

# **Parkmore Industrial Estate**

## **Housing Demand and Composition Report**

February 2025

# Contents

Executive Summary	i
1. Introduction	1
2. Study Approach and Methodology	5
3. Policy Context	7
4. Interim Housing Needs and Demand Assessment	16
5. Local Demographic and Stock Profile	21
6. Demand and Supply	28
7. Summary and Conclusions	35

**Client**  
Watfore Limited

**Our reference**  
Project: 01566

February 2025

## Executive Summary

1. This report addresses the proposed provision of a housing mix which provides for 22% 3-bedroom homes as part of a typology of sizes which responds to the local demand for homes. It acknowledges and provides an evidence-based justification for the departure from the provisions of H1 Objective 12 of the South Dublin County Development Plan (2022-2028)<sup>1</sup>, which establishes an expectation for a higher provision (minimum of 30%) of 3-bedroom.
2. In doing so it addresses the relevant policies and objectives of the Development Plan, including the interim HNDA (2021) and other relevant local strategy. This importantly includes the City Edge project, within which the site is located. It also provides a contextual analysis of the prevailing housing and demographic character to the development site, recognising the above policies reference the appropriateness of considering a 10-minute walking area and an appreciation that different parts of the County have different needs.
3. In the establishment of Policy H1 the HNDA identifies that in excess of 30% of households in the County are projected to contain 4 persons or more. This projection is informed by 2016 Census data and population projections integrated in the NPF. The HNDA recognises that the trend observed to 2016, which saw household sizes increase, was in part at least related to the adverse consequences of an under-supply of housing, nationally and locally, and the challenges arising from worsening affordability which has constrained the formation of younger households. The issue of increasing numbers of adults (18+) living with parents creating so called 'hidden households' was identified as existing within South Dublin County.
4. The HNDA also identifies that South Dublin County has seen a net out-migration, especially of people and households in early formative years, with this identified as representing a challenge for South Dublin and acknowledging that it will necessitate the provision of additional housing for a greater number of smaller households, while also catering for a range of age groups and families.
5. The HNDA's projections anticipate a return to smaller household sizes in line with national trends over the projection period and longer-term. Analysis of more recently published 2022 Census in this report has confirmed that the average household size has fallen in South Dublin since 2016. It has also confirmed, however, that the number of adults living with parents has increased across the County, with 16% of Adult Children living at home, up from 11.5% in 2016 and compared to a national average of 13% in 2022. These households will be contributing to the identification of larger household sizes in the County but require the provision of smaller homes to accommodate their needs.
6. A review of the supply of new homes confirms that it is only in the last two years, and since 2022, that the supply of homes in the County has increased more significantly, with the provision of new apartments a key factor in the boosting of supply. Increased

---

<sup>1</sup> South Dublin County Council (2022) South Dublin County Development Plan 2022-2028: Written Statement

supply will need to be sustained to accommodate the projected need within the County and address issues associated with growing numbers of concealed households.

7. The draft NPF recognises the need to respond to more pronounced demographic pressures and the consequences of a sustained under-supply of homes nationally, including the constraining of new household formation for younger households in particular. It proposes to increase the national targets for housing delivery, whilst retaining the requirement to provide compact growth and focus supply within larger settlements and the regeneration of brownfield sites. It is noted that the application site aligns with these objectives.
8. The City Edge project is intended to directly address the need to boost supply and facilitate sustainable economic growth within Dublin. The application site sits at the heart of the 700 hectare City Edge area. The supporting evidence base and Strategic Framework establish a target to delivery 40,000 new homes alongside 75,000 jobs. It recognises the comparative urban nature of the area and establishes expectations around the density of development, whilst recognising the need to accommodate diverse communities in an appropriate typology of housing. The Strategic Framework, which it is recognised is a non-statutory document, proposes that a minimum of ca. 20% three or more bedroom units should be considered for residential development in City Edge<sup>2</sup>. The proposed application compares favourably to this suggested development mix, providing a higher proportion of 3-bedroom homes (22%).
9. In recognition of the HNDA and Development Plan's acceptance of the potential for deviation from the 30% requirement for 3-bedroom provision detailed consideration has been given to the socio-economic and demographic profile of the local area, as defined by a 10-minute walking neighbourhood and the stock profile. This demonstrates that:
  - The area is attractive to younger, smaller households on average when compared to the County. Within the local area approximately one third of households are aged 20 to 39 compared to 27% across South Dublin. The profile of households is also comparatively oriented towards single person and couple households, with lower representations of households with children.
  - Whilst flats / apartments and smaller homes (less than 2-bedrooms) are more prevalent than the County average in this area, reflecting the above demographic albeit falling short of aligning with demand for one and two bed homes, homes with 3 or more bedrooms represent the largest share of stock. Their preponderance is demonstrated by making up at least 59% of all homes within the local area.
  - Analysis of the RTB register for the appropriate eircode geography shows a strong orientation of demand toward 2-bedroom properties as of January 2025.
  - Analysis of house price and rental change within the Dublin 12 eircode continues to show that even in the context of the boosting of supply at a County level demand remains high for all sizes of home. In accordance with the City Edge

---

<sup>2</sup> [City-Edge-Strategic-Framework-August-2022-Final.pdf](#), page 65

ambition a pipeline of housing is identified within the local area with the scheme contributing to this required pipeline to ensure that supply responds to growing demand.

10. Based on the above, it would clearly be reasonable for a development in this location to offer fewer large homes than is typically expected of similar schemes in South Dublin. This would better reflect its established role in the wider housing market – and its excellent connectivity to Dublin, via tram and bus – while best catering to the needs of those choosing to live in this area, who tend to be smaller and younger than their counterparts elsewhere in South Dublin.
11. The proposal for 3-bedroom properties to account for 22% of the homes provided at the application site, rather than the stipulated 30%, is therefore considered to be justified, appropriate and necessary.

# 1. Introduction

- 1.1 This report has been prepared by Turley Economics on behalf of Watfore Limited, with reference to the site at Parkmore Industrial Estate ('the application site'). It should be read alongside the 'Planning Report' which has been prepared by McGill Planning Limited.

## **Subject site and proposed scheme**

- 1.2 The proposed development site is approximately 6.5km south-west of Dublin City centre and falls within the City Edge Project lands.
- 1.3 The site is a brownfield site located along the Long Mile Road (R110), Dublin 12, which provides access to the site. The site forms a triangular shaped site, with the north boundary fronting onto the Long Mile Road. The south eastern boundary bounds an existing estate road (cul-de-sac) which serves a number of long established commercial units.
- 1.4 The area is characterised by a conglomeration of industrial estates and business parks within a pattern of low-medium intensity development with smaller pockets of residential development pepper-potted throughout. The industrial estates and business parks have access to high quality existing and planned public transport, infrastructure and services and are located in close proximity to Dublin City Centre. It is acknowledged, as the Planning Report states, that land uses in City Edge have evolved over time from industry and manufacturing to primarily sales and logistics, and it is understood that a high volume of commuter employees are attracted to the employment opportunities in the area that have been created.
- 1.5 The context to the application site and its proximity to employment opportunities and arterial routes are shown in Figure 1.1.

**Figure 1.1: Site Context**



Source: McGill Planning

- 1.6 The proposed development constitutes 436 new homes, with the development description as follows:

*The development will comprise a Large-Scale Residential Development (LRD) on a site at Parkmore Industrial Estate, Long Mile Rd, Robinhood, Dublin, 12. The proposed development will comprise the demolition of existing industrial units, and construction of a mixed use, residential-led development within 4 no. blocks ranging in height from 06 to 10 storeys over semi-basement. The development will comprise the following: 436 no. apartments (studios; 1 beds; 2 beds and 3 beds) with commercial/employment units, creche, café and library. Provision of car, cycle and motorbike parking. Vehicular accesses from Parkmore estate road and additional pedestrian/cyclist accesses from the Long Mile Road and Robinhood Road. Upgrade works to the estate road and surrounding road network. All associated site development works and services provision, open spaces, ESB substations, plant areas, waste management areas, landscaping and boundary treatments.*

- 1.7 The following development mix by size of home is proposed and confirmed within the Architects' Schedule of Accommodation.

**Table 1.1: Proposed residential mix**

Apartment Type	Application Site Mix			
	1 bedroom (1 person)	1 bedroom (2 person)	2 bedroom (4 person)	3 bedroom (5 person)
Totals	2	180	158	96
Mix	0.5%	41.3%	36.2%	22.0%

Source: Reddy's Architecture and Urbanism 2025

### Report scope

- 1.8 This report addresses the proposed provision of a housing mix including 22% 3-bedroom homes as part of a typology of sizes which responds to local demand for homes. It acknowledges and provides an evidence-based justification for the departure from the provisions of H1 Objective 12 and under Unit Mix in Chapter 12 of the South Dublin County Development Plan (2022-2028)<sup>3</sup>, which establishes an expectation for provision of a minimum of 30% of 3-bedroom, unless it can be demonstrated that a lesser provision may be acceptable.

- 1.9 Policy H1 Objective 12 (and under Unit Mix in Chapter 12) states the following:

*Proposals for residential development shall provide a minimum of 30% 3-bedroom units, a lesser provision may be acceptable where it can be demonstrated that:*

- there are unique site constraints that would prevent such provision; or*
- that the proposed housing mix meets the specific demand required in an area, having regard to the prevailing housing type within a 10-minute walk of the site and to the socioeconomic, population and housing data set out in the Housing Strategy and Interim HNDA; or*
- the scheme is a social and / or affordable housing scheme.*

*Note: Build-To-Rent (BTR) residential developments shall comply with the Sustainable Urban Housing: Design Standards for New Apartments (2020) (or any superseding Section 28 Ministerial Guidelines).*

- 1.10 The report addresses the relevant policies and objectives of the Development Plan and other relevant local strategy. It also provides a contextual analysis of the prevailing housing and demographic character to the development site, recognising the above policies reference to a 10-minute walking area.
- 1.11 The study also uses available housing demand and supply information, drawing as appropriate on the Housing Strategy Interim HNDA (2021), to understand and consider the implications of the current need situation with future projections. This includes

---

<sup>3</sup> South Dublin County Council (2022) South Dublin County Development Plan 2022-2028: Written Statement



consideration of the more recent 2022 Census results, upon which future evidence assembled by the council will be based.

### **Report structure**

1.12 The report is structured as follows:

- Section 2: Study Approach and Methodology
- Section 3: Policy Context
- Section 4: Interim Housing Needs and Demand Assessment
- Section 5: Local Demographic and Stock Profile
- Section 6: Demand and Supply
- Section 7: Summary and Conclusions

## 2. Study Approach and Methodology

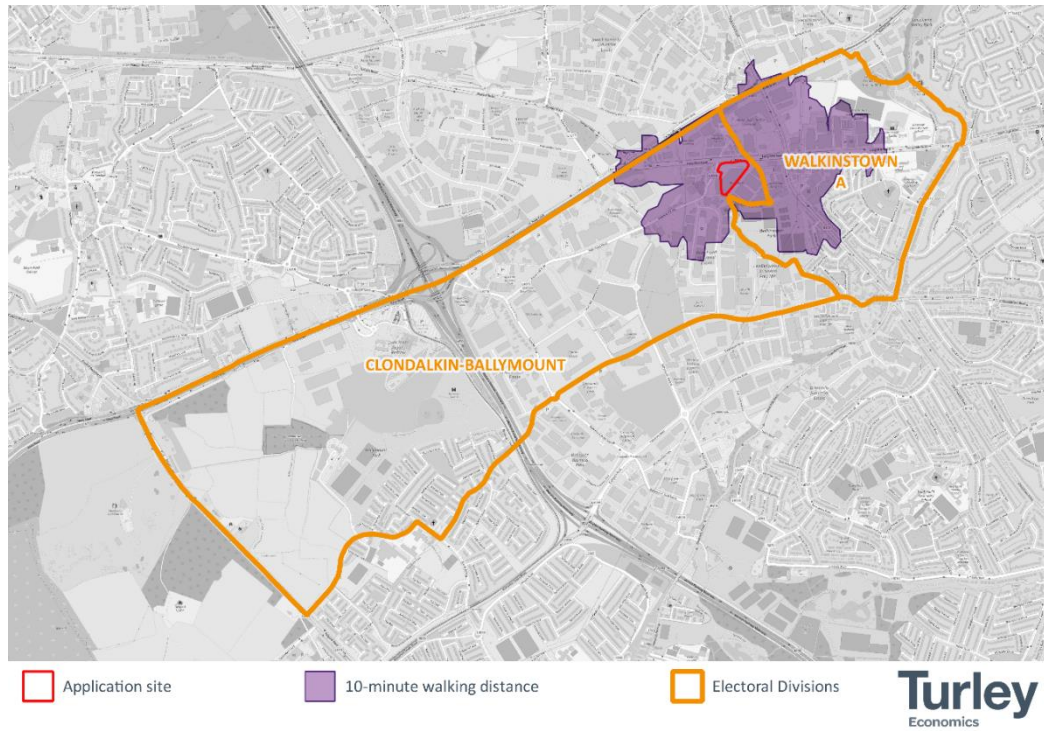
- 2.1 The analysis presented within this report has drawn upon the evidence underpinning the South Dublin County Development Plan, namely the county's Interim Housing Need Demand Assessment (HNDA) (2021).
- 2.2 Analysis has been presented using a number of different geographic areas. To build a profile of the locality a 10-minute walking catchment has been used, in line with the expectation of Policy H1 Objective 12. This geography is shown at Figure 2.1 overleaf.
- 2.3 To enable the analysis of Census and other datasets the 10-minute walking distance (hereafter the 'local area' or '10-minute walking area') is best represented by two Electoral Divisions (EDs), namely Clondalkin-Ballymount and Walkinstown A<sup>4</sup> (notwithstanding that the latter is technically part of Dublin City). This geography has been used within the analysis presented in this report and benchmarked as appropriate against the South Dublin area, which represents the Development Plan area.
- 2.4 Analysis from the HNDA has been complemented with analysis of updated datasets including the 2022 Census results which were not available at the time the Interim HNDA was prepared. This has been used to generate an up-to-date profile of stock and demographic characteristics, including a detailed consideration of the age profile of the population and changing household size, for the local area.
- 2.5 Separate consideration has been given to proximate pipeline developments and market information in the form of changes in the price of housing, with information again focused on the local area geography<sup>5</sup>.

---

<sup>4</sup> While the Clondalkin-Ballymount ED is acknowledged to be relatively large, a similar issue exists when attempting to use small areas meaning that this is the geography that best fits to a 10-minute walking distance

<sup>5</sup> This analysis uses datasets which are disaggregated by postal code with the Dublin 12 postal code used, recognising the address of the application site.

**Figure 2.1: 10-minute Walking Distance from the Site at Parkmore Industrial Estate**



### 3. Policy Context

- 3.1 The analysis presented in this report is, as set out in section 1, directed to address the policy provisions of H1 Objective 12 and under Unit Mix in Chapter 12 of the South Dublin County Development Plan (2022-2028)<sup>6</sup>. Within this section it is appreciated that this must be considered within the wider national, regional and accompanying local policy agenda.
- 3.2 It is considered pertinent to recognise in presenting this policy review that it is framed against a backdrop of a worsening housing crisis which is presenting material challenges to the economy and the population more widely<sup>7</sup>.
- 3.3 The severity of this challenge and the pressing need to deliver a significant boost in the provision of housing is widely reported. The current National Planning Framework established an aim to complete 33,000 new homes annually, rising to 40,000 by 2030. More recently Government party leaders have agreed, in the recognition of the need to build more, to aim to deliver 303,000 homes in the period from 2025 to 2030. This will require an average of 50,500 homes being built, building up to 60,000 in 2030<sup>8</sup>.
- 3.4 The setting of this target recognises that provision in recent years has failed to meet targets or increase to meet growing demand, with it reported in early 2025 that the delivery of new homes is forecast to fall short of targets again. This references that only 35,000 new homes were granted planning permission in 2024, this is one of the lowest figures over the last six years and down from 41,000 in 2023<sup>9</sup>.
- 3.5 The consequences of the housing crisis in constraining economic competitiveness have also been reported and identified by the Irish Development Agency (IDA). A shortage of stock has left young people in particular facing the consequences of soaring rents and overcrowding<sup>10</sup>. Separate reference has been made in this context to the important role that the provision of new apartments must play in meeting needs and enabling the economy to grow<sup>11</sup>.

#### **National Planning Framework**

- 3.6 The National Planning Framework (NPF) provides a strategy to shape growth and development in Ireland to 2040. As referenced above it represents the Government's plan to respond to and accommodate the projected significant growth in population and associated housing demand.

---

<sup>6</sup> South Dublin County Council (2022) South Dublin County Development Plan 2022-2028: Written Statement

<sup>7</sup> [Ireland's housing crisis facts and figures: All you need to know – The Irish Times](#)

<sup>8</sup> [Govt agrees new targets to deliver 303,000 homes by 2030](#)

<sup>9</sup> [Ireland's housing output could be as low as 32,000 units, according to new report](#)

<sup>10</sup> [Ireland's housing crisis undermining new investment - IDA - BBC News](#)

<sup>11</sup> [Ireland needs up to 500,000 new apartments to be built, Trinity College economist says | Business Post](#)

- 3.7 The five cities (Dublin, Cork, Limerick, Galway and Waterford) are intended to accommodate 50% of overall national growth with Ireland's large and smaller towns, villages and rural areas accommodating the other 50%.
- 3.8 In the context of achieving compact growth the NPF establishes an overall strategy to see at least 40% of all new housing delivered within the existing built-up areas of cities, towns and villages on infill and/or brownfield sites.
- 3.9 It also affirms that:

*"To more effectively address the challenge of meeting the housing needs of a growing population in our key urban areas, it is clear that we need to build inwards and upwards, rather than outwards. This means that apartments will need to become a more prevalent form of housing, particularly in Ireland's cities"*<sup>12</sup>

- 3.10 In striving to achieve a strong economy National Policy Objective 5 aims to:

*"Develop cities and towns of sufficient scale and quality to compete internationally and to be drivers of national and regional growth, investment and prosperity"*<sup>13</sup>

- 3.11 In July 2024 the Government published a draft first revision of the NPF for public consultation<sup>14</sup>. Subsequently in November 2024 the Government agreed to progress with the draft NPF and publish a draft schedule of amendments to the First Revision. The draft took into account evidenced changes in population growth, identified by the Census 2022, noting the need to plan for a population of 6.1 million by 2040, an additional 250,000 people over that planned for in 2018. Importantly it recognises, as referenced in the introduction to this section, a need to boost the supply of housing further, setting an expectation to deliver over 50,000 homes per annum.

- 3.12 It proposes to retain the promotion of city-based population and employment growth with the target of 50% of future growth to be focussed in the existing five cities and their suburbs retained. It is noted that based on the Census 2022 and other indicators it identifies that these *'highlight significant unmet demand for housing in Dublin and the Mid-Eastern Region in particular. This has the potential to undermine national competitiveness and social cohesion.'*<sup>15</sup>

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

- 3.13 The Eastern and Midlands RSES is intended to support the implementation of the national policies set out in the NPF and sets a framework for local economic development and spatial planning for each of the 12 local authorities in the region.

---

<sup>12</sup> *Ibid*, p93

<sup>13</sup> *Ibid*, p56

<sup>14</sup> Government of Ireland (November 2024) – Updated Draft Revised National Planning Framework

<sup>15</sup> *Ibid*, page 11

- 3.14 The RSES echoes the NPF in emphasising sustainable development patterns and seeks to focus growth within the footprint of existing urban areas and in key regional growth settlements.
- 3.15 The RSES identifies that the Dublin Metropolitan Area is *‘to realise ambitious compact development targets at least 50% of all new homes within or contiguous to the existing built-up area in Dublin and at least 30% in other metropolitan settlements.’*
- 3.16 Table 4.2 of the RSES establishes the settlement hierarchy with Dublin City and suburbs placed at the top of the hierarchy for the region, reflecting its anticipated role in accommodating growth of both the population and the economy.
- 3.17 It recognises that population growth across the region is set to continue, given its relatively young demographic profile and evidence of a return to net inward migration as Ireland returns to economic growth following the crash in 2008. It observes that the working age population of the region is set to rise, with increases in the cohorts between 15 – 29 and 45 – 64, and notes that in response there will be continued demand for family homes as well as smaller and one-person households. It observes with regards the current housing stock that of the 800,000 households in the region, four in five live in conventional housing with apartments accounting for around 18% of housing stock. It notes:

*“One of the challenges facing the Region is the continued growth rates of household formation coupled with a severe slowdown in the development of new housing stock during the economic recession, resulting in housing supply and affordability pressures in both sale and rental markets, particularly in Dublin and urban areas but affecting all of the Region”<sup>16</sup>*

- 3.18 Several relevant growth enablers are set out, *inter alia*:
- **Economic Growth** – including the re-intensification of employment within existing urban areas to better withstand economic shocks and sustain national growth;
  - **Align Population, Employment and Housing Growth** – promotion of sustainable growth and consolidation in local services, amenities and employment in areas that have experienced large scale commuter driven housing employment;
  - **Compact Sustainable Growth** – support co-ordination across local authorities and agencies to promote active land management and better use of under-utilised, brownfield and public lands; and
  - **Regeneration and Development** – identify significant ready-to-go regeneration projects in the existing built areas of our cities, town, villages which could leverage private and public-sector support and investment, including NPF and European funding with a focus on social as well as physical regeneration.

---

<sup>16</sup> *Ibid*, p17

## South Dublin County Development Plan 2022-2028

- 3.19 The South Dublin County Development Plan 2022-2028 ('the Development Plan') was made on 22<sup>nd</sup> June 2022 and came into effect on 3<sup>rd</sup> August 2022.
- 3.20 The Development Plan sets out the framework to guide future development within South Dublin County.
- 3.21 The Development Plan is intended to support the strategic vision such that: *'In 2028 South Dublin will be a place that our communities are proud of, that our businesses can thrive in and that will help us to live greener and healthy lives.'*<sup>17</sup>
- 3.22 With specific reference to the role of housing in achieving this vision it confirms the that Development Plan: *'Ensures the delivery of high quality and well-designed homes in sustainable communities to meet a diversity of housing needs within the County.'*<sup>18</sup>
- 3.23 The Settlement Strategy is predicated upon a vision to: *'Maximise the potential of the county to deliver a compact settlement form in line with National and Regional population targets, with a strong focus on regeneration and the redevelopment of brownfield over greenfield lands.'* The application site evidently proposes to develop a brownfield site to accommodate a new residential population, responding to an identified need created by a growing population, recognising that the Development Plan responds to the need to accommodate an additional 45,005 people up to 2028.
- 3.24 The Development Plan, in responding this growing population, provides for the accommodation of 15,576 new housing units between 2022 and 2028. In explaining this level of housing need the justifying text confirms that:
- 'The combination of the additional housing units required alongside the population growth indicates an anticipated reduction in average household size for the overall County. By 2028, with a total population of 323,769 persons and a total housing stock of 118,632 houses, the household size will be an average of 2.73 per house. This is a reduction from 2.99 in 2016 and is consistent with the downward national trend of household size, from 2.75 in 2016 to 2.5 in 2040, outlined in the National Planning Framework.'*<sup>19</sup>
- 3.25 The Development Plan also provides for accommodating an additional 18,336 jobs by 2028 (growth of 28% and year on year growth of an average of 1,528 jobs). Sustainably supporting these jobs will require a continued growth in the working age population and therefore labour-force. This recognises the neighbourhood-led focus which the Development Plan provides for which *'looks towards creating well designed successful*

---

<sup>17</sup> South Dublin County Council (2022) South Dublin County Development Plan 2022-2028: Written Statement, p19

<sup>18</sup> *Ibid*, p20

<sup>19</sup> *Ibid*, p44

*and sustainable communities that will support vibrant places to live, work, visit, socialise and invest in.*<sup>20</sup>

- 3.26 It is noted that to support sustainable enterprise and employment growth in South Dublin County Policy EDE1 identifies a number of objectives which recognise the important relationship between demographic change and the provision of housing. For example, Policy EDE1 Objective 1 identifies the need to *‘attract investment and talent’* and Objective 3 seeks to *‘promote compact growth by strengthening the integration between employment, housing and transportation.’*<sup>21</sup>
- 3.27 Policy H1 of the Development Plan is predicated on implementing the South Dublin County Council Housing Strategy and Interim Housing Needs and Demand Assessment (Interim HNDA). It confirms the intention to carry out a review of the Housing Strategy as part of the mandatory Two-Year Development Plan review.
- 3.28 Policy H1 sets out 18 objectives which relate to various aspects of the Interim HNDA. Of particular relevance to this report and the application site is Policy H1: Objective 12 which states:

*‘Proposals for residential development shall provide a minimum of 30% 3-bedroom units, a lesser provision may be acceptable where it can be demonstrated that:*

- *there are unique site constraints that would prevent such provision; or*
- *that the proposed housing mix meets the specific demand required in an area, having regard to the prevailing housing type within a 10-minute walk of the site and to the socioeconomic, population and housing data set out in the Housing Strategy and Interim HNDA; or*
- *the scheme is a social and / or affordable housing scheme*<sup>22</sup>

- 3.29 As set out in section 1 of this report it is proposed that the application site accommodates 96 3-bedroom units. This represents approximately 22% of the total development mix, falling short of the 30% sought through the policy above. Recognising the potential for flexibility subsequent sections of this report provide consideration specifically of the aspects set out in the second bullet-point of the objective, namely the local prevailing housing type and specific demand aligned with the socio-economic and demographic profile of the locality. Prior to this further context is given to the evidence set out within the Interim HNDA from which the Policy Objective is derived.

---

<sup>20</sup> South Dublin County Council (2022) South Dublin County Development Plan 2022-2028: Written Statement, p64

<sup>21</sup> *Ibid*, p 340

<sup>22</sup> South Dublin County Council (2022) South Dublin County Development Plan 2022-2028: Written Statement, p224



## City Edge

- 3.30 The City Edge Project in Dublin is identified within the Development Plan but also included in the NPF and the RSES, it is specially referenced as a case study in the recently published draft of the updated NPF<sup>23</sup>.
- 3.31 It is a transformative initiative to reimagine the Naas Road, Ballymount and Park West areas of Dublin as a new urban quarter providing up to 40,000 homes and 75,000 jobs<sup>24</sup>.
- 3.32 The City Edge lands stretch over 700 hectares and straddle the Dublin City Council and South Dublin County Council areas. It is located at the western edge of Dublin City, only 15 minutes from the City Centre, with the draft NPF identifying it as *‘creating a unique opportunity for sustainable compact growth.’*<sup>25</sup> Indeed one of the City Edge project Strategic Objectives is to create a compact urban environment with an active travel focus.

**Figure 3.1: City Edge Project in the context of the Greater Dublin Area**



Source: City Edge Project – Strategic Framework Figure 1

- 3.33 The City Edge Strategic Framework (CESF) was published in 2022<sup>26</sup>. The document, which is itself non-statutory establishes high-level strategies for the regeneration of City Edge. It is identified as providing the context for the subsequent preparation of a statutory plan(s) to provide more detailed guidance for the future development of the area.
- 3.34 The CESF recognises that alongside the ambition to accommodate an intensification of employment uses there exists an existing residential population of just over 5,000 people comprising approximately 1,600 households, peppered throughout City Edge. It observes that: *‘given the proximity of these lands to the City, there is huge scope to provide much needed new homes that are accessible for people of all ages, abilities and income levels that offer people choice, about where and how they to want to live and homes that ultimately meet the increasing needs of our city’s growing population.’*

<sup>23</sup> Government of Ireland (November 2024) – Updated Draft Revised National Planning Framework, page 32

<sup>24</sup> Strategic Framework – Summary Booklet – The City Edge Project

<sup>25</sup> *Ibid*

<sup>26</sup> [About - The City Edge Project](#)

**Figure 3.2: City Edge: Illustrative spatial configuration and character map**



*Source: City Edge – Strategic Framework, Figure 58*

- 3.35 The application site is within the Naas Road District of the City Edge lands and therefore sits very much at the heart of the project area.
- 3.36 A detailed baseline study was published to support the CESF. In the context of the proposed application the following findings are observed from this detailed assessment, which is understood to have been based on the 2016 Census and relates to the City Edge Study Area unless otherwise specified:
- The resident population was characterised by a high proportion of young persons, with a total of c.66% of all persons aged 0 – 44.
  - There was a total of 1,639 households and the average household size was 2.8. The most common household size was 'Two Persons' which accounted for c.26% of all households, with 'One Person' households representing c.22%.
  - 23% of the population were classified in the 'Professional Services' group. Nearly one-quarter of the population (24%) held a 'Managerial/Technical' position.

- In terms of housing typology, the ratio of houses to flats/ apartments was generally 75:25 in favour of houses, with 73% of all households residing in a traditional dwelling (either detached, semi-detached or terrace.)
- Analysis of large scale residential / mixed use developments (in excess of 100 residential units) identified that no permissions for large scale development existed in the South Dublin County Council portion. However, within Dublin City the potential pipeline of residential development represented 3,344 homes. This is 1,587 more than the existing residential stock of the City Edge area. It observed that the accommodation breakdown of the approved units was as follows:
  - Studio units: 255 no. (c.8%)
  - 1-bed units: 1,172 no. (c35%)
  - 2-bed units: 1,715 no. (c.51%)
  - 3-bed units: 202 no. (c.6%)

3.37 Where the CESF highlights the ambition to accommodate a diverse range of housing typologies within high density development, in referencing the policies of South Dublin (then draft County Development Plan 2022-28) and the Dublin City Development Plan (also at draft stage then) and factoring in international case study analysis it proposes that a minimum of ca. 20% three or more bedroom units should be considered for residential development in City Edge<sup>27</sup>. The proposed application compares favourably to this suggested development mix, whilst recognising that the CESF is a non-statutory document.

3.38 It is apparent that the City Edge project establishes an expectation as to the typology of housing required to achieve its ambitions, to which the proposed application aligns and responds positively.

### **Summary and Implications**

3.39 In the context of a widely reported housing crisis the Government has acknowledged the need to increase the supply of housing. The current NPF establishes a clear ambition to deliver new homes, identifying a parallel objective of achieving this through the delivery of compact growth and the re-development of brownfield land. In the recently published draft NPF these policy objectives are sustained but an even higher target is advanced for the annual delivery of homes nationally.

3.40 The RSES affirms the need to ensure that demographic growth is accommodated sustainably to mitigate worsening affordability and to support the alignment with economic growth and labour-demands. It similarly advocates the importance of accommodating growth within the Dublin Metropolitan Area, recognising the importance of Dublin's economy.

---

<sup>27</sup> [City-Edge-Strategic-Framework-August-2022-Final.pdf](#), page 65

- 3.41 The South Dublin County Development Plan seeks to respond to the pressures arising from a growing population and recognises the importance of meeting a diversity of housing needs, as well as the important relationship between the provision of housing and attracting investment and talent to support local economic growth. Its policy objectives are supported by an evidence-base which precedes the publication of the 2022 Census. Where Policy H1: Objective 12 establishes the expectation of delivering a minimum of 30% 3-bedroom units it acknowledges that a lesser provision may be acceptable in some circumstances. This includes consideration as to the specific demand in an area, with reference to consideration of the characteristics of the locality defined on the basis of a 10-minute walking area.
- 3.42 In recognising the spatial and context of the locality it is pertinent to acknowledge that the proposed application is located with the City Edge project. The ambition is to create a new urban quarter of up to 40,000 homes and 75,000 jobs, acknowledging the unique urban locational advantages of the area to accommodate sustainable compact growth. At the time of the preparation of the City Edge Strategic Framework there was a significant pipeline of residential development, albeit none of the large-scale residential developments were in South Dublin County. The City Edge Strategic Framework proposes a residential typology mix which establishes a minimum expectation to provide 20% 3+ bedroom homes. The proposed application aligns with this expectation and therefore responds positively to the objectives and ambitions of this national priority project.

## 4. Interim Housing Needs and Demand Assessment

- 4.1 This section considers the analysis presented within Council's Housing Strategy 2021 and Interim Housing Needs and Demand Assessment 2022-2028<sup>28</sup> (HNDA), recognising that this provides the supporting evidential basis for Policy H1.
- 4.2 Consideration is given to the implications of up-to-date data in the form of the 2022 Census, which was not available at the time the HNDA was prepared. This is important as it provides updated demographic information from which to consider the direction of travel regards underlying household demand. It is noted that subsequent updates to the HNDA will integrate the same data to derive new quantified outputs.

### **HNDA analysis of future household change**

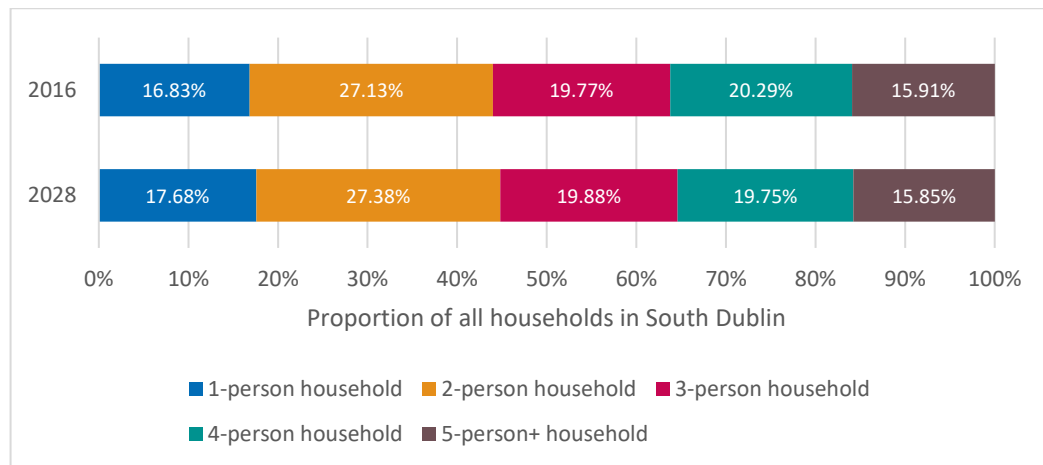
- 4.3 The Interim HNDA acknowledges that it was written before the publication of the HNDA Guidelines on the 14 April 2021 and confirms that the housing targets relate to the ESRI 50:50 Scenario published by the Department in December 2020. The analysis and projections use demographic data from the 2016 Census.
- 4.4 The HNDA frames its analysis with a consideration of a historic demographic baseline. This identified that the County saw its population grow by just over 5% between 2011 and 2016, and that this represented a slowdown from the previous inter censal period which saw growth of over 7%.
- 4.5 It also identified that during the period 2006 – 2011, South Dublin was the only County in the GDA to have experienced net out-migration. Indeed there was a net outmigration of c.810 persons over this period. The HNDA identifies that this outflow became markedly more significant between 2011 and 2016 with a net outmigration of circa 4,200 persons, noticeably reducing the overall growth in the population over this period<sup>29</sup>. It is again noted that South Dublin is unique in this regard with reference to other local authorities in Dublin. The HNDA through its conclusions acknowledges that this poses a notable issue and challenge for the County to address.
- 4.6 In supporting the justification for the unit mix articulated through Policy H1 Objective 12 and in the Unit Mix in Chapter 12, the HNDA cites analysis of future household composition which blended '*historic census information*' – understood to be up to 2016 – with '*housing formation*' and other '*demographic information*'.
- 4.7 Figure 4.1 presents analysis from within the HNDA which projects forward changes to the household size cohort across the County.

---

<sup>28</sup> South Dublin County Council (2021) South Dublin Housing Strategy and Interim HNDA 2022-2028

<sup>29</sup> *Ibid*, Table 11, page 25

**Figure 4.1: Household Size Cohort Forecast in South Dublin (2016-28)**



*Source: South Dublin County Council HNDA (Table 50)*

- 4.8 It is evident that the HNDA’s projection suggested that a growing proportion of all households in South Dublin would contain fewer than three people, with fewer accommodating four or more<sup>30</sup>.
- 4.9 The HNDA does though observe that the representation of households with at least four people would reduce marginally, ‘from 36.2% to 35%’, proceeding to suggest that most would require homes with at least three bedrooms. It is understood that it is on the interpretation of this data that the HNDA proceeds to recommend that ‘30% of all new housing stock should facilitate 3-bedrooms+’ having apparently allowed for some of the larger households needing only two bedrooms.
- 4.10 It is important to recognise that this is only a projection, and indeed a relatively dated one having been produced over three years ago prior to April 2021 and the 2022 Census<sup>31</sup>.
- 4.11 The Census 2022 provides an important update and insight as to how the profile of households has continued to change, albeit one which is only halfway into the projection period.
- 4.12 Looking at this more recent dataset confirms that there has been a reversal of the previous trend of increasing household size, upon which the HNDA analysis was based. This is shown in Figure 4.2 with the average household size as recorded in the 2022 Census having fallen back closer to that seen in 2011. As noted above this trend was identified in the Development Plan and expected to continue, noting an assumption that it would fall to 2.75 by 2028<sup>32</sup>. This recognises, as the HNDA confirms that this

<sup>30</sup> *Ibid*, Table 50

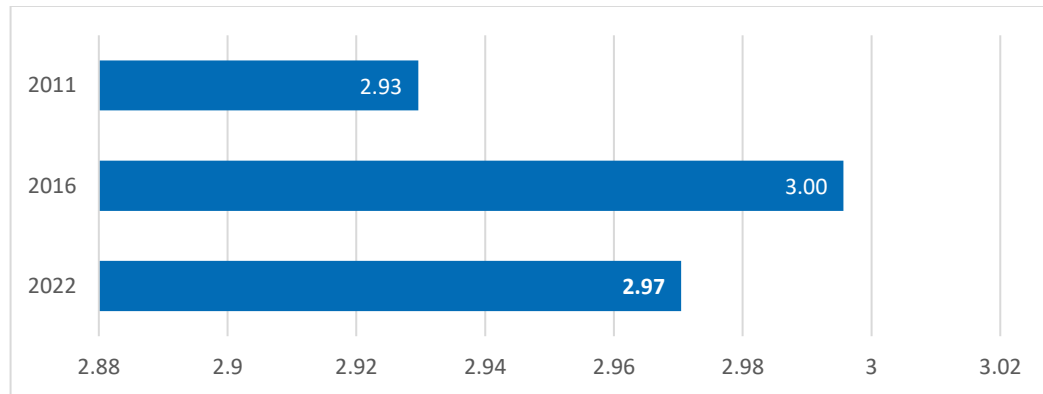
<sup>31</sup> South Dublin County Council (2021) South Dublin Housing Strategy and Interim HNDA 2022-2028, p6. ‘The document was written before the publication of the HNDA Guidelines on the 14 April 2021’

<sup>32</sup> *Ibid*, Table 45



decline is projected 'due to wider demographic trends associated with lower fertility rates and an ageing population.'<sup>33</sup>

**Figure 4.2: Average Household Size in South Dublin (2011-22)**



Source: Census 2011; Census 2016; Census 2022

- 4.13 It is also important to note that when looking at the increase between 2011 and 2016 in the above chart the HNDAs suggests that with regards the increase seen to 2016: *'It is possible that this slight increase reflects the difficulties faced in forming new households in the aftermath of the last economic crisis as both income levels and construction activity entered a period of significant decline.'*<sup>34</sup>
- 4.14 The review of policy in section 3 of this report has highlighted the ongoing endurance of challenges associated with boosting supply sufficiently and indeed the related issue of worsening affordability. The acknowledgement that the absence of supply has played a part in creating more concealed households is an important one. Analysis in the next couple of sections of this report highlights that concealed households exist in significant numbers within the County, with some of these living within the locality of the application site as well. It also shows that it is only since 2022 that the supply of homes in the County has seen a marked increase (see Figure 6.1 of this report). In this context it is unsurprising that household sizes have been higher than would reasonably be expected to form in a less constrained market environment.
- 4.15 This forms an important context for assessing the appropriateness of seeking a mix which includes a more substantial proportion of larger homes on all sites, if hidden households and a shortage of smaller units is resulting in adult children remaining at home for longer than they wish.
- 4.16 Importantly, in the context of the evidence of changing demographic trends the HNDAs correctly acknowledges and provides for a degree of flexibility.
- 4.17 The HNDAs describes the 30% figure as only a 'benchmark' and acknowledges that *'each part of the County has different needs'*<sup>35</sup>. With each area described as having *'specific socio-economic differences and thus different housing demands'*, the HNDAs states that

<sup>33</sup> *Ibid*

<sup>34</sup> South Dublin County Council (2021) South Dublin Housing Strategy and Interim HNDAs 2022-2028, p43

<sup>35</sup> *Ibid*, p6

*'development proposals may justify any deviation from the minimum 3-bedroom mix, based on the socio-economic and demographic context within a 10-minute walking distance from the site'*<sup>36</sup>.

- 4.18 This recognition of a need for flexibility and the potential to depart from the suggested mix is reflected in the Development Plan. It confirms that *'a lesser provision may be acceptable'* where it is demonstrated that *'the proposed housing mix meets the specific demand required in an area, having regard to the prevailing housing type within a 10-minute walk of the site'*<sup>37</sup>.
- 4.19 The following section looks at a profile of households, demographics and stock for the locality area, as defined by the 10-minute walking distance. Prior to considering this analysis it is important to highlight that the analysis of the City Edge, referenced in the previous section and within which the application site is located, identified an average household size of 2.8<sup>38</sup>. It is understood that this was based on the 2016 Census and when compared to the comparable household size in Figure 4.2 (household size of circa 3), confirms the distinctiveness of this wider geographic designation.

### **Summary and Implications**

- 4.20 It is recognised that the Interim HNDA provided the evidential justification for Policy H1 Objective 12 and the Unit Mix in Chapter 12.
- 4.21 The HNDA drew upon data available at the time in the form of the 2016 Census and using a range of datasets projected changes to profile of households by size. In doing so it projected that a growing proportion of all households in South Dublin would contain fewer than three people, with even fewer accommodating four or more.
- 4.22 It is understood that this accounted for an expectation of falling household sizes in the future, reverting to a longer historic trend and accounting for falling fertility rates and an ageing population. Despite this trend the HNDA provided the justification for the approach to expect developments to provide a minimum of 30% 3 bedroom+ homes where it identified that approximately 35% of households would have 4 or more persons.
- 4.23 Analysis of the most up-to-date Census 2022 data confirms a return to falling household sizes, albeit recognising that this only represents a mid-way point in the projection period.
- 4.24 It is important to observe in this context, as the HNDA does, that one of the factors behind household sizes increasing beyond historic trends has been the consequences of an under-supply of housing and worsening affordability creating so called 'hidden' households. Furthermore, the HNDA identifies that uniquely amongst the local authorities in Dublin, South Dublin has seen a notable net outmigration of persons

---

<sup>36</sup> *Ibid*, p75

<sup>37</sup> South Dublin County Council (2022) South Dublin County Development Plan 2022-2028, p224

<sup>38</sup> [3.-Baseline-Study-Findings-2-2](#), page 16



between 2011 and 2016, with the scale of the outflow increasing significantly between 2016 and 2022 compared to the previous inter-censal period.

- 4.25 The HNDA recognises that the 30% figure is only a 'benchmark' acknowledging differing needs across the County and that deviation may be appropriate in the context of different socio-economic and demographic context and the existing stock mix within a 10-minute walking neighbourhood. This is considered in further detail in the following section, but it is also observed, noting the importance of the City Edge designation, that underpinning analysis of demographics and household size in this area referenced in the previous section already confirmed that the area was defined by younger households with a smaller average household size than that seen on average within South Dublin.

## 5. Local Demographic and Stock Profile

- 5.1 The previous section identified that the HNDA affirmed the appropriateness of flexibility in the identification of the 30% 3+bedroom minimum expectation in the context of understanding the characteristics of a 10-minute walking neighbourhood to a development. This section considers the socio-economic and demographic characteristics of the local area, the geography of which was defined in section 2.
- 5.2 It also considers the housing stock profile of the same local area, specifically noting that the HNDA confirms that the consideration of an appropriate mix which departs from the minimum *'may typically arise in infill development in established urban areas where there is a preponderance of three beds and greater within a short walking distance of any proposed development.'*<sup>39</sup>
- 5.3 Further to the above it is important in considering the current demographics of the area and the wider strategic ambitions in South Dublin and City Edge to also recognise that the HNDA identifies as a further important consideration in justifying a departure: *'that the County has had a sustained net out migration, especially in the early formative household years.... To encourage and provide for this demographic group to return and/or remain in the County, it is important to provide a mix of housing type to encourage them to stay and to provide the necessary housing mix as they progress to the family formation stage.'*<sup>40</sup>

### Local prevailing demographic characteristics

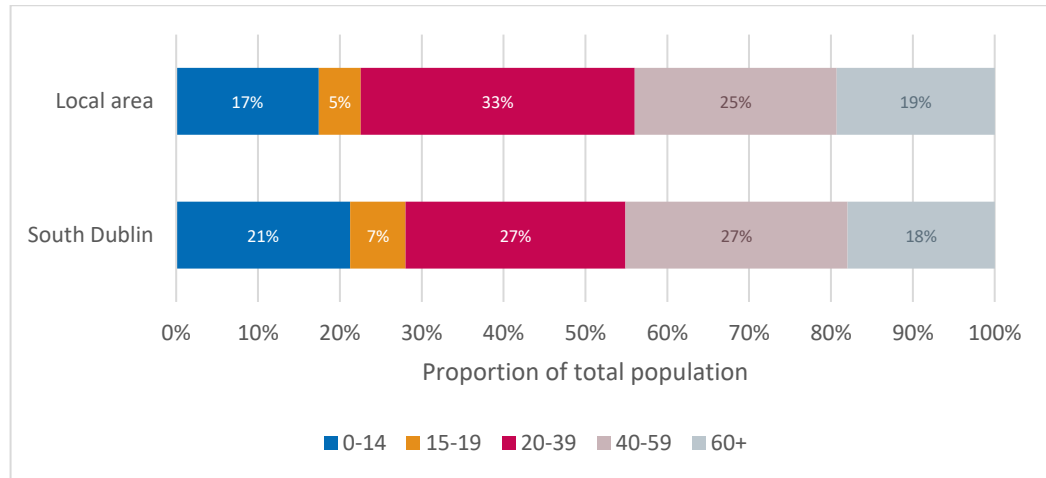
- 5.4 Looking at the age profile of the local area benchmarked against the South Dublin average confirms that it accommodates a generally younger population. Roughly one third (33%) of all residents are aged 20 to 39, whereas only 27% of South Dublin residents are in this age bracket. The area is consequently home to relatively few children as only around one sixth (17%) of residents are aged 14 or below, with the equivalent figure for South Dublin being higher at 21%. This suggests that the area is attractive to younger households currently, albeit it can also be seen to accommodate a slightly higher proportion of older people (aged 60+) than South Dublin.

---

<sup>39</sup> South Dublin County Council (2021) South Dublin Housing Strategy and Interim HNDA 2022-2028, Section 6.8.3, p65

<sup>40</sup> *Ibid*

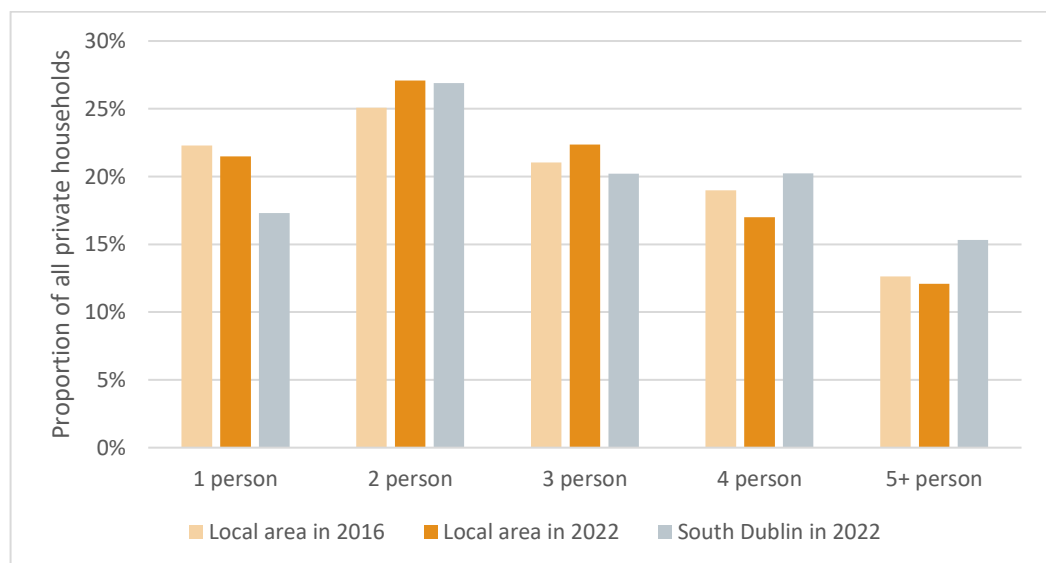
**Figure 5.1: Age Profile (2022)**



*Source: Census 2022*

- 5.5 Households in this area also tend to be **smaller**, with each one containing an average of 2.79 people as of 2022 – fractionally less than in 2016 (2.80) – whereas the average for South Dublin continues to be higher at 2.97. This average household size aligns closely with that documented for the City Edge area (see paragraph 3.36 of this report), albeit noting that the analysis here is based on a more up-to-date Census.
- 5.6 Almost half (49%) of all households in the local area contain only two people, with this figure having risen from 47% in 2016 and continuing to comfortably exceed the equivalent one for South Dublin (44%). This rise is likely to be at least partially driven by younger professionals delaying having children, with the provision of larger housing – with at least three bedrooms – unlikely to meet the needs of such households.

**Figure 5.2: Size of Private Households (2016-22)**



*Source: Census 2022*

- 5.7 Looking at household composition provides further insights into the profile of households in the local area when compared with South Dublin County. The Census 2022 provides a detailed profile of households with the following table amalgamating these into broader categories.

**Table 5.1: Household Composition - Local Area / South Dublin**

Household type	Local area	South Dublin
One person	21%	17%
Two or more non-related persons	11%	5%
Couple or cohabiting couple no children	16%	17%
Other household no children	7%	6%
Household with children	45%	54%
Total	100%	100%

Source: Census 2022

- 5.8 It is evident from the above that the area has a stronger representation of one-person and two or more non-related persons households than the County (48% versus 39%). In the case of the former this would suggest a stronger need for smaller accommodation. In contrast the area has a much lower representation of households with children than the County average (45% versus 54%). Again, this serves to affirm the comparative attractiveness of the area to younger households.
- 5.9 In the context of the above it is also important to acknowledge the significant number of people aged over 18 and living with parents. The HNDA states that: *‘The number of adult children living at home is a measurement to understand the movement and pressures within existing households with children forming part of the Adult Family nucleus.’* It proceeds to state in its analysis of data from the 2016 Census that: *‘This figure will be closely monitored as part of the forthcoming Census 2022, as these figures could indicate a ‘hidden’ household as children stay home longer to afford homeownership.’*<sup>41</sup>
- 5.10 The Census 2022 indeed revealed that across Ireland, issues associated with accessing the housing market resulted in 13% of those aged 18 or over living with their parents.
- 5.11 Table 5.2 replicates the 2016 Census data presented in the HNDA for South Dublin and compares it with the Census 2022 data that has been subsequently released. It also shows the number of adult children living at home within the local area.

<sup>41</sup> South Dublin County Council (2021) South Dublin Housing Strategy and Interim HNDA 2022-2028, Section 5.6.3, page 49

**Table 5.2: Adult children living at home, 2016 - 2022**

Year	Geography	Adult children (18+) living at home	% of adult children at home
2016	South Dublin	32,034	11.5%
2022	South Dublin	34,902	15.5%
2022	Local area	524	12.6%

*Source: CSO Census 2022 data and Interim HNDA Table 35*

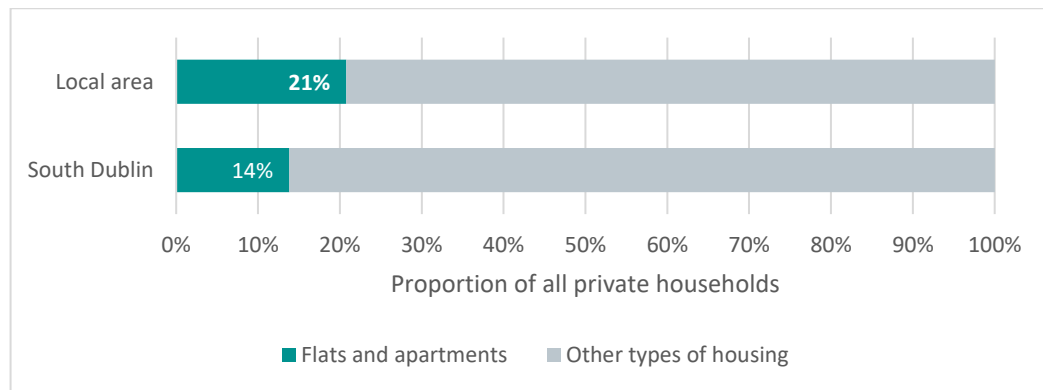
- 5.12 This shows that the proportion of adult children living at home in South Dublin is higher than the national average (13%) and increased notably since 2016 to c.16%, this equates to almost 35,000 people aged 18 or over living with their parents in the County. In the local area alone there are just over 520 such persons, a rate more aligned with the national average. This affirms the significant pressing need to provide housing to enable so called ‘concealed’ households to form, with the local area being one which is apparently attractive to these households, and highlights the limitations of modelling need on the basis of household size alone.

#### **Local housing stock profile**

- 5.13 Looking at the stock profile of the local area, again using census data from April 2022, identifies further points of distinctiveness and character which form an important context for understanding how supply responds to demand.
- 5.14 **Flats and apartments** are more prevalent in this area, accommodating 21% of all private households with the equivalent figure for South Dublin being roughly a third lower at only 14%. Both are substantially lower than in Dublin City where some 38% of private households lived in apartments as of 2022, up from 35% six years prior<sup>42</sup>. While there are more apartments in this local area compared to South Dublin overall, it accords with the urban profile of the area, and noting again that this aligns with the compact growth ambitions of the City Edge project.

<sup>42</sup> Government of Ireland (2022) Sustainable Urban Housing: Design Standards for New Apartments: Guidelines for Planning Authorities, paragraph 1.11

**Figure 5.3: Prevalence of Flats and Apartments (2022)**

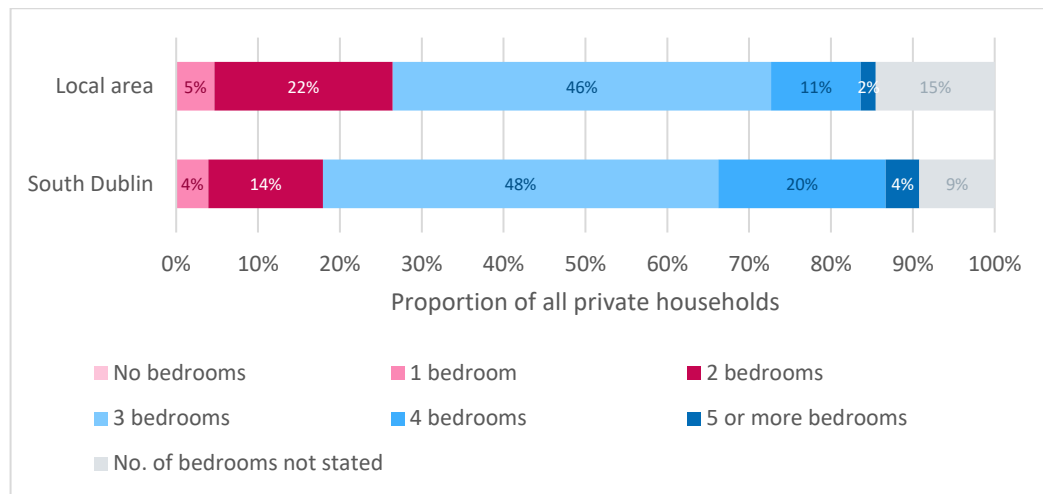


*Source: Census 2022*

- 5.15 Aligned with the above the local area also generally provides larger housing that is still **slightly smaller** than is typical in South Dublin. At least 26% of all private households have no more than two bedrooms, meaning that the majority of homes have at least three bedrooms<sup>43</sup>. However the proportionately higher quantum of smaller sized units, when compared to the equivalent figure for South Dublin (which is as low as 18%) suggests a profile of stock which responds to the younger demographic observed above.
- 5.16 In line with the HNDA though it is important to observe that at least 59% of all homes in this location have three bedrooms or more, with at least 13% having four or more. This indeed shows a current preponderance of these larger homes within the area, which in the context of its attractiveness to a younger demographic, the ability to downsize within the area, the existence of concealed households and falling household size (as considered in section 4) would suggest that a greater diversity of housing including smaller housing would be appropriate.

<sup>43</sup> Figures presented as minima given that the number of bedrooms was not stated by 15% of households in the local area, and by 9% of households in South Dublin

**Figure 5.4: Number of Bedrooms (2022)**



*Source: Census 2022*

### Summary and Implications

- 5.17 The HNDA identifies that the 30% minimum 3+ bedroom should be viewed as a benchmark recognising distinctions in need across the County, as well as the current stock profile of an area and an overarching objective and need to encourage the retention and attraction of households in their early formative years. In considering these factors in more detail this section has profiled the local area, based on a 10-minute walking neighbourhood. It has identified that:
- The local area is attractive to younger households, where roughly one third of residents are aged 20 to 39 compared to 27% across South Dublin.
  - The profile of households is oriented towards single people and couples, with lower representations of households with children.
  - The average size of household is as a result smaller, with almost half of all households containing only two people, with this having risen since the 2016 Census. This rise is likely to be at least partially driven by younger professionals delaying having children, with the provision of larger housing – with at least three bedrooms – unlikely to meet the needs of such households who would prefer smaller homes
  - South Dublin has seen a rise in adult children living with parents at home since 2016, with c.16% of those aged 18 or over living with parents. This exceeds the national average. Over 500 adult children are living with parents within the local area. This underlines the importance of providing appropriate housing to allow them to form independent households in the area and recognising the comparative attractiveness of the local area already to households in their early formative years and stem the current ongoing outmigration from South Dublin.
  - The local area has a greater representation of flats/ apartments than the County as a whole, and in turn generally contains smaller housing than is typical in South

Dublin, responding in part to the socio-economic and demographic profile described above. This proportion still falls considerably short of the comparative representation in Dublin City noting the proximity of the site to the City boundary.

- Despite the above it is of note that homes with three bedrooms or more still make up the majority of the housing stock in the area with at least 59% of stock having at least three bedrooms, and at least 13% having four or more bedrooms. This confirms a current preponderance of larger homes within the local area, which in the context of the younger demographic, existence of concealed households and falling household size (as considered in section 4) would suggest that a greater diversity of housing including a higher proportion of smaller housing and a modest reduction in three-bed units would be appropriate as suggested in this application.



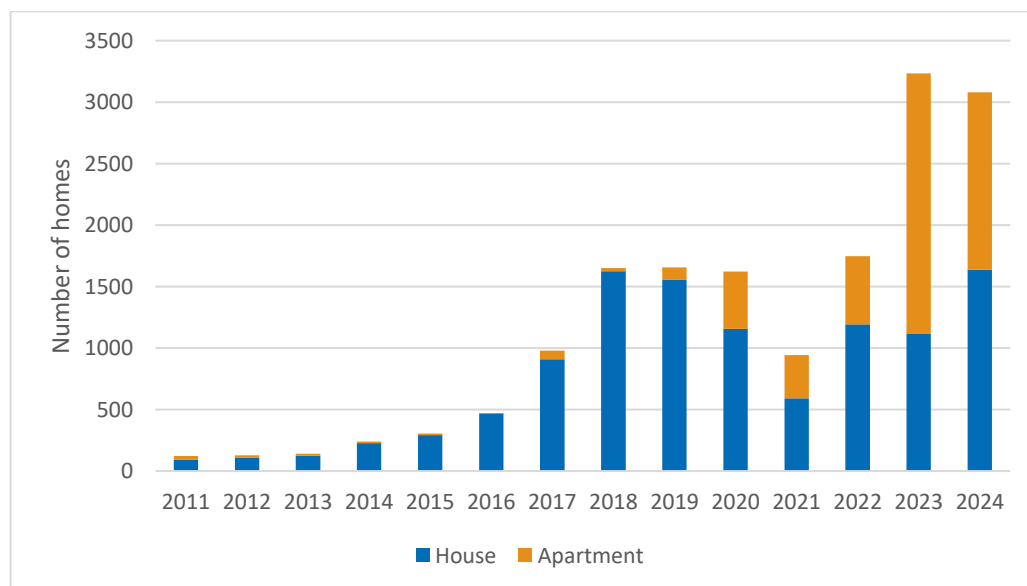
## 6. Demand and Supply

- 6.1 The previous section affirmed that the local area (10 minutes walking area) had several distinct demographic and stock characteristics, which affirms the appropriateness of a varying of the mix and specifically a modest reduction in the proposed provision of larger homes. This section looks at the recent provision of new housing within the County to consider how this has responded to growing needs for different sizes of home.
- 6.2 It proceeds to consider the current pipeline of future developments within the local area and where information is available the additional sizes of homes this will deliver into the local market.
- 6.3 Finally, while this report has not sought to provide analysis of market demand high-level consideration is given to trends in house prices, where this provides an important indication as to the balance between supply and demand.

### County-level supply

- 6.4 The following chart illustrates the number of new houses and apartments provided annually in South Dublin County.

**Figure 6.1: South Dublin County Council completions houses / apartments 2011 – 2024**

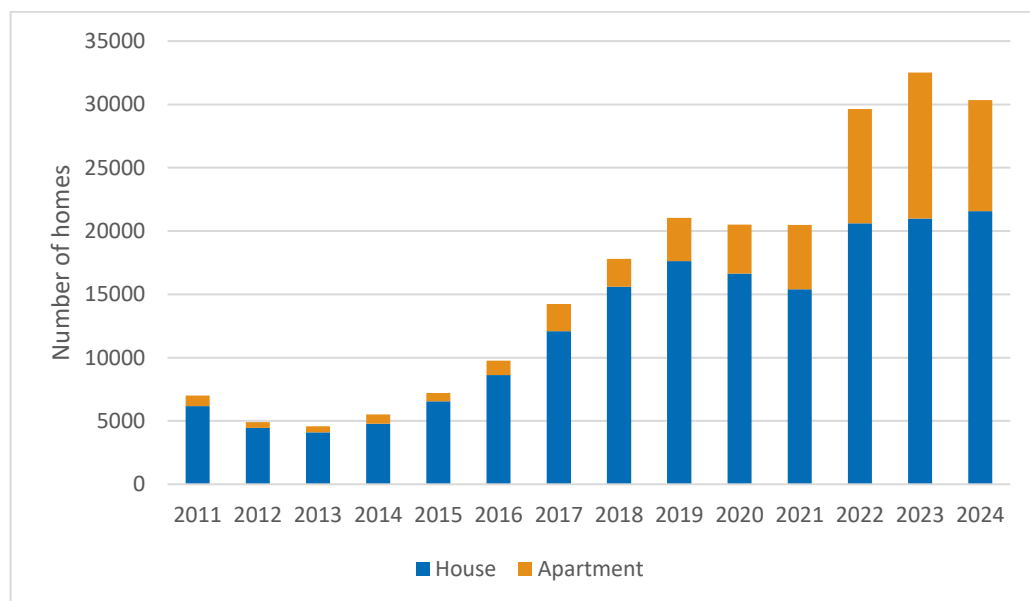


Source: Table NDQ06 (Source: CSO)

- 6.5 It is apparent from the chart above that the number of completions in the County have been slow to increase, only showing a significant uplift in the last couple of years and notably since the results of the 2022 Census were obtained.

- 6.6 It is observed that the provision of apartments has represented the significant factor in the substantial increase in new homes provided in these last two years. Indeed, it is noted that up until 2020 apartments made an almost negligible component of supply and remained relatively modest up until 2023.
- 6.7 Figure 6.2 presents the equivalent information for Ireland. This shows that apartments started to make a more meaningful contribution earlier at a national level but equally shows the important role they have played in boosting supply over more recent years. It is important to note that where South Dublin is a comparatively urban authority when compared to the state as a whole the comparatively low provision of apartments up until to the last two years is even more surprising.

**Figure 6.2: Ireland completions houses / apartments 2011 – 2024**



Source: Table NDQ01 (Source: CSO)

### Planning Pipeline

- 6.8 Analysis has been undertaken of the planning application pipeline for residential development the local area.
- 6.9 Table 6.1 lists the developments which have been identified as forming the pipeline within the locality.

**Table 6.1: Residential developments within the pipeline in the locality**

Address	Reference	Description of Development	Status	Final Grant Date	Units	Commenced
Former CHM premises, Ballymount Road Lower, Walkinstown, Dublin 12, D12 CK60.	320249 / LRD24A/00 03 (SDCC)	Amendments to permitted strategic housing development (ABP-309658-21): Change of use at ground floor level of Block B from café to retail unit, incorporation of off-licence area within proposed retail unit, signage, internal reconfiguration of permitted creche area and communal areas, amendments to apartments on level 5 of Block C, overall residential provision will increase from permitted 163 to 164 units, changes to level 6 of Block B, additional bicycle parking stand and associated site development works.	Granted	23/10/2024	164	Yes

Royal Liver Assurance Retail Park, Old Naas Road, Dublin 12.	307804 / 4238/19 (DCC)	Permission (for a period of 10 years) The development will comprise the demolition of single storey warehouse buildings sub-divided to comprise 8 retail / retail warehouse units, to provide a mixed-use development and all ancillary works; comprising 9 buildings ranging in height from 7 to 18 storeys. The residential component comprises 1,102 units consisting of Build-to-Rent Residential Development	Granted	19/11/2020	1,102	No
Site to the east of Walkinstown Avenue at the junction of Walkinstown Avenue and Naas Road	3228/20 (DCC)	10-year planning permission for a large-scale, mixed-use development on a 6.921-hectare site at the junction of Walkinstown Avenue and Naas Road. The development will consist of 13 blocks (A-L), ranging from 4 to 15 storeys, with a cumulative gross floor area (GFA) of 168,184.13 sq.m, and will incorporate residential, commercial, and community elements.	Granted	06/04/2021	1,137	Yes

*Source: Turley (January 2025)*

- 6.10 This data suggests that there are over 2,000 residential homes with permission in the locality, across 3 schemes that span the administrative boundary between Dublin City and South Dublin. It is apparent that several of the developments are mixed-use and will include some employment generating uses.

### Rental and House Price Data

- 6.11 Changes in rents and house prices are an important indicator of comparative demand. Analysis has been undertaken of DAFT data focussed on the Dublin 12 eircode.
- 6.12 Table 6.2 draws from the DAFT.ie reports of market rents to show recent changes in rental values by size of property in the Dublin 12 eircode. Annual figures are extracted based on Q3 data, with this the latest available quarter of data for 2024 at the time this report was written.

**Table 6.2: Data.ie snapshot of market rents - Dublin 12 eircode**

	Average market rent (monthly), and annual change (%)									
	1 bed apartment		2 bed house		3 bed house		4 bed house		5 bed house	
<b>24 Q3</b>	€1,576	2.8%	€1,914	3.1%	€2,396	1.3%	€2,979	1.8%	€3,525	-1.2%
<b>23 Q3</b>	€1,533	5.5%	€1,856	5.4%	€2,364	9.0%	€2,927	12.5%	€3,566	19.1%
<b>22 Q3</b>	€1,452	8.6%	€1,762	10.9%	€2,169	9.5%	€2,600	9.2%	€2,994	15.3%

*Source: The Daft.ie Rental Price Report*

- 6.13 The rental data shows a strong growth in rental values year on year over the last three years for all sizes of property in the eircode area, with the exception of larger 5-bedroom homes in the last year.
- 6.14 It is notable that for the last years data smaller properties have seen the largest increases in rental values suggesting a comparatively strong demand. That said it is clear, as referenced in earlier sections that the area is dominated by family-sized properties and that these have also seen strong growth over recent years suggesting a more pronounced imbalance between supply and demand more widely.
- 6.15 Analysis has been undertaken of the Residential Tenancies Board (RTB) register, which shows all private tenancies currently registered. Analysis as of January 2025 for the Dublin 12 eircode, as shown in Table 6.3, shows a strong orientation of demand toward 2-bedroom properties. Indeed, when one and two bedroom properties are taken into consideration they account for 71% of demand, with only 29% of demand being for properties with three or more bedrooms.

**Table 6.3: RTB Register Dublin 12 by bedroom size (January 2025)**

Bedroom size	Count	%
1 bedroom	708	22%
2 bedroom	1,586	49%
3 bedroom	785	24%
4 bedroom	123	4%
5 bedroom +	34	1%
<b>Total</b>	<b>3,236</b>	<b>100%</b>

*Source: RTB Register (January 2025)*

- 6.16 Comparable analysis is presented below of asking prices for purchasing homes. Analysis is again focussed on the Dublin 12 eircode. Q4 data is used with this the latest published report.

**Table 6.4: Data.ie snapshot of asking prices - Dublin 12 eircode**

	Average list prices (€000s), and annual change (%)									
	1 bed apartment		2 bed house		3 bed house		4 bed house		5 bed house	
<b>24 Q4</b>	€206	3.3%	€295	11.5%	€391	9.4%	€715	16.2%	€731	8.0%
<b>23 Q4</b>	€189	-9.5%	€285	0.5%	€408	3.2%	€610	-2.6%	€756	11.2%
<b>22 Q4</b>	€209	4.0%	€284	4.0%	€395	2.0%	€627	4.0%	€682	0.0%

*Source: The Daft.ie House Price Report*

- 6.17 The analysis of house prices again shows the implications of supply falling short of demand across the last year, with price increases recorded for all property sizes in this period.

### Summary and Implications

- 6.18 Across the County up until 2022 levels of completions were slow to increase. It is only in the last two years, since 2022, that the supply of homes has been markedly boosted. The provision of apartments has represented the significant factor in the substantial increase in new homes provided in these last two years. Indeed, it is noted that up until 2020 apartments made an almost negligible component of supply and remained relatively modest up until 2023. This contrasts with the national picture where the provision of apartments, including in Dublin, started to make a more meaningful contribution to supply earlier.
- 6.19 Within the local area a pipeline of development has started to emerge, with permissions identified on larger schemes which sum to over 2,000 new homes. These

are understood to be higher density developments which align with the ambitious objectives of the City Edge project.

- 6.20 Analysis of the RTB register for the appropriate eircode geography shows a strong orientation of demand toward one and two bedroom properties as at January 2025.
- 6.21 Analysis of house price and rental change within the Dublin 12 eircode continues to show that even in the context of the boosting of supply at a County level demand remains high for all sizes of home, resulting in rising rents and house prices within the area. In accordance with the City Edge ambition a pipeline of housing is identified within the local area with the scheme contributing to this required pipeline to ensure that supply responds to growing demand, creating a more affordable as well as attractive location in which to live.

## 7. Summary and Conclusions

- 7.1 This report addresses the proposed provision of a housing mix which provides for 22% 3-bedroom homes as part of a typology of sizes which responds to the local demand for homes. It acknowledges and provided an evidence-based justification for the minor departure from the provisions of H1 Objective 12 of the South Dublin County Development Plan (2022-2028)<sup>44</sup>, which establishes an expectation for a higher provision (minimum of 30%) of 3-bedroom.
- 7.2 In doing so it addresses the relevant policies and objectives of the Development Plan, including the interim HNDA (2021) and other relevant local strategy. This importantly includes the City Edge project, within which the site is located. It also provides a contextual analysis of the prevailing housing and demographic character to the development site, recognising the above policies reference the appropriateness of considering a 10-minute walking area and an appreciation that different parts of the County have different needs.
- 7.3 In the establishment of Policy H1 the HNDA identifies that in excess of 30% of households in the County are projected to contain 4 persons or more. This projection is informed by 2016 Census data and population projections integrated in the NPF. The HNDA recognises that the trend observed to 2016, which saw household sizes increase, was in part at least related to the adverse consequences of an under-supply of housing, nationally and locally, and the challenges arising from worsening affordability which has constrained the formation of younger households. The issue of increasing numbers of adults (18+) living with parents creating so called 'hidden households' was identified as existing within South Dublin County.
- 7.4 The HNDA also identifies that South Dublin County has seen a net out-migration, especially of people and households in early formative years, with this identified as representing a challenge for South Dublin and acknowledging that it will necessitate the provision of additional housing for a greater number of smaller households, while also catering for a range of age groups and families.
- 7.5 The HNDA's projections anticipate a return to smaller household sizes in line with national trends over the projection period and longer-term. Analysis of more recently published 2022 Census in this report has confirmed that the average household size has fallen in South Dublin since 2016. It has also confirmed, however, that the number of adults living with parents has increased across the County, with 16% of adult children living at home, up from 11.5% in 2016 and compared to a national average of 13% in 2022. These households will be contributing to the identification of larger household sizes in the County but require, and would prefer, the provision of smaller homes to accommodate their needs.
- 7.6 A review of the supply of new homes confirms that it is only in the last two years, since 2022, that the supply of homes in the County has increased more significantly, with the provision of new apartments a key factor in the boosting of supply. Increased supply

---

<sup>44</sup> South Dublin County Council (2022) South Dublin County Development Plan 2022-2028: Written Statement



will need to be sustained to accommodate the projected need within the County and address issues associated with growing numbers of concealed households.

- 7.7 The draft NPF recognises the need to respond to more pronounced demographic pressures and the consequences of a sustained under-supply of homes nationally, including the constraining of new household formation for younger households in particular. It proposes to increase the national targets for housing delivery, whilst retaining the requirement to provide compact growth and focus supply within larger settlements and the regeneration of brownfield sites. It is noted that the application site aligns with these objectives.
- 7.8 The City Edge project is intended to directly address the need to boost supply and facilitate sustainable economic growth within Dublin. The application site sits at the heart of the 700 hectare City Edge area. The supporting evidence base and Strategic Framework establish a target to delivery 40,000 new homes alongside 75,000 jobs. It recognises the comparative urban nature of the area and establishes expectations around the density of development, whilst recognising the need to accommodate diverse communities in an appropriate typology of housing. The Strategic Framework, which it is recognised is a non-statutory document, proposes that a minimum of ca. 20% three or more bedroom units should be considered for residential development in City Edge. The proposed application compares favourably to this suggested development mix, providing for a higher proportion of 3-bedroom homes (22%).
- 7.9 In recognition of the HNDA and Development Plan's acceptance of the potential for deviation from the 30% requirement for 3-bedroom provision detailed consideration has been given to the socio-economic and demographic profile of the local area, as defined by a 10-minute walking neighbourhood and the stock profile. This demonstrates that:
- The area is attractive to younger, smaller households on average when compared to the County. Within the local area approximately one third of households are aged 20 to 39 compared to 27% across South Dublin. The profile of households is also comparatively oriented towards single person and couple households, with lower representations of households with children.
  - Whilst flats / apartments and smaller homes (less than 2-bedrooms) are more prevalent than the County average responding to the above demographic albeit falling short of aligning with demand, homes with 3 or more bedrooms represent the largest share of stock. Their preponderance is demonstrated by 3+ bed units making up at least 59% of all homes within the local area. It is noted that 2 bed or smaller units only amount to 27% of the overall housing in the area.
  - Analysis of the RTB register for the appropriate eircode geography shows a strong orientation of demand towards one and two bedroom properties as of January 2025.
  - Analysis of house price and rental change within the Dublin 12 eircode continues to show that even in the context of the boosting of supply at a County level that demand remains high for all sizes of home. In accordance with the City Edge ambition a pipeline of housing is identified within the local area with the scheme

contributing to this required pipeline to ensure that supply responds to growing demand.

- 7.10 Based on the above, it would clearly be reasonable for a development in this location to offer fewer large homes than is typically expected of similar schemes in South Dublin. This would better reflect its established role in the wider housing market – and its excellent connectivity to Dublin, via tram and bus – while best catering to the needs of those choosing to live in this area, who tend to be smaller and younger than their counterparts elsewhere in South Dublin.
- 7.11 The proposal also contributes to providing a more varied housing mix to the locality, providing greater choice for new household formation and downsizers. Currently the lack of supply of smaller units, with only 27% of the unit mix in the area falling into this category, is driving up both rental and sale prices for these unit types. Therefore, the provision of a greater number of smaller units, while still providing a proportion of three beds, aligning with the City Edge policy, is considered to be appropriate to this location.
- 7.12 The proposal for 3-bedroom properties to account for 22% of the homes provided at the application site – a minor reduction compared to the stipulated 30% – is therefore considered to be justified, appropriate and necessary.

