

# Housing Needs Assessment and Unit Mix Analysis for **Dublin** **City and Clonliffe Road**

Rationale for proposed apartment mix, having regard to, National and Local planning policy, the site's context, including a quantitative assessment of composition, occupancy, supply, and affordability within the housing market, and the demand for residential development in Dublin over the next decade.





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# EXECUTIVE SUMMARY

The following report has been prepared by KPMG Future Analytics on behalf of CWTC Multi Family ICAV acting on behalf of its sub fund DBTR DR1 FUND to quantify the level of demand for residential development across Dublin, with a particular focus on Dublin City, the subject site on Clonliffe Road and the proposed development, comprising of 1,614 no. apartment units (540 studios, 602 no. 1 bed units, 419 no. 2 bed units and 53 no. 3 bed units). The report provides a 10-year outlook, in particular, aiming to address the size and composition of the housing market, how it will change over the next 10 years, and what the implications are for unit size/mix demand.

Given the important economic role Dublin City plays in Ireland, and its influence on the wider Eastern and Midland Region, following the publication of the National Planning Framework (NPF) and the EMRA Regional Spatial and Economic Strategy, this study recognises the need for a high-level strategic document to present the compositional changes in households over the past decades and to identify how the demand for units is changing, and if the current supply (and pipeline of supply) will meet this demand.

With the continued high levels of population growth, it is imperative that future urban development occurs in a sustainable manner, which makes most efficient use of the limited land available. This will ensure that future communities are connected and integrated within Dublin's urban form and are well placed to avail of existing and proposed services and infrastructure. The National Planning Framework recognises the inherent dangers in continuing to push development outside pre-existing settlements to greenfield locations, acknowledging that "meeting Ireland's development needs in housing, employment, services and amenities on mainly greenfield locations will cost at least twice that of a compact growth-based approach".

The assessment uses a number of demand models to establish population growth and housing needs into the future. Specifically, the recent National Planning Framework and ESRI housing demand outputs have been paired with a custom projection from KPMG on population growth and housing requirements to quantify unit demand across the county, as well as what the optimal unit mix to accommodate the changing demographic profile. Following this, a review of affordability is carried out for the market to determine the levels to which households can afford now and how that affordability is likely to change into the future.

It is with this strategic approach in mind that the study has considered how different drivers of demographic change has influenced demand over the past decade, and how housing and land-use policy can best synergize to sustainably meet demand going forward. The report has sought to utilise the best available data on population growth, socio-economic changes, income, market analysis and awareness of stock and a range of other inputs to create the outlook.

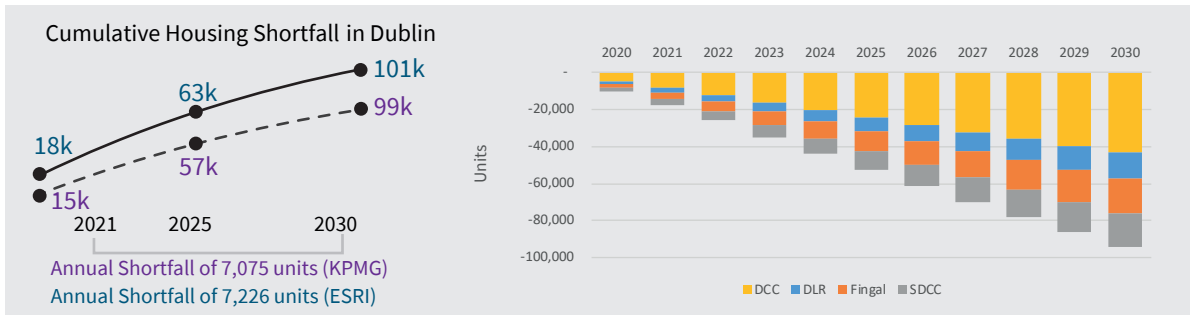
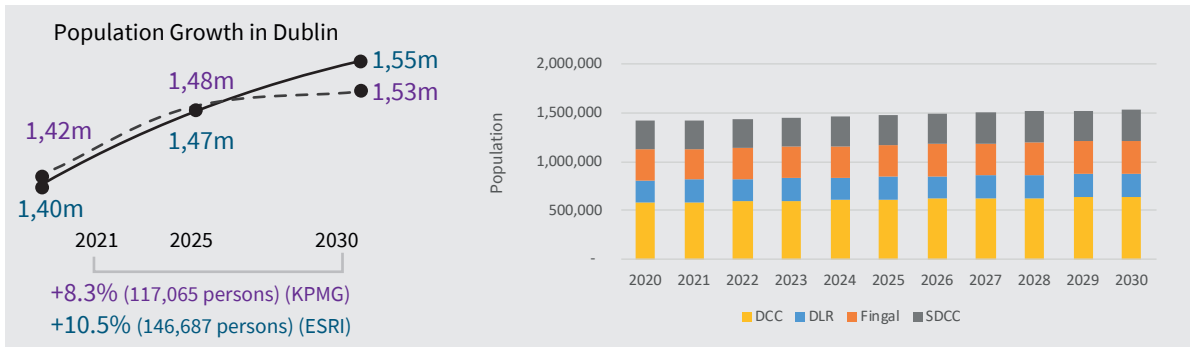
## Key Findings

Population growth in Dublin will generate an additional housing demand of over 101,171 units (projected by ESRI) 99,062 units (projected by KPMG) by 2030. A strong increase in units completions will be required annually to meet demand. This completions pipeline has not been reflected in recent years despite a large planning pipeline, with an average of just 4,000 units being completed per annum between 2011-2020 in the county.

The largest demand will be from Dublin City which will have a cumulative need for 42,878 units over the next 10 years (4,200 per annum). Unit completion will need to significantly ramp up from current levels to meet demand given that a total of just 11,672 units were completed in the period 2011-2020. This demand will be predominantly for smaller unit types, with 1- and 2-person households accounting for over 73.3% of

unit demand. Moreover, there will be no additional need for units accommodating 5-persons or more by 2030 with the existing unit composition in the market able to account for all future demand. Given the current relationship between supply, demand, forecast income growth and rent/price growth in the market, it is likely that the levels of affordability will continue to decrease in the Dublin City market to 2030 until such as time that the demand for housing is met.

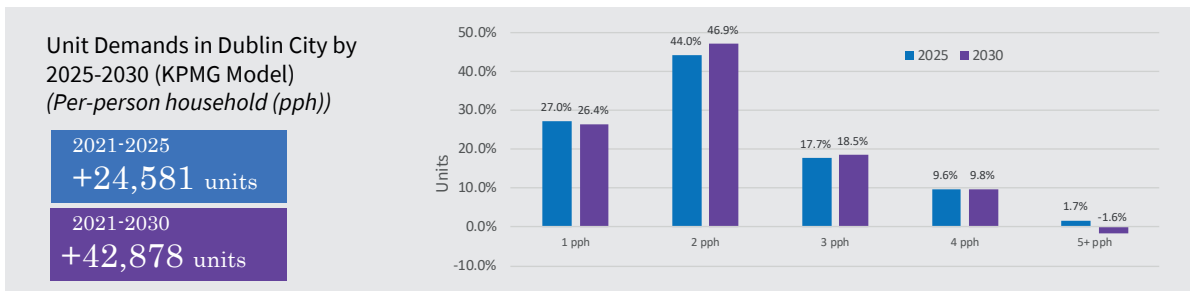
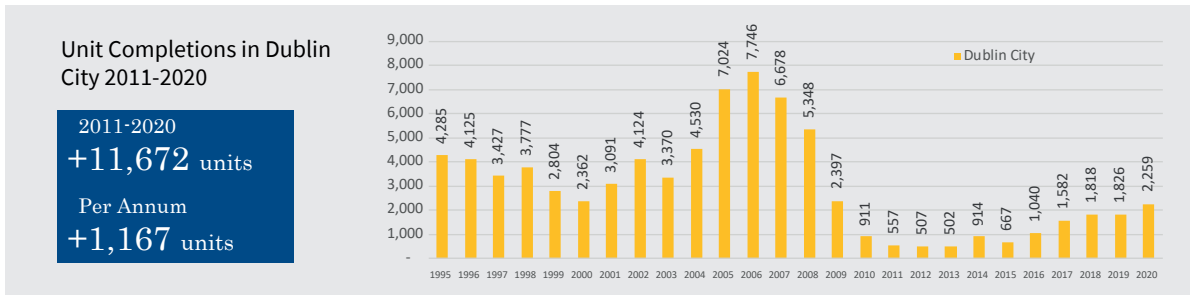
**The results of this analysis indicate that both the scale of the development and the unit mix at the proposed site on Clonliffe Road would align with the requirements for Dublin City, greatly assist in meeting the substantial shortfall that exists in the wider market, and be an optimal use for the subject site given its strategic location in the city.**



### Planning Permission Pipeline

**+66,160 units** in the Dublin Region  
**+22,009 units** in Dublin City

Area	Units	1 Bed	2 Bed	3 Bed	4 Bed	5 Bed	5 Bed+
DCC	22,009	38.7%	49.5%	9.5%	1.1%	0.3%	0.0%
DLR	14,526	22.1%	46.8%	19.5%	9.9%	1.3%	0.0%
Fingal	18,111	16.5%	40.9%	25.7%	14.4%	2.1%	0.0%
SDCC	11,514	19.6%	36.6%	33.2%	8.7%	0.1%	0.0%
Dublin Overall	66,160	25.7%	44.3%	20.3%	8.0%	1.0%	0.0%



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## DESCRIPTION OF DEVELOPMENT

The development will consist of the construction of a Build To Rent residential development set out in 12 no. blocks, ranging in height from 2 to 18 storeys, to accommodate 1614 no. apartments including a retail unit, a café unit, a crèche, and residential tenant amenity spaces. The development will include a single level basement under Blocks B2, B3 & C1, a single level basement under Block D2 and a podium level and single level basement under Block A1 to accommodate car parking spaces, bicycle parking, storage, services and plant areas. To facilitate the proposed development the scheme will involve the demolition of a number of existing structures on the site.

The proposed development sits as part of a wider Site Masterplan for the entire Holy Cross College lands which includes a permitted hotel development and future proposed GAA pitches and clubhouse.

The site contains a number of Protected Structures including The Seminary Building, Holy Cross Chapel, South Link Building, The Assembly Hall and The Ambulatory. The application proposes the renovation and extension of the Seminary Building to accommodate residential units and the renovation of the existing Holy Cross Chapel and Assembly Hall buildings for use as residential tenant amenity. The wider Holy Cross College lands also includes Protected Structures including The Red House and the Archbishop's House (no works are proposed to these Structures).

The residential buildings are arranged around a number of proposed public open spaces and routes throughout the site with extensive landscaping and tree planting proposed. Communal amenity spaces will be located adjacent to residential buildings and at roof level throughout the scheme. To facilitate the proposed development the scheme will involve the removal of some existing trees on the site.

The site is proposed to be accessed by vehicles, cyclists and pedestrians from a widened entrance on Clonliffe Road, at the junction with Jones's Road and through the opening up of an unused access point on Drumcondra Road Lower at the junction with Hollybank Rd. An additional cyclist and pedestrian access is proposed through an existing access point on Holy Cross Avenue. Access from the Clonliffe Road entrance will also facilitate vehicular access to future proposed GAA pitches and clubhouse to the north of the site and to a permitted hotel on Clonliffe Road.

The proposed application includes all site landscaping works, green roofs, boundary treatments, PV panels at roof level, ESB Substations, lighting, servicing and utilities, signage, and associated and ancillary works, including site development works above and below ground.

Section 01  
**INTRODUCTION**

Dublin’s population continues to expand robustly, despite net outward migration during the economic downturn. In the ten years to 2016, it grew by 13.5% to 1.35 million. The composition of Dublin households is also changing rapidly.

Despite the economic recession, Ireland’s population has grown by +12.3% over the past decade from 4.24m to 4.76m in 2016. The population living in urban areas has also increased by +16% from 2.57m to 2.98m. Over the same period, the population of Dublin increased from 1.19 to 1.35 million (13.5%); An average population growth rate of 1.3% per annum. Dublin’s population is set to continue expanding due to natural growth and net inward migration. In 2020, it is estimated at over 1.40 million.

Alongside the growth in population, there has been a shift in household occupancy and composition within existing and new households. This situation represents something of a ‘paradigm shift’ as different housing profiles and needs have developed that were not historically present. The characteristics of households, including their size and composition, are closely associated to a wide range of societal changes that impact demography and preference. The primary driver of this shift is lower fertility rates. The fertility rate in Ireland and Dublin has dropped significantly over the past 50 years our replacement rate is now below the rate of two children per woman. Most countries have seen a decline in the fertility rate over the past three decades. Today almost no OECD country has a total fertility rate above the population replacement rate of two children per women. This reduction in fertility has decreased the average size of families and as a consequence, the demand for larger unit sizes. The average household size in Dublin was 2.73 persons per household in 2016. This is down from 2.99 in 1996 and 3.94 in 1971.

In line with this pattern, residential stock in Dublin has grown by approximately 14.0% since 2006. The share of semi-detached houses of total has remained in and around 35% of stock, increasing in absolute terms by 7.8% on 2006 figures by 2016. Apartments were the highest growing housing type in that same period though, seeing an almost 39% increase on 2006 figures. They are presently just under 24.9% of the total residential stock share and are reflective of the new demands of the resident population.

**INSIGHTS**

Dublin’s population growth has been robust, increasing by 13.5% to nearly 1.35 million in the ten years to 2016. Between the last two censuses in 2011 and 2016, the population grew by 5.8%.

This recent increase in Dublin was greater than the state-wide growth of 3.8% during the same period and may be seen as evidence of the city’s draw as an economic centre, with workers coming to seek out improved employment opportunities and availing of the fall in property prices during the economic downturn.

Changes to Dublin’s age structure have closely aligned with national trends since 2002 (Table 1). The 15–24 years of age cohort fell by 4% nationally and by 5% in Dublin. However, while the core working age group – 25–44 years – fell by 1% nationally, it grew by 1% in Dublin.

Type of Change	Absolute Change		Percentage Change	
	State	Dublin	State	Dublin
Age Group				
0-14	179,124	44,761	22%	21%
15-24	-65,070	-28,536	-10%	-14%
25-44	226,032	88,611	19%	24%
45-64	303,010	68,690	36%	30%
65+	201,566	51,012	46%	45%
Total	844,662	224,538	22%	20%

## INSIGHTS

Dublin’s housing stock has grown by approximately 26% between 2002 and 2016, reaching nearly 480,000 residential units. In 2002, apartments comprised 16.7% of the stock. However, the share of apartment's increased markedly to 24.9% in 2016.

In Dublin, property prices have been increasing since 2012, with the average sale price at €514,480 in Dublin in 2020, 76.2% higher than the bottom of the market.

Rents have also gone through a considerable period of change since the mid-2000s and now exceed peak pre-economic crisis levels. For Dublin, 2020’s average asking market rent has been €2,023; 102% higher than the lowest point in 2012 and 43.5% higher than the previous peak in 2008 (Daft.ie).

Supply’s failure to meet the requirement or demand for housing is resulting in an annual accumulation of pent-up, unmet demand and an ‘inflation’ in prices. The speed with which supply increases and its (in)ability to stabilise at or around the demand rate will play a vital role in determining changes in rents.

Occupancy within the housing market also shifted significantly in the last number of years, evidenced by the relative growth of the private rental sector which has more than doubled in size between 2006 and 2016, with approximately one in five households (24%) in Dublin now renting their home. The lack of housing supply, affordability constraints, and increase in property prices all combined to see a transition away from the well-established owner-occupier market.

In addition to fertility, trends in household size are influenced by trends in: health, longevity and migration; cultural patterns surrounding intergenerational co-residence, home leaving, cohabitation, marriage and divorce, lower mortality; and socioeconomic factors that shape trends in education, employment and housing markets. For example, in 2016 there were 40,271 persons living alone in Dublin over the age of 65, accounting for over 1-in-4 (26.8%) of all persons over 65. This rate increases to 46.8% for persons over 80 years old. Taken as a whole, these trends mean that there is a need to plan for more homes, particularly to meet the accommodation needs of smaller families and single person households (including older people), both of which are likely to increase in number.

In parallel with these social changes, the residential development sector has not functioned correctly over the past 10 years. In Dublin, the completion of just 40,043 units in 10 years between 2011 and 2020 (average at 4,004 units per year) was not sufficient to meet the needs of a growing/changing population and created a significant ‘pent-up’ demand for new units in the capital (Figure 1.1). Population continued to grow year-on-year from 1.26 million in 2010 to 1.40 million in 2020 adding 140,000 additional persons in the Dublin Region over the period.

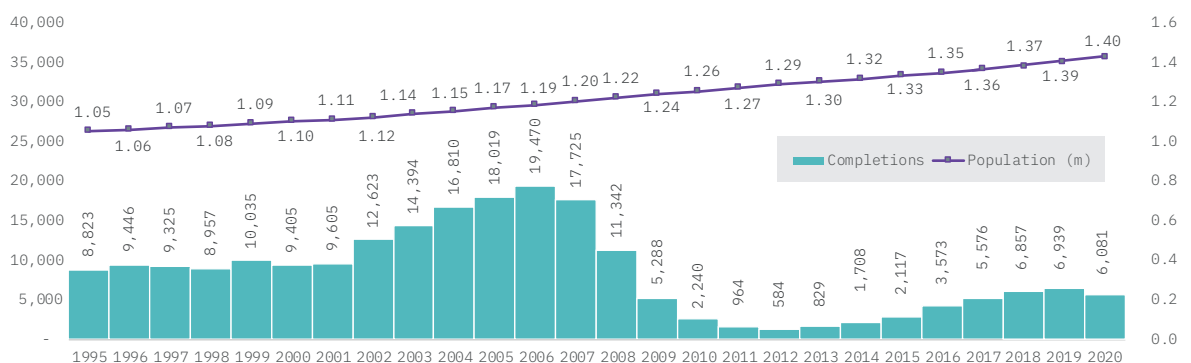
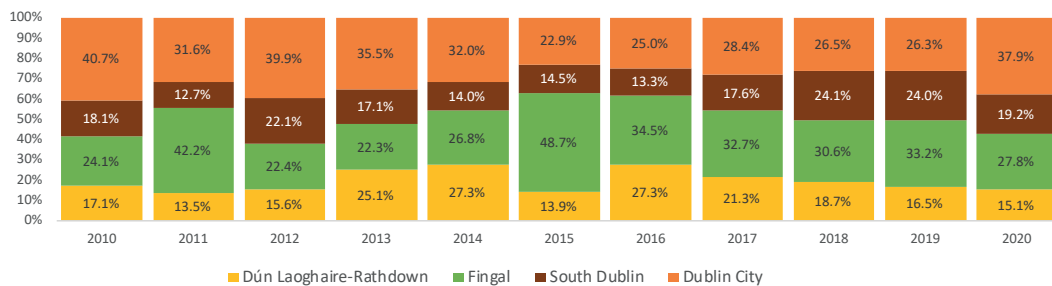


Figure 1.1: Population Growth and Housing Completions 1995 - 2020 (Dublin)



When housing completions are viewed by local authority area across the Dublin region, Dublin City and Fingal have the highest concentrations of completions (61.1% of total completions) accounting for 32.6% (10,685 units) and 28.5% (9,358 units) of completions respectively. This percentage breakdown year-on-year varies, but broadly follows this same pattern (Figure 1.2). The lowest level of completions has been in Dun Laoghaire Rathdown with 6,328 units completed since 2010 or approx. 632 units per annum.



**Figure 1.2: Proportion of Housing Completions By Local Authority 2010-2020**

This dysfunction within the housing market over the past decade is now impacting on the quality of life of large sections of society. This is best illustrated by the fact that for the first time since the foundation of the State, average household size increased in the last census. Many thousands of people can no longer choose their desired living arrangements and must remain living with family or in a house share for longer than planned in sub-optimal situations or in many cases have no home at all.

The outlook is relatively positive from a housing supply capacity perspective. Granted residential planning permissions in Dublin total of 66,160 residential units (in schemes of 10+ units). While a significant quantum of housing units awaits the commencement of construction, there are 18,160 units currently classified as commenced. This accounts for 27.4% of total extant permissions currently in the pipeline. Although this is a significant quantum of new units, the level of consent will need to continue at a similar pace to ensure a constant supply of new units. In the period between 2012 and 2020 in Dublin, consents for 6,243 units across 109 schemes of 9 units or more elapsed/expired with no unit completion. Based on available information, it is envisaged that a shortfall in supply will persist in Dublin in the face of strong, sustainable demand, until such time as unit delivery dramatically increases or population restructuring occurs.



*Population growth and a return to economic performance have increased the need to deliver housing. However, supply has failed to increase accordingly, exemplified by completions of just 13,020 units combined for 2019 and 2020 and has led to the further increases in property price and rent.*



## Section 02 POLICY CONTEXT

Key national policy documents informing the planning and development of housing and unit mix in Dublin City are set out in this section.

This section provides an overview of the key planning and development policy documents that guide the evolution of housing strategy for each Local Authority. Ultimately, it illustrates the viability of a proposed housing development and its adherence to, and consistency with, specified planning policy principles and objectives.

### National Planning Framework: Ireland 2040 Our Plan

The National Planning Framework (NPF) is the Government's high-level strategic plan for shaping the future growth and development of the country to the year 2040. The core principles that run through the framework are that of sustainable development and the creation of sustainable high-quality communities. A key theme and recognised National Strategic Outcome of the NPF is Compact Growth, and it is recognised that carefully managing the sustainable growth of compact cities, towns and villages will require the consolidation of development within the footprints of existing urban settlements.

It is clear that the NPF will drive increasing levels of forthcoming population growth and residential development into urban areas as the most sustainable and resilient locations. The proposed development aligns with the National Policy Objectives (NPOs) and the broader principles of the NPF, redeveloping an urban brownfield site with significant potential to secure additional sustainable housing capacity and employment.

Key NPOs are detailed below and it is firmly considered that the proposed development is consistent with them and their principles. The scheme is a progressive and proactive proposition to secure additional population growth and employment opportunities within the existing urban envelope of Dublin, thereby supporting more sustainable residential densities and land-use intensities (NPOs 1b, 2a, 3a, 3b, 33 and 35). This supports the bolstering of critical mass to justify the provision of services and at a central location close to public transport, employment opportunities and a host of services, amenities and facilities. Importantly, the sustainable use and densification of urban land will have environmental benefits by protecting undeveloped lands, promoting active and public modes of transport, reducing greenhouse gas emission and improving air quality (NPOs 52 and 64).

NPO 1b: "Eastern and Midland Region: 490,000-540,000 additional people i.e. a population of around 2.85 million."

• NPO 2a: "A target of half (50%) of future population and employment growth will be focused in the existing five cities and their suburbs."

• NPO 3a: "Deliver at least 40% of all new homes nationally, within the built-up footprint of existing settlements."

• NPO 3b: "Deliver at least half (50%) of all new homes that are targeted in the five Cities and suburbs of Dublin, Cork, Limerick, Galway and Waterford, within their existing built-up footprints."

• NPO 33: "Prioritise the provision of new homes at locations that can support sustainable development and at an appropriate scale of provision relative to location."

• NPO 35: "Increase residential density in settlements, through a range of measures including reductions in vacancy, reuse of existing buildings, infill development schemes, area or site-based regeneration and increased building heights."

- NPO 52: “The planning system will be responsive to our national environmental challenges and ensure that development occurs within environmental limits, having regard to the requirements of all relevant environmental legislation and the sustainable management of our natural capital.”
- NPO 64: “Improve air quality and help prevent people being exposed to unacceptable levels of pollution in our urban and rural areas through integrated land use and spatial planning that supports public transport, walking and cycling as more favourable modes of transport to the private car, the promotion of energy efficient buildings and homes, heating systems with zero local emissions, green infrastructure planning and innovative design solutions.”

The NPF recognises the inherent dangers in continuing to push development outside pre-existing settlements to greenfield locations, acknowledging that “meeting Ireland’s development needs in housing, employment, services and amenities on mainly greenfield locations will cost at least twice that of a compact growth-based approach” (NPF, p. 28). The NPF strongly encourages infill development as a sustainable alternative to greenfield development and determines that the ‘extent to which we prioritise brownfield over greenfield use, encourage the use and reuse of buildings in urban and rural areas, and reduce sprawl, will all help to increase the efficiency of land use... (NPF, p.118).

The acceleration of the delivery of new housing is imperative in order to combat the current shortage of affordable housing which is currently distorting Dublin’s housing market. This must be delivered in sufficient densities in order to make efficient use of available land in urban built up areas and must be supported by suitable services and public transport.

### Eastern and Midland Regional Assembly-Regional Spatial and Economic Strategy

The Regional Spatial and Economic Strategy (RSES) for the Eastern and Midland region was agreed in May 2019 and came into force in June 2019. It is a high-level strategic plan and investment framework that seeks to shape the development of the Eastern and Midland region up to 2031 and beyond, supporting the implementation of the NPF by providing a long-term strategic planning and economic framework for the development of the regions.

The RSES translates the NPOs of the NPF to key Regional Policy Objectives (RPOs) to inform and guide the relevant local authorities with respect to the preparation of the City and County Development Plans, Local Area Plan and other plans and in their assessment of planning applications.

#### 2.1 ‘Growth Strategy’

Regional Policy Objective 3.2: “Local authorities, in their core strategies shall set out measures to achieve compact urban development targets of at least 50% of all new homes within or contiguous to the built up area of Dublin city and suburbs and a target of at least 30% for other urban areas.”

The principle of compact growth is a key priority for the EMRA region over the next 10 years. Focusing development within the existing built-up area of Dublin will need to be a cornerstone for future housing strategy at a local authority level. The subject site at Clonliffe Road provides opportunity to follow this principle at a location that is accessible, with ample amenities, economic activity and well served on public transportation routes.

## 2.2 'People and Place'

Regional Policy Objective 4.3: *“Support the consolidation and re-intensification of infill/brownfield sites to provide high density and people intensive uses within the existing built up area of Dublin city and suburbs and ensure that the development of future development areas is co-ordinated with the delivery of key water infrastructure and public transport projects.”*

The proposed development, comprising of 1,614 no. apartment units (540 studios, 602 no. 1 bed units, 419 no. 2 bed units and 53 no. 3 bed units) at Clonliffe Road will serve to increase the density of housing in an area within walking distance of Dublin City urban core. Higher density infill developments on good public transport links next to significant employment opportunities would make better use of existing infrastructure and provide housing to a market with chronic undersupply.

## 2.3 'Dublin Metropolitan Area Strategic Plan (MASP)'

Regional Policy Objective 5.5: *“Future residential development supporting the right housing and tenure mix within the Dublin Metropolitan Area shall follow a clear sequential approach, with a primary focus on the consolidation of Dublin and suburbs, and the development of Key Metropolitan Towns, as set out in the Metropolitan Area Strategic Plan (MASP) and in line with the overall Settlement Strategy for the RSES. Identification of suitable residential development sites shall be supported by a quality site selection process that addresses environmental concerns.”*

The proposed development follows the logical sequential approach set out by RPO 5.5, seeking the redevelopment of the underutilised subject site within Dublin's existing built-up area, which is within reach of employment opportunities, services and public transport.

## 2.4 'Connectivity'

Regional Policy Objective 8.1: *“The integration of transport and land use planning in the Region shall be consistent with the guiding principles expressed in the transport strategy of the RSES.”*

The proposed development seeks to achieve a sustainable and appropriate mix of uses, residential density and land-use intensity at the subject site, within walking distance of neighbourhood services, the Royal Canal and Drumcondra train station stops and several bus stops.

## 2.5 'Quality of Life'

Regional Policy Objective 9.4: *“Design standards for new apartment developments should encourage a wider demographic profile which actively includes families and an ageing population.”*

The proposed development has been designed to cater for individuals and households from varying demographic and socio-economic backgrounds. The inclusion of the Part V social housing units within the scheme will add diversity to the tenure type and social background. The mix of units (studio, 1-beds, 2-beds and 3-beds) will cater to individuals and families of various demographic backgrounds and stages of the life cycle.

## Guidelines for Planning Authorities on Sustainable Urban Housing: Design Standards for New Apartments

The Sustainable Urban Housing: Design Standards for New Apartments Guidelines for Planning Authorities (Apartment Design Guidelines) were published in December 2020 as an update to the Guidelines issued by the Department in 2007 and 2015. The Guidelines aim to: (1) uphold proper standards for apartment design to meet the accommodation needs of various household types and sizes, (2) reduce construction costs and increase development viability, (3) increase housing supply, (4) improve affordability for buyers and (5) improve sustainability and resilience.

Specific Planning Policy Requirement 1: *“Apartment developments may include up to 50% one-bedroom or studio type units (with no more than 20-25% of the total proposed development as studios) and there shall be no minimum requirement for apartments with three or more bedrooms. Statutory development plans may specify a mix for apartment and other housing developments, but only further to an evidence-based Housing Need and Demand Assessment (HNDA), that has been agreed on an area, county, city or metropolitan area basis and incorporated into the relevant development plan(s).”*

A breakdown of the proposed development, comprising of 1,614 no. apartment units (540 studios, 602 no. 1 bed units, 419 no. 2 bed units and 53 no. 3 bed units) at Clonliffe Road is stated in Table 2.1. SPPR 8(i) provides flexibility to provide a greater number of 1-bed units noting that, *“no restrictions on dwelling mix and all other requirements of these Guidelines shall apply, unless specified otherwise.”* for proposals that qualify as BTR developments.

**Figure 2.1 Proposed residential unit mix at subject site**

Unit Type	No. Units	Percentage
Studio	540	33.5%
1 Bed	602	37.3%
2 Bed	419	26.0%
3 Bed	53	3.3%
<b>Total</b>	<b>1614</b>	<b>100.0%</b>

A detailed HNDA was prepared by KPMG as part of this study to identify housing need across the county over the next decade. The outputs of this HNDA are discussed in Section 5 of the report, but indicate that Dublin City has a significant need for new unit completions over the next 10 years. Moreover, that the demand in Dublin City will be predominantly in the 1 and 2 person household types, representing over 73% of total demand. The composition and density of this scheme fits with the projected housing needs for the city up to 2030.

## Dublin City Development Plan 2016–2022

The following sections details the relevant policies and objectives relating to the proposed development specified by An Bord Pleanála. These policies and objectives are outlined below and are responded to as necessary.

### Sustainable Communities and Neighbourhoods

Policy SN1: *“To promote good urban neighbourhoods throughout the city which are well designed, safe and suitable for a variety of age groups and tenures, which are robust, adaptable, well served by local facilities and public transport, and which contribute to the structure and identity of the city, consistent with standards set out in this plan.”*

The proposed scheme promotes the creation of a new urban development, the design and layout of which is safe and suitable for a variety of age groups, family units and incomes. The proposed development includes 1,614 no. units on-site with external and internal communal area and support facilities to meet their needs and enhance residential amenity. The proposed development is located in a well-established public transport corridor that is defined by the Drumcondra train station and Dublin Bus stops on Drumcondra Road Lower. The provision of this development will contribute to the structure and identity of the surrounding area by bringing an underutilised area back into beneficial use. The proposed development is consistent with national and local development management standards.

*Policy QH6: “To encourage and foster the creation of attractive mixed-use sustainable neighbourhoods which contain a variety of housing types and tenures with supporting community facilities, public realm and residential amenities, and which are socially mixed in order to achieve a socially inclusive city.”*

The proposed development is consistent with national development management standards for new residential developments contained in the Delivering Homes Sustaining Communities – Statement on Housing Policy, Sustainable Urban Housing: Design Standards for New Apartments, and Sustainable Residential Development in Urban Areas and the accompanying Urban Design Manual: A Best Practice Guide.

Consistent with the core strategy for Dublin City, the proposed development provides for the regeneration of an underutilised site to provide for a suitable and sustainable residential density of development at a site which enjoys close proximity to existing public transport infrastructure services and community services. The proposed development, by building at higher densities, making more efficient use of land and energy resources, will serve to consolidate urban form and foster the development of compact neighbourhoods at a critical mass which contributes to the viability of economic, social, and transport infrastructure. Varied housing typologies have been applied for in order to encourage a more diverse choice of housing options in terms of tenure, unit size, and building design in the local area. The proposed development provides a combination of studio and 1-, 2- and 3-bed apartment units to cater for the needs of a variety of homeowners and households, both now and in the future.

The development will provide apartment units of different types and sizes, thereby catering for individuals and families of different sizes, stage in life and incomes. The inclusion of the Part V social housing on-site will support the mix in tenures and household incomes.

## Section 03

### DEMOGRAPHICS AND CHANGING DEMANDS

The population of Dublin grew by 27.3% between 1996-2016. The pattern of growth varied significantly between Local Authority areas, with highest proportional growth occurring in Fingal.

Ireland experienced a population increase of +12.3% over the past decade from 4,239,848 in 2006 to 4,761,865 in 2016. Population living in urban areas has increased by +16% from 2,574,313 to 2,985,781. Over the same period the population of Dublin increased from 1.18 to 1.27 million between 2006 and 2011 (7.2%), and a further 5.8% growth from 1.27 to 1.34 from 2011 to 2016. A summary of this growth can be seen in Figure 3.1 below. Dublin City in 2016 accounted for 41.5% of the total population in the county with 554,554 residents, with the remaining 58.5% roughly split evenly across the other local authority areas. Growth over the past 20 years has not occurred proportionally, and Fingal and South Dublin county council areas have experienced higher growth rates at 76.5% and 27.4% respectively.

Changes to Dublin's age structure have closely aligned with the national trend since 2002. The 15–24 years of age cohort fell by 4% nationally and by 5% in Dublin. However, while the core working age group (25–44 years) fell by 1% nationally, it grew by 1% in Dublin. Ireland has the youngest population in Europe with a third of the population under 25 years old and almost half the population under the age of 34. 282,300 persons in Dublin were aged between 15-29 (21% of total) in 2016.

While the overall population is still very young, one of the most notable features of Ireland's changing demographics is the pace at which the population is ageing, particularly the rate of growth in the older age cohorts. Age dependency is defined as people outside of the typical working age categories (i.e. 0-14, 65 years+). Data released from the Census 2016 indicates that Ireland's population of older people (defined here as those being 65+) is now 637,567. This is an increase of 36% over the past decade. Older people now account for 13% of the national population (up from 11% in 2006).

The CSO's Population and Labour Force Projections 2016 – 2046 estimate the likely changes to population and this trend over the next two decades. It is projected that the population within the 65+ age cohorts will increase by 223,033 (or 35%) to 860,600 persons over the next 10 years. This will see the age dependency rate rise again from 13% to 16% of the total population.

Area	Population 1996	Population 2002	Population 2006	Population 2011	Population 2016	Population Change 96-2016	Population Change 96-02	Population Change 02-06	Population Change 06-11	Population Change 11-16	% of Dublin Population in LA
Dublin City	481,854	495,781	506,211	527,612	554,554	15.1%	2.9%	2.1%	4.2%	5.1%	41.2%
Dún Laoghaire-Rathdown	189,999	191,792	194,038	206,261	218,018	14.7%	0.9%	1.2%	6.3%	5.7%	16.2%
Fingal	167,683	196,413	239,992	273,991	296,020	76.5%	17.1%	22.2%	14.2%	8.0%	22.0%
South Dublin	218,728	238,835	246,935	265,205	278,767	27.4%	9.2%	3.4%	7.4%	5.1%	20.7%
<b>Dublin (All LAs)</b>	<b>1,058,264</b>	<b>1,122,821</b>	<b>1,187,176</b>	<b>1,273,069</b>	<b>1,347,359</b>	<b>27.3%</b>	<b>6.1%</b>	<b>5.7%</b>	<b>7.2%</b>	<b>5.8%</b>	-

Figure 3.1: Population Growth in Dublin (By Local Authority), 1996-2016

Dublin's population reached 1.35 million at the time of the census in 2016 and it is expected to continue growing robustly to 1.55 million by 2030. The rate of growth (Figure 3.2) which is based on the National Planning Framework projections for population in the Dublin region, will generate an ever-increasing housing requirement, which will not likely be sufficiently catered for based on current planning consents.

Population in Dublin City will surpass 600,000 in 2024 and reach 637,446 by 2030, an increase of +60,374 persons in the next 10 years. The remaining Local Authorities in Dublin are projected to experience similar levels of growth with an average growth rate of 9.4% up to 2030.

Area	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Dublin City	577,071	582,842	588,670	594,557	600,503	606,508	612,573	618,698	624,885	631,134	637,446
Dún Laoghaire-Rathdown	226,870	229,139	231,431	233,745	236,082	238,443	240,828	243,236	245,668	248,125	250,606
Fingal	308,040	311,120	314,231	317,374	320,547	323,753	326,990	330,260	333,563	336,898	340,267
South Dublin	290,086	292,987	295,917	298,876	301,865	304,883	307,932	311,012	314,122	317,263	320,435
<b>Dublin (All LAs)</b>	<b>1,402,067</b>	<b>1,416,088</b>	<b>1,430,249</b>	<b>1,444,551</b>	<b>1,458,997</b>	<b>1,473,587</b>	<b>1,488,323</b>	<b>1,503,206</b>	<b>1,518,238</b>	<b>1,533,420</b>	<b>1,548,754</b>

**Figure 3.2 Future Population Growth in Dublin (By Local Authority), 2020-2030**

The fertility rate in Ireland, measuring the average number of children per female, is lower amongst the current cohort than it has been in previous generations. This implies families are, on average, smaller households than they have been in the past and also that there are more households without children. In Dublin, the proportion of 4- and 5-person households is reducing, while 1- and 2-person households are becoming the norm. The Dublin City local authority area is home to the largest cohort of 1 and 2-person households. Dublin City also retains the largest cohort of 3-person households, mostly due to its existing suburbs - inter-mixed with newer constructed housing types. The surrounding local authorities are home to a large mix of 3, 4 and 5+ person households, though each has a sizable cohort of 1 and 2-person households as well. Much of the housing in Dún Laoghaire-Rathdown, is being occupied by 1, 2 and 3-person households. With family households likely to be smaller than in the past, there is a valid contention that such households are likely to demand smaller dwellings.

Coupled with changing fertility rates, Ireland is experiencing many of the social changes that are identical to that happening globally in developed western economies. These changing demands are having a significant impact on housing demand, occupancy and unit preference, and are magnified in major metropolitan areas, such as Dublin. The key trends are:

- Higher proportions of people living alone
- Reduced rates of marriage and higher divorce rates
- An aging population in a developed economy where life expectancy is increasing
- Cities having much higher concentrations of young professionals
- Delayed household formation and less children
- Increased social mobility (higher income, educational attainment)

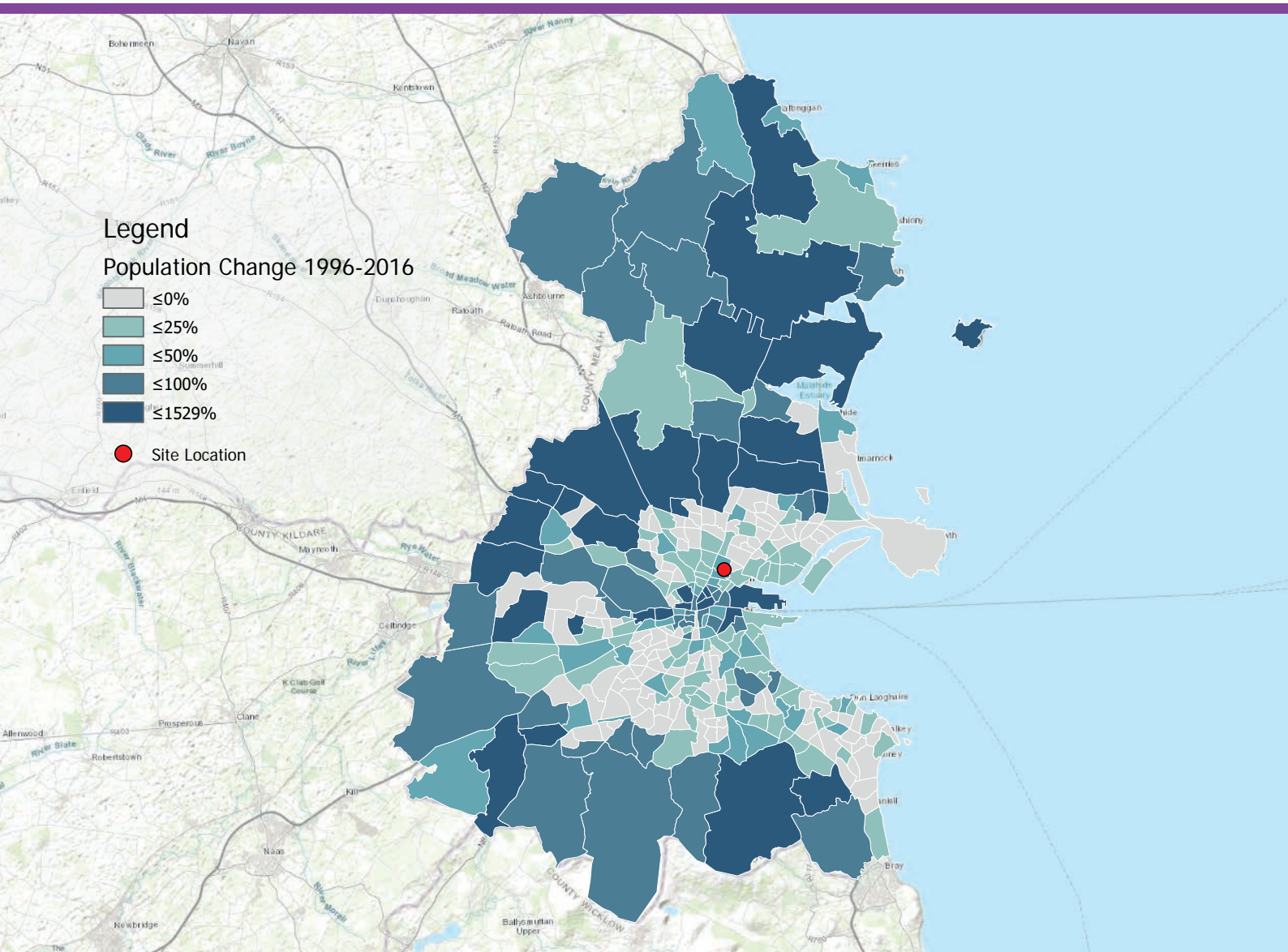
Tenure preference has also shifted significantly in the last number of years. The private rented sector has more than doubled in size between 2006 and 2016, with approximately one in five households (24%) now renting their home in the private rented sector in Dublin. Increasingly the sector is providing housing for a wide range of households, including; those who have postponed house purchase due to a variety of reasons; and others who have lost their homes during the recession; and students, and individuals and households who choose to rent by choice. The sector also provides homes for those whose rents are paid for by the State through the Rent Supplement and Rental Accommodation schemes. **The latest data from the social housing waitlist for Dublin City also confirms that this demand will be largely for 1 bed units with 55.4% (9,154 applications) of the current RAS demand (August 2020) for 1-person households.**



Looking at historic growth at a sub-county level, the principal areas where population gain has been highest have been around Dublin Airport, Blanchardstown, Stepside, and many parts of Dublin City centre. These top 25 areas account for 163,341 additional persons since 1996 and amount to 56.5% of total growth in the county over the period. 54.8% of this growth has occurred in Fingal, 23.6% in South Dublin, and the remainder in DLR and Dublin City. The spatial distribution of this growth pattern from 1996 to 2016 is visualised below by Electoral Division.

#	Electoral Division	LA	Population 1996	Population 2016	Historic Growth 1996-2016	Per Annum Growth
1	Airport	Fingal	308	5,018	1529%	76.5%
2	Dubber	Fingal	577	7,372	1178%	58.9%
3	The Ward	Fingal	806	9,602	1091%	54.6%
4	Balgriffin	Fingal	603	3,113	416%	20.8%
5	Cabinteely-Loughlinstown	DLR	880	4,280	386%	19.3%
6	Balbriggan Rural	Fingal	3,454	16,495	378%	18.9%
7	Ushers A	Dublin City	845	3,930	365%	18.3%
8	Lucan-Esker	South Dublin	7,451	32,236	333%	16.6%
9	Lucan North	Fingal	340	1,436	322%	16.1%
10	Blanchardstown-Abbotstown	Fingal	1,531	6,195	305%	15.2%
11	Blanchardstown-Mulhuddart	Fingal	1,245	4,123	231%	11.6%
12	Saggart	South Dublin	1,408	4,640	230%	11.5%
13	Swords-Lissenhall	Fingal	3,222	10,447	224%	11.2%
14	Kinsaley	Fingal	3,282	9,621	193%	9.7%
15	Ballymun A	Dublin City	1,766	4,765	170%	8.5%
16	Lusk	Fingal	3,740	9,623	157%	7.9%
17	Blanchardstown-Blakestown	Fingal	15,131	38,894	157%	7.9%
18	Glencullen	DLR	8,063	19,773	145%	7.3%
19	Tallaght-Jobstown	South Dublin	7,294	17,824	144%	7.2%
20	Rotunda A	Dublin City	2,522	5,965	137%	6.8%
21	North City	Dublin City	2,391	5,654	136%	6.8%
22	Arran Quay C	Dublin City	1,914	4,471	134%	6.7%
23	Cherry Orchard A	Dublin City	1,398	3,254	133%	6.6%
24	Grange B	Dublin City	2,329	5,326	129%	6.4%
25	Blanchardstown-Tyrrelstown	Fingal	1,473	3,257	121%	6.1%

Figure 3.3 Top 25 Population Growth areas in Dublin (By Local Authority), 1996-2016



The Electoral Division maps below provide further breakdown of selected socio-economic variables looking at income distribution, age dependency, owner-occupancy, household type. For example, the Dublin City area has higher than average income than the Dublin Region or Nationally, a comparatively lower average age, and a very low proportion of elderly, retired or empty nest household types. Renting is the dominant tenure with low levels of owner-occupancy existing across the city centre.

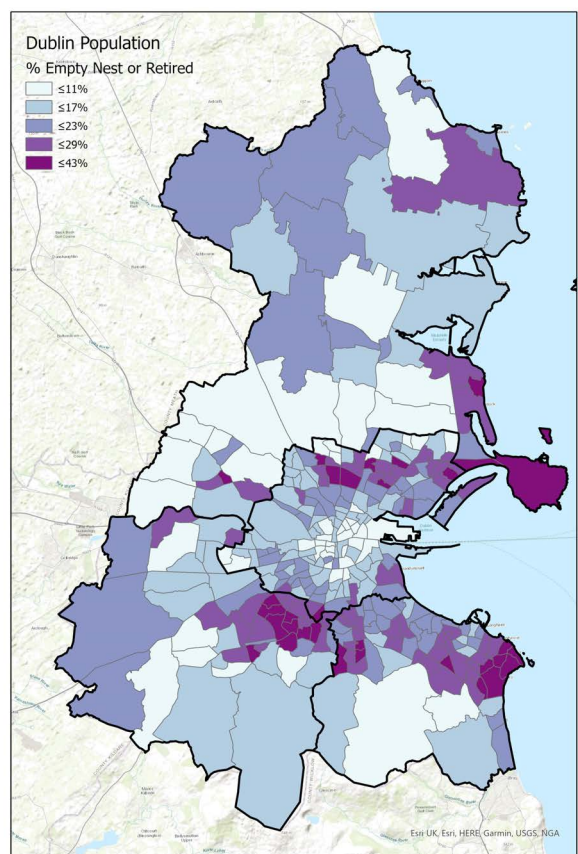
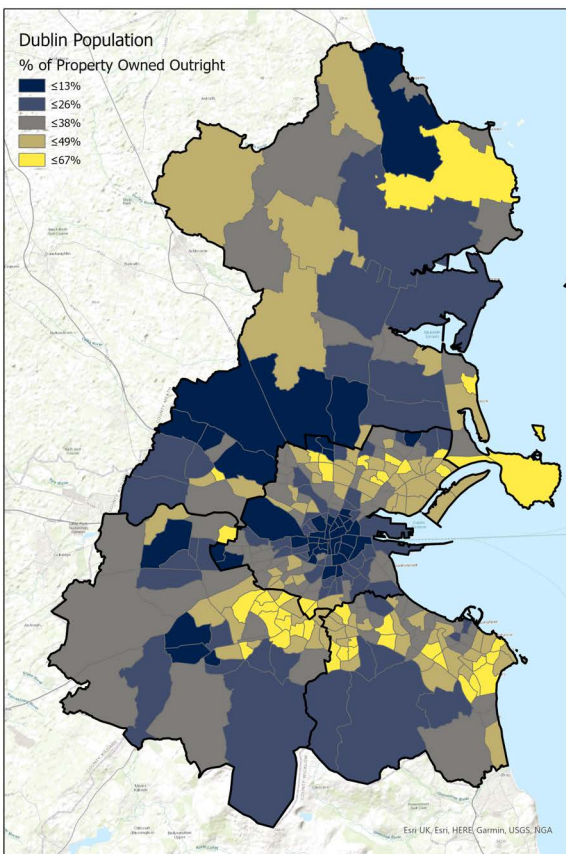
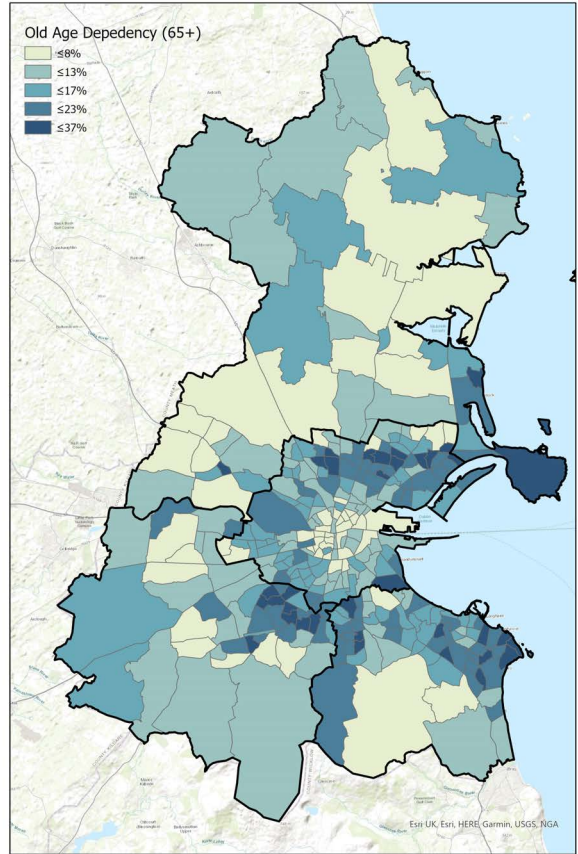
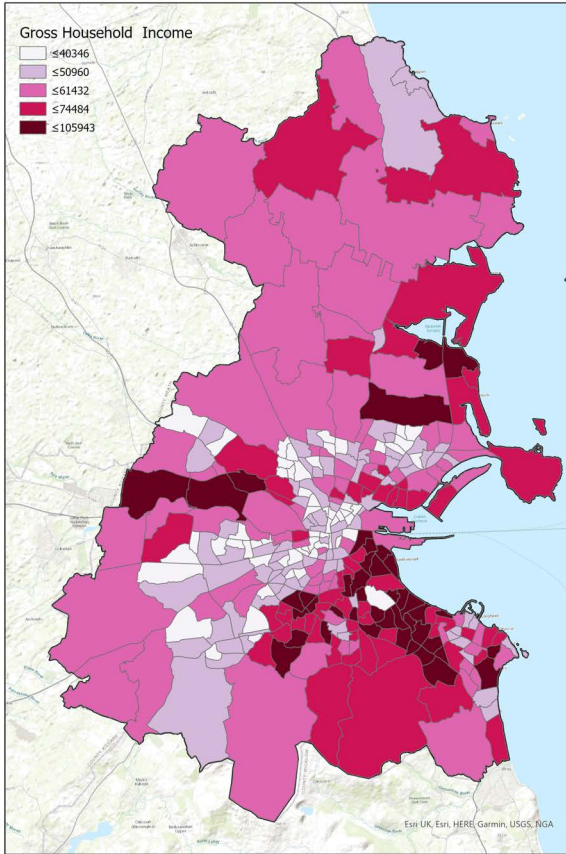


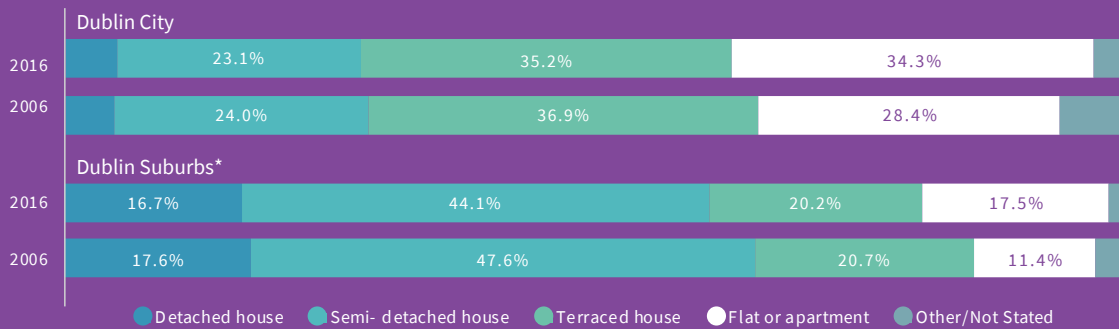
Figure 3.4 Key demographic variables for Dublin (By Electoral Division), 2016

## CHANGING TRENDS IN PROPERTY

Over the past few decades there has been marked changes in the size, composition and occupancy of households in Dublin. These changes are partly because of social trends, the nature of highly developed countries, and our demographic composition

### New House Types

The proportion of all existing housing types has shrunk over the past 10 years in Dublin with the exception of apartment units. The proportion of apartments has increased by 39.0% over this period.



### Household Size

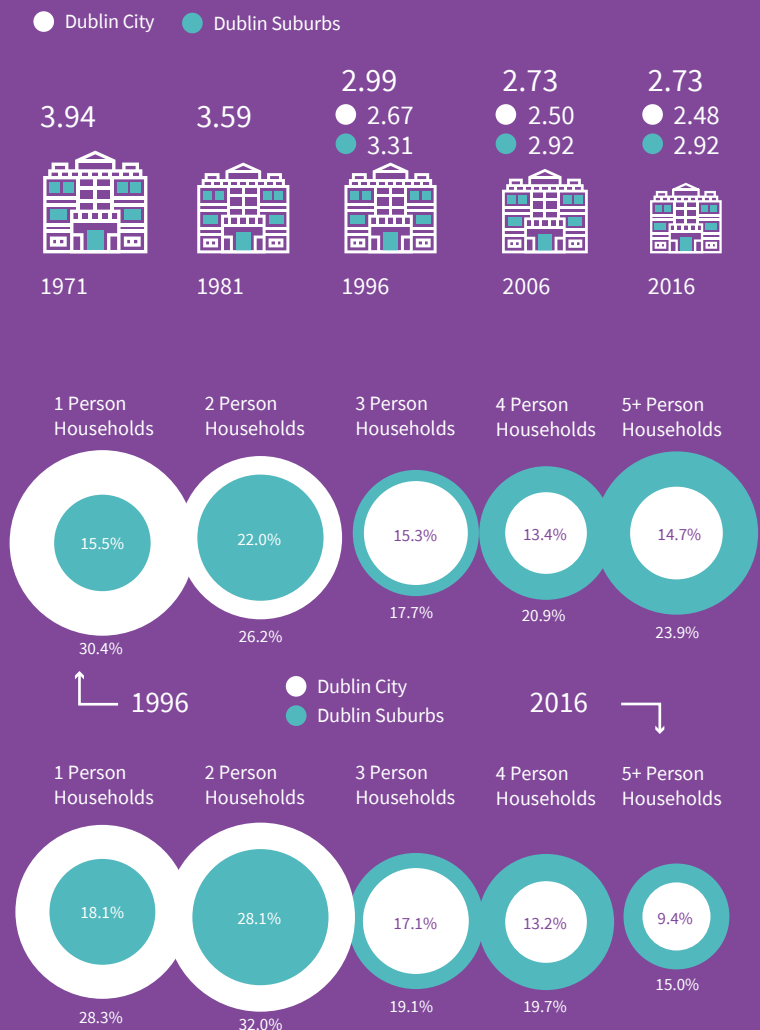
The shift in demand for unit types has been as a result of a shrinking average household size and larger increases in smaller per person households (ph) over the period.

In 2016, the average household size in Dublin was 2.73 persons per household. This is down from 2.99 in 1996 and 3.94 in 1971.

Dublin City is home to the largest cohort of 1 and 2-ph. In 2016, the combined 1 and 2 ph accounts for 60.3% of all households.

Dublin Suburbs are home to a large mix of 3, 4 and 5+ ph, though the largest growth has been in 1 and 2-ph (2 ph have grown by 6.1% since 1996). While 3 ph has also seen growth over the past 20 years, both 4 and 5+ ph have shrunk.

Both the city and suburban areas have seen significant contraction in household of sizes 5 persons and over since 1996.

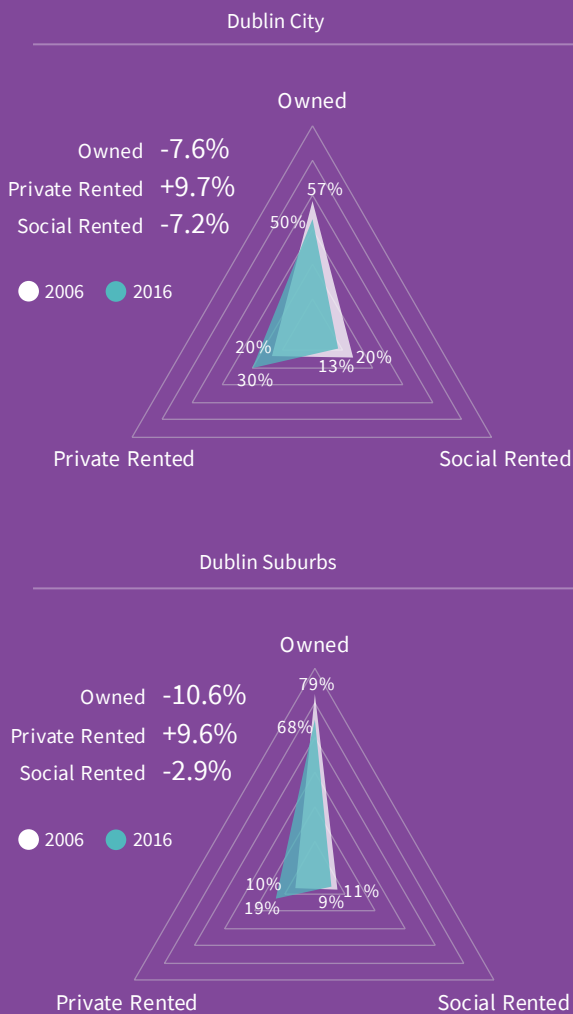


\*Dublin Suburbs referring to the combined administrative areas of Fingal, South Dublin, and Dun Laoghaire Rathdown.

## Housing Occupancy

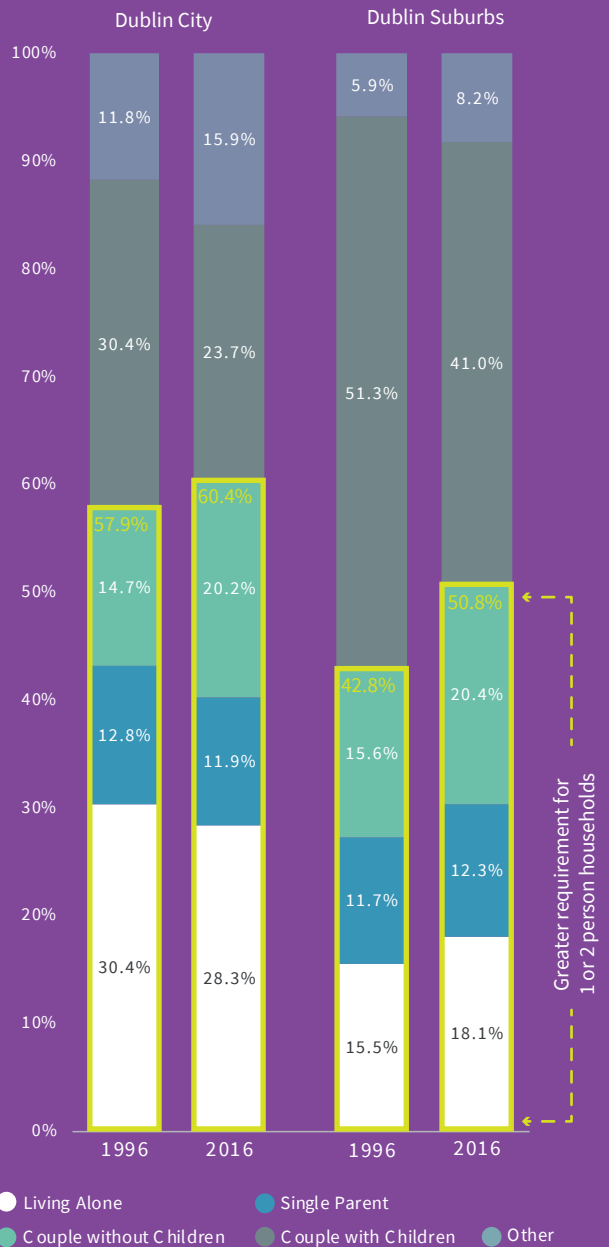
The housing market has also shifted significantly, evidenced by the relative growth of the private rental sector, the lack of housing supply, all combined with a shifting household composition stemming from shifting socio-economic norms and demographic change.

The private rented sector has more than doubled in size between 2006 and 2016, with approximately one in five households (24%) in Dublin now renting their home.



## Housing Composition

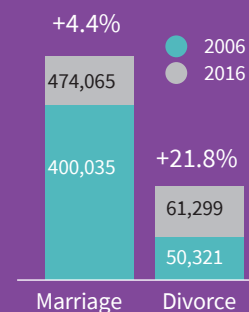
The proportion of adults living alone in Dublin has increased to 23.9% between 1996 and 2016. Dublin City consistently ranks highest, due to its highly urbanised environment and larger offering of accommodation suited to the needs of a one person household.



## Marriage, Civil Partnerships and Divorce

The rate of marriage and civil partnerships in Dublin has been decreasing over the past two decades. While there has been an increase in total numbers the growth has diminished.

Divorce was legalised in Ireland in 1996. In 2006, the rate of divorce and separation in Dublin was 42.4 per 1,000 population. This figure increased to 45.5 per 1,000 population in 2016 which constitutes a 21.8% increase in the number of persons divorced or separated in Dublin.



Section 04

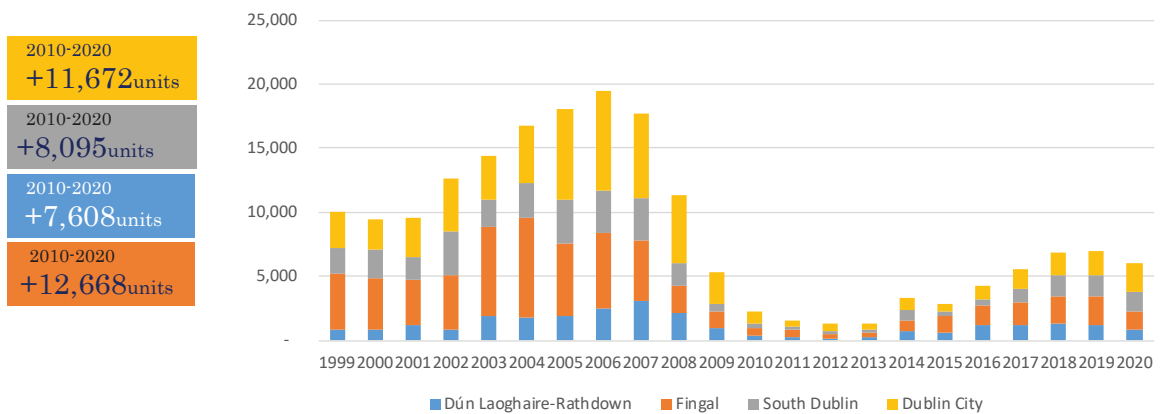
**THE SUPPLY OF HOUSING**

A persistent under-supply of housing over the past 10 years since the economic recession has created significant unmet demand for new accommodation in Dublin.

*Historic Supply*

Residential stock in Dublin has grown by approximately 26% since 2002. The share of semi-detached houses of total has remained in and around 35-40% of stock, increasing in absolute terms by 12.1% on 2002 figures by 2016. Flats and apartments were the highest growing housing type in that same period though, seeing an almost 89% increase on 2002 figures. They are presently just under 24.9% of the total residential stock share.

The annual volume of building completions fell significantly across the country and in Dublin when compared with the annual volume recorded in 2006. Over a 90% decline from peak in 2006 to trough in 2013 (Figure 4.1). While there has been significant growth in completions in recent years, it has still not recovered to near the level's pre-crash. For the past 10 years there has been an average of 4,004 units completed per annum in Dublin with a cumulative total of just 40,043 units being completed over the period. These unit completions number are relatively even spread across the 4 local authority areas and not concentrated in any one area. Fingal County experienced the largest growth adding 12,668 new units to the market from 2010-2020.



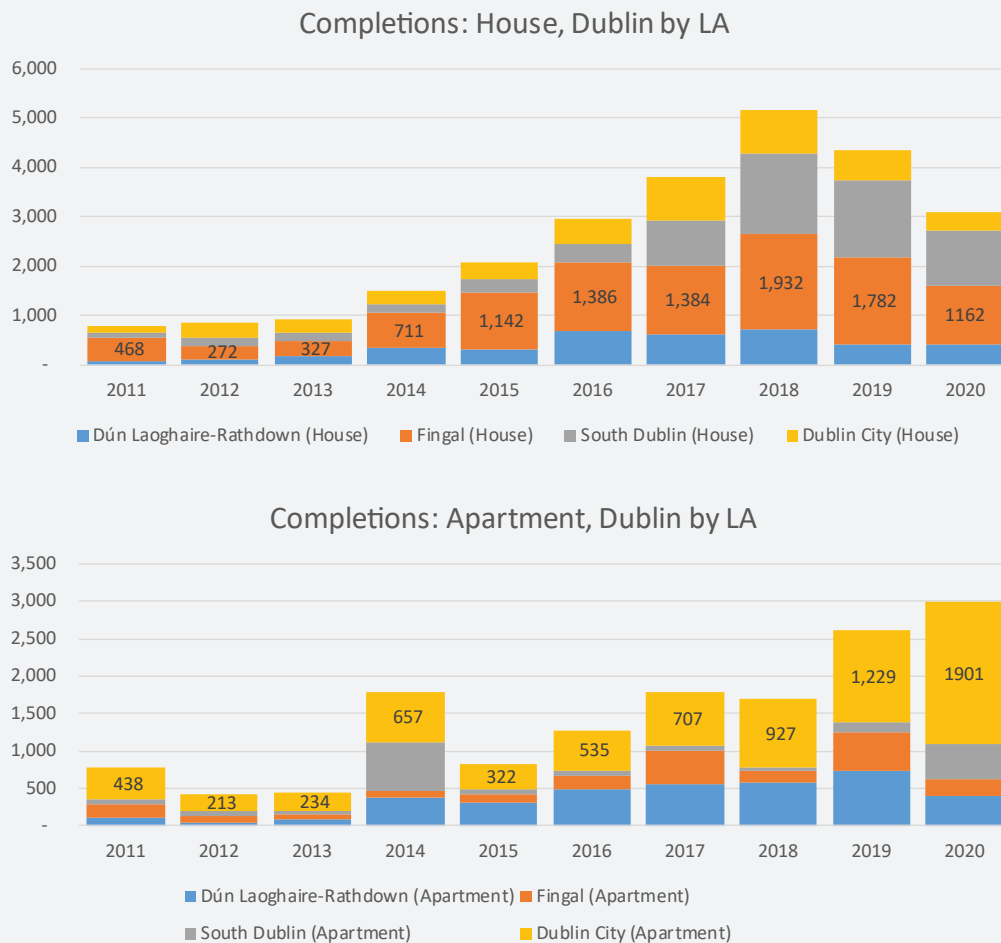
**Figure 4.1: CSO/ESB Residential Completions 1999-2020 in Dublin By Local Authority**

Of the 40,043 units completed in Dublin, 36.5% of those units (14,601 units) were apartments, while 63.4% or 25,442 units were houses. The scale of development has clearly ramped up in recent years with the average level of annual completions for the county now at 6,626. A similar profile of completions existed in South Dublin which has completed 8,095 units in the past 10 years, or an average of 809 units per annum, with just 20.3% or 1,641 units classified as apartments (164 units per annum). By contrast, in the past three years, apartments have comprised the bulk of completed units in both Dublin City and Dún Laoghaire-Rathdown (Figure 4.2 overleaf). In the past three years, apartments have comprised the bulk of completed units in both Dublin City and Dún Laoghaire-Rathdown comprising 63.0% of all units or 5,766 units. By comparison, just 12.3% of units completed in South Dublin were apartments (608 units).

During this period of chronic housing undersupply, population has continued to grow strongly across Dublin (over 13% between 2006 and 2016). This type of dysfunction within the housing market is impacting on the quality of life of large sections of society. This is best illustrated by the fact that for the first time since the foundation of the State, average household size increased in the last census. Many thousands of people can no longer choose their desired living arrangements and must remain living with family for longer than planned or in many cases have no home at all.

A further two markers of this undersupply can be viewed in data relating to group housing. The proliferation of shared occupancy is now a very common feature of the Dublin housing market. This is especially concentrated in the private rental sector. **The latest 2016 Census statistics indicate that this phenomenon is pervasive and accounts for 30.0% of all rented units in Dublin where multiple unrelated households and choosing to live together in a single unit.** Equally, it can be seen in the proportion of adults (over 21 years old) living at home with their parents, which has increased nationally from 168,001 persons in 2011 to 178,441 persons in 2016 indicating a 6.2% growth in this figure in just 5 years.

While undersupply in any given market can be difficult to quantify exactly, there is an abundance of markers to indicate that the Dublin housing market is not functioning correctly and is in urgent need of increasing housing supply to meet demands.



**Figure 4.2: Housing Completions 2011-2020 By Apartment and House Type**

*Supply Pipeline*

An analysis of planning consents data indicates a relatively strong pipeline for granted and commenced applications in Dublin providing a cumulative 66,160 units across 455 schemes\* as of 2021. 29.2% of all applications are for major schemes of 150 units or more, they constitute 74.9% of the unit pipeline. Equally, minor schemes of under 25 units, account for 22.0% of the permissions but just 2.1% of units. Dublin City accounts for 22,009 units (33.3%) of this pipeline across 155 schemes. While this pipeline to be completed over the next 5 years is strong, based on historic data, the completion rate from this figure is likely to be significantly less. For example, in the period between 2012 and 2020 in Dublin, consents for 6,243 units across 109 schemes of 9 units or more elapsed/expired with no unit completion. Moreover, the level of consents will need to continue over the next number of years to meet demand from 2025-2030.

The trend in Dublin has been to seek smaller unit sizes with 69.9% of all granted units for 1 or 2 bedrooms which aligns significantly with the changing demographic profile. This composition varies across local authorities with South Dublin having the highest concentration of schemes with units of 3-bed or more at 42.0%, compared to the Dublin Region average of 29.3%.

The current pipeline has shifted from the previous 10 years focusing on house units, to a more 60/40 split between apartments and houses. This will provide a greater mix of units and cater better to reducing household size and shifting occupancy demands in Dublin.

While this pipeline to be completed over the next 5 years is healthy, based on historic data, the resultant completion rate from this figure is likely to be significantly less. Moreover, the level of consents will need to continue over the next number of years to meet ESRI projected demand from 2025-2030. Presently, the current supply pipeline, assuming 100% is developed” will still be insufficient units to meet the minimum housing requirement to 2030 and indicates a shortfall of -34.6% (or a cumulative requirement of 35,011 additional units).

Area	Major Residential (more than 150 residential units)		Medium Residential (between 25 and 150 residential units)		Minor Residential (10+, less than 25 residential units)	
	Schemes	Units	Schemes	Units	Schemes	Units
DCC	27.1%	76.1%	43.9%	20.6%	29.0%	3.3%
DLR	24.3%	67.6%	57.4%	30.2%	18.3%	2.2%
Fingal	29.2%	73.6%	53.3%	24.5%	17.5%	2.0%
SDCC	43.1%	83.6%	36.9%	14.3%	20.0%	2.1%
Dublin Overall	29.2%	74.9%	48.8%	22.7%	22.0%	2.5%

**Planning Application Pipeline By Scheme Size in Dublin By Local Authority (2021)**

Area	Units	1 Bed	2 Bed	3 Bed	4 Bed	5 Bed	5 Bed+
DCC	22,009	38.7%	49.5%	9.5%	1.1%	0.3%	0.0%
DLR	14,526	22.1%	46.8%	19.5%	9.9%	1.3%	0.0%
Fingal	18,111	16.5%	40.9%	25.7%	14.4%	2.1%	0.0%
SDCC	11,514	19.6%	36.6%	33.2%	8.7%	0.1%	0.0%
Dublin Overall	66,160	25.7%	44.3%	20.3%	8.0%	1.0%	0.0%

**Planning Application Pipeline By Unit Size in Dublin By Local Authority (2021)**

Area	Apartments		Houses		Mixed Development	
	Schemes	Units	Schemes	Units	Schemes	Units
DCC	74.8%	73.9%	4.5%	0.7%	18.1%	24.0%
DLR	45.2%	35.5%	12.2%	3.2%	41.7%	59.9%
Fingal	24.2%	31.9%	47.5%	21.7%	27.5%	45.3%
SDCC	40.0%	42.6%	24.6%	8.2%	35.4%	49.2%
Dublin Overall	49.0%	48.5%	20.7%	8.3%	29.0%	42.1%

**Planning Application Pipeline By Type in Dublin By Local Authority (2021)**

\*Consents data refers to all applications granted or partially commenced for schemes above 9 units.

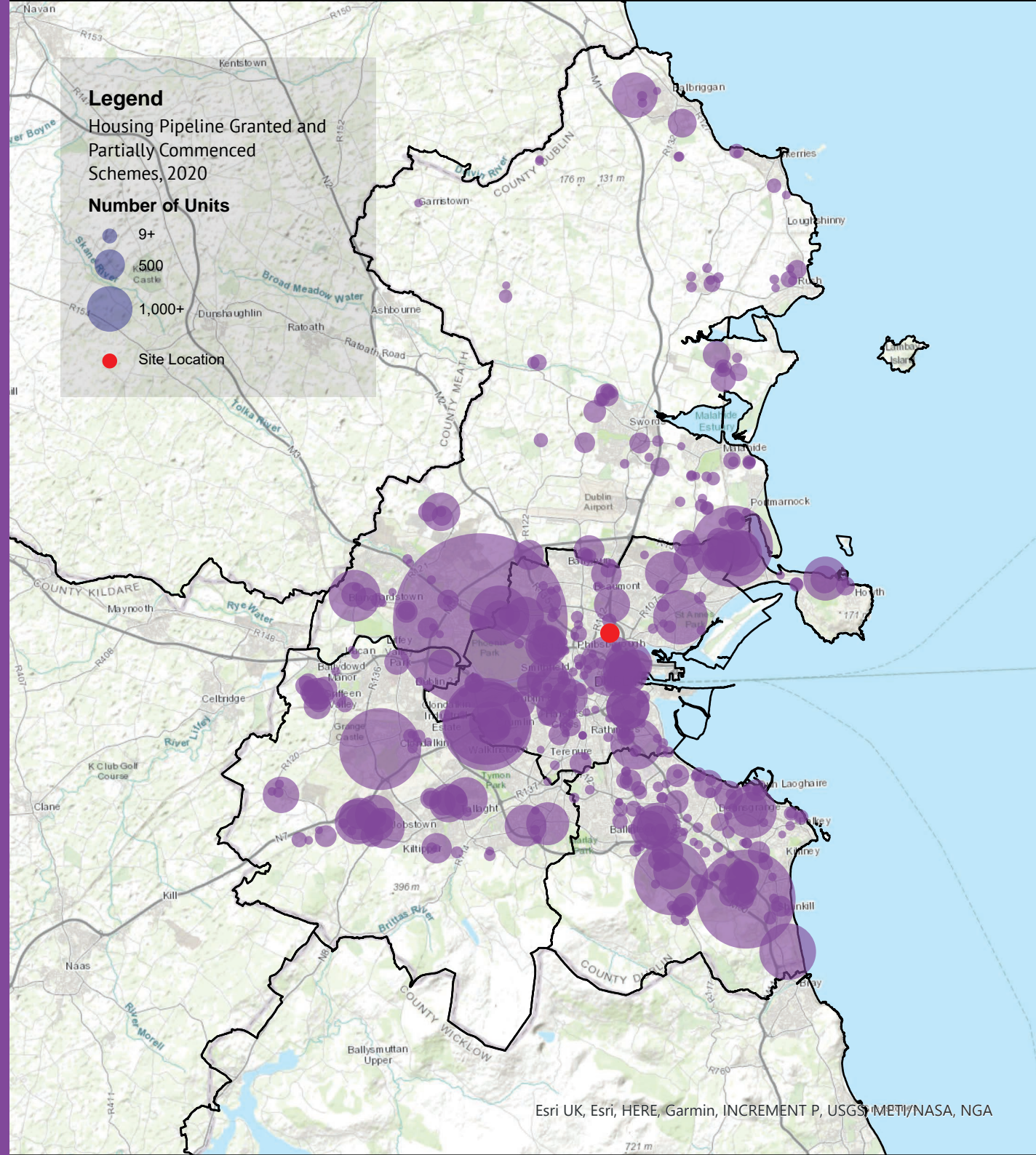
## Findings

Clustering of granted units can be seen in parts of the county that correspond to areas that have large quantum of zoned undeveloped residential lands. In particular, very significant unit development is occurring around the Strategic Development Zones across the county.

The strongest development pipeline is in Dublin City with 22,009 units consented. This second to Fingal with 18,111 units. Dun Laoghaire Rathdown has 14,526 units granted, while South Dublin has the smallest granted pipeline at 11,514 units.

South Dublin also has considerably less active schemes that the other 3 Dublin local authorities with just 65 active sites as opposed to the 156 in Dublin City, 115 in Dun Laoghaire Rathdown, and 120 in Fingal County.

The granted unit pipeline in Dublin City is strong, although less pronounced near Drumcondra, with large infill and SDZ applications consented over the past number of years particularly around the Docklands and Phoenix Park areas of the city. Lower levels of house building is occurring in traditionally less affluent areas such as Finglas and Ballymun where market appetite is low, or in older affluent areas of the city like Ranelagh or Rathmines where land capacity is low and local opposition for higher density is strong.





## Section 05

### FUTURE DEMAND FOR HOUSING & UNIT MIX

Population growth and a return to economic performance have increased the need to deliver more affordable forms of housing. Looking forward, annual rates of growth are expected to pick up and the population of Dublin is projected to reach 1.47 million by 2025 and 1.55 million by 2030.

Demand for housing is population driven, however national policy exists to guide and plan for this growth. This section provides a review of the latest ESRI/NPF strategic housing demand figures, as well as custom Cohort Component Model (CCM) projection for Dublin City to best quantify future demand in the city, its spatial distribution across Dublin, and preference per unit type.

Government policy on housing in Ireland has for many years aimed to ensure that, to the greatest extent possible, every household can access secure, good quality and affordable housing suited to its needs and location within sustainable communities. The provision of quality housing in the right locations underpins wider national and regional economic and social progress, not least by ensuring that cities, towns and villages are successful and attractive places to live and work.

The challenges presently faced in the housing sector are complex, heightened by legacy effects of the post-2008 economic contraction, the impacts of which were extreme by any international measure. The collapse of the credit-driven property market decimated the development industry and seriously impaired the banking sector.

Ireland's economy is growing at a high rate and this recovery is taking place to a considerable degree in Dublin and other large urban areas, with associated increases in household formation, incomes and demand for new homes. The result has been price inflation, particularly in urban rental markets over the past 5 years. Current economic projections for sustained growth and increasing employment levels will contribute to further demand increases in urban areas, meaning that the recent decade of severe under-supply in Dublin will have on-going and enduring economic and social consequences. Yet, the capacity of the housing sector to meet increased demand is currently limited.

#### NPF/ESRI Analysis on Housing Demand

In 2021, the Department of Housing, Local Government and Heritage (DHLGH) released its research into structural housing demand in Ireland to 2040 producing annual housing requirements to be used by local authorities over the next 10 years in establishing housing needs. This research aligns with that of the population projections of the NPF and will be seen as the principle mechanism to translate projected growth into unit demand. The research indicates a major shortfall in built housing versus what was needed between 2016 and 2020, but also that large quantum of units that will need to be brought to the market each year to cater for minimum demands. In order for the DHLGH/ESRI annual housing requirements to be met there will need to be **increasing and sustained completions** across the county for the next 10 years as residential completions data for the Dublin Region and for Dublin City would not indicate that these housing targets can be easily met. 2008 was the last year that Dublin reached 10,000 unit completions per annum.

In the period of reduced completions between 2010 and 2016 the population of Dublin continued to grow. Figure 5.1 below provides an overview of this growth set against the historic completions data and the ESRI future housing requirements data (baseline scenario). The data clearly indicates a deficit in completions, an inevitable pent-up demand that has been created in the market on account of the lack of completions, and the challenges facing each council over the next 10 years to meet these minimum housing targets.

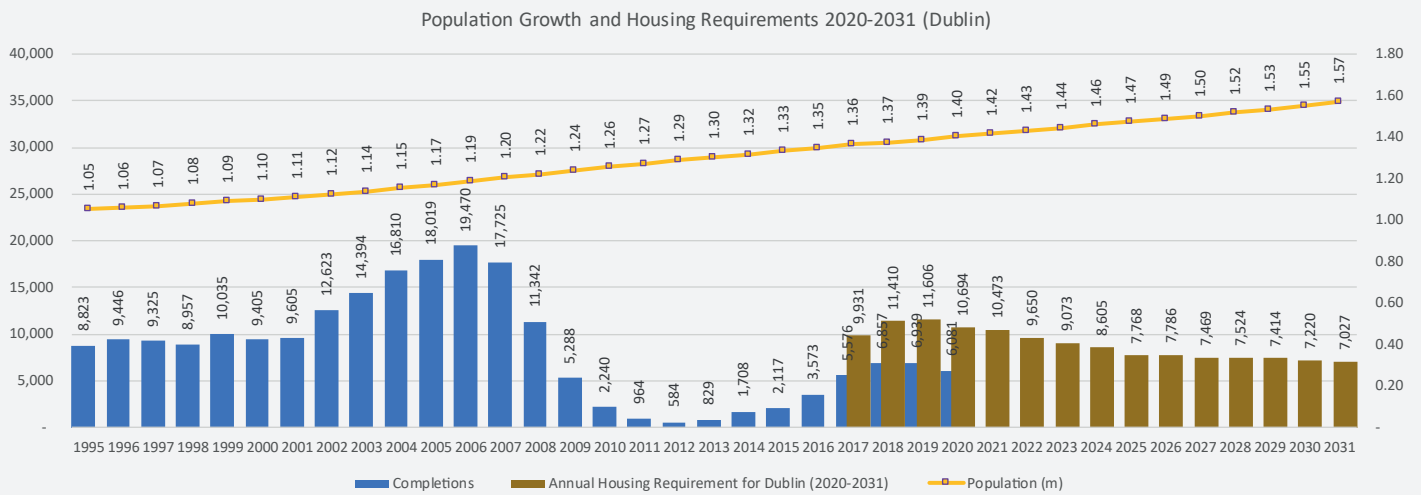


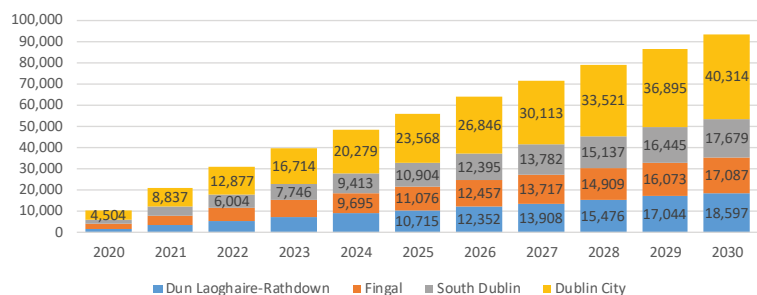
Figure 5.1 Housing Completions, Population Growth and ESRI Housing Need 1995-2031

Dublin’s population is set to continue expanding due to natural growth and net inward migration. In 2020, it is estimated at over 1.40 million and by 2030 the population of the county will be over 1.55 million (+10.5%). A modelled assessment of housing needs indicates that there will be a minimum cumulative housing requirement for 93,677 units to be completed in Dublin over the next 10 years to meet population growth and changing household preference (9,300 units a year, on average)(ESRI/NPF baseline growth scenario). While this additional need does not fully address the ‘pent-up’ demand that exists in the Dublin market, the annual requirement can be considered a low projection for the county. The annual housing demand requirements for Dublin is listed by local authority area in Figure 5.2 below. This demand increases to 109,608 units under the higher growth scenarios, or 10,961 units per annum.

**Furthermore, the model estimates a targeted demand for 43,930 units in the 4 years between 2017 and 2020 in Dublin of which on 25,453 units were completed (a shortfall of 41%). This would be considered excess demand, and identifies an additional 18,187 units required between 2020-2030 to balance this lack of completions between 2017 and 2020. In total, there is a cumulative need for 101,171 new units in Dublin by 2030.**

2020-2030 <b>+40,314 units</b>	2020-2030 <b>+18,597 units</b>
2020-2030 <b>+17,679 units</b>	2020-2030 <b>+17,078 units</b>

Figure 5.2 ESRI Projected Cumulative Housing 2020-2030 in Dublin By Local Authority



## Housing Need and Demand Assessment (HNDA) Approach

Declines in the construction sector and wider economic activity in the previous decade, coupled with Ireland's emerging economic recovery have led to ongoing challenges around fluctuations in the supply, demand and price of housing. It has also led to opportunities, with a greater mix of house types and tenures diversifying Ireland's housing market. Aside from the traditional home-ownership model, rental accommodation will play a greater role in the provision of housing in Dublin. And increasing levels of activity in the construction sector will provide new homes to meet current and projected demand and contribute to Dublin's social housing stock by way of Part V obligations.

The National Planning Framework (NPF) contains a number of National Policy Objectives that support the delivery of residential development at a suitable location and scale to achieve an overall target of 550,000 additional households nationwide by 2040.

The achievement of National Policy Objectives at a county level will be underpinned by the development of a Housing Need Demand Assessment (HDNA) by each local authority. A HDNA is defined as a "database which allows local authorities to run a number of different scenarios to inform key decisions on housing need and supply." They will provide long-term estimates of future housing needs to support the preparation of Housing Strategies, inform housing policy outputs and enhance how acute and unmet demand for housing is identified before it arises. The NPF lists a number of key evidence inputs that will inform and drive the HDNA model, based around:

- Demographic trends, affordability trends and wider economic trends.
- Housing stock pressures (occupancy/under occupancy stock turnover, etc.), existing need, and management issues.
- Estimate future housing need and demand, and land requirement.

HNDAs must assess demand across different tenures, including owner-occupied, the rental sector and social housing and provide estimates of future housing needs based on employment growth, income levels and affordability in the housing market. **This approach will ensure Housing Strategies are catering for the more diverse market demands that exist today and plan for how further changes in the characteristics of household composition, tenure and preference will effect demand into the future.**

HNDAs carried out within the 4 Dublin Local Authorities have an additional layer of complexity in that they must holistically plan for future demand and supply across the Dublin region, rather than view growth in isolation. These local authorities must assess strategic objectives for the region that are interoperable and coherent. Equally, that development within the Dublin Metropolitan area (MASP), which crosses each of these local authorities, is configured to meet housing targets, create linkages, and provide affordable, higher density housing for future populations.

The next section reviews the outputs of the HNDA carried out for Dublin by KPMG FA on future population growth and housing demand estimates in Dublin over the next decade.

## Projecting Population and Housing Need

In 2017 a modelling exercise was carried out by the Irish government and the ESRI in order to provide a foundation for strategic policy-making and the direction of population growth in Ireland up to 2040. In 2019, this exercise was taken further, and population estimates were applied to a housing needs model to establish a county level projection on future housing requirements. The result of that housing needs assessment have been provided on previous pages of this section.

In order to better understand population growth and housing need at a sub-county level, KPMG have modelled our own spatially disaggregated custom projections for CWTC Multi Family ICAV acting on behalf of its sub-fund DBTR DR1 Fund using the latest internal assumptions around changes in migration, recent economic developments (e.g. Brexit) as well as environmental (eg. Covid).

The model output provides future population assessment (proposed up to the year 2030) at a county level and per Electoral Division level (EDs) connected to the variance in migration, fertility, mortality at each spatial scale. The model also utilises the latest land-use assessments to allocate future populations to area that can support future growth. Appendix 1 of this document provides a technical note on the demographic cohort component methodology (CCM) for undertaking the future population assessments.

In addition, a detailed housing analysis providing assessment of current and future housing need (up to the year 2030) is provided including an assessment of “pent up demand”, housing composition and typologies, providing clear evidence of the need by unit type with a specific focus on Dublin and the local area data at Electoral Division level within the immediate Drumcondra location.

## Population Outputs

Population in Dublin is projected to increase by 8.3% or 117,065 persons over the next 10 years. The highest levels of real and proportional growth will be experienced in Dublin City at 51,496 additional persons and 8.8%. The lowest level of growth will occur in Dun Laoghaire Rathdown with just 14,709 persons and 6.5% growth rate. Figure 5.3 below shows the annual growth per Local Authority area.

While the methodologies used in both the ESRI and KPMG models are structurally different, the outcome of the modelled exercise indicates a similar growth rate over the next decade. The ESRI model indicating 9.4% growth versus the KPMG growth rate of 8.3%, or a difference of 14,917 persons.

In both cases, the population in Dublin City will surpass 600,000 in 2024 and reach 635,462 by 2030, an increase of +60,374 (ESRI) +51,496 (KPMG) persons in the next 10 years. The KPMG model predicts a variance in growth rate sub-county with individual Local Authority areas likely to experience difference rates of growth.

Area	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	Population Growth 2021-2030	Growth Rate
DCC	583,966	588,662	594,100	600,258	606,196	611,878	617,243	622,320	627,091	631,450	635,462	51,496	8.8%
DLR	226,299	227,032	228,206	229,824	231,442	233,052	234,663	236,280	237,882	239,461	241,008	14,709	6.5%
Fingal	312,818	315,094	317,731	320,778	323,714	326,559	329,299	331,960	334,573	337,123	339,640	26,822	8.6%
SDCC	293,689	295,599	297,906	300,634	303,286	305,852	308,334	310,751	313,127	315,453	317,726	24,037	8.2%
<b>Dublin Overall</b>	<b>1,416,772</b>	<b>1,426,387</b>	<b>1,437,943</b>	<b>1,451,493</b>	<b>1,464,638</b>	<b>1,477,342</b>	<b>1,489,538</b>	<b>1,501,310</b>	<b>1,512,673</b>	<b>1,523,487</b>	<b>1,533,837</b>	<b>117,065</b>	<b>8.3%</b>

Figure 5.3 KPMG FA Model Future Population Growth in Dublin (By Local Authority), 2020-2030

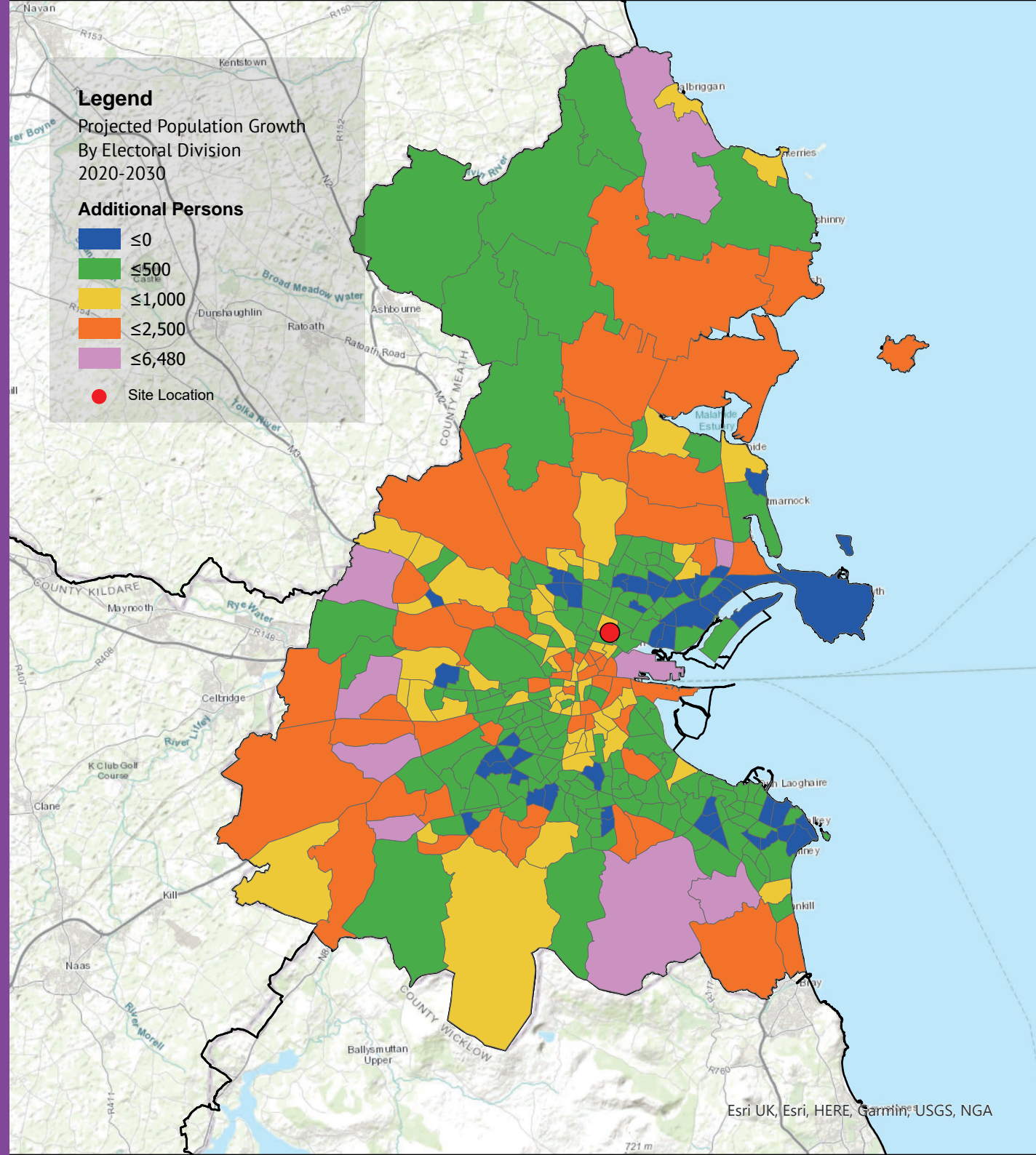
## Findings

While natural population growth will continue across most areas of Dublin, the largest growth in populations will be in areas that have the greatest land capacity to support new development. For example, areas like Cherrywood and Stepside will be likely to absorb much of the household growth in Dun Laoghaire Rathdown over the next 10 years. In South Dublin the same can be said for the areas of Clonburris and Adamstown.

Population growth will be strong across Dublin City, with the highest concentrations around the docklands SDZ area. The electoral division of North Dock B is projected to increase by 2,810 persons between 2020 and 2030.

Depopulation will occur in older more established areas of Dublin. Dalkey and Howth, where land capacity is limited and the average age of residents is high, are likely to experience significant depopulation over the next 10 years.

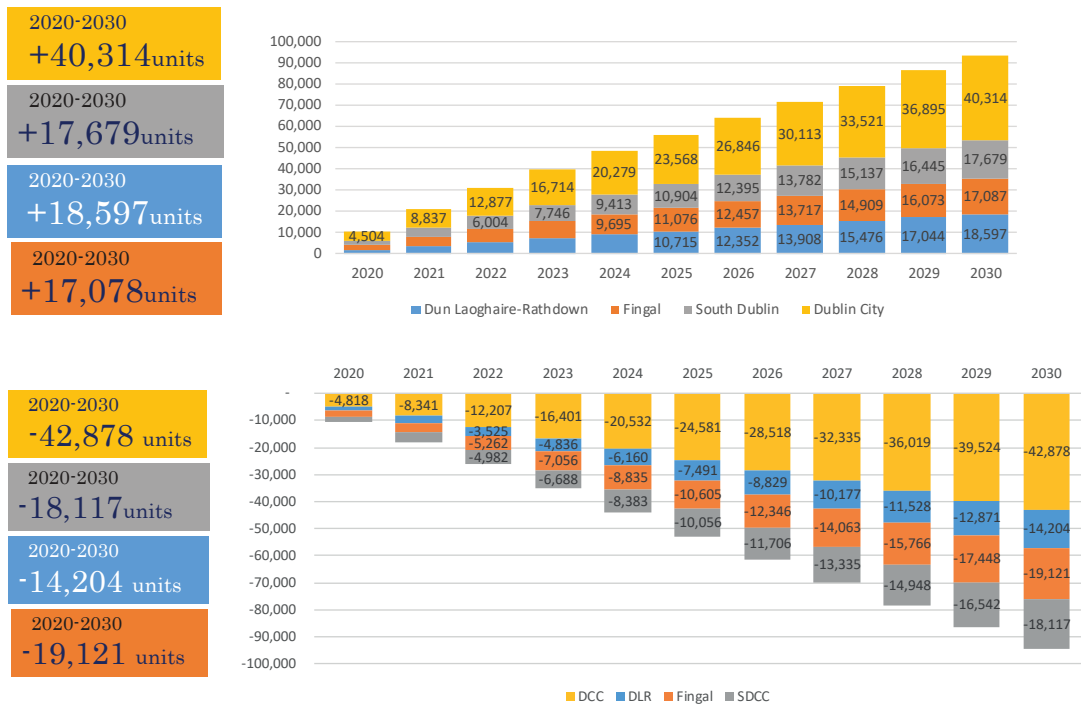
The Drumcondra location in DCC will experience moderate levels of growth based on existing household composition as well as available land capacity (with and without planning consents).



### Housing Need

A modelled assessment of housing needs indicates that there will be a minimum cumulative housing requirement for 99,062 units to be completed in Dublin from 2021-2030 to meet population growth and changing household preference (11,006 units a year, on average). **This figure includes the shortfall in housing provided to the market in the 4 years between 2017 and 2020 in Dublin of 15,206 units. This would be considered latent demand that has not been satisfied by the rate of unit completions in the county.**

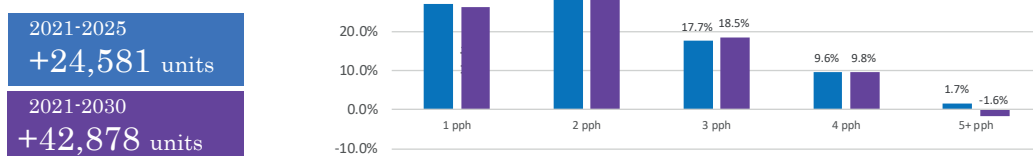
Despite the fundamental differences in the housing demand methodologies used in both the ESRI and KPMG models, the outcome of the modelled exercise indicates a similar unit need and spatial distribution over the next decade. The ESRI model indicating 101,171 units demanded in the county versus the KPMG growth rate of 99,062, or a difference of 2,109 units over the period. A comparison of these housing demands can be viewed in Figure 5.4 below. Note that minus figure in the KPMG study denote need or shortfall and compares to the positive value in the ESRI study.



**Figure 5.4 Comparison of Housing Demand Assessments -**  
 (Top) ESRI Projected Cumulative Housing 2020-2030 in Dublin By Local Authority  
 (Bottom) KPMG FA Projected Cumulative Housing 2020-2030 in Dublin By Local Authority

The pattern of falling household size requirements will persist to 2030 and the majority of this demand will be for 1-and 2-person households which will account for 65,062 or 72.5% of preferences. Demand for larger will decrease and in the case of 5+ bed units the level of demand will actually be negative indicating an oversupply of that unit type for the household composition of Dublin.

**Figure 5.5 Unit Demands in Dublin City by 2025-2030 (Per-person household (pph))**



2021-2025  
 +24,581 units  
 2021-2030  
 +42,878 units

## Housing Need and the Proposed Development

The overall development will provide high-quality apartments at a central location, next to high quality public transport infrastructure and employment opportunity. The composition and density of the scheme has been assessed with respect to the overall city region as well as the local context. This assessment can be summarised under two areas:

- 1) What is the profile of housing demand over a 10-year horizon for the Dublin City 2021-2030?*
- 3) Would the profile of housing in the local area around Clonliffe Road benefit from the scale and unit mix of the proposed development?*

### **1) What is the profile of housing demand over a 10-year horizon for the Dublin City 2021-2030?**

The modelling exercise from both the ESRI and KPMG indicate that there will be a need for over 42,000 additional units in Dublin City over the next 10 years or a requirement for over 4,000 unit completions per annum to meet demand.

Population growth and housing need in the county over the past 10 years has created a demand for housing that currently outstrips supply by a significant margin. Dublin City has had low unit completion rates for the past decade, and currently has comparatively fewer units in the pipeline for the future. Completions data would indicate no certainty that current strategic targets will be met. The consented pipeline of 22,009 units in Dublin City still leaves a large gap in achieving the minimum target of 42,000 units by 2030. Given the scale of the requirement for housing there will be a need to build larger volume schemes using large scale developers comfortable managing and delivering at scale.

Intercensal trends indicate that number of persons per household has been shrinking since 1970 in Ireland, and in Dublin City the average household size is now 2.48 persons per household. This trend will continue in line with trends in developed economies worldwide and generally indicate that future demand is predominately in smaller units. The modelling exercise completed as part of this study indicates, that the demand in Dublin City will be predominantly in the 1 and 2 person household types, representing over 73% of total demand.

The chronic lack of supply of new housing stock to the market over the past decade has been driving up the cost to purchase and to rent toward levels that are severely unaffordable for an increasing number of households. This has resulted in a greater proportion of households on some form of income support from the State, or pushing families into living in sub-optimal housing, or preventing new households from graduating from the private rental market to owner occupancy.

The Dublin housing market has also shifted significantly in the last number of years, evidenced by the relative growth of the private rental sector. The lack of housing supply, limited availability of finance for purchases, increase in property prices all combined to see a transition away from the well-established owner-occupier market. The PRS increased from 14.5% of households in 2002 to account for 23.9% of households in 2016. Its absolute growth has been from nearly 55,000 to over 114,000; growth of 109% between 2002 and 2016. Consequently, there is now a greater level of competition amongst those households choosing, or being forced to choose privately rented housing. This level of competition has steepened since 2016 with the introduction of the government Housing Assistance Payment scheme which has sought to deliver up to 40% of its social housing requirement through the PRS. Thus, the demand for PRS is likely to increase into the future. For Dublin City, an area with a comparatively higher demands for the PRS sector, it would indicate significant scope for expansion into the future.

There is an increased appetite for investment in new housing solutions to cater specifically to these changing market dynamics which is perhaps not surprising considering demographic projections for Ireland's population in the medium to long term. 'Build to Rent' in particular will have an important role to play in helping to address severe supply shortages of rental accommodation in Dublin and other Irish cities. The delivery of much-needed purpose-built student accommodation in Ireland's cities will alleviate pressures in other areas of the housing market and is to be welcomed. Meanwhile, the delivery of elder care housing throughout Ireland is critical considering the extent to which the Irish population is ageing.

There is a clear need for apartment and smaller unit types across the city. The proposed development of apartment units at the subject site is seeking to cater for this preference and offer the greatest feasibility to meet the market demand (pent-up and future) in terms of both unit type and scale.

## **2) Would the profile of housing in the local area around Clonliffe Road benefit from the scale and unit mix of the proposed development?**

Dublin City Council and the Regional Spatial and Economic Strategy for the Metropolitan Area identifies the Drumcondra area forming part of the Metropolitan Area Strategic Plan (MASP) where strategic residential and employment development is targeted in order to achieve compact sustainable and sequential growth. The location is well positioned within the city to cater for a higher density of residential development next to significant hub of economic activity, it has excellent connectivity with the wider region and will have rapid access to the city centre all of which match the strategic objectives of local planning in an area that would support a large scale residential development.

As discussed in Section 6 of this report, the profile of existing housing in the local area is diverse with apartments constituting 39.3% of total units. Just 21.2% of households have more than 3 persons living there, and 36.0% of households being privately rented (compared to the Dublin City average of 29.7%). This is despite the fact that 60.7% of the housing stock is semi-detached or terraced housing. This composition would indicate that there is a mismatch between the type of unit available and trends/demands in occupancy and tenure in the area. Current housing practices are sub-optimal but a product of the need in the market for housing at that location.

This mismatch, alongside the outputs of the unit mix analysis for Dublin City would indicate that there is a strong need for the proposed residential mix at the subject site (Figure 5.5). Moreover, the local catchment area mirrors the demand type in Dublin City which will be predominantly in the 1 and 2 person households, representing over 73% of total demand. The composition and density of this scheme fits with the projected housing needs for the city up to 2030.

**Figure 5.5 Proposed residential unit mix at subject site**

Unit Type	No. Units	Percentage
Studio	540	33.5%
1 Bed	602	37.3%
2 Bed	419	26.0%
3 Bed	53	3.3%
<b>Total</b>	<b>1614</b>	<b>100.0%</b>

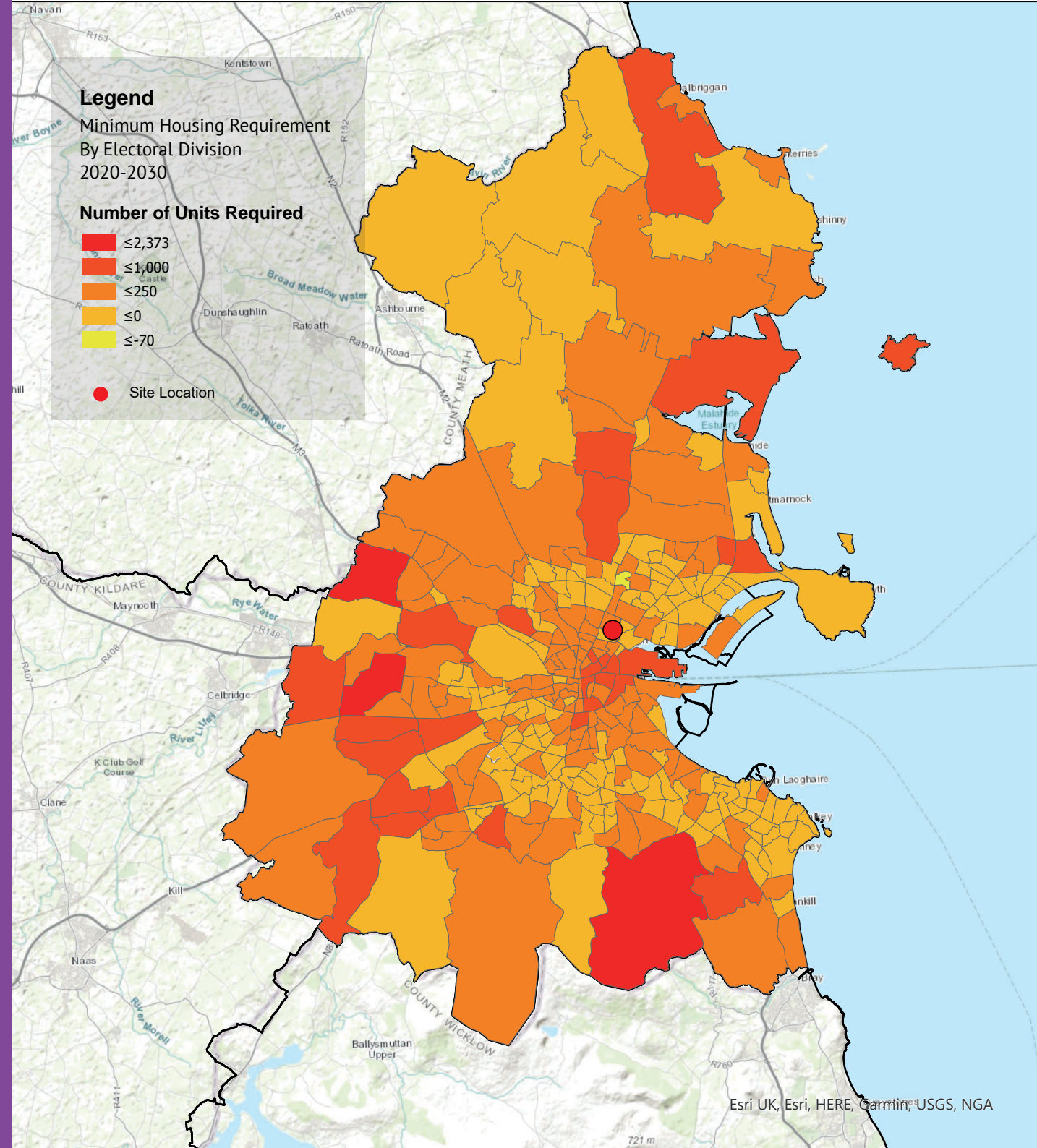


## Findings

The results of the housing needs assessment broadly correlate to that of the population growth scenario. Areas of Dublin with the largest growth in housing demand will be city centre locations and suburban parts of Dublin in areas with the greatest land capacity to support new development. For example, areas like Clonburris, Citywest and Adamstown in South Dublin will be likely to absorb much of the household growth in that local authority over the next 10 years.

There will be a significant housing need across the Docklands area of inner city Dublin. This growth parallels with the pipeline for residential development at these locations as well as the demand for smaller units and PRS in the city centre next to local employment opportunity on high quality public transportation networks.

The demand for units in Dublin City will be almost twice that of the surrounding local authorities (42,878 new household formations by 2030) as population growth is projected to be much greater here.



## Section 06

### CLONLIFFE ROAD: A LOCAL AREA ASSESSMENT

A profile of current populations, relevant land use, access, planning and economic activity within a 2km catchment of the Subject Site on Clonliffe Road.

National and Regional planning policy emphasises; compact growth in the Dublin Metropolitan Area and; placemaking through the development of attractive places supported by existing and planned transport infrastructure now and into the future. The Regional Spatial and Economic Strategy for the Metropolitan Area identifies the subject site, located on Clonliffe Road, 2km north of Dublin City centre within the suburb of Drumcondra within the city centre forming part of the Metropolitan Area Strategic Plan (MASP) where strategic residential and employment development is targeted in order to achieve compact sustainable and sequential growth.

Combining 22 of the local electoral divisions in the area to comprise the catchment area, there has been minimal to negative population growth in this area over the past 20 years compared to more suburban parts of the county and the direct core of Dublin City. This area grew by just 24% over 20 years or 1% per annum and accounted for +15,296 new persons over the period.

Similar to the historic trend, although the area commands higher purchase and rental prices, the lack of available land in these areas indicates limited potential for population growth over the next 10 years.

The local area is classified in the latest Deprivation and Affluence index (2016) to be quite 'Affluent' with pockets of disadvantage closer to city centre. The area has a marginally higher than average household median income of €48,366 (versus €45,271 nationally) and has a large number of positive socio-economic characteristics that constitute affluence. Overall the area has low unemployment, a well educated workforce working in higher value industries, and over 75% of residents aged between 15-64 (versus 65% nationally). This level of affluence has largely stayed static with no significant improvements made from the 2006 version of same.

The section overleaf provides a background to this socio-economic, as well as insights on planning activity in recent years.



Figure 6.1 Context Map: 2km Buffer around Subject Site

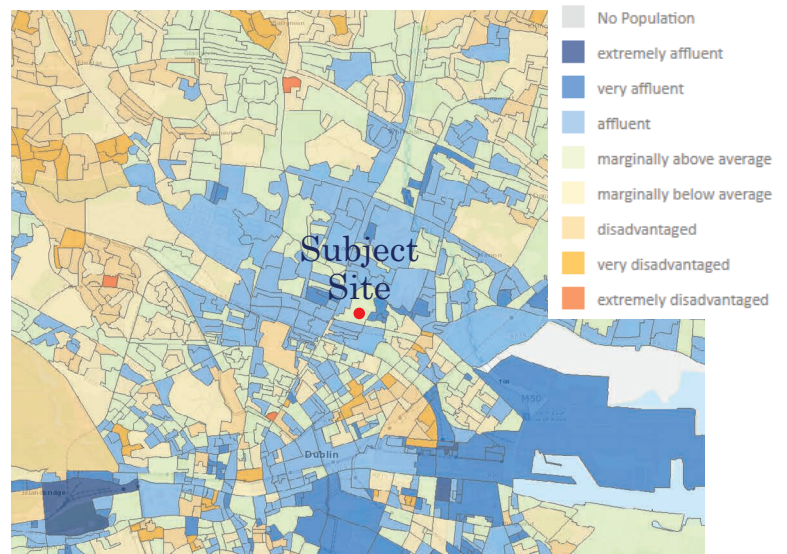
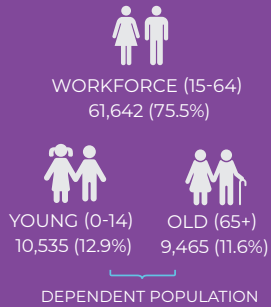


Figure 6.2 Haase and Pratske Deprivation and Affluence Index 2016

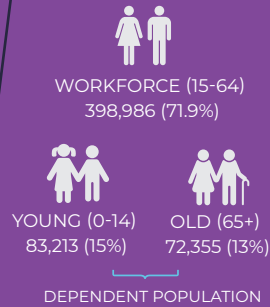
# SOCIO-ECONOMIC INDICATORS

SOURCE: CSO, RTB, DAFT, PSRA, KPMG FUTURE ANALYTICS

## Local Catchment



## Dublin City



59%

OF RESIDENTS EITHER WALK, CYCLE OR TAKE PUBLIC TRANSPORT TO WORK



39%

ARE 3<sup>RD</sup> LEVEL EDUCATED



30%

OF HOUSEHOLDS HAVE YOUNG CHILDREN (PRE ADOLESCENT)



8%

OF POPULATION BETWEEN 15-65 ARE UNEMPLOYED



2.41

THE AVERAGE HOUSEHOLD SIZE OF CATCHMENT IN 2016



49%

OF THE POPULATION HAVE A WORK COMMUTE TIME LESS THAN 30 MINUTES



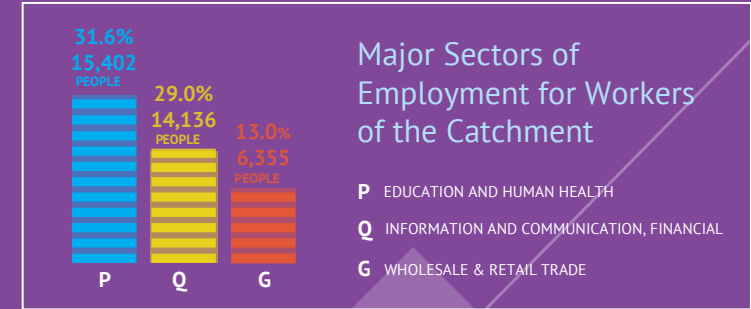
52%

OF THE RESIDENT POPULATION ARE UNDER THE AGE OF 35



40%

OF HOUSEHOLDS HAVE NO ACCESS TO A CAR



## HOUSING MARKET (EXISTING & FUTURE)

SOURCE: CSO, RTB, DAFT, PSRA, KPMG FUTURE ANALYTICS



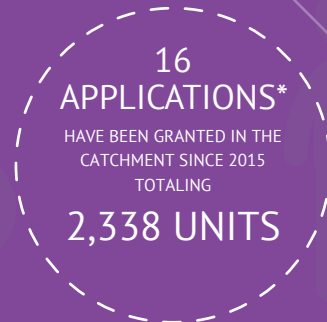
### 48.1%\* Rented

14,937 HOUSEHOLDS IN THE CATCHMENT ARE IN RENTED ACCOMMODATION, OF WHICH 75% ARE PRIVATELY RENTED HOMES (11,204).

### 42.6%\* Owned

13,255 HOUSEHOLDS IN THE CATCHMENT ARE OWNER-OCCUPIED; EITHER OWNED OUTRIGHT OR WITH A MORTGAGE OR LOAN ON THEM

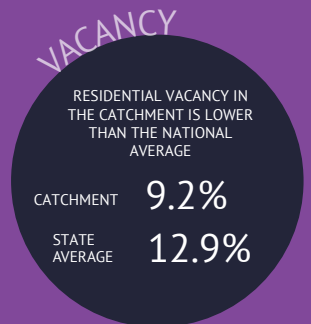
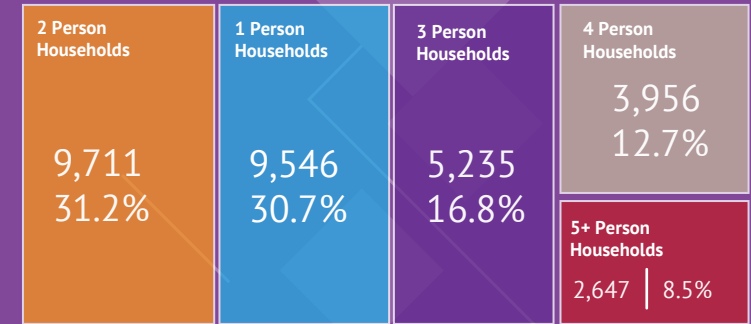
\* REMAINING 9.3% EITHER NOT STATED / OCCUPIED RENT FREE



\*Applications for 10 or more units



## HOUSING COMPOSITION, 2016



There are currently 81,642 persons living within a 2km radius of subject site. The age profile is comparatively young with an average age of 36.9 and 52% of the population under the age of 35. The area has above average tertiary education (NFQ Level 7+) with 38.8% of the resident population having a degree qualification versus the 36.2% average for the rest of Dublin. The catchment area has a significantly higher than average jobs density with 48,733 persons living in or commuting to the area for employment. 60.6% of this employment is in ICT and Finance or Education and Human Health and 63.7% of these workers have received 3rd level education. Family Structure is diverse with 38.0% of all households having children, 15.2% classified as empty-nest or retired family units, and 12.7% of households with people living alone.

Larger households are uncommon despite the unit typology of the area and just 21.2% of all households having more than 3 persons. 39.3% of total housing stock are apartments, and 36.0% of households privately rent. A further 12.0% of all households in the area are socially rented. New population and housing in the area has been very minor since 2000, with just 20.6% of all units built post-2000. Future population growth potential is strongly linked to future consented planning pipeline. There are 16 consented applications for future residential development as of 2020 (for schemes of 10 units or more) totalling 2,338 units. The largest concentration of this will be toward the centre of the city near Connolly Station with the recently granted mixed-use residential scheme including 741 units (largely accommodating 1-bed [484 units] and 2-bed units [251 units]).

Projected population growth over the next 10 years will create significant additional demand for housing (private and social) in the wider Dublin City market area. As Drumcondra is located next to the city centre, in close proximity to high quality public transport, the demand for units at this location is likely to be very strong. While the average cost to buy and rent is higher in Dublin City than it is in the wider Dublin Region or Nationally, it is likely to experience greater demand for housing on account of other demand factors, such as accessibility, proximity to employment opportunity, and an average household size that will likely follow the Dublin wide trend shifting toward smaller unit sizes.

Both housing and population density within the existing 2km catchment of the Clonliffe Road site are significantly lower than the core city centre area, and the targeted densities for the wider city. The catchment has an average population density of 65 persons per hectare and a housing density of 28 units per hectare. The DCC Development Plan 2016-2022 indicates that higher densities of development should be supported in areas close to the city centre with higher capacity to support growth.

**Dublin City Council Development Plan**  
15 Min City Target - 80 units per hectare

**Currently in 2km catchment – outlined)**  
28.5 Units Per Hectare

**After Development of Clonliffe**  
30 Units Per Hectare

**Figure 6.3 Density Analysis 2016, Dublin City and Subject Site Catchment**

Taking the current average household size for the area and applying it to current consents, the population has the current potential to grow by 5,611 persons over the next 5-10 years. When paired with the natural growth likely to occur within the existing resident population, the catchment area is likely to grow significantly into the future.

Given the current housing crises and lack of suitable housing on the market to meet the demands in Dublin and in particular in Dublin City, the result of further housing shortages is likely to lead to higher costs of renting, continued growth in shared living arrangements and further increases in homelessness and those falling into category of requiring state-support for accommodation. Furthermore, it will augment the pre-2018 pent up housing demand generated by the lack of completions from 2010-2015, thereby exacerbating the existing pressures in the housing market until such a time that the wider supply shortage abates.

Section 07

**CONCLUSION**

The study has considered how different drivers of demographic change have influenced demand for housing over the past decade. The assessment then quantifies the direction in which demand is likely to go in the coming decade. Taken as a whole, the trends indicate that Dublin will have to plan for significantly more homes, particularly meeting the accommodation needs of those who will struggle to meet the affordability requirements of the changing housing market. This will be an increasing number of people as the cost associated with rent or purchasing increases at a faster pace than income.

The primary research question evaluated in this reporting being; What is demand for new unit development in Dublin City over the next 10 years? and is the subject site a catchment area a suit for the scale and unit mix of the proposed development. The summary analysis is reviewed below:

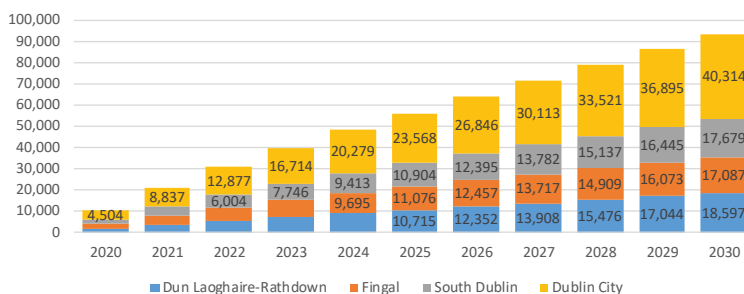
**Future Housing Requirements in Dublin**

Under the ESRI/NPF baseline growth scenario, the population of Dublin will grow by an additional 146,687 persons by 2030 (+10.5%). Given changing household characteristics, household size, and existing unmet demand, there will be a minimum need for an additional 93,677 units over the period under the baseline scenario. This demand increases to 109,608 units under the higher growth scenarios, or 10,961 units per annum. Furthermore, the model estimates a target demand for 43,930 units between 2017 and 2020 in Dublin of which 25,453 units were completed (a shortfall of 41%). This would be considered excess demand, and identifies an additional 17,967 units required between 2020-2030 to balance this lack of completions between 2017 and 2020.

Under the baseline scenario, 43.0% (40,314 units) of this need is projected for Dublin City, targeting 4,031 units per annum at a minimum to accommodate this growth. This requirement increases to 4,791 units per annum under the higher growth scenarios.

**ESRI Projected Cumulative Housing 2020-2030 in Dublin By Local Authority**

2020-2030 <b>+40,314units</b>	2020-2030 <b>+18,597units</b>
2020-2030 <b>+17,679units</b>	2020-2030 <b>+17,078units</b>



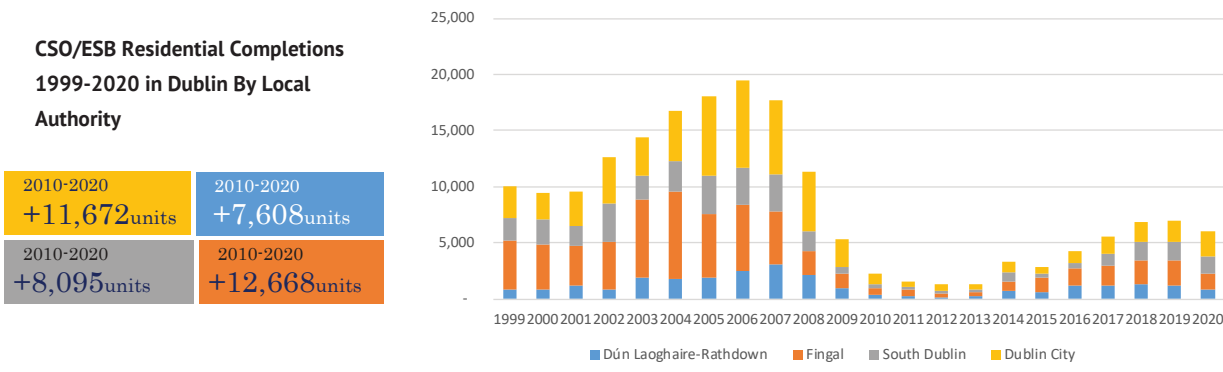
**A Decade of Housing Shortfall**

Residential completions data for the Dublin Region and for Dublin City would not indicate that these housing targets can be easily met. 2008 was the last year that Dublin reached 10,000 unit completions per annum and Dublin City has not completed 4,000 units a year since 2008.

For the past 10 years there has been an average of just 4,004 units completed per annum in Dublin, or just 40% of this annual 10,000 unit target. Similarly, Dublin City has completed just 11,672 units in the past 10 years, or an average of 1,167 units per annum which is dramatically below what is required.

Of the 41,023 units completed in Dublin over the past 10 years, just 36.4% (14,601 units) have been for apartment units. This trend is reversed in Dublin City where 61.4% of completions have been for apartments (714 units per annum).

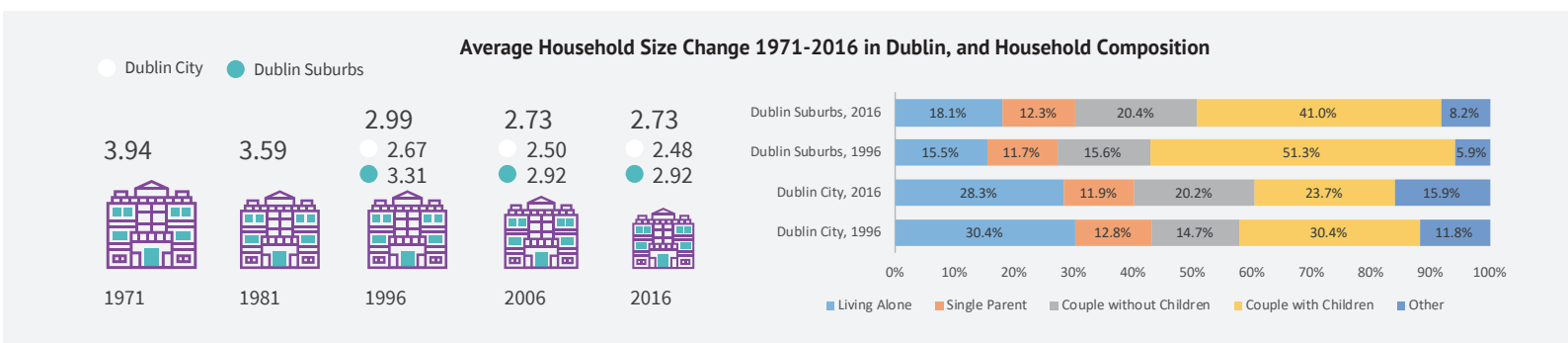
In order for the DHLGH/ESRI annual housing requirements to be met there will need to be increasing and sustained completions across the county for the next 10 years from large scale developers with a greater balance of apartment versus house unit type.



### Changing Demographic and Housing Mix

Between 1996-2016 the average size of a household in Dublin has decreased from 2.99 to 2.73 persons per household. Over the same period in South Dublin the average size reduced from 3.50 to 3.0 persons per household. This downward trend is in line with national and international trends and is almost certain to continue to decrease in the coming years. This creates a significant additional demand for housing that does not relate to population growth.

Over the same period, the proportion of 1-person households grew across Dublin with the Dublin Suburbs increasing by 2.6% from 15.5% to 18.1% of all households, while the households consisting couples with children reduced further from 51.3% to 41.0% in the Dublin Suburbs, representing massive shifts in household composition and the resulting demand for unit types. A much greater share of future output will need to cater for one or two-person households and targeted policy interventions will be needed to meet the particular housing needs of an ageing population.



## Residential Planning Pipeline

An analysis of planning consents data indicates a relatively strong pipeline for granted and commenced applications in Dublin providing a cumulative 66,160 units across 455 schemes\* as of 2021. Dublin City accounts for 22,009 units (33.3%) of this pipeline across 155 schemes. While this pipeline to be completed over the next 5 years is strong, based on historic data, the completion rate from this figure is likely to be significantly less. Equally, the level of consents will need to continue over the next number of years to meet demand from 2025-2030.

The trend in Dublin has been to seek smaller unit sizes with 70.5% of all units 1-bed or 2-bed. This composition varies across local authorities with South Dublin having the highest concentration of consented schemes with units of 3-bed or more at 42.8%, compared to the Dublin Region average of 29.5%.

Area	Units	1 Bed	2 Bed	3 Bed	4 Bed	5 Bed	5 Bed+
DCC	22,009	38.7%	49.5%	9.5%	1.1%	0.3%	0.0%
DLR	14,526	22.1%	46.8%	19.5%	9.9%	1.3%	0.0%
Fingal	18,111	16.5%	40.9%	25.7%	14.4%	2.1%	0.0%
SDCC	11,514	19.6%	36.6%	33.2%	8.7%	0.1%	0.0%
Dublin Overall	66,160	25.7%	44.3%	20.3%	8.0%	1.0%	0.0%

Planning Application Pipeline By Unit Size in Dublin By Local Authority (2021)

Area	Apartments		Houses		Mixed Development	
	Schemes	Units	Schemes	Units	Schemes	Units
DCC	74.8%	73.9%	4.5%	0.7%	18.1%	24.0%
DLR	45.2%	35.5%	12.2%	3.2%	41.7%	59.9%
Fingal	24.2%	31.9%	47.5%	21.7%	27.5%	45.3%
SDCC	40.0%	42.6%	24.6%	8.2%	35.4%	49.2%
Dublin Overall	49.0%	48.5%	20.7%	8.3%	29.0%	42.1%

Planning Application Pipeline By Type in Dublin By Local Authority (2021)

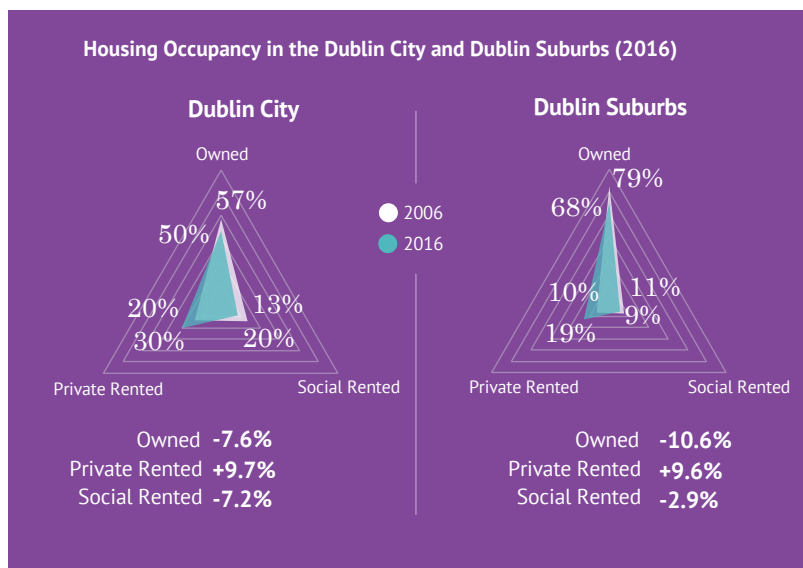
\*Consents data refers to all applications granted or partially commenced for schemes above 9 units.

The current pipeline has shifted from the previous 10 years focusing on house units, to a more 50/50 split between apartments and houses. This will provide a greater mix of units and cater better to reducing household size and shifting occupancy demands in Dublin.

## Occupancy and Alternative Housing Solutions

The private rented sector (PRS) has nearly doubled in size between 2006 and 2016, with approximately one in five households (23.9%) now renting their home in the private rented sector in Dublin. Dublin City caters for a significantly larger proportion of the Dublin PRS sector with 16.4% or 11,224 households, but the proportional growth indicates a similar doubling of PRS from 8% in 2006. It is expected that this trend will continue and the proportion of households privately renting will increase largely at the expense of homeownership.

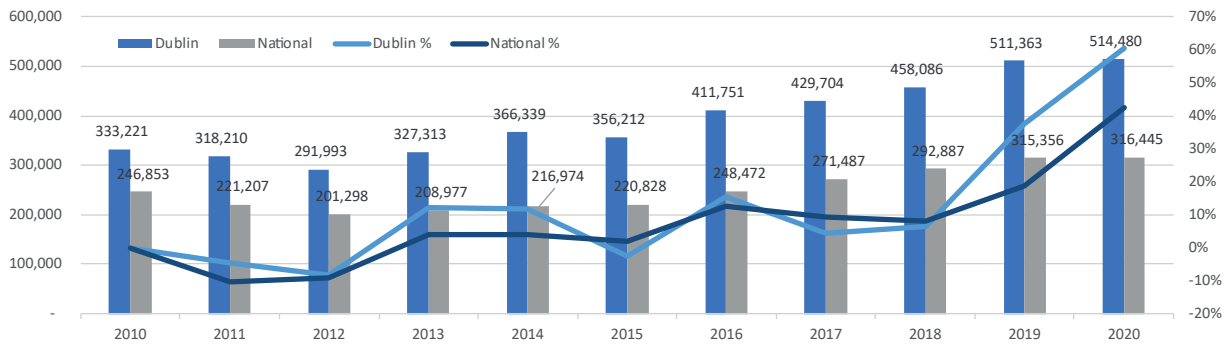
Demographics are changing and this is having a significant impact on occupancy and household composition. New housing solutions such as Elder Care housing, Build to Rent, Purpose Building Student Accommodation are all new interventions into the market that have been very successful highlighting the needs of undeserved demographics.



## Housing Affordability

In Dublin, property prices have been increasing since 2012, with the average sale price at €514,480 in Dublin in 2020, 76.2% higher than the bottom of the market. Rents have also gone through a considerable period of change since the mid-2000s and now exceed peak pre-economic crisis levels. For Dublin, 2020’s average asking market rent has been €2,023; 102% higher than the lowest point in 2012 and 43.5% higher than the previous peak in 2008 (Daft.ie).

Affordability is a significant and increasing issue in the Dublin housing market in terms of purchase affordability and rent affordability with a large proportion of new household formations unable to meet their housing preference. Given the rate of annual growth, affordability issues are expected to worsen until such a time that there is sufficient supply in the market to meet demand.



Property Price Register - Average Sale Price in Dublin 2010-2020

## Housing Need and the Proposed Development

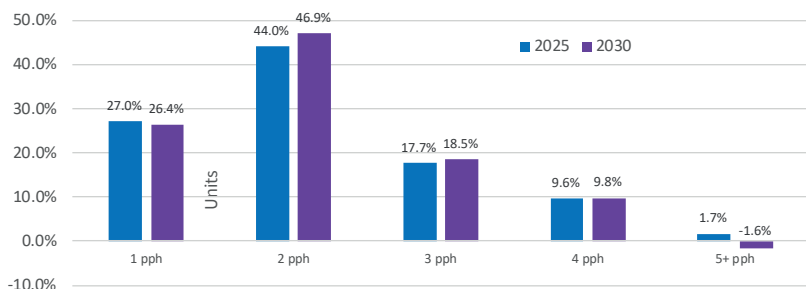
The modelling exercise from both the ESRI and KPMG indicate that there will be a need for over 42,000 additional units in Dublin City over the next 10 years or a requirement for over 4,000 unit completions per annum to meet demand. This demand will be predominantly in the 1 and 2 person household types, representing over 73% of total demand.

The proposed development of apartment units at the subject site will cater to this preference and offer the greatest feasibility to meet market demand (pent-up and future) in terms of both unit type and scale.

### Unit Demands in Dublin City by 2025-2030 (Per-person household (pph))

2021-2025  
+24,581 units

2021-2030  
+42,878 units





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April 2021

# Housing Needs Assessment and Unit Mix Analysis for **Dublin** **City and Clonliffe Road**

Rationale for proposed apartment mix, having regard to, National and Local planning policy, the site's context, including a quantitative assessment of composition, occupancy, supply, and affordability within the housing market, and the demand for residential development in Dublin over the next decade.



## **Appendix 1: CCM Model Method**



## **Appendix 2: Technical Note: A Description of factors concerning the projection of population**

### ***Context***

The projection of population methodology is underpinned by the application of the demographic cohort component methodology (CCM); the same methodology as used by the CSO in preparing the national projections. A series of projection scenarios were developed in order to provide an in-depth review of demographically driven trends affecting population change in the county.

The following sets out the methodology employed in the application of the CCM.

### ***The Cohort Component Method***

Utilised as the basis by which each scenario was projected, the cohort component method (CCM) for population projection is widely used internationally as a best-in-class methodology which provides a flexible and powerful approach to population projection.

CCM can incorporate many application techniques, types of data and assumptions regarding future trends. It can also be used at any level of geography (given data suitability) and perhaps most importantly, it provides projections of total population, demographic composition and individual components of population growth by applying key assumptions in fertility rates, mortality rates and migration rates per year of projection across the duration of the period.

Future populations are derived from a base population through the projection of population change and its major demographic components, births, deaths and migration. The projection of the demographic components of change is driven by the composition of the population by age, sex and birth rates, and the way these variables determine the propensity to bear children, die and migrate to, from or within Ireland.

Knowledge of the age and sex composition of the population at any point in time is fundamental to the projection of the population. Knowing the age-sex distribution at one date (2016) allows us to impute the age-sex distribution of those still alive at later dates, since sex does not change while age advances with the passage of time. This knowledge also allows the projection of demographic behaviours (above) as differentiated by age based upon past trends and expert opinion in order to introduce confidence and mitigate uncertainty.

In its simplest statement, the component method is expressed by the following equation:



$$P_t = P_{t-1} + B_{t-1,t} - D_{t-1,t} + M_{t-1,t} \quad (1)$$

where

$P_t$	= population at time t ;
$P_{t-1}$	= population at time t-1 ;
$B_{t-1,t}$	= fertility, in the interval from time t-1 to time t ;
$D_{t-1,t}$	= mortality, in the interval from time t-1 to time t ; and
$M_{t-1,t}$	= net migration, in the interval from time t-1 to time t.

Components of population change are projected separately and applied to equation 1 recursively to produce a series of populations. The measurement unit of time may be of any interval from t-1 to t, however, the impact of each component will vary over time.

This logic is also true for individual age groups, recognising that the source population for a given age group is the population at time t-1 in the adjacent younger age group. For the initial age group, it is births during the interval from t-1 to t, hence the 2011 base figure for under 1's is used. Equation 1 is replaced by two equations, depending on whether the age group is under 1, denoted as 0, or any other age, denoted by a.

$$P_t(0) = B_{t-1,t} - D_{t-1,t}(0) + M_{t-1,t}(0) \quad (2)$$

$$P_t(a) = P_{t-1}(a-1) - D_{t-1,t}(a) + M_{t-1,t}(a) \quad (3)$$

Each of the terms in equations 2 or 3 whether defined as a population or a number of events, relates to people born in a particular year. Such a group is known as a birth cohort, hence the term "cohort component method".