County that have development plans.

¹⁵ During the 2017 to 2020 period, Part V units accounted for only 4% of the total units delivered.

Table 7.2 Housing Growth Targets up to 2031

Level	Settlement	Housing Stock 2016	Completions 2017-2020	Estimated completions 2021-Q2 2022	Housing Growth Q3 2022-Q2 2028	Housing Growth Q3 2028-Q4 2031	Total Housing Growth 2016-2031
1	Bray	11,232	165	100	4,026	771	5062
	Wicklow - Rathnew	5,456	650	200	1,267	275	2392
3	Arklow	5,406	165	100	790	166	1,221
	Greystones - Delgany	6,766	875	400	508	170	1953
	Blessington	1,914	5	40	393	81	519
4	Baltinglass	903	46	40	85	24	195
	Enniskerry	648	34	40	36	15	125
	Kilcoole	1,451	97	20	140	30	287
	Newtownmount-kennedy	1,222	250	100	433	99	882
	Rathdrum	669	132	100	68	31	331
5	Ashford	2,390	255	90	129	41	515
	Aughrim						
	Carnew						
	Dunlavin						
	Tinahely						
6	Avoca	1,534	46	30	114	28	218
	Donard						
	Kilmacanogue						
	Newcastle						
	Roundwood						
	Shillelagh						
7-9	Villages clusters /	15,395	510	134	478	117	1249
10	Open countryside						
Total		54,968	3,230	1,404	8,467	1,848	14,949

The review of each LAP will ensure that each plan is consistent with the CDP 'Core Strategy' and its associated housing targets. The Core Strategy has determined that there is a surplus of land zoned for residential development in all of the towns with Local Area Plans. This surplus will be addressed as part of the review of the local area plans.

With respect to the remaining 10 settlements, their plans form part of this County Development Plan. Zoning is therefore provided to meet the requirements of the Core Strategy targets. The zoning plans included as part of the County Development Plan and those that will be prepared as part of future Local Area Plans will ensure that adequate land is zoned to accommodate the housing target as identified in the Core Strategy (Chapter 3 of the County Development Plan).

The Infrastructural Assessment (Appendix 9 of the CDP) outlines infrastructure constraints to the delivery of zoned land. All land that is zoned as part of the County Development plan is either serviced (Tier 1) or has the potential to be serviced (Tier 2). There is an urgent need to address services deficiencies, particularly in

the growth towns of Bray, Arklow and Blessington, where there is a high demand for social housing. The deficiencies in Arklow and Blessington relate principally to wastewater treatment whereas the infrastructure required in Bray to release zoned land is the delivery of motorway enhancement and public transport infrastructure to Fassaroe. The delivery of much of this infrastructure is outside the remit of the Local Authority, being the responsibility of Irish Water and Transport Infrastructure Ireland / National Transport Authority. It is essential that these agencies deliver services in accordance with the priorities set out in the Wicklow Core Strategy.

7.2 Local Authority Land Bank

Wicklow County Council currently owns c. 38.49 hectares of zoned / designated housing land and the estimated capacity of this land is c. 1417 units, as detailed in the table below. Not all of this land is however currently serviced¹⁶.

Table 7.4 Local Authority Land Bank

Municipal Area	Hectares	Location of Land	Serviced land Tier 1 or Tier 2 ¹⁷	Estimated development potential (units) ¹⁸	
				Tier 1	Tier 2
Baltinglass	11.07	Burgage more, Blessington	Tier 2	126	261
		Milltown Rd., Dunlavin	Tier 2		
		Ballard Site, Shillelagh	Tier 1		
		Lugduff, Tinahely	Tier 2		
		Kilcommon Phase 2, Tinahely	Tier 2		
Arklow	9.82	Ballanagh Estate, Avoca	Tier 2	-	34
		Chapel Lane, Aughrim	Tier 2		
		Sheephouse, Arklow	Tier 2		
		Tinahask, Arklow	Tier 2		
Wicklow	2.8	Ballinahinch, Ashford	Tier 1	98	-
		Riversite, Rathnew	Tier 1		
		O'Sullivan's Lands, Rathnew (Phase 2)	Tier 1		
Bray	4.7	Rehills, Bray	Tier 1	235	
		Fassaroe, Dargle Road, Bray	Tier 1		
Greystones	10.1	Burnaby Mills, Greystones	Tier 1	353	
		Lott Lane, Kilcoole	Tier 1		
Total	38.49			812	605

¹⁶ In accordance with NPO 72a of the National Planning Framework, planning authorities are required to apply a standardised, tiered approach to differentiate between i) zoned land that is serviced and ii) zoned land that is serviceable within the life of the plan.

¹⁷ Tier 1 is land that is serviced and Tier 2 is land that is serviceable within the life of the Plan.

¹⁸ A minimum density of 50 units/ha is assumed for the Bray MD and 35 units / ha is used for Wicklow, Greystones, Baltinglass and Arklow MDs.

7.3 Housing Output & Targets

Between Q1 2017 and Q4 2020, 3,230 units have been completed which is an average of 808 units per year. Although the number of units is well below the target identified in the 2016 County Development Plan, the data shows that the County has seen a consistent increase in the number of housing completions year on year since 2012.

Table 7.5 House Completions

CSO House Completions 2011 – 2020												
2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	Average 17-20	Total 11-20	Average 11- 20
218	149	138	155	293	354	479	589	1116	1,046	808	4,537	454

Source: CSO

Table 7.5 Annual housing delivered / delivery targets 2017-2031

Year	Completions	Estimated completions up to Q2 2022	Targeted completions Q3 2022 – Q4 2031
2017	479		
2018	588		
2019	1,116		
2020	1,046		
2021		936	
2022		468	706
2023			1,411
2024			1,411
2025			1,411
2026			1,411
2027			1,411
2028			969
2029			528
2030			528
2031			528

In order to meet the plan period housing targets set out in the Core Strategy, housing completions will be required to increase to 1,411 per annum by 2023, from a previous 'high' of 1,116 completions seen in 2019 (last full year of construction without COVID interruptions). While ambitious, this increase is not considered unachievable given the pent up demand created in part by the COVID slowdown in 2020-2021 and both the number of units under construction as of March 2021 (estimated at just over 3,000) and the number of extant permissions in the County (c. 3,500 units) which will presumably be delivered over the next 4-5 years (given planning permission durations), which is the equivalent of around 1,300 units per annum. Further applications for large scale developments are likely in 2021-2022, in particular on the strategic sites in Bray, and these will add to the annual output during the plan period.

8. Social Housing

This section of the Housing Strategy addresses the provision of social housing in County Wicklow. In doing so, regard is had to the requirements of Section 94(4) of the planning and Development Act 2000 (as amended).

This Housing Strategy takes into account the need to ensure that social housing is available for people across all tenures. As such, this strategy is designed to ensure that a mixture of house types and sizes is developed to reasonably match the requirements of the different categories of households, as may be determined by the housing authority, including the requirements of target groups including older people, people with disabilities and members of the Travelling Community.

8.1 National Context

'Programme for Government – our Shared Future' launched in 2020, emphasised the role of the private housing stock, addresses the challenge of viability, access to finance, land availability, infrastructure delivery, building standards, quality and regulation, as well as sufficient skilled labour capacity.

Programme for Government: 5-year housing objectives

1. Put affordability at the heart of the housing system.
2. Prioritise the increased supply of public, social and affordable homes.
3. Progress a State-backed affordable home purchase scheme to promote home ownership.
4. Increase the social housing stock by more than 50,000, with an emphasis on new builds.
5. Tackle homelessness.
6. Ensure local authorities are central to delivering housing.
7. Work with the private sector to ensure an appropriate mix and type of housing is provided nationally.
8. Improve the supply and affordability of rental accommodation and the security of tenure for renters.

Previous national policy is contained within Rebuilding Ireland – An Action Plan for Housing and Homelessness, launched in 2016, under which Wicklow County Council progressed its Supply Programme up to and including 2020. The overarching aim of Rebuilding Ireland was to increase delivery of housing across all tenures to help individuals and families meet their housing needs, and to help those who are currently housed to remain in their homes or be provided with appropriate options of alternative accommodation, especially those families in emergency accommodation.

8.2 Social Housing Demand

At the end of December 2020, there were 4,466 households on Wicklow County Council's list for Social Housing Support. This represents an increase of 17% on the number of housing applicants as per the Housing Needs Assessment 2015.

The demands are arising at the following locations and for the following type of units:

Table 8.1 Social housing demand in Wicklow as of December 2020

Municipal District	1 bed	2 bed	3 bed	4 bed	Total
Baltinglass	140	273	123	25	561
Arklow	281	376	154	18	829
Wicklow	337	451	149	25	962
Bray	399	428	176	22	1,026
Greystones	328	487	251	23	1,089
Total	1,485	2,015	853	113	4,466

The key objective of Wicklow County Council is to facilitate the provision of sustainable, high quality, social, affordable and cost effective housing accommodation to meet the existing and likely future needs, responsive to the requirements of all categories of persons in the County, in accordance with current Government strategy.

This remains a challenge for a number of reasons emanating from the legacy of the economic downturn. While construction of units has resumed since 2016, progress has been slow due to long lead in time in design, approvals and tendering. The use of design and build has now improved supply, which has increased significantly since 2019, and should continue for the lifetime of this plan. Availability of suitable land is expected to be a significant challenge in future. While the Covid-19 pandemic has caused disruption to construction activity, particularly during the lockdown period, it is too soon to predict the short / medium term impacts of the pandemic on housing delivery in the County.

Wicklow County Council has a significant social housing need as outlined in Table 8.1. Much of the housing development in County Wicklow is in the north-east of the County and along the east coast which corresponds with the areas of most significant demand for social housing. These are also the areas where land and property prices are highest and the Local Authority has few sites to address the demand by constructing social housing in significant numbers.

There has been a significant increase in the numbers of people experiencing homelessness and at risk of homelessness since 2016 with over 500 people presenting each year.

8.3 Social Housing Supply

This section sets out the record of delivery of social housing over the lifetime of the last Housing Strategy 2016-2022.

It should be noted that as per the Government's Housing Policy Statement of 16 June 2011, the Government 'stood down' all existing affordable housing programmes in 2011 to reflect affordability conditions. Accordingly there were no affordable housing units provided under the previous plan.

An overriding objective of current national strategy is to make homes more affordable and proposes a focus on provision of Affordable Housing with the progression of a state backed affordable home purchase scheme.

Part V provides 10% social housing in eligible private developments, and as of September 2021, in certain circumstances, this is increased to 20%. This augments the Council's own supply in areas of particularly high demand. Part V assists in the Government Policy of social integration as social houses are provided, tenure blind, in private residential estates in a dispersed manner. In addition Part V prevents segregation as it ensures a mix of income groups within developments. In 2018, 45 Part V units were provided, in 2019 - 46

units and in 2020 - 29 units. This has resulted in 120 families being housed. Due to the provisions of the Act this accommodation is purchased at reasonable prices and provides value for money.

Table 8.2 Provision of Social Housing units 2016-2020

	2016	2017	2018	2019	2020	Total
Provision of Social Housing units to incl. Acquisitions/Built/Leased						
Built Social Units	0	0	28	27	322	377
Direct Acquisitions	28	15	21	23	22	109
Part V Social Unit Acquisitions	0	1	45	46	29	121
Social Units either acquired directly by Approved Housing Bodies (AHBs) or leased from this sector by Wicklow County Council	16	4	12	133	83	248
Social units provided under short and long term leasing from private sector	11	6	0	4	17	38
Social units provided under Rental Assistance Scheme (RAS) from private sector	516	516	429	347	280	280
Social units provided under Housing Assistance Scheme (HAP) from private sector	348	62	566	686	482	2,144
Casual Vacancies - houses available to rent from existing stock	74	112	84	126	48	444
Mortgage to Rent	1	0	3	16	25	45
Total Social Housing Provision	994	716	1,188	1,408	1,308	3,806

8.4 Housing needs of the elderly and people with a disability

The 'National Housing Strategy for People with a Disability' 2016-2020 sets out a framework for the delivery of housing for people with disabilities through mainstream housing policy. In Wicklow, a 5-year Strategic Plan has been developed. Its objectives include:

- Developing plans to meet the housing needs and related supports for people with disabilities;
- Ascertain with Housing Allocations Department the needs of the households on the Local Authority waiting list;
- Consult on pipeline delivery (Local Authority, Part V's and Approved Housing Bodies) and developing mechanisms to ensure that delivery will meet the need including specific design requirements;
- Explore options for increasing the supply of housing for people with a disability being delivered by the private sector.

The Summary of Social Housing Assessments 2019 indicated that the number of people over 70 years of age requiring housing assistance increased from 58 persons in 2018 to 73 in 2019.

8.5 Homelessness

Significant challenges are being faced by Wicklow County Council in dealing with the increasing numbers of people and families presenting as homeless.

Table 8.3: Number of Homeless Presentations (2016-2020)

	2016	2017	2018	2019	2020
Homeless Presentations	522	446	480	520	546

Wicklow works closely with Approved Housing Bodies to provide differing levels of supported accommodation within the County, through the Capital Assistance Scheme and through providing units from its own stock for such purpose.

Housing First: Housing First is a participant-centred model that focuses on ending homelessness for people who have been homeless for many years or who are particularly vulnerable. The Housing First model aims to provide a person sleeping rough, or someone who has been long-term homeless, with their own secure accommodation as well as access to intensive and specialised support services. One bed units are essential to progress this programme.

Homelessness from Notice to Quit (NTQ): Since the last Development Plan, there was a noticeable increase in families becoming homeless from private rented properties which were being withdrawn from the market by landlords. The Council is utilising all resources to ensure these families are transitioned to either social housing or other resultant vacant RAS/HAP rentals.

8.6 Traveller Accommodation

Under the provisions of the Traveller Accommodation Act 1998, Wicklow County Council is required to prepare, adopt and implement a new Traveller Accommodation Programme (TAP) to meet the accommodation needs of the County's Traveller community, i.e. those families who have been resident in the county for at least three years prior to the adoption of the programme and who are on the Council's list for Social Housing Support.

It is the policy of Wicklow County Council, within the resources available, to provide group and standard housing options as well as halting sites for the accommodation of Travellers who are on the list for Social Housing Support with Wicklow County Council, in accordance with the Assessment of Need carried out under the Traveller Accommodation Act.

The current Traveller Accommodation Programme for Wicklow covers the period from 01 June 2019 to the 31st December 2024. Current need is estimated to be 80 units of accommodation, comprising 59 standard housing units and 21 units of traveller specific accommodation (specially built to include Group Housing, halting sites and one off single sites).

This was spread throughout the Municipal Districts as follows:

Table 8.4 Assessment of Demand for Accommodation for Travellers 2019-2024

	Standard Housing	Traveller Specific Accommodation (specially built to include Group Housing, halting sites and one off single sites)	Total Units of Accommodation Required
Arklow MD	7	11	18
Baltinglass MD	7		7
Bray MD	18	3	21
Greystones MD	8		8
Wicklow MD	19	7	26
Total	59	21	80

The 59 standard housing units required will be provided through a combination of the Council's own house building programme and Part V, with 16% of all social units being allocated to travellers¹⁹. There is adequate zoned and serviced land in each MD to meet this demand, across the various settlements in each district.

With respect to traveller specific accommodation, 8 new units are in train in the Wicklow and Arklow MDs and are due to completion in 2022. The remaining 13 units (8 in Arklow MD, 3 in Bray MD and 2 in Wicklow MD) will be provided during the lifetime of the programme on Council owned land in these districts, which is sufficient to meet this demand.

¹⁹ Having regard to the Council's goal to build c.300 units per annum, this would provide for c. 19 units per annum.

9. Conclusions & Objectives

9.1 Conclusions

1. The 2022-2028 County Development Plan identifies a housing target of 14,946 by 2031. In order to meet this target it will be necessary for c. 1,150 units to be delivered annually between 2021 and 2026 and c. 965 units per annum thereafter up to 2031.
2. House completions have increased consistently year on year between 2012 and 2019. Between 2017 and 2020 the average number of house completions was 808 units per annum.
3. The 2022-2028 County Development Plan and the Local Area Plans that will flow from it, will provide for adequate zoned land to meet the housing target.
4. All regions in Wicklow have experienced an increase in house prices, with the highest increases in Greystones (21%) and Bray (17%). Analysis of property prices shows a difference between the east and west of the County. In 2019 the mean property prices for all types of house on the eastern seaboard ranged from €335,123 to €441,741 (Wicklow town, Bray and Greystones) compared to the west where the prices range from €161,949 to €268,698 (Baltinglass and Blessington).
5. Analysis of affordability has indicated that at least 20% of households will not be able to afford housing in the private market during the lifetime of this strategy. Therefore the maximum 10% social housing or 20% social and affordable in certain circumstances (as set out in the Affordable Housing Act 2021) is required to be sought.
6. The maximum number of social units that could be delivered through Part V requirements up to 2028 is 882 units through the lifetime of the strategy. This is only achievable where all housing projects are subject to Part V. The yield is likely to be much lower given the house number and site size exemptions that apply to Part V. The Local Authority also has capacity for 1,417 units, on the basis of all the land in its ownership being serviced and funded for development. Even in the unlikely scenario that all of these units could be delivered; there would still be a shortfall in the order of 1,167 units given current housing demand (c. 4,466 households).
7. There is an urgent need to address service infrastructure deficiencies, particularly in the growth towns of Bray, Arklow and Blessington, where there is a high demand for social housing. The deficiencies in Arklow and Blessington relate to wastewater treatment whereas the infrastructure required in Bray to release zoned land is the delivery of major transport investment. The delivery of much of this infrastructure is outside the remit of the Local Authority, being the responsibility of Irish Water and the Transport Infrastructure Ireland / National Transport Authority. It is essential that these agencies deliver services in accordance with the priorities set out in the Wicklow Core Strategy.
8. It is essential that funding streams are made available to develop, to the maximum capacity, housing lands in the ownership of the Local Authority.

9.2 Objectives

- HS1** To facilitate the delivery of sufficient new homes to meet the housing target of 14,946 by 2031. In this regard, it will be necessary for c. 1,400 units to be delivered annually between 2022 and 2028.
- HS2** To facilitate the delivery of houses on designated housing land within the boundaries of settlements in accordance with the requirements of the settlement strategy, which directs growth into the key towns, self-sustaining growth towns, self-sustaining towns and small towns.
- HS3** To monitor housing development and the delivery of services on an ongoing basis and to review population targets where service delivery is impeded.
- HS4** To ensure sufficient zoned land is available in all settlements to meet projected housing demand.
- HS5** To facilitate the provision of water services so that they are or will be available during the currency of the plan, sufficient to meet the housing demand.
- HS6** To prioritise as much as possible investment in and distribution of infrastructure in a balanced manner around the County, with priority given to towns that have the highest growth targets.
- HS7** To require the highest standard of design in all new social development or development containing an element of social housing, in accordance with the development standards set out in the County Development Plan and the DoEHLG social housing guidelines.
- HS8** Support the provision of lifetime adaptable homes that can accommodate the changing needs of a household over time and in particular to require that all new residential developments in excess of 20 residential units to provide a minimum 5% universally designed homes in accordance with the requirements of *'Building for Everyone: A Universal Design Approach* and the *Universal Design Guidelines for Homes in Ireland (2015)*²⁰.
- HS9** To require that 10% of all zoned land developed for residential use, or for a mixture of residential and other uses, shall be devoted to social housing. In certain circumstances as set out in the Affordable Housing Act 2021, this requirement will be 20% devoted to social and affordable housing.
- HS10** To require all applicants for permission that will include social and affordable housing to engage in meaningful pre-planning discussions with both the Housing and Planning Authorities, in order to establish at the outset the location, house size and house design requirements of both Authorities.
- HS11** To facilitate the selection of lands or housing units to purchase or lease by the Council, including Part V, to counteract undue segregation by persons of different social backgrounds.
- HS12** To require new multi-unit residential development to provide an appropriate mix of unit types and sizes to ensure that there is a range unit types available to suit the needs of the various households in the county.

²⁰ National Disability Authority Centre for Excellence in Universal Design

- HS13** To encourage proposals from developers to satisfy Part V obligations which are directed toward special need categories – namely, elderly accommodation, traveller accommodation, and specialised accommodation for the homeless and specially adapted accommodation for persons with disabilities – where the proposal is related to an identified local need and is consistent with other policies of the Development Plan.
- HS14** To support independent living and facilitate the provision of supported housing (specific purpose built accommodation) for older people and people with disabilities towns and villages. To facilitate the provision of nursing homes, retirement villages, residential care facilities at appropriate locations in towns and villages in the County.
- HS15** To protect the existing housing stock to meet housing demand and resist development, including short-term letting that would undermine the provision of housing including a supply of rental properties available for longer-term rental in the area.