Armagh City Banbridge & Craigavon Borough

PHYSICAL AND ENVIRONMENTAL REGENERATION REPORT

AUGUST 2016

Armagh City Banbridge & Craigavon Borough Council

INTRODUCTION

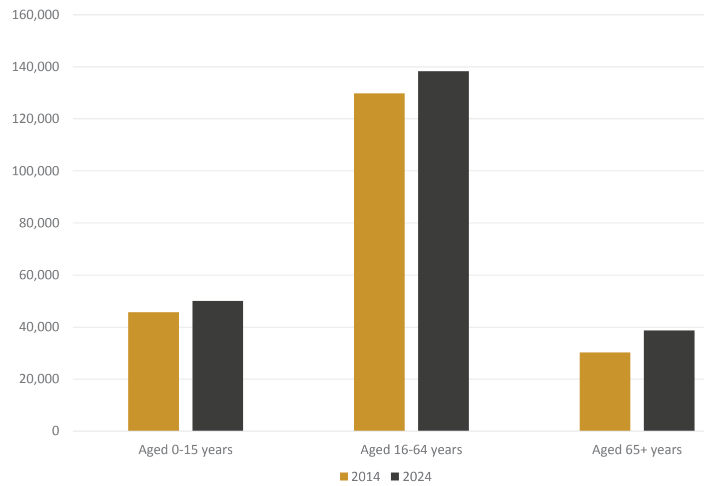
The purpose of this document is to provide an overview of the physical and environmental regeneration conditions in Armagh City, Banbridge and Craigavon Borough to help inform the development of a community plan.

KEY FINDINGS

Population (2014)

Total Population
205,711

11% of total NI population



City / Town Centre Vacancy Rates (2015)

Armagh	Banbridge	Craigavon	Lurgan	Portadown	Northern Ireland
20%	14%	6%	17%	23%	16%

Development Management (Planning Applications)

(Oct-Dec 2015)

331 Received
411 Decided
94.9% Approval Rate

Applications to Building Control

(2015/16)

3,519 applications
£126m value of works

Housing

House Prices (Q1 2016)

Annual Change
6.6% Armagh City, Banbridge & Craigavon
5.9% Northern Ireland

Standardised Price
£105,087 Armagh City, Banbridge & Craigavon
£117,524 Northern Ireland

Housing Stock (2011)

70% Owner Occupied
18% Private Rented and Others
11% Social Rented

Housing Conditions (2011)

	Unfitness	Failing Decent Homes Standards	Fuel Poverty
Armagh City, Banbridge and Craigavon	4% - 5%	10% - 14%	40% - 45%
Northern Ireland	5%	11%	42%

Social Rented Sector Waiting List (31st March 2015)

3,059
applicants for social housing

1,189
applicants in housing stress

Homelessness (2014/15)

534
households accepted as homeless

99
households placed in temporary accommodation

Environment (2014/15)

NI Households Concern for the Environment

= **70%** Very/Fairly concerned

= **30%** Not Very/At all concerned

Top 3 Environmental Concerns Considered Most Important

	Illegal dumping of waste	Pollution in rivers	Traffic congestion
Northern Ireland	42%	31%	29%

Note – Multiple responses permitted.

Top 3 Actions Taken For Environmental Reasons by NI Households

	reused plastic bags or used a reusable bag	used energy saving light bulbs	ensure clothes/furniture are reused
Northern Ireland	82%	77%	68%

POPULATION

In 2014 the population of the Borough was estimated at 205,711 (11.2% of the total NI population). The Borough has a similar age profile to NI, with the majority (63%) being working age (16-64 years).

The 2014 based population projections show the population of the Borough is projected to increase by 10.4% or almost 21,400 people to 2024 – almost double the rate of population increase projected for NI as a whole (5.3% increase). As with NI as a whole the Borough has both a growing and ageing population.

The number of children (i.e. those aged 0-15) is projected to increase by 4,400 people (9.6%) from 45,700 to 50,100.

The working age population (i.e. those aged 16-64) is projected to increase by 8,600 people (6.6%) from 129,800 in mid-2014 to 138,400 in mid-2024.

The number of those aged 65 and over is projected to increase by 8,500 people (28.0%) from 30,200 to 38,700 over the ten years from mid-2014 to mid-2024. Within this group, the number of people aged 85 and over is projected to increase by 1,700 people (50.1%).

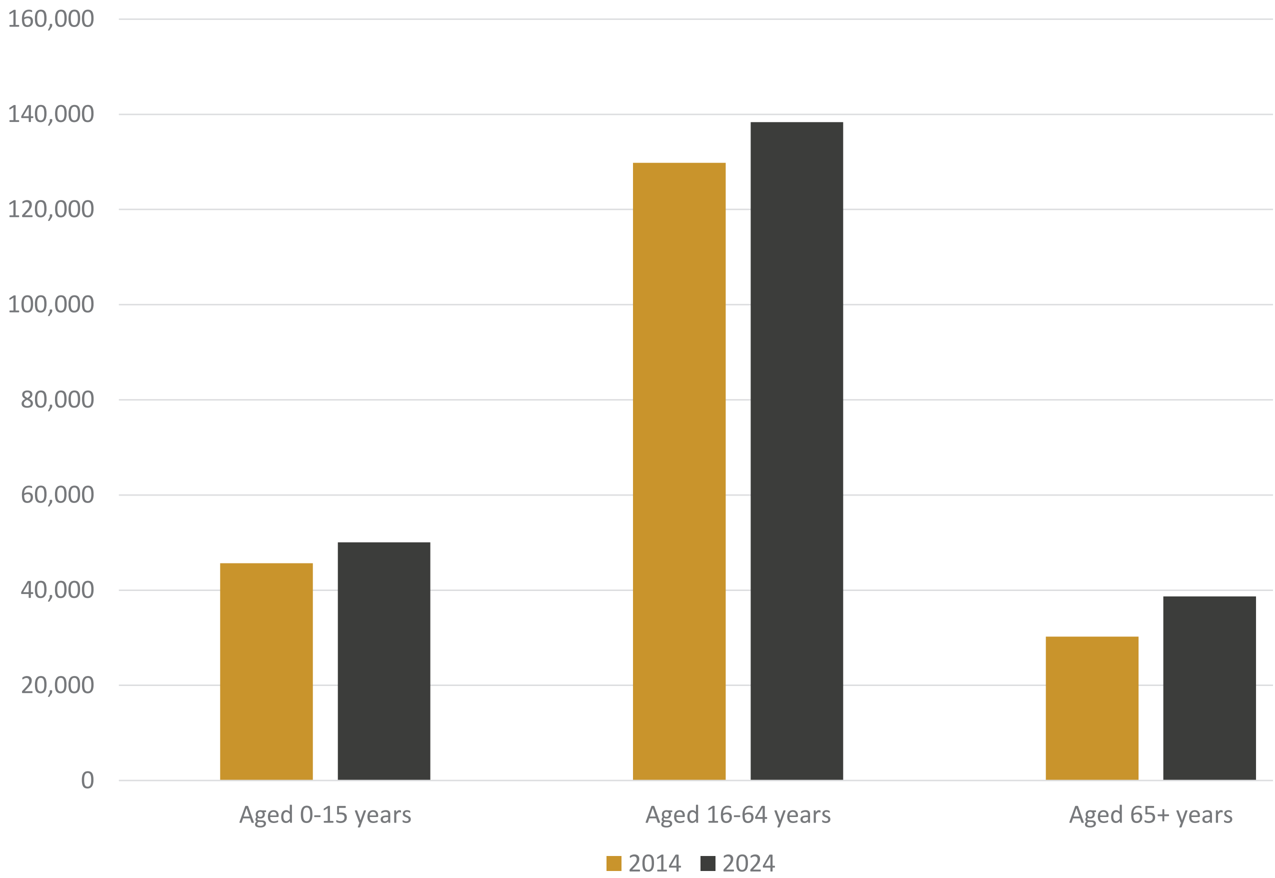


Figure 1. Population, Armagh City, Banbridge and Craigavon 2014 - 2024. Source: NISRA.

The number of households is projected to increase from 77,762 in 2014 to 85,688 in 2024, an extra 7,926 households or a 10% increase (2012 based household projections). This is higher than the increase projected for NI overall (6%). The average household size in the council area (2.63) was slightly higher than NI (2.54), but both are expected to decrease over time.

SETTLEMENTS - CITY CENTRE, TOWNS, VILLAGES AND SMALL SETTLEMENTS

The existing Area Plans which cover the Borough recognise a settlement hierarchy which places the hubs of Armagh City, Craigavon Urban Area (Portadown, Central Craigavon and Lurgan) and Banbridge as the main settlements.

Within this hierarchy, the Borough also has six smaller local towns (Keady, Markethill, Tandragee, Dromore, Rathfriland and Gilford), 29 villages and 66 small settlements.

The 2011 population of the largest Borough settlements are shown below. Both the Planning and the NISRA settlement classification used Settlement Development Limits (SDLs) to define the spatial extent of settlements; the Settlement Development Limit of the Craigavon Urban Area includes the three elements of Portadown, Central Craigavon and Lurgan. Populations for these three individual elements are not currently available.

Settlement	NISRA Classification	ACBCBC Planning Classification	2011 Census Population
Craigavon Urban Area (includes the three elements of Portadown, Central Craigavon and Lurgan)	Large Town (population 18,000+)	Urban Area and Hub	64,193
Banbridge	Medium Town (population 10,000 - 17,999)	Main Town and Hub	16,653
Armagh		City and Hub	14,749
Dromore	Small Town (population 5,000 - 9,999)	Local Town	6,011
Waringstown	Intermediate Settlement (population 2,500 - 4,999)	Village	3,647
Tandragee		Local Town	3,486
Keady		Local Town	3,036
Richhill		Village	2,821
Rathfriland	Village (population 1,000 - 2,499)	Local Town	2,472
Dollingstown		Village	2,126
Gilford		Local Town	1,927
Donaghcloney		Village	1,701
Markethill		Local Town	1,652
Magheralin		Village	1,337
Laurelvale / Mullavilly		Village	1,284
Aghagallon		Village	1,056
Bleary		Village	1,011
	Settlements with populations of less than 1,000 or open countryside		

Table 1. NISRA Settlement Classification 2015, Armagh City, Banbridge and Craigavon Borough Council Planning Classification, Census 2011 population.

In the NISRA settlement classification a prescriptive urban-rural classification is not produced, but a default urban-rural classification is provided; where settlements with a population of over 5,000 being classified as urban. Note this differs from the Council Planning Department classification of settlements which considers issues such as the population, location and settlement role, including facilities provided and rural catchment.

Looking at 2011 Census results just over half of the Borough's population (51%) lived in urban areas based on the NISRA default urban / rural classification, while just under half (49%) lived in rural areas (compared to 63% urban and 37% rural for Northern Ireland overall using the NISRA classification). The Borough had a higher proportion of its population living in rural areas than NI overall. These estimates differ from the estimates using Planning Department's classification of urban and rural which estimates that approximately 72% of the Borough households live within the urban area (hubs, local towns and villages); a higher percentage than when using the NISRA classification.

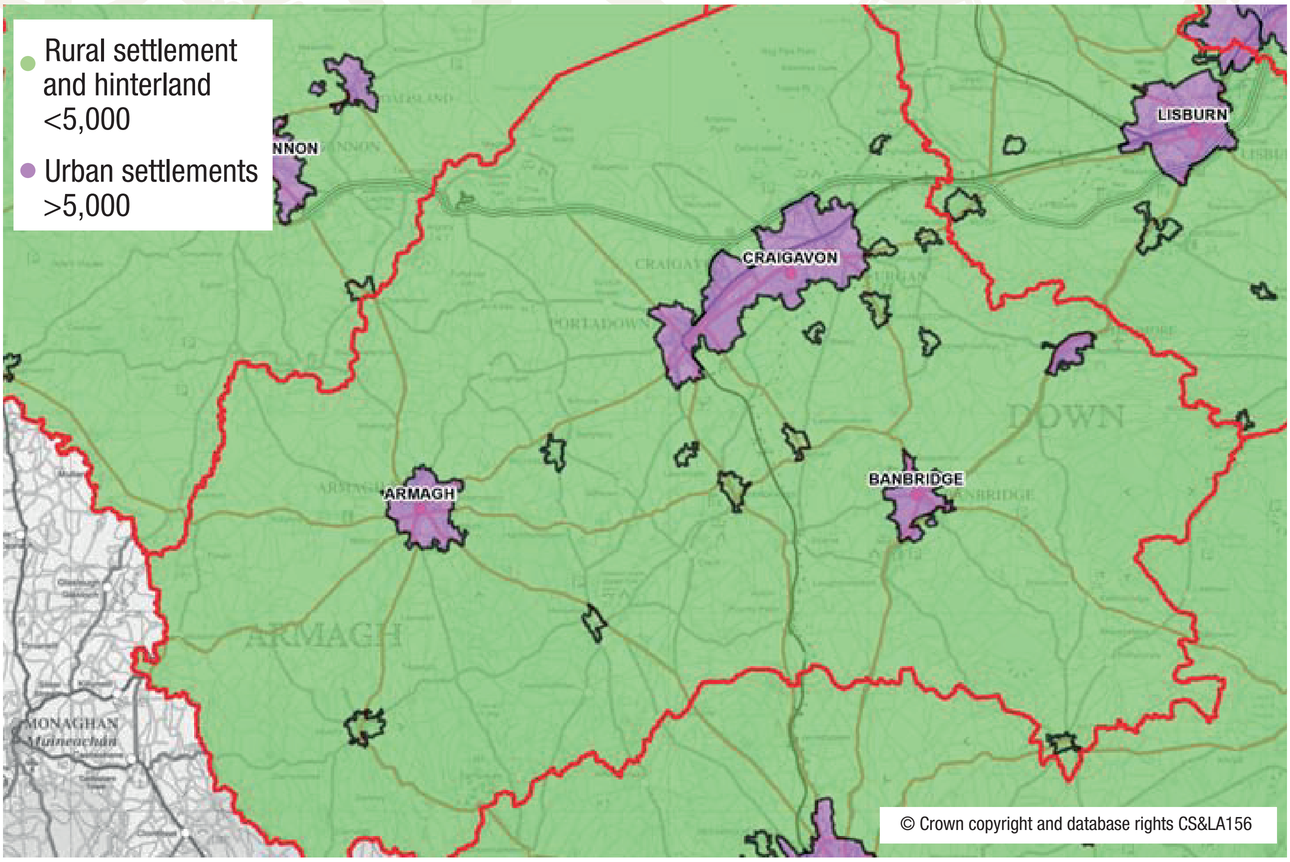


Figure 2. Urban / Rural Geographies. NISRA Settlement Classification 2015. Source: NIHE Housing Investment Plan 2015-2019. Note - The Settlement Development Limit of the Craigavon Urban Area (labelled Craigavon) shown on the map includes the three elements of Portadown, Central Craigavon and Lurgan.

Deprivation – Proximity to Services

The NI Multiple Deprivation Measure 2010 includes a proximity to services domain. The purpose of this domain is to measure the extent to which people have poor geographical access to key services, including statutory and general services, it uses expected travel times.

The Borough has six areas in the 10% most deprived areas in NI on the proximity to services measure.

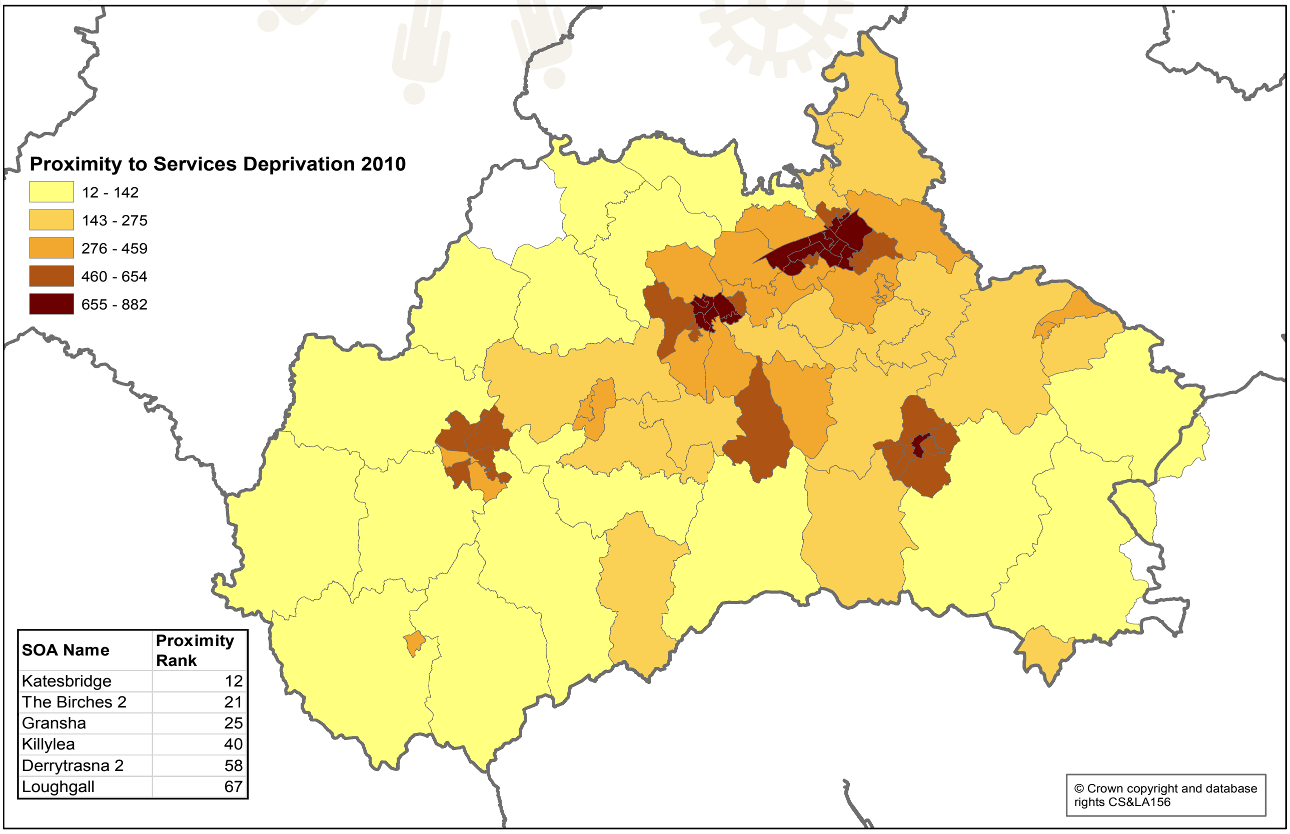


Figure 3. Proximity to services deprivation, NIMDM 2010. Top 6 areas in most deprived 10% in NI listed. Source: NISRA.

OVERVIEW OF RETAIL TRENDS IN NI

Planning Department in the council have summarised the retail and town centre studies for the Borough as part of their preparatory studies for the development of the Local Plan (Paper 4 Town centres and Opportunity Sites May 2015).

As part of the preparation of the Strategic Planning Policy Statement (SPPS) a study was undertaken by GL Hearn on behalf of DOE Planning to research issues surrounding town centres and retailing in Northern Ireland (January 2014). This included health checks for existing town / city centres as designated in adopted plans using a variety of health check indicators. This research also included an assessment of town centre and retail trends. Overall the town centre health checks did not identify any towns that were performing badly, but equally there was little evidence of any particularly strong performance. Therefore there is room for improvement in the vitality and viability of town centres and a policy stance which seeks to protect and enhance town centre performance and diversity will contribute to uplifting existing centre vitality and viability.

In compiling the GL Hearn study town centre composition data was obtained from Experian Goad who carry out physical town centre surveys and prepare occupier plans for most town centres in the UK. Some of the key findings regarding town centres in Northern Ireland included:

- In comparison to the rest of the UK towns, Northern Irish towns tend to have smaller catchment areas.
- Diversity of uses shows the importance of the service sector in town centres (42%), followed by non-food shops (35%). Service uses take up a larger proportion of town centres by unit number, reflecting the smaller sized units these uses tend to occupy.
- Convenience good floorspace is focused in a proportionately small number of larger units reflecting the wider UK trend of the dominance of larger supermarkets in meeting shopping needs.
- Independent operators typically comprise 76% of town centre occupiers. In most centres, independents have a strong offer in food, non-food and service sectors. Unlike many town centres in the rest of the UK, local independent food retailers remain a feature of Northern Irish towns. The Armagh City, Banbridge and Craigavon area has a good representation of independent long-established family businesses offering convenience and comparison retailing and service uses.
- The proportion of other town centre uses in was notably higher in NI than the UK average. The other category includes transport services, employment and commercial activities, religious buildings, wholesale trade, civic and unclassified buildings.
- Having a range of other uses within town centres should be considered a positive attribute which confirms town centres are performing as a hub for a range of activities thereby contributing to overall vitality and viability.
- The Northern Ireland vacancy rate is notably higher, both by floorspace and unit numbers than the UK average. The 2015 vacancy rate for NI was 16.3%. Vacancy rates in Armagh, Banbridge and Craigavon town centres are as follows: Armagh 20.37%, Banbridge 14.33%, Craigavon 5.63%, Lurgan 17.32%, Portadown 22.63% and a Borough average of 18.57%.

A number of town centre issues facing Northern Ireland towns were identified. The weaknesses and threats identified by GL Hearn “indicate that it would be appropriate to have a stronger policy stance on protecting and enhancing town centres, encouraging private sector investment and development and making town centres the focus for not just retail but other significant footfall generating uses”.

Strengths/Opportunities	**Weaknesses/Threats**
Diversity of existing town centres	Vacancies and potential obsolesce of some floorspace
Strong local independent retail offer	Low and falling retail rents
Good quality physical environment	Amount and profile of out of centre retailing
Town centre parking, particularly short stay ‘on street’ provision	Development pipeline
Employment uses within town centres	Limited private sector town centre development /investment
Good accessibility and public transport hubs	Heavy traffic flows and congestion leads to conflict with shoppers

Table 2. NI Town Centre Issues. Source: Planning - based on GL Hearn Study for DOE Planning (2014).

The retail sector is constantly evolving and adapting in response to consumer and lifestyle trends and other market influences. Much of this change has been the growth in both personal income and disposable consumer spending, coupled with population growth. Such trends and influences have and will continue to transform traditional high street retailing and commercial leisure development. The economic downturn has had a negative effect on consumer spending. As a consequence of the recession, retail spending year on year for the next three to four years is expected to be low.

National trends in consumer expenditure show a growth in home shopping and electronic commerce. The home shopping sector includes a number of retailing channels including catalogue sales, direct retailing, TV shopping and internet shopping. An increasing number of 'high street' retailers are now offering online shopping. (DOE NI- GL Hearn Report, January 2014). However, the growth in online shopping habits does not mean the end of the high street. Whilst online sales are increasing so too is 'click and collect' where consumers order online but visit the store to collect their goods. This service can help ensure that town centres will attract people and remain viable.

CITY/TOWN CENTRE VACANCY RATES

Vacancy rates are considered as an important measure of how healthy a town centre is. According to the Northern Ireland Retail Consortium (2015), town centre vacancy rates have fallen in NI from 20.0% in 2011 to 16.3% in January 2015. Despite this welcome fall in the NI vacancy rates, this still remain significantly higher than the UK average (10.4%).

Vacancy rates for 2013 (both by unit numbers and floorspace) for NI are shown in the graphs below.

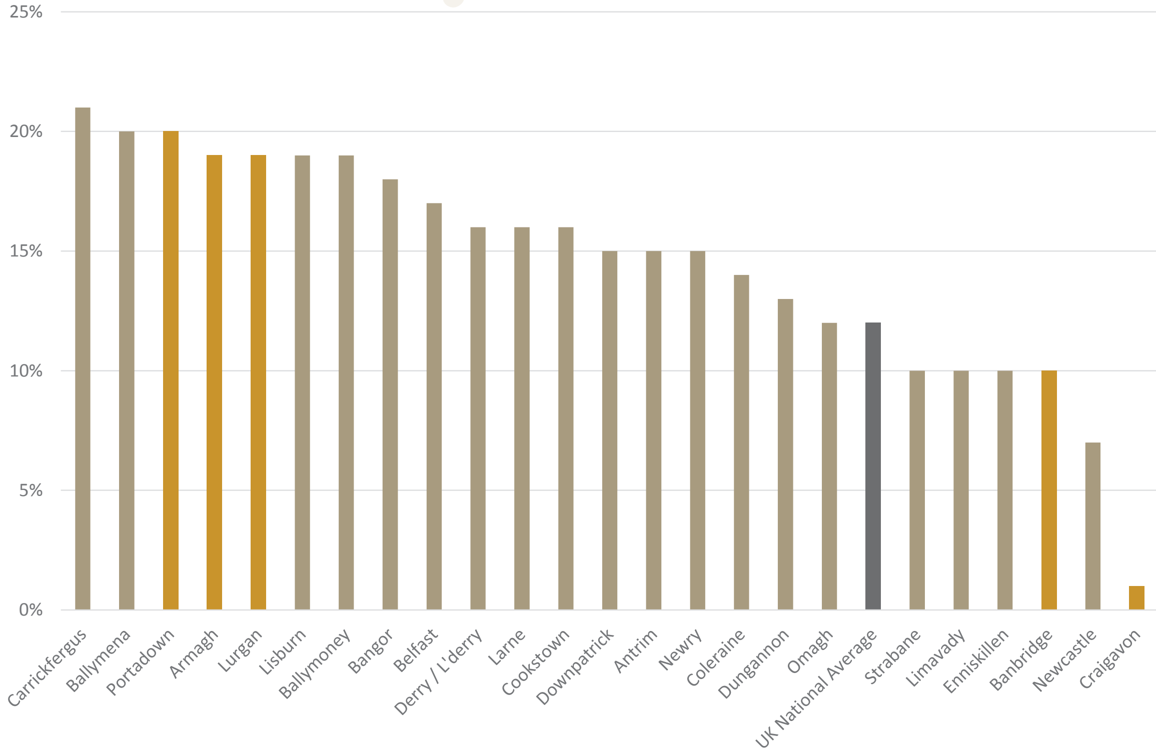


Figure 4. NI City/ Town Centre Vacancy Rate by unit numbers 2013. Source: Planning - GL Hearn Study.

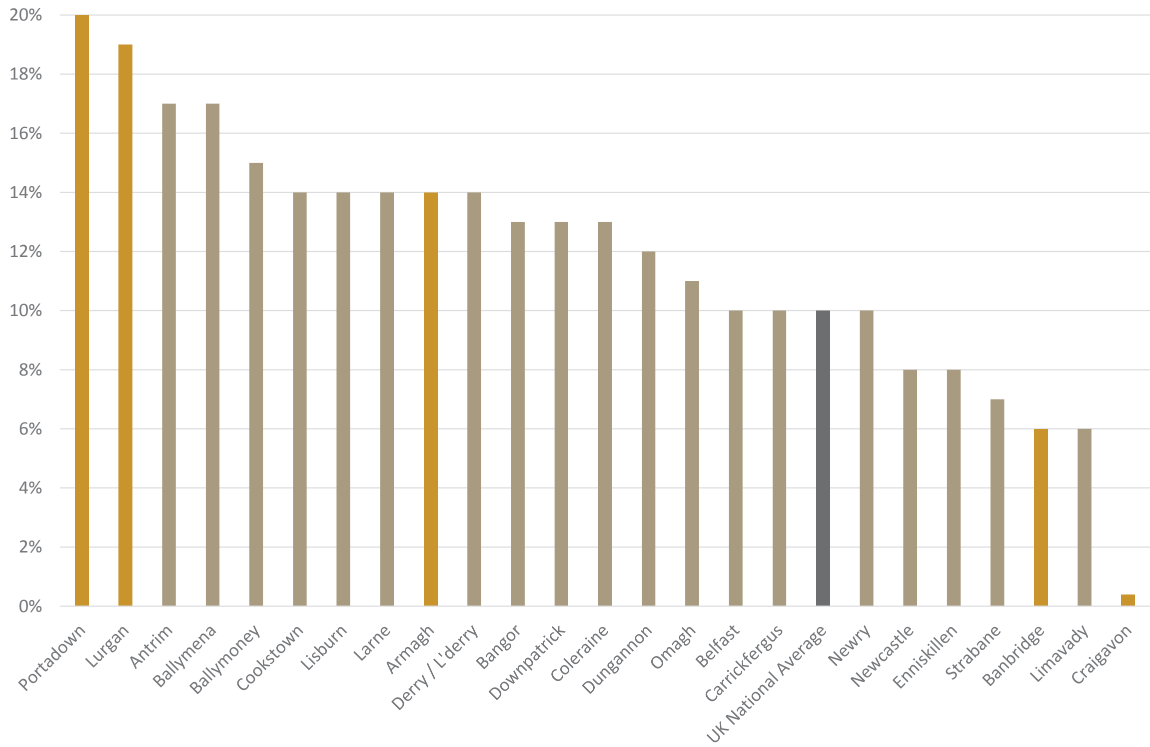


Figure 5. NI City/ Town Centre Vacancy Rate by floor space 2013. Source: Planning - GL Hearn Study.

Town centre surveys were conducted by Planning in 2011 and 2015 looking at the composition of the town centre units and the percentage of units vacant.

In 2015 the average vacancy rate for the council is 19%, slightly higher than the Northern Ireland average (16%) and an increase from 16% in 2011.

Of the city / town centres in the council area, Portadown has the highest levels of vacancy (23%), followed by Armagh (20%), Lurgan (17%), Banbridge (14%) and Craigavon the lowest (6%). Only Banbridge and Craigavon town centre vacancy rates are lower than the NI average.

There has been a marked increase in vacancy rates in Banbridge from 3% in 2011 to 14% in 2015. An increase in vacancy rates were also seen within Armagh City Centre. Vacancy rates have remained similar in Lurgan and Portadown. Craigavon Town Centre is acknowledged as unique in terms of form and history and this may explain why it continues to experience extremely low levels of vacancy compared to the traditional town centres. Therefore, it may not be readily comparable.

City / Town Centre	NI	ACBCBC (Average)	Armagh	Banbridge	Craigavon	Lurgan	Portadown
2011 (%)	20	16	17	3	4	17	22
2015 (%)	16	19	20	14	6	17	23

Table 3. NI and Armagh City, Banbridge and Craigavon - City / Town Centre Vacancy Rates, Planning Surveys 2011 & 2015. Source: Planning.

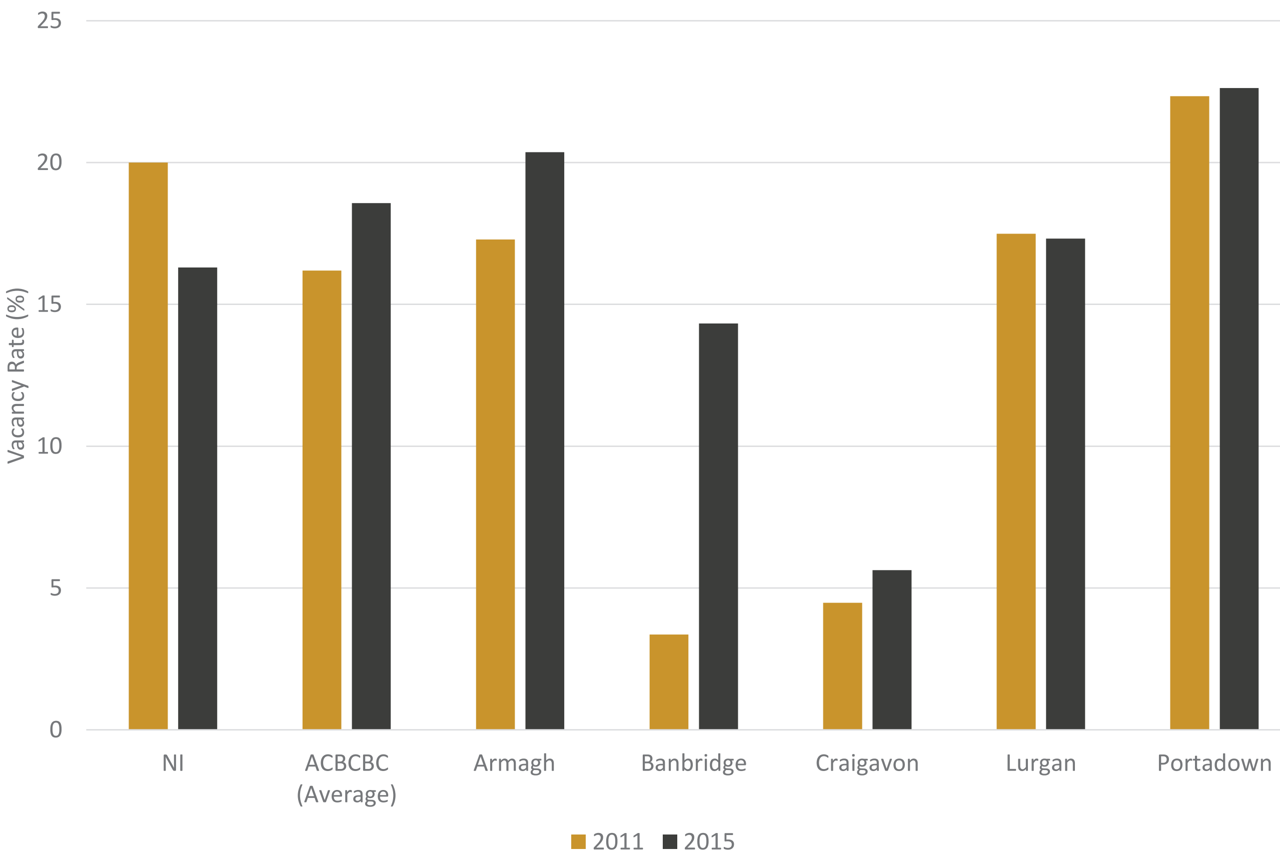


Figure 6. NI & Armagh City, Banbridge and Craigavon - City / Town Centre Vacancy Rates 2011 & 2015. Source: Planning Surveys.

An important element of a vibrant town centre is a compact form which is well connected and walkable. Portadown and Armagh have the largest town centre sizes, lowest number of units per square hectare (excluding Craigavon) and also the highest vacancy rates.

City / Town Centre	Area (ha)	Total No of Town Centre Units	Total No of Units per sq ha	Vacancy Rate (%)
Armagh*	52	432	8.31	20
Banbridge	32	293	9.16	14
Craigavon	47	71	1.51	6
Lurgan	36	358	9.94	17
Portadown	56	488	8.71	23
ACBCBC Total	**223**	**1,642**	**7.36**	**19**

Table 4. Geographic Area (ha) of Armagh City, Banbridge and Craigavon City / Town Centres & Vacancy Rates, Planning Surveys 2011 and 2015. Source: Planning. * Area surveyed is within Armagh Central Area Limit as no Designated City Centre Boundary.

Looking at the uses of the town centres 'retail services' and 'Comparison' make up over half of the land use for the five main towns in the council area. Lurgan has the largest proportion of retail services (34%), while Craigavon has the largest proportion of 'Comparison' land use (61%).

Area	Comparison (%)	Retail Services (%)	Convenience (%)	Mixed Store (%)	Offices (%)	Leisure (%)	Vacancy Rate (%)	Total No
Armagh	27	30	6	0	15	2	20	432
Banbridge	26	30	10	0	18	2	14	293
Craigavon	61	11	15	1	6	0	6	71
Lurgan	17	34	13	0	18	1	17	358
Portadown	24	26	8	0	17	2	23	517
ACBCBC City / Town Average	26	29	9	0	16	1	19	1671

Table 5. City / Town Centre Uses, Planning Surveys 2015. Source: Planning.

Definitions

Retail services - A use that provides a retail service to the general public (such as hairdressers / café / fast-food / bookmakers / travel agency/ shoe repairs etc.) which it is appropriate to provide in a shopping area.

Convenience goods - Broadly defined as food, drinks, tobacco, newspapers, magazines, cleaning materials, toilet articles.

Comparison goods - Other goods not classified as convenience goods such as a shop selling clothes or 'white goods'.

FOOTFALL

Another key indicator of town centre vitality is pedestrian footfall. Armagh, Banbridge and Craigavon Local Development Plan – Paper 4 Town centre and Opportunity Sites includes some information on footfall. The paper used findings from a review of existing town centres in Northern Ireland contained in the 2014 GL Hearn report and information contained within Health-checks prepared by Place Solutions (on behalf of Armagh City and District Council and Craigavon Borough Council to inform the review of the Armagh Masterplan and CIDF) in February 2015. Unfortunately, these Place Solutions health-checks did not include Banbridge. However, a footfall counter is in place in Newry Street in Banbridge.

- Place Solutions (February 2015) has indicated that footfall in Armagh is approximately 26,300 per week and evening footfall now accounts for 18% of the total weekly footfall.
- The average weekly footfall for Lurgan is estimated at 31,800 people (Source: Springboard Milestone).

- Portadown - Pedestrian flows are highest along the main shopping streets Market Street and High Street. Pedestrian Counters are in place and have indicated an average weekly footfall of 48,000.
- Craigavon - The average weekly footfall for the centre is estimated at 100,000 people which is more than the combined total for Portadown and Lurgan.
- Banbridge – The footfall counter in Newry Street estimates weekly footfall of 27,000 – 34,000 people (2016).

CAR PARKING

Responsibility for off street car parks transferred from the then DRD Roads Service to Councils on 1st April 2015 as part of the Transfer of Functions under the Reform of Public Administration. This resulted in a total of 51 car parks, including 1 Pay on Foot car park, i.e. the Mall West Car Park in Armagh, transferring to the Armagh City, Banbridge & Craigavon Borough Council. Of the 51 car parks, 33 are free to park in and 18 are charged with a breakdown across the various towns in the Borough shown in the table below.

Town	Car Parks - Free		Car Parks - Charged		Car Parks - Total	
	Number	Spaces	Number	Spaces	Number	Spaces
Armagh	4	224	6	744	10	968
Keady	4	139	-	-	4	139
Markethill	1	50	-	-	1	50
Tandragee	1	36	-	-	1	36
Banbridge	4	221	4	360	8	581
Dromore	3	138	-	-	3	138
Gilford	1	21	-	-	1	21
Rathfriland	1	56	-	-	1	56
Lurgan	9	540	3	233	12	773
Portadown	5	449	5	665	10	1,114
Total	**33**	**1,874**	**18**	**2,002**	**51**	**3,876**

Table 6. Off street car parks, 2016. Armagh City, Banbridge and Craigavon Borough Council.

Whilst the council is responsible for off street car parking, towns may also have on street or other car parking facilities available.

EVENING AND NIGHT TIME ECONOMY

The evening and night time economy sector can be an important strand in regeneration. It is noted under ‘Creating Places of Choice’ one of the thematic action areas identified in the Council’s Regeneration and Development Strategy 2015-2020.

A scoping study to understand the baseline position in absolute terms was undertaken for Armagh in 2014. TBR is a UK based economic consultancy which specialises in the ENTE sector. TBR developed the Night Mix Index in 2009 to provide clear economic information on the sector. Table 7 gives a summary of the ENTE Sector for the legacy Armagh District Council area.

The study showed the core-ENTE activities (which are drink, entertainment and food led) delivered £21m in productivity (GVA) and £41m revenue. This represents 11% of all Armagh revenue.

In addition, non-core activities (the supply chain of the ENTE – including all retail sales, hotel revenues, transport receipts) was estimated to deliver £100m productivity and £335m turnover.

Between 2003 and 2013, while the number of drink and entertainment led firms declined, the number of food led firms increased (from 72 to 124). The numbers in employment in food led firms and turnover also increased.

ENTE Sector	Firms	Employment	Gross Value Added £'000	GVA per employee	Turnover £'000	Turn-over per employee
Drink	44	220	£3,217	£14.6	£7,535	£34.1
Entertainment	16	85	£2,855	£33.1	£6,589	£76.4
Food	124	645	£15,159	£23.5	£26,874	£41.7
Core ENTE	184	950	£21,231	£22.3	£40,998	£43.1
Non-Core ENTE	532	4,065	£100,898	£24.8	£335,417	£82.5
Total ENTE	716	5,015	£122,129	£24.3	£376,415	£75.0
Non ENTE	3,388	18,650	£528,952	£28.4	£1,628,518	£87.3
Total Economy	**4,104**	**23,670**	**£651,081**	**£27.5**	**£2,004,934**	**£84.7**

Table 7. Evening and Night Time Economy legacy Armagh council area, 2013. Source: ENTE Scoping Study 2014.

PLANNING

As part of local government reform, the majority of planning functions transferred from the Department of the Environment (DoE) to the 11 new councils on 1st April 2015 which, through their elected representatives, are responsible and accountable for most planning decisions. The Planning Act (Northern Ireland) 2011 sets out the legislative framework for Planning in NI. The Council Planning responsibilities are primarily within three areas:

- Development Management (planning applications);
- Development Plan (Local Development Plan); and
- Enforcement.

Development Management (Planning Applications)

Planning applications for development categorised as being either major development or local development are determined by the council.

In the three legacy councils and NI overall the number of planning applications received declined between 2005/06 and 2012/13 in line with the economic downturn. However, since 2012/13 the number of applications received each quarter has largely stabilised and indeed shown signs of growth in 2014/15.

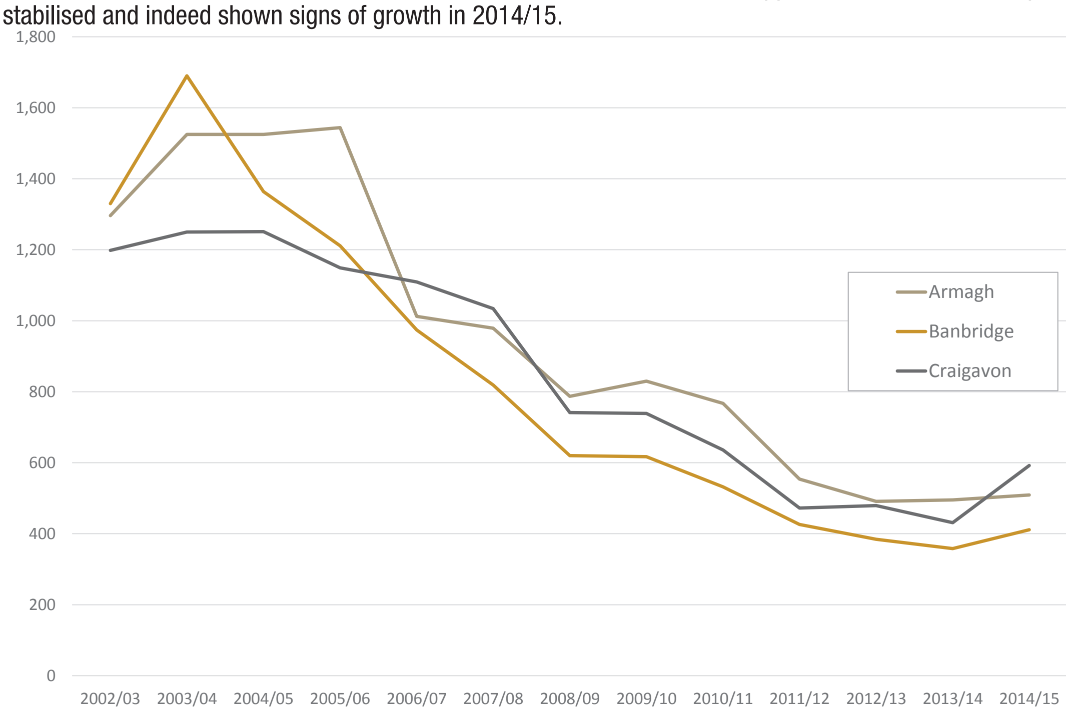


Figure 7. Planning applications for Armagh, Banbridge and Craigavon legacy council areas, 2002/03 - 2014/15. Source: DoE.

During the third quarter of 2015/16 there were 331 planning applications received in the Borough, the fourth highest number of the 11 council areas. This was 40 more applications than were received in Q2 (291) and similar to the number received in Q1 (330).

In Q3 2015/16 there were 411 planning decisions issued in the Borough, the highest of all 11 NI Councils and higher than in Q1 (164) and Q2 (230). In Northern Ireland in the first quarter of 2015/16, immediately following the transition of planning authority to councils, the level of decisions dropped sharply as the new systems and procedures were introduced. However, notably in quarter two, and continuing into quarter three, the number of planning decisions issued has returned to similar levels recorded over the last four years and is again keeping pace with applications received.

The approval rate for all planning applications in the Borough for the period October to December 2015 was 94.9%, slightly above that for NI overall 93.3%.

Residential applications received during Q3 2015/16 made up 58.3% of the planning applications in the Borough (similar to NI 58.9% residential applications).

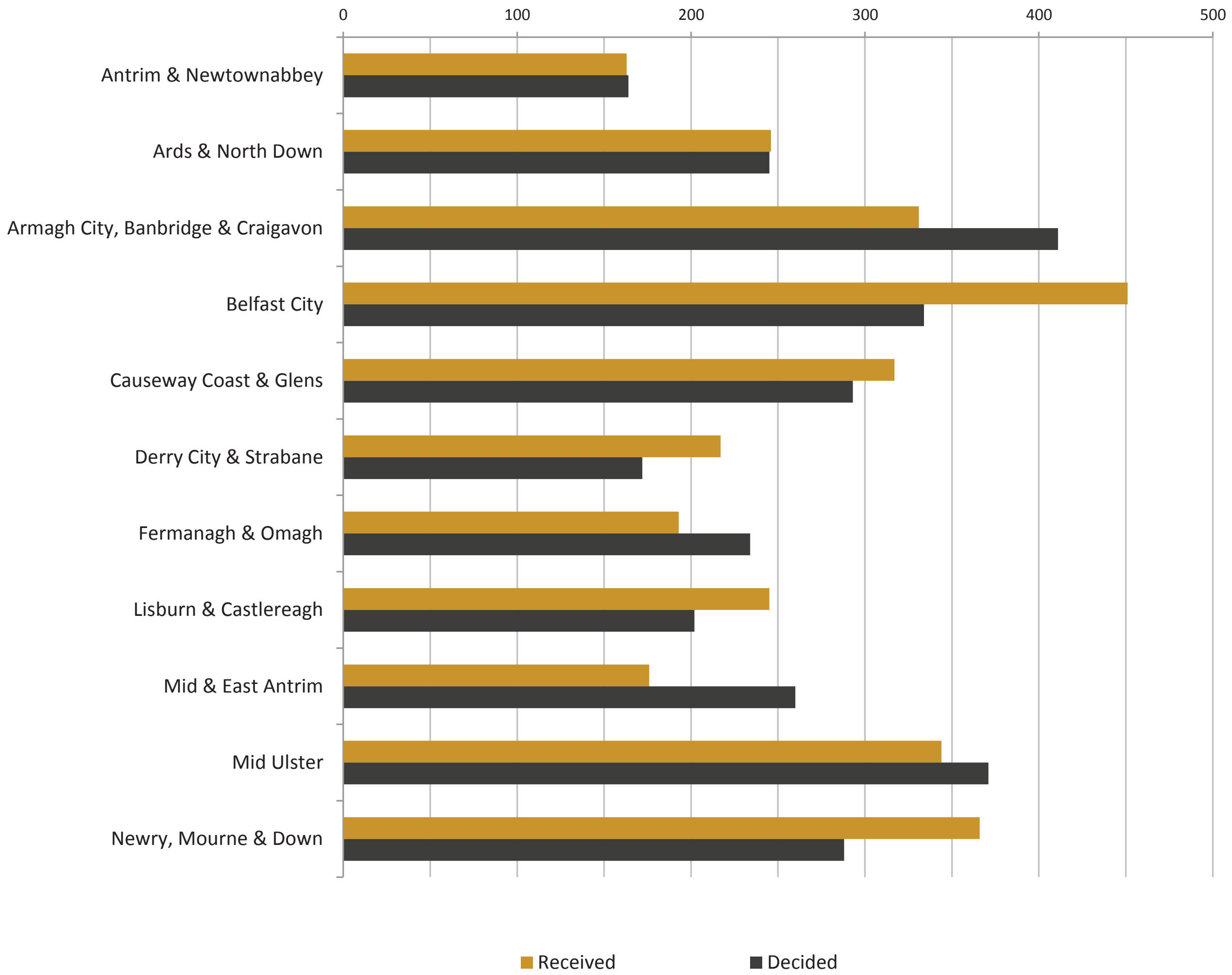


Figure 8. Applications received and decided by council, Oct - Dec 2015 (Q3). Source: DoE.

BUILDING CONTROL

The Building Control Department in the Council is responsible for enforcing The Building Regulations and ensuring that buildings conform to these regulations which include standards on health, structural stability, fire safety, energy conservation and accessibility. The Building Regulations are a set of construction standards laid down by Central Government. These standards are enforced through plan assessment and site inspections.

Applications can be made for 'Full Plans', 'Building Notices' (for internal works and small extensions to dwellings only) and 'Regularizations' (for work that has been carried out without an application to Building Control).

In 2015-16 there were 3,519 applications to Building Control with an associated value of works of over £126m. There were 695 full plan applications for domestic properties and 251 full plan applications for non-domestic properties.

	2011-12	2012-13	2013-14	2014-15	2015-16
Total number of applications	3,158	3,261	4,358	4,625	3,519
Cost of works	£111,372,946	£142,855,098	£114,689,805	£168,707,257	£126,005,841
Full plan applications:					
Domestic	763	845	692	789	695
Non-Domestic	252	268	245	292	251

Table 8. Total applications to Building Control and associated value of works and number of full plan domestic and non-domestic applications. Source: Building Control - Armagh City, Banbridge and Craigavon Borough Council. The total value of works is for the total number of applications. The number of domestic and non-domestic applications are for 'full plans' applications only and do not add up to the total number of applications.

PLANS AND REGENERATION

Development Plan (Local Development Plan)

The Regional Development Strategy (RDS) 2035 is the spatial strategy of the NI Executive and identifies Armagh, Banbridge and Craigavon as main hubs within the Spatial Framework for Northern Ireland. It states that they have the potential to form a cluster and both Craigavon and Banbridge are well positioned on Key Transport Corridors with Armagh positioned on a Link Corridor. The RDS states that the Craigavon Urban Area is the third largest centre of population in Northern Ireland and performs a strong sub-regional function offering a wide range of services and facilities. It refers to Banbridge's strategic location on the Belfast Dublin Corridor and quality environment. In relation to Armagh City, it refers to the heritage and tourism destination in terms of cultural product and ecclesiastical, architectural and heritage resource.

The extant Area Plans (Armagh Area Plan 2004, Craigavon Area Plan 2010 and Banbridge/Newry and Mourne Area Plan 2015) are the statutory plans for these areas and provide the policy framework alongside prevailing regional planning policy against which to assess development proposals.

Masterplans and Regeneration

Town Centre Masterplans are non-statutory documents which focus on regeneration and public realm improvements. They set out a vision for a particular town centre and identify key proposals for realising that vision over a set period of time. Recent examples of masterplans for the Borough are:

- Armagh City Centre Masterplan
- Banbridge Town Centre Masterplan
- Craigavon Integrated Development Framework (includes Central Craigavon, Lurgan and Portadown Masterplans)
- Dromore Town Centre Masterplan

Non-statutory Village Plans have also been prepared for various settlements throughout the Borough to encourage village renewal and development. The map below shows settlements where masterplans or village plans have been produced.

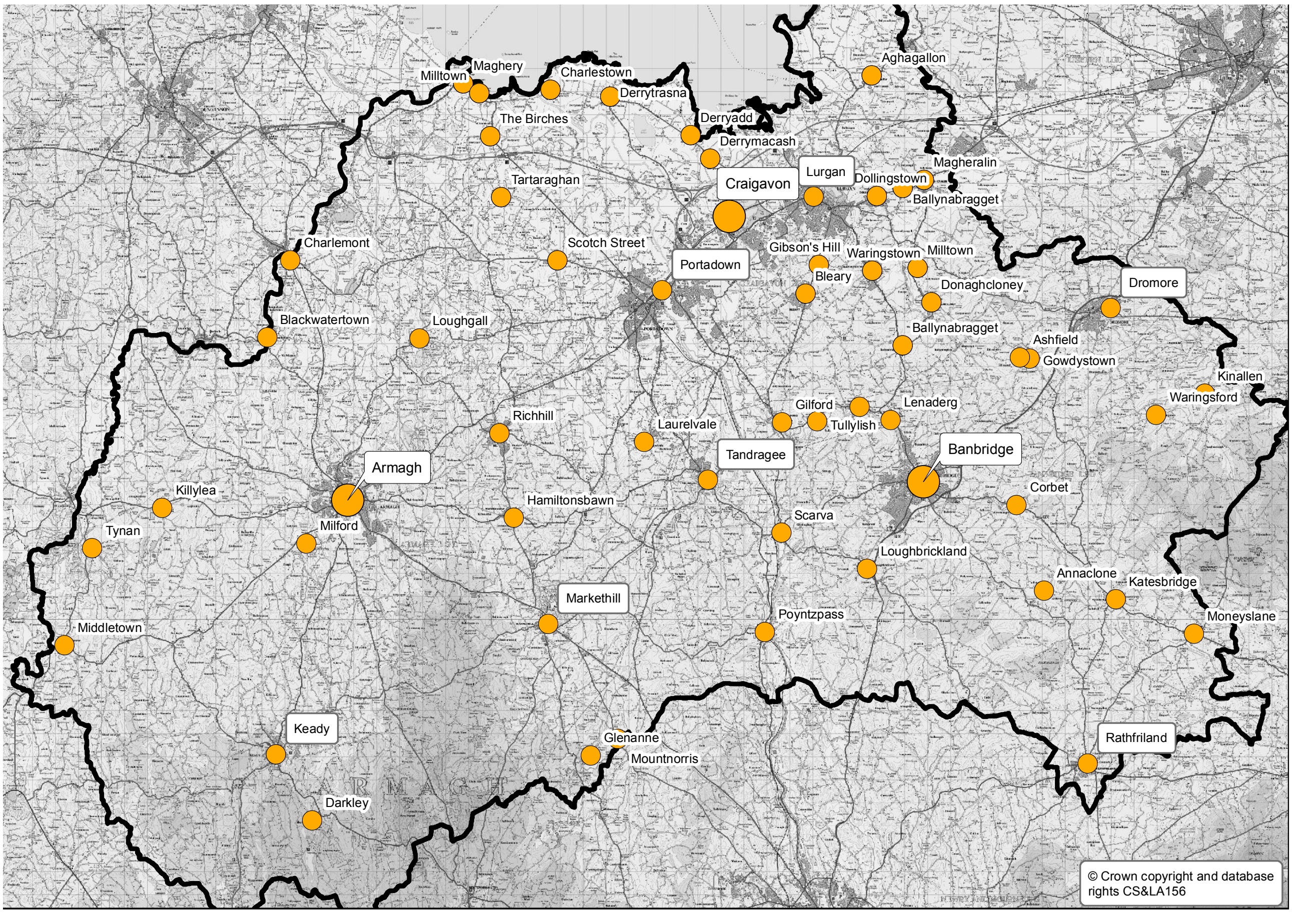


Figure 9. Examples of plans and regeneration in the Borough.

HOUSING

HOUSING STOCK

In 2015 the Borough had a housing stock of almost 82,000, the second largest of the 11 councils and 10.6% of NI total. The housing stock in the council area has increased by over 5,000 properties from 2008 to 2015, an increase of 7% similar increase to NI overall (6%).

District Council	2008	2009	2010	2011	2012	2013	2014	2015
Antrim and Newtownabbey	54,181	55,274	55,748	56,130	56,350	56,695	57,228	57,615
Ards and North Down	66,612	67,127	67,875	68,491	68,694	69,060	69,392	69,769
Armagh City, Banbridge and Craigavon	76,521	78,449	79,812	80,683	80,621	80,855	81,373	81,854
Belfast	148,473	150,252	152,219	153,350	154,003	154,389	155,047	155,381
Causeway Coast and Glens	59,875	60,754	61,613	62,169	62,039	62,237	62,473	62,615
Derry City and Strabane	57,619	58,216	58,639	59,021	59,304	59,443	59,698	60,018
Fermanagh and Omagh	44,904	45,874	46,519	46,830	47,225	47,660	47,832	47,839
Lisburn and Castlereagh	52,599	53,524	54,551	55,181	55,388	55,999	56,700	57,261
Mid and East Antrim	55,502	56,391	57,123	57,282	57,392	57,719	58,060	58,307
Mid Ulster	49,255	50,120	50,735	51,133	51,050	51,483	51,877	52,272
Newry, Mourne and Down	62,800	64,117	65,515	66,377	66,454	66,805	67,698	68,202
Northern Ireland	**728,341**	**740,098**	**750,349**	**756,647**	**758,520**	**762,345**	**767,378**	**771,133**

Table 9. Total Housing Stock by LGD 2008 - 2015. Source: Land and Property Services, Department of Finance.

The main dwelling type in the council area was detached (42%) followed by terrace properties (29%). The council had a high proportion of detached properties and lower proportions of Apartments and Semi-Detached than found in NI overall.

District Council	Apartment	Detached	Semi-Detached	Terrace
Antrim and Newtownabbey	11	34	26	29
Ards and North Down	11	37	28	25
Armagh City, Banbridge and Craigavon	5	42	23	29
Belfast	21	9	26	43
Causeway Coast and Glens	9	45	25	21
Derry City and Strabane	10	30	25	35
Fermanagh and Omagh	5	60	17	18
Lisburn and Castlereagh	9	38	30	23
Mid and East Antrim	10	40	22	29
Mid Ulster	4	54	22	20
Newry, Mourne and Down	7	48	24	22
Northern Ireland	**11**	**36**	**25**	**29**

Table 10. Proportion of Dwellings by Type by LGD April 2015. Source: Land and Property Services, Department of Finance.

In line with the Rates Order (NI) 1977, Housing stock is defined as a count of properties which are valued as domestic or mixed for the purposes of rating. This refers to properties in the Valuation list which are used (or when next in use, will be used) for the purposes of a private dwelling. This includes properties which are temporary incapable of beneficial occupation, but excludes caravans, domestic garages, domestic stores and car parking spaces.

HOUSING TENURE

The majority of properties in the council area were owner occupied (70%), followed by private renting (18%) and social rented (11%). The tenure breakdown in the council area was similar to the profile for NI overall.

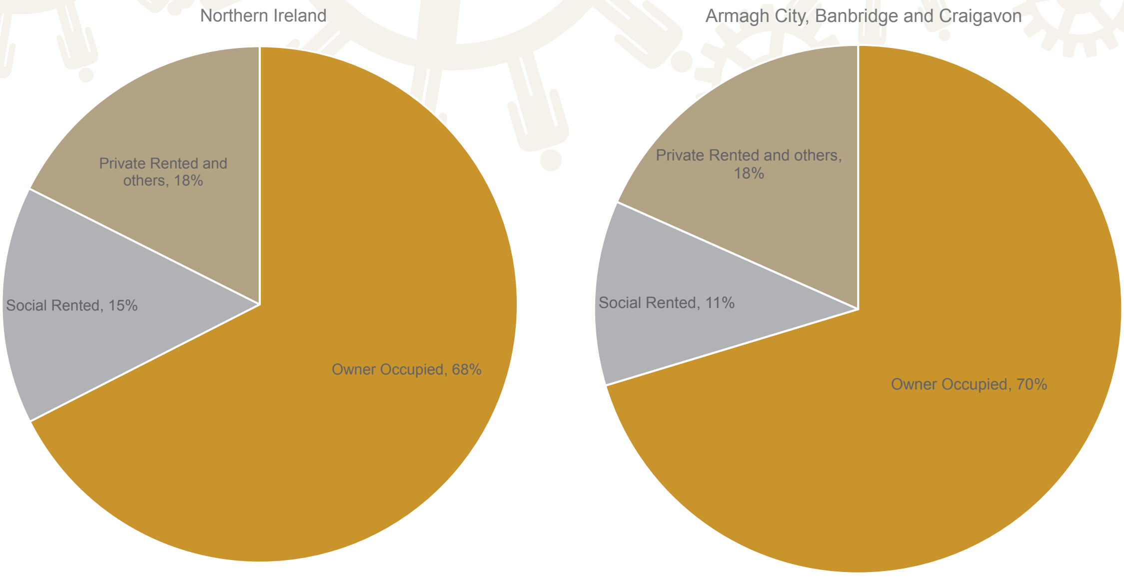


Figure 10. Housing tenure, Armagh City, Banbridge and Craigavon and NI, 2011 Census. Source: NISRA.

%	Owner occupied				Social rented			Private Rented and others
	Owner occupied - all	Owns outright	Owns with a mortgage or loan	Shared ownership	Social Rented - all	NIHE	Housing association or charitable trust	
Antrim and Newtownabbey	73	31	42	1	13	11	2	14
Ards and North Down	75	35	39	1	11	9	2	14
Armagh City, Banbridge and Craigavon	70	33	37	1	11	9	2	18
Belfast	54	24	30	1	25	17	8	20
Causeway Coast and Glens	68	36	32	1	13	11	2	19
Derry City and Strabane	60	27	32	1	21	16	5	19
Fermanagh and Omagh	72	41	30	0	10	8	2	19
Lisburn and Castlereagh	76	34	41	1	12	10	3	12
Mid and East Antrim	72	35	36	1	12	10	2	16
Mid Ulster	72	38	33	0	9	8	1	19
Newry, Mourne and Down	71	35	35	0	10	8	2	19
Northern Ireland	**68**	**32**	**35**	**1**	**15**	**12**	**3**	**18**

Table 11. Housing tenure by LGD, 2011 Census. Source: NISRA.

Comparing to results from the 2001 Census, the 'private rented and other sector' has increased, from 8-9% in the three legacy council areas, to 18% in Armagh City, Banbridge and Craigavon.

Private rented sector

Looking at Census results, the 'private rented and other sector' has increased, from 8-9% in the three legacy council areas in 2001, to 18% in Armagh City, Banbridge and Craigavon in 2011. The 2011 Census showed there was 11,861 households in the private rented sector in the Borough, with 29,021 usual residents.

	Number of households	Number of usual residents in households
Owns outright	24,958	58,243
Owns with a mortgage or loan	27,737	89,462
Shared ownership	413	1,022
NIHE	6,999	14,050
Housing association or charitable trust	1,553	2,898
Private Rented and Others	11,861	29,021
Lives rent free	1,985	3,491
All	**75,506**	**198,187**

Table 12. Housing tenure in Armagh City, Banbridge and Craigavon Borough, 2011 Census. Source: NISRA. Note - Shared ownership: pays part rent and part mortgage.

'Performance of the Private Rental Market in Northern Ireland (July – December 2016)' - the latest survey of the Northern Ireland private rental sector by NIHE indicates a vibrant market with continuing demand for rental. The average private rent in the Borough in 2015 was £480 per month, below the NI average of £560 per month. Average rents in rural areas tended to have lower private rents than the NI average.

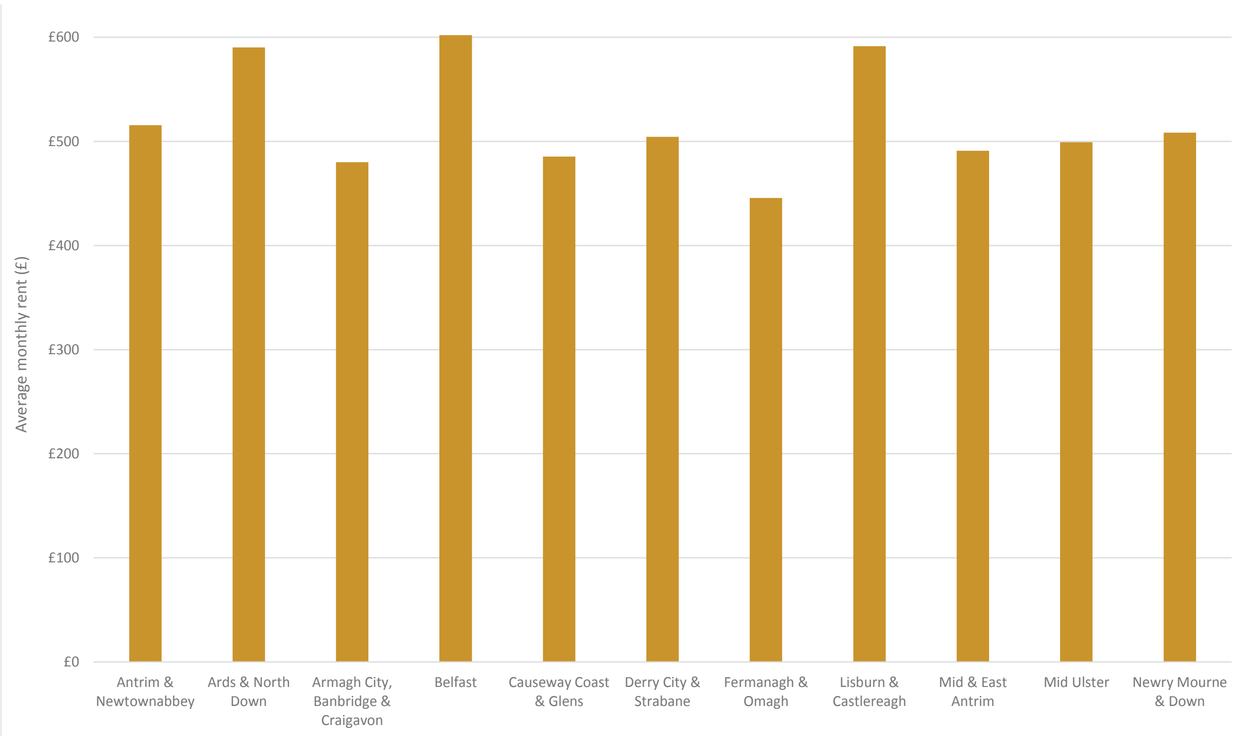


Figure 11. Average monthly rent by Local Government Districts in 2015. Source: Performance of the private rental market in NI, NIHE.

Local Housing Allowance (LHA) is a rent assessment scheme for tenants who rent accommodation from private landlords. It is based on rent levels for the area and how many people are in the household. Entitlement to Housing Benefit still depends on a person's income, how many people make up their household and any savings held.

The Northern Ireland Housing Executive (NIHE) has divided Northern Ireland into eight 'broad rental market areas' (BRMAs). NIHE sets LHA rates for different property sizes within each broad rental market area, these rates are published on the NIHE website and are shown below. This allows users to find out the maximum amount of rent that NIHE will use to work out Housing Benefit. The rate of LHA NIHE uses to work out Housing Benefit depends on:

- the area you live in – this will set the BRMA you fall under; and
- who lives with you – this will decide how many bedrooms you need.

The Borough falls into Lough Neagh Lower and South broad rental market areas.

Broad Rental Market Area	Belfast	Lough Neagh Upper	Lough Neagh Lower	North	North West	South	South East	South West
Postcode	BT1	BT29	BT25	BT51	BT47	BT32	BT17	BT74
	BT2	BT36	BT62	BT52	BT48	BT34	BT18	BT75
	BT3	BT37	BT63	BT53	BT49	BT35	BT19	BT76
	BT4	BT38	BT64	BT54	BT82	BT60	BT20	BT77
	BT5	BT39	BT65	BT55		BT61	BT21	BT78
	BT6	BT40	BT66	BT56		BT68	BT22	BT79
	BT7	BT41	BT67	BT57			BT23	BT81
	BT8	BT42	BT68				BT24	BT92
	BT9	BT43	BT69				BT26	BT93
	BT10	BT44	BT70				BT27	BT94
	BT11	BT45	BT71				BT28	
	BT12	BT46					BT30	
	BT13	BT80					BT31	
	BT14						BT33	
	BT15							
	BT16							
Shared Room rate per week	£42.15	£48.45	£43.63	£37.90	£50.52	£45.80	£52.09	£45.70
1 Bedroom rate per week	£83.65	£69.85	£66.94	£65.47	£74.31	£58.72	£77.96	£59.40
2 Bedroom rate per week	£92.44	£85.70	£77.92	£83.17	£89.53	£79.99	£93.09	£76.07
3 Bedroom rate per week	£101.90	£93.27	£89.43	£89.42	£99.60	£88.44	£102.92	£87.10
4 Bedroom rate per week	£118.51	£104.48	£106.83	£97.66	£108.13	£99.58	£120.93	£96.79

Table 13. Weekly Local Housing Allowance rates effective from 1 April 2016 to 31 March 2017. Source: NIHE.

HOUSE PRICES

The Residential Property Price Index, produced by Land & Property Services with assistance from NISRA, measures change in the price of residential property sold in Northern Ireland. The Index uses stamp duty information on residential property sales recorded by HM Revenue & Customs. The latest figures are for quarter 1 2016.

The Residential Property Price Index for Armagh City, Banbridge and Craigavon shown a similar trend to that for NI. The index rose to a peak in 2007, followed by a sharp fall, before stabilizing in 2009. Between 2010 and 2012 prices continued to fall but at a slower rate. Since then the index has risen, for the council area the index stands at 106.6 in quarter 1 2016; the index is now 6.6% higher than in the first quarter of 2015 (the reference period).

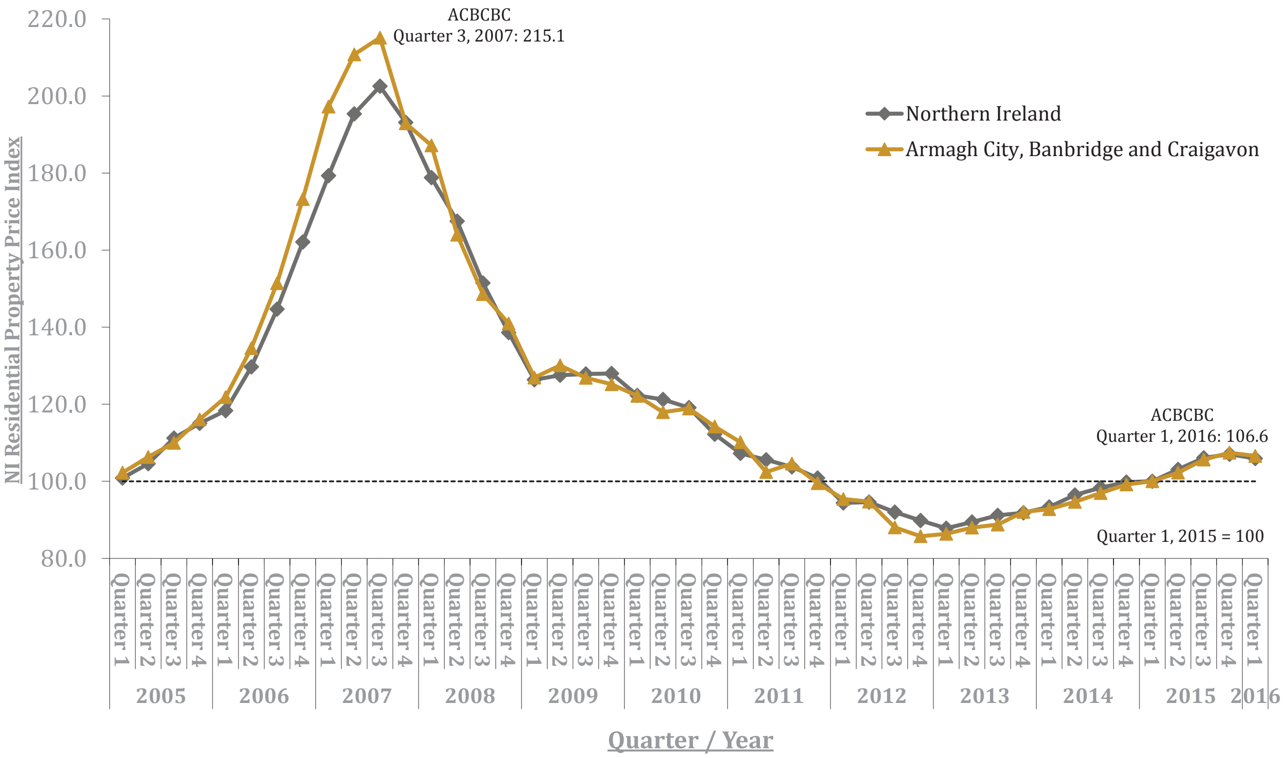


Figure 12. Northern Ireland Residential Property Price Index (Q1 2007 – Q4 2015). Source: LPS.

In 2015 there were 2,242 verified residential property sales in the Borough, twice the number recorded in 2010. Verified residential property sales are defined as sales recorded by HM Revenue & Customs which could be matched to a domestic property in the NI Valuation List.

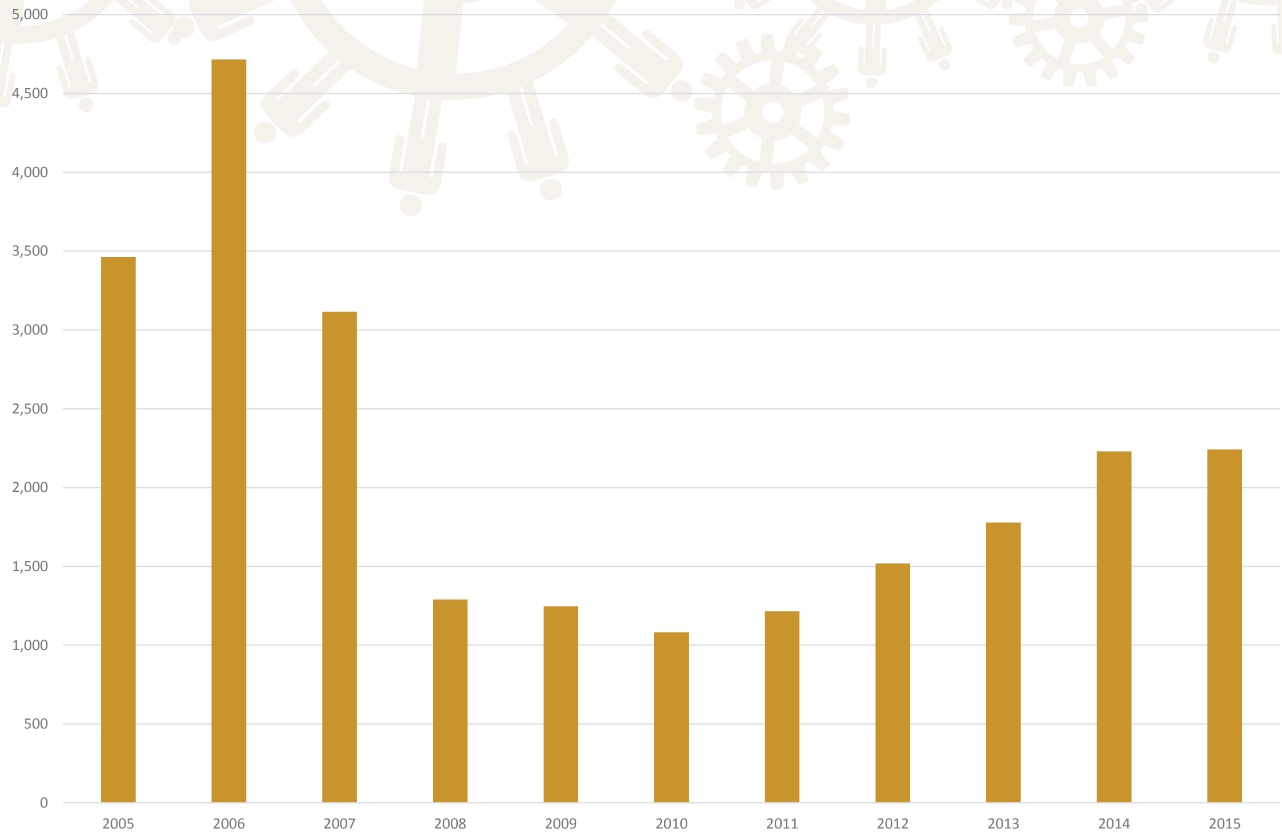


Figure 13. Verified Residential Property Sales, Armagh City, Banbridge and Craigavon, 2006 - 2015. Source: LPS.

The standardised price in Armagh City, Banbridge and Craigavon was £105,087, lower than the NI average £117,524) and the second lowest by council area, after Derry and Strabane (£99,527).

	Index (Quarter 1 2016)	Percentage change on previous quarter	Percentage change over 12 months	Standardised price (Quarter 1 2016)
Antrim and Newtownabbey	103.9	-2.8%	3.9%	£119,479
Ards and North Down	103.5	-1.5%	3.5%	£138,933
Armagh City, Banbridge and Craigavon	106.6	-0.7%	6.6%	£105,087
Belfast	104.1	-2.5%	4.1%	£110,042
Causeway Coast and Glens	111.5	1.7%	11.5%	£120,429
Derry City and Strabane	105.1	1.5%	5.1%	£99,527
Fermanagh and Omagh	114.1	-1.8%	14.1%	£109,346
Lisburn and Castlereagh	104.8	-1.6%	4.8%	£140,686
Mid and East Antrim	106.2	-0.7%	6.2%	£109,918
Mid Ulster	108.4	4.5%	8.4%	£121,209
Newry, Mourne and Down	106.7	-1.9%	6.7%	£120,018
Northern Ireland	**105.9**	**-1.0%**	**5.9%**	**£117,524**

Table 14. NI RPPI and standardised price by Local Government District (Quarter 1 2016). Source: LPS. Note: Index Q1 2015 = 100.

All council areas showed an increase over the 12 months since Q1 2015.

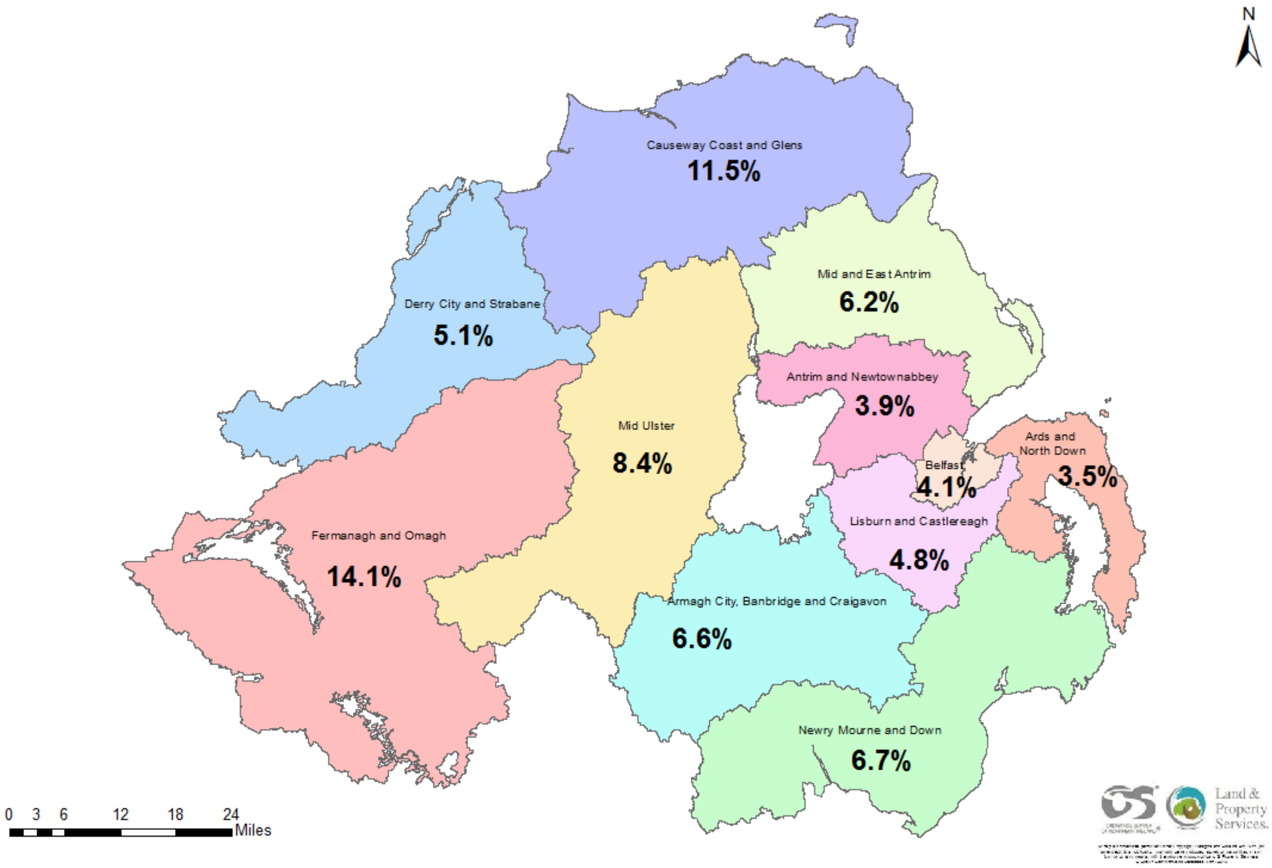


Figure 14. Annual Change in RPPI by Local Government District Q1 2016. Source: LPS.

For NI overall, in 2005 median house prices were around five and a half times a median annual full time salary, but by 2007, at the peak of the market, prices were more than 9 times the median salary. With the downturn in the property market since 2008, the ratio fell each year until 2012. In 2014, the ratio rose to 4.5 but this has fallen again in 2015, and the median residential property sale price is now 4.3 times the median annual gross full time earnings.

DEPRIVATION – LIVING ENVIRONMENT

The NI Multiple Deprivation Measure 2010 includes a Living Environment domain. This domain aims to identify small areas experiencing deprivation in terms of the quality of housing, access to suitable housing, and the outdoor physical environment. Results are also available for these three sub-domains.

The council has eight areas in the 20% most deprived areas in NI on the living environment measure, the top seven of these being defined as Urban, the eighth (Ballybay being Mixed Urban/Rural).

The council also has 31 areas in the 20% least deprived areas in NI on the living environment domain, the least deprived in the Borough on this domain being Waringstown 2, Magheralin 1, Richhill 2 and Richhill 1.

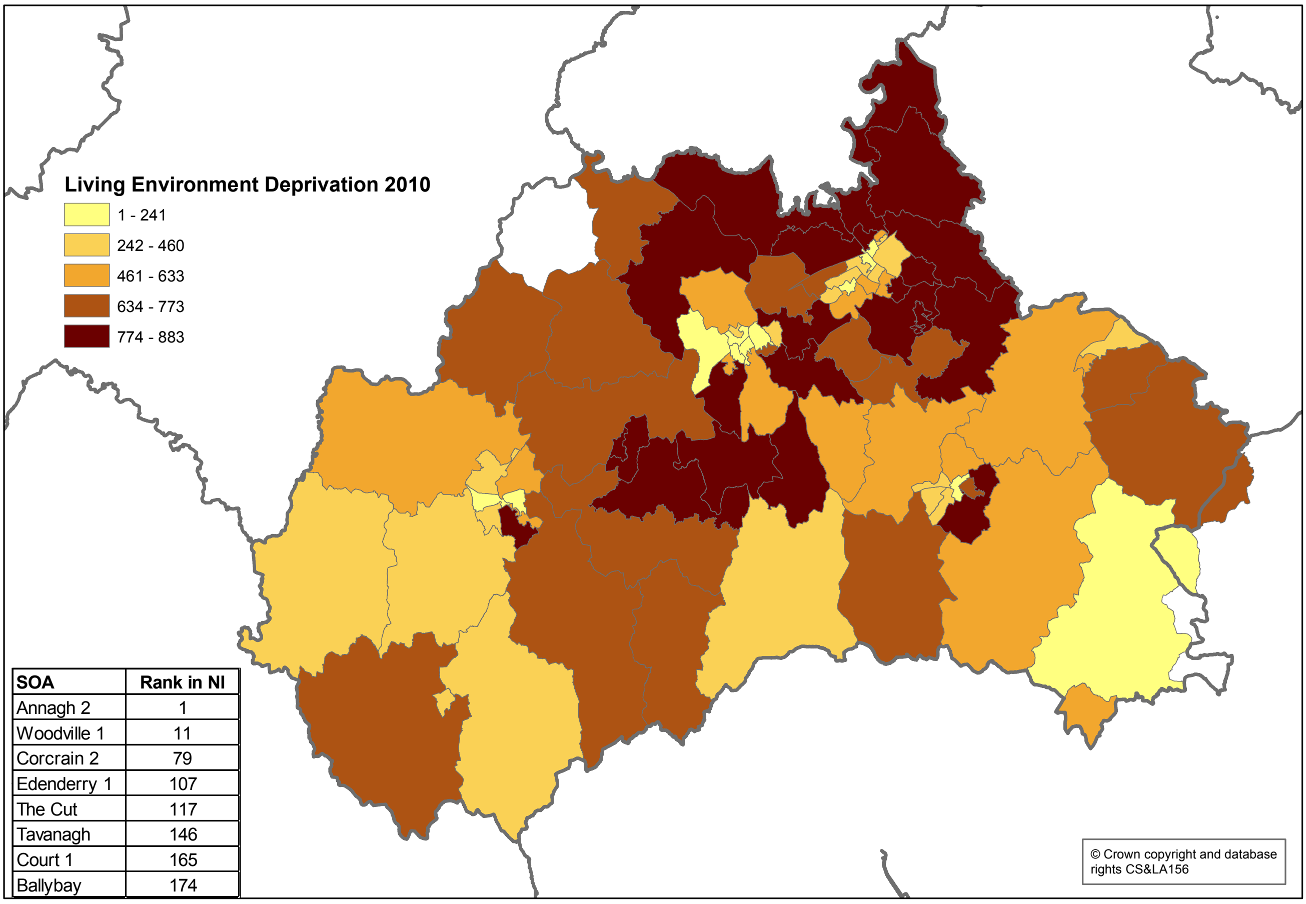


Figure 15. Living Environment Deprivation, NIMDM 2010. Top 8 areas in most deprived 20% in NI listed. Source: NISRA.

NIHE HOUSING INVESTMENT PLAN

The Northern Ireland Housing Executive have developed Housing Investment Plans for each of the eleven councils, the Armagh City, Banbridge and Craigavon report is available here: http://www.nihe.gov.uk/index/corporate/plans/district_housing_plans.htm

It is structured under 5 themes.

Theme One - Identify and meet housing need and demand

1. Identify new housing requirements.
2. Increase the supply of affordable renting to meet the needs of communities.
3. Assist home ownership.

Theme Two - Improving people's homes

4. Improve the quality of the housing stock.
5. Develop low carbon homes and reduce fuel poverty.

Theme Three - Transforming people's lives

6. Provide suitable accommodation and support services for vulnerable residents.
7. Homelessness is prevented or is addressed effectively.

Theme Four - Enabling sustainable neighbourhoods

8. Regenerate neighbourhoods.
9. Create safer and cohesive communities.

Theme Five - Delivering Quality Services

10. Deliver better services.

Armagh City, Banbridge and Craigavon Borough council area falls mainly within the Housing Executive's Craigavon Housing Market Assessment (HMA) area. Remaining areas of the borough lie within Newry and Belfast HMA's. The three HMAs present an assessment of the housing market conditions throughout the area and provide a robust evidence base, which highlights the pressures within and between housing tenures in Armagh City, Banbridge and Craigavon Borough. The HMA's identified the following key issues, which remain relevant in the current housing market.

- House prices have become much more affordable. However, tighter lending is likely to lead to the continuation of low rates of private housing construction;
- There has been significant growth in the size of the private rented sector since 2001;
- House conditions are likely to deteriorate with a lack of available private sector grant funding for housing and reduced disposable income;
- Fuel poverty will remain an issue;
- Public expenditure cuts in Northern Ireland suggest that they will have implications across the Craigavon HMA for the next decade and possibly beyond;
- The growth in older people will have implications in terms of the demand for housing adaptations, specialist housing and personal or nursing care.

HOUSING CONDITIONS

A range of information is available for the NIHE House Conditions Survey.

Unfitness

Between 2006 and 2011, the unfitness rates increased in the former Armagh, Banbridge and Craigavon districts. The main causes of rising unfitness levels have been identified as reduced grant funding and decreased consumer spending on housing maintenance. The Northern Ireland Housing Market Review 2014 also highlighted a link between the increasing level of unfitness and a rise in the rate of vacancies, particularly in isolated rural areas. The graph adjacent shows unfitness between 2001 and 2011 in the former Armagh, Banbridge and Craigavon districts.

Decent Homes

A decent home considers a wider range of indicators beyond unfitness and is one that meets modern standards in terms of fitness, structure, energy efficiency and facilities. The 2011 House Condition Survey (HCS) estimated that 14% of dwellings in the former Armagh District and 13% in the former Banbridge District were recorded as failing decent home standards, while in Craigavon the figure was 10%.

Energy Efficiency/Fuel Poverty

The Housing Executive has a key role under the 1995 Home Energy Conservation Act to identify, promote and monitor progress of energy efficiency throughout all tenures in the residential sector in Northern Ireland. The last House Condition Survey (HCS) carried out in 2011, recorded a 22.5% improvement in the energy efficiency of the occupied housing stock in Northern Ireland between 1996 and 2011. Evidence would suggest that the Northern Ireland figures are broadly representative of Armagh City, Banbridge and Craigavon Borough.

Considerable progress has been made to date in upgrading the energy efficiency of all housing stock across all tenures in Northern Ireland. However, fuel poverty remains an issue, mainly due to high fuel prices and low household incomes. There is a high level of dependency on home heating oil with 68% of households in Northern Ireland continuing to rely on kerosene to heat their homes.

DSD's vision of eradicating fuel poverty remains a challenge in Armagh City, Banbridge and Craigavon Borough, given that between 40% and 45% of households were classified as being in fuel poverty in 2011 (HCS 2011). This is comparable to the Northern Ireland figure of 42%. Despite the fall in oil and gas prices in early 2015, this objective will remain a challenge, as this price trend is unlikely to be lasting.

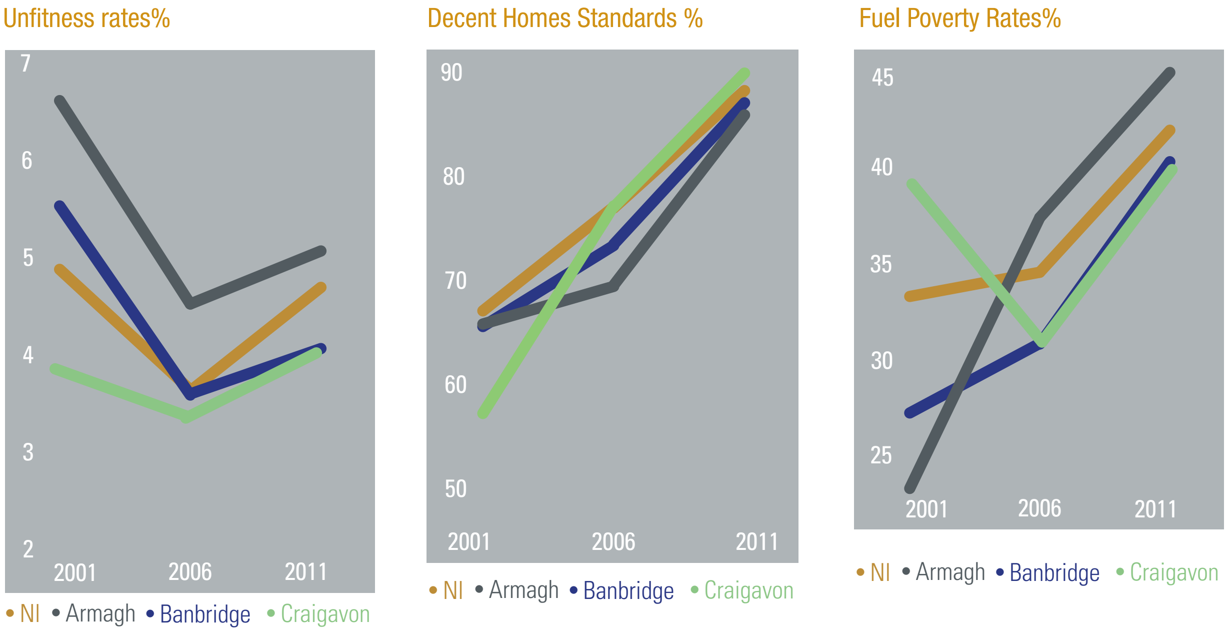


Figure 16. Unfitness, Decent Homes, and Fuel Poverty. Source: House Conditions Survey, NIHE.

SOCIAL HOUSING SECTOR

The NIHE Housing Investment Plan describes how housing need for Armagh City, Banbridge and Craigavon Borough remained at a consistently high level between 2010 and 2015.

Waiting Lists and Housing Needs trends for Armagh City, Banbridge and Craigavon

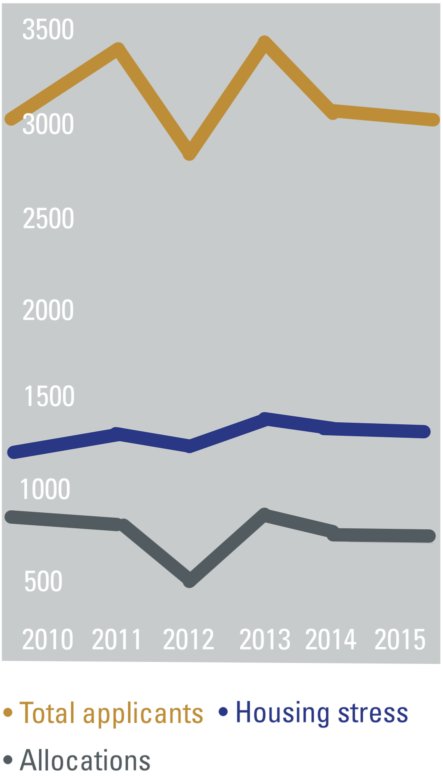


Figure 17. Waiting Lists and Housing Needs trends, Armagh City, Banbridge and Craigavon, 2010 – 2015. Source: House Conditions Survey, NIHE.

	Total Applicants	Number of Applicants in Housing Stress
Antrim and Newtownabbey	2,628	1,519
Ards and North Down	3,570	2,064
Armagh City, Banbridge and Craigavon	3,059	1,189
Belfast	11,615	6,933
Causeway Coast and Glens	2,490	1,286
Derry City and Strabane	4,120	2,750
Fermanagh and Omagh	1,422	506
Lisburn and Castlereagh	2,205	1,173
Mid and East Antrim	2,729	1,509
Mid Ulster	1,898	1,017
Newry, Mourne and Down	3,602	2,151
Northern Ireland	**39,338**	**22,097**

Table 15. Social Rented Sector Waiting List, 31st March 2015. Source: NIHE via NINIS.

The Housing Executive holds data on all housing applications and allocations made through the Common Selection Scheme in the Housing Management System (HMS). The Selection Scheme was approved by the Department for Social Development and has been effective from 1st November 2000. It applies to accommodation owned by the Housing Executive or any registered Housing Association which is participating in the scheme with the exception of accommodation which is let on a temporary basis.

There were 3,059 applicants (with no existing NIHE/Housing Association tenancy) on the waiting list in Armagh City, Banbridge and Craigavon at 31 March 2015. Of these applicants, 1,189 were in 'housing stress' where they have 30 or more points under the Common Selection Scheme.

PROJECTED NEED

The 5-year (2014/19) projected housing need for the district identified a requirement for 317 units with the areas of greatest need being in North Lurgan, Armagh 1 local housing area and Banbridge Town. Single, elderly and small adult households comprised approximately 70% of the Armagh City, Banbridge and Craigavon Borough waiting list in housing stress. Future housing mix in new build developments will need to cater for these household groups along with any potential changes associated with Welfare Reform.

Where possible social housing need in Armagh City, Banbridge and Craigavon Borough has been delivered by housing associations on Housing Executive land in North Lurgan, Armagh City and Portadown. At March 2015, there were 57 units on site across Armagh City, Banbridge and Craigavon Borough including schemes in Lurgan, Portadown, Charlemont, Derrymore and Middletown.

Increasingly, areas of housing need are emerging in locations where the Housing Executive does not own land such as North Lurgan, Banbridge Town and Derrymacash. Housing associations report difficulties in obtaining sites in areas of housing need throughout Northern Ireland. This results in housing associations having to acquire sites on the open market. To advise housing associations and developers on locations where there is a shortage of programmed development sites to meet the projected social housing need the Housing Executive publishes an Unmet Need Prospectus, found on the following link: http://www.nihe.gov.uk/index/corporate/unmet_need_prospectus.htm

To further assist in this process, the Housing Executive undertakes site identification studies for locations of unmet need. These studies investigate potential sites, engage landowners and provide these details to housing associations for investigation/acquisition. A number of these studies have been carried out across Armagh City, Banbridge and Craigavon Borough at the following locations: Derrytrasna and North Lurgan.

HOMELESSNESS

The Northern Ireland Housing Executive's Housing Investment Plan describes homeless levels. The Northern Ireland Homelessness Strategy 2012-17 was launched in May 2012 with a vision to eliminate long-term homelessness and rough sleeping across Northern Ireland by 2020. Within the Armagh City, Banbridge and Craigavon Borough the three main reasons for homeless presentation are:

- Sharing breakdown/family dispute;
- Accommodation not reasonable; and
- Loss of rented accommodation

In 2014/15 over 1,400 households presented as homeless, of these 534 were accepted as homeless, with almost 100 households being placed in temporary accommodation. There is a range of temporary accommodation available within the Armagh City, Banbridge and Craigavon Borough including 33 privately owned single lets and 57 hostel placements.

Year	Homeless Presenters	Homeless Acceptances	Households placed in temporary acc.
2010/11	1,491	574	72
2011/12	1,431	504	70
2012/13	1,340	514	53
2013/14	1,330	514	99
2014/15	1,419	534	99

Table 16. Homelessness Statistics, Armagh City, Banbridge and Craigavon. Source: NIHE Housing Investment Plan 2015-2019.

ENVIRONMENT

PUBLIC OPINION

Northern Ireland Households were asked to provide their views on environmental issues in NISRA's Continuous Households Survey (CHS). Breakdown by Local Government Districts is available for the headline level of public concern for the environment measure.

Key points

- The level of public concern for the environment had been increasing, peaking in 2008/09 (at 82%) but has since fallen so that the levels in 2014/15 (70%) are lower those in 2003/04 (76%).
- Illegal dumping of waste is the biggest environmental concern for households in Northern Ireland.
- In 2014/15, the most common actions taken by households for environmental reasons were reusing plastic bags or using a reusable bag, using energy saving light bulbs and ensuring clothes/furniture are reused.

LEVEL OF PUBLIC CONCERN

The level of public concern for the environment had been increasing, peaking in 2008/09 (at 82%) but has since fallen to a 12-year low in 2014/15 of 70%. This may be linked to financial concerns assuming a higher priority in peoples' lives during the recent economic downturn.

In Armagh City, Banbridge and Craigavon the level of concern for the Environment (68% concerned) was similar to that in NI as a whole (70% concerned).

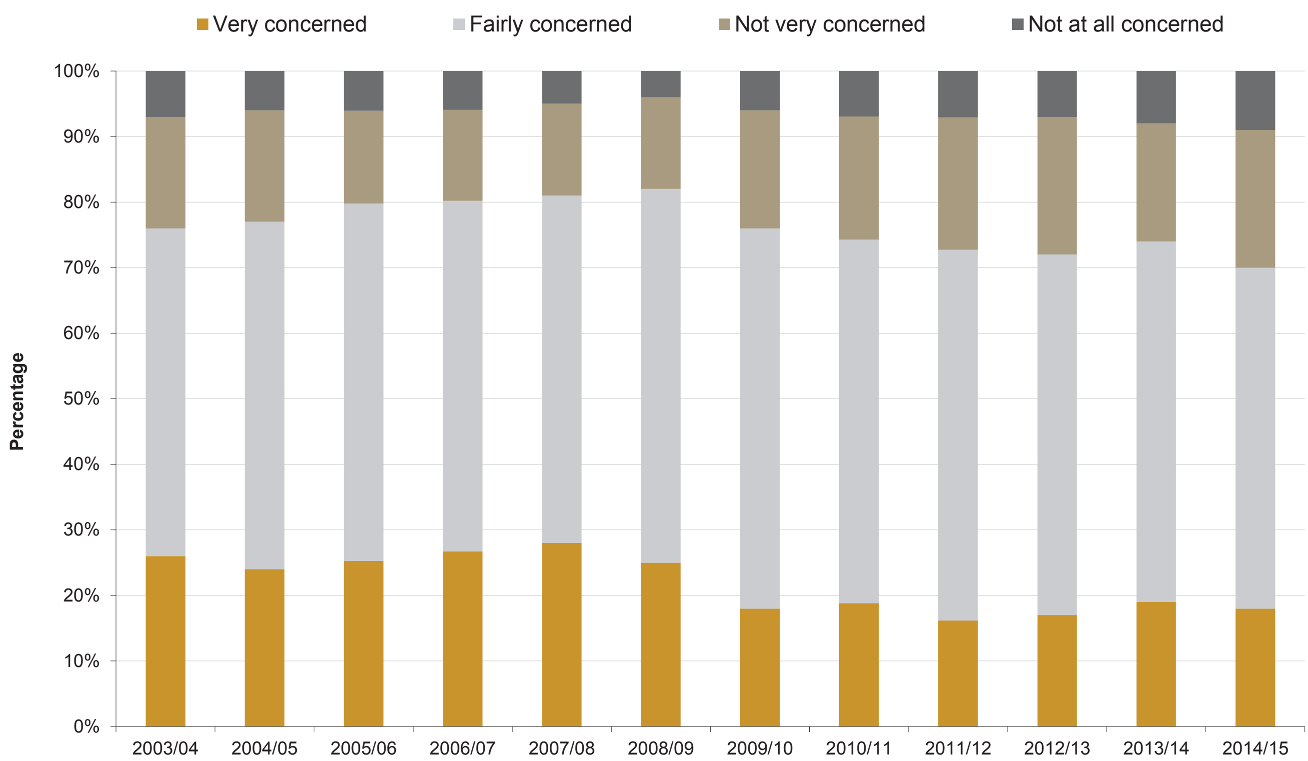


Figure 18. Level of concern for the environment, 2003/04 – 2014/15. Source: Continuous Household Survey, NISRA.

	Concerned	Not concerned
Antrim & Newtownabbey	75	25
Ards & North Down	78	22
Armagh City, Banbridge & Craigavon	68	32
Belfast	71	29
Causeway Coast & Glens	66	34
Derry City & Strabane	59	41
Fermanagh & Omagh	67	33
Lisburn & Castlereagh	75	25
Mid & East Antrim	68	32
Mid Ulster	67	33
Newry, Mourne & Down	73	27
NI	**70**	**30**

Table 17. Level of concern for the environment, Local Government Districts, 2014/15. Source: Continuous Household Survey, NISRA.

ENVIRONMENTAL CONCERNS

Households were also asked to provide their views on their three most important environmental problems. Illegal dumping of waste is the biggest environmental concern for households in Northern Ireland. Results show that in 2014/15, the most commonly selected environmental problems were illegal dumping of waste (42%), pollution in rivers (31%), traffic congestion (29%) and climate change (26%).

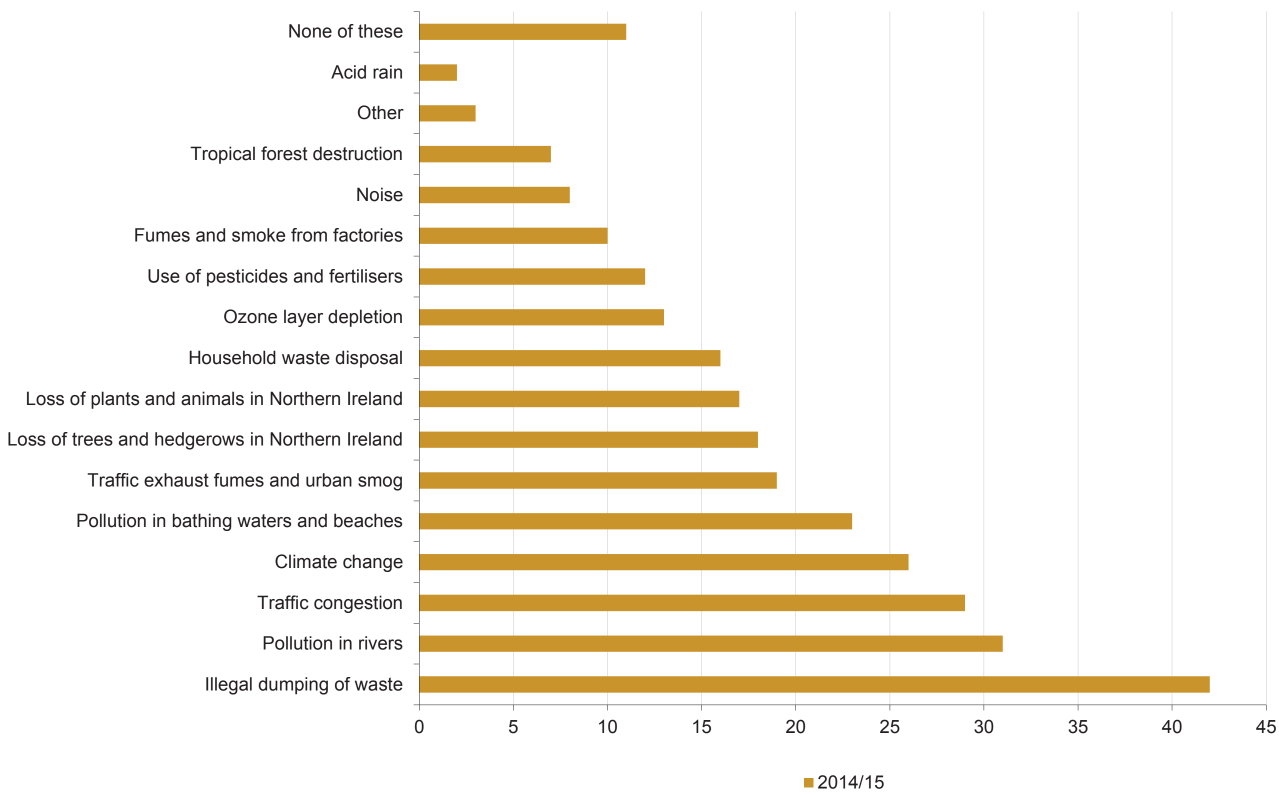


Figure 19. Environmental problems considered most important, 2014/15. Source: Continuous Household Survey, NISRA.

ACTIONS TAKEN BY HOUSEHOLDS FOR ENVIRONMENTAL REASONS

In 2014/15, the most common actions taken by households for environmental reasons were reusing plastic bags or using a reusable bag (82%), using energy saving light bulbs (77%) and ensuring clothes/furniture are reused (68%).

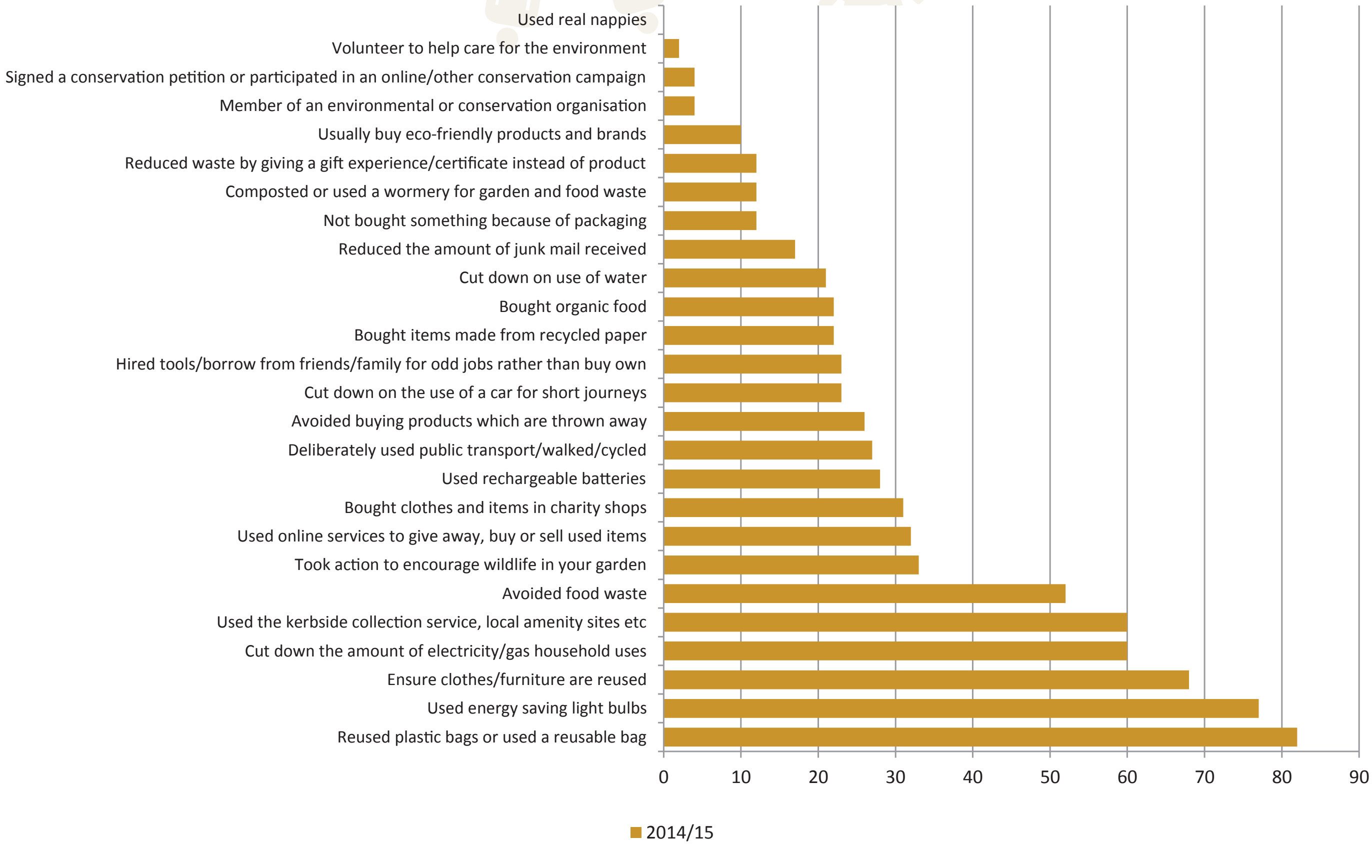


Figure 20. Actions taken that have a positive impact on the environment, 2014/15. Source: Continuous Household Survey, NISRA.

KEY NI ENVIRONMENT STATISTICS

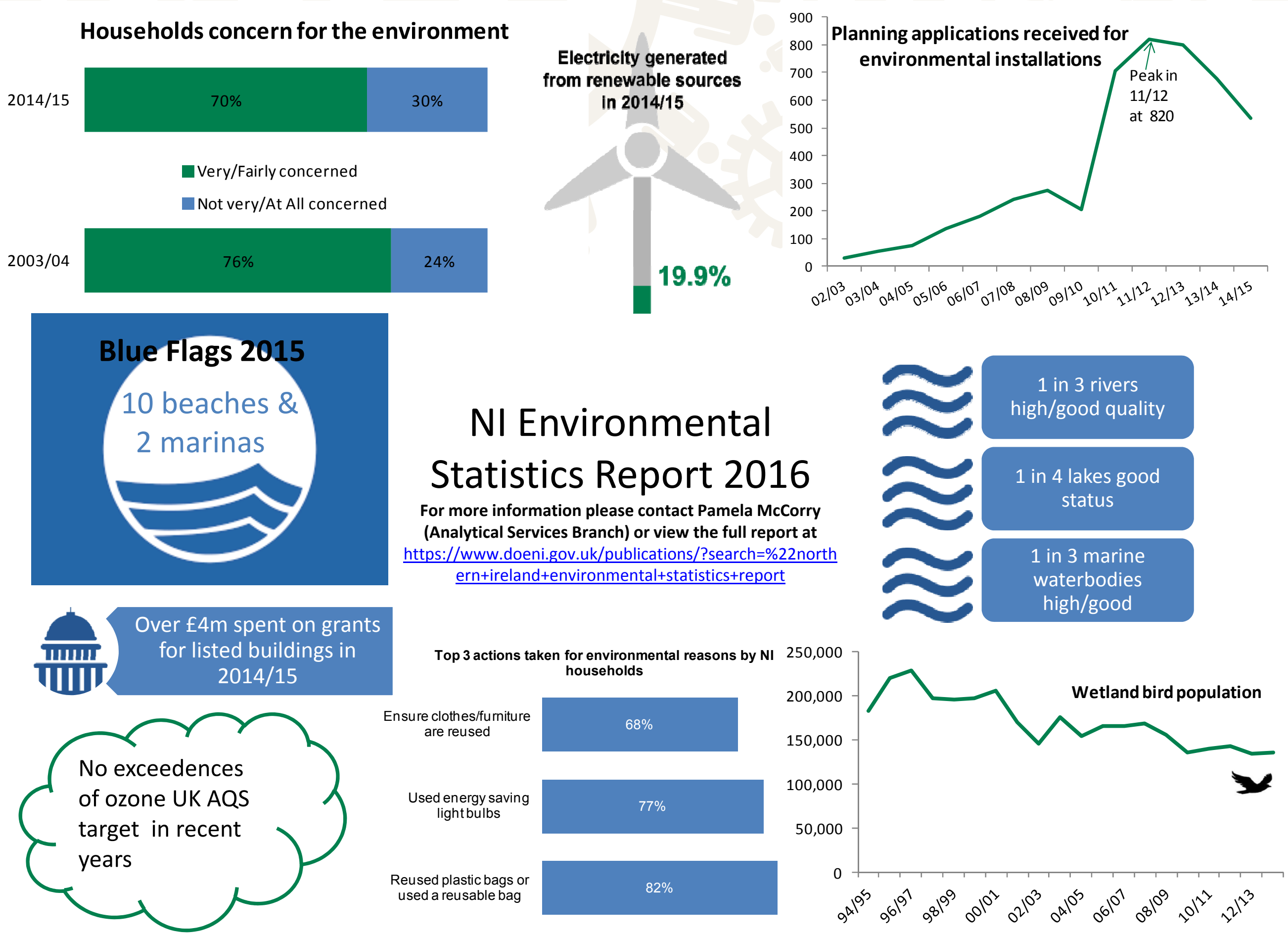


Figure 21. Northern Ireland Environmental Statistics Report 2016. Source: DAERA.

AIR QUALITY

The air that we breathe is vital to our health and wellbeing. Good air quality is essential for human health, the climate, habitats and the built environment. Government statistics estimate that air pollution in the UK reduces the life expectancy of every person by an average of 7-8 months, with an associated cost of up to £20 billion each year (Source: Department of Agriculture, Environment and Rural Affairs).

The Council's statutory 'Air Quality Updating and Screening Assessment 2015' has identified that the greatest contribution to air pollution in the Borough is from road traffic, particularly in the town centres of Armagh, Portadown and Lurgan where the road network is frequently congested. It is estimated road traffic accounts for over 85% of the emissions in Armagh City, Banbridge and Craigavon Borough. Other sources such as industry, agriculture or construction, make a relatively small contribution to local emissions.

The report notes that given the size of the rural hinterland, public transport options are limited and there is a greater tendency to rely on the private car as the primary means of transport. The road network within the Borough is regarded as a route hub to the border with the Republic Of Ireland and is a main through-route between mid-Ulster and the south-east of Northern Ireland and hence has a traffic flow higher than that which could be created by local traffic alone.

Air quality in the Borough is monitored at a number of locations. Particulate Matter (PM10) and Nitrogen Dioxide (NO2) would be considered as the pollutants most at risk of breaching the objective limits in the Borough as a result of road traffic.

In 2014 there were 3 sites where nitrogen dioxide (NO2) levels exceed the health-based objective limit of 40ug/m3 (Greenpark Terrace, Railway Street / Mall West in Armagh and Mill Street in Tandragee). The Greenpark Terrace and Railway Street / Mall West sites have been declared as Air Quality Management Areas (AQMAs) as required by the Environment (NI) Order 2002, Mill Street in Tandragee will be formally declared in 2016. Where AQMAs exist, the Council is required to produce Action Plans along with partners such as the Department of Infrastructure and Translink to reduce air pollution.

NATURAL HERITAGE

Planning Department in the council have summarised the environmental assets of the Borough as part of their preparatory studies for the development of the Local Plan (Paper 8 Environmental Assets February 2016).

The diversity of Northern Ireland's habitats, species, landscapes and earth science features (i.e. natural heritage) is an important and highly valued asset of our society. Our natural heritage provides a wide range of opportunities for enjoyment, recreation and sustainable economic activity. The conservation, enhancement and restoration of the abundance, quality, diversity, and distinctiveness of the region's natural heritage are also fundamental to the overall health and well-being of our society.

Sustaining and enhancing biodiversity is fundamental to furthering sustainable development. Incorporating biodiversity into plans for regeneration can help deliver economic and social growth by creating places where people want to live, work, invest in and visit.

Habitats and species in Northern Ireland are protected by a series of statutory designations. These include Areas of Special Scientific Interest (ASSI), Special Areas of Conservation (SAC), Special Protection Areas (SPA), Ramsar sites (areas of wetland and waterfowl conservation), National Nature Reserves, Marine Nature Reserves and Local Nature Reserves. Protection is also afforded by non-statutory Sites of Local Nature Conservation Importance (SLNCI).

The council area contains the following natural heritage designations:

International Designations

- 1 RAMSAR site (Lough Neagh & Lough Beg)
- 2 Special Areas of Conservation (SACs: Peatlands Park and Montiaghs Moss)
- 1 Special Protected Areas (SPAs: Lough Neagh)

National Designations

- 21 Areas of Special Scientific interest (ASSI's)
- 1 National Nature Reserve (Oxford Island)
- 4 Nature Reserves (Annagariff Nature Reserve and Mullenakill - both within Peatlands Park, Brackagh Nature Reserve and Lough Neagh Islands)

Local Designations

- 3 Local Nature Reserves
- 77 Sites of Local Nature Conservation Importance (SLNCI)

The locations of the international and national designation are shown in figures 22 and 23.

There are also a range of site based facilities owned and managed by public bodies that have public access, for example:

- Public forests managed by Forestry Service
- Parks and woodlands
- National Trust sites (The Argory estate and Ardress House and grounds)

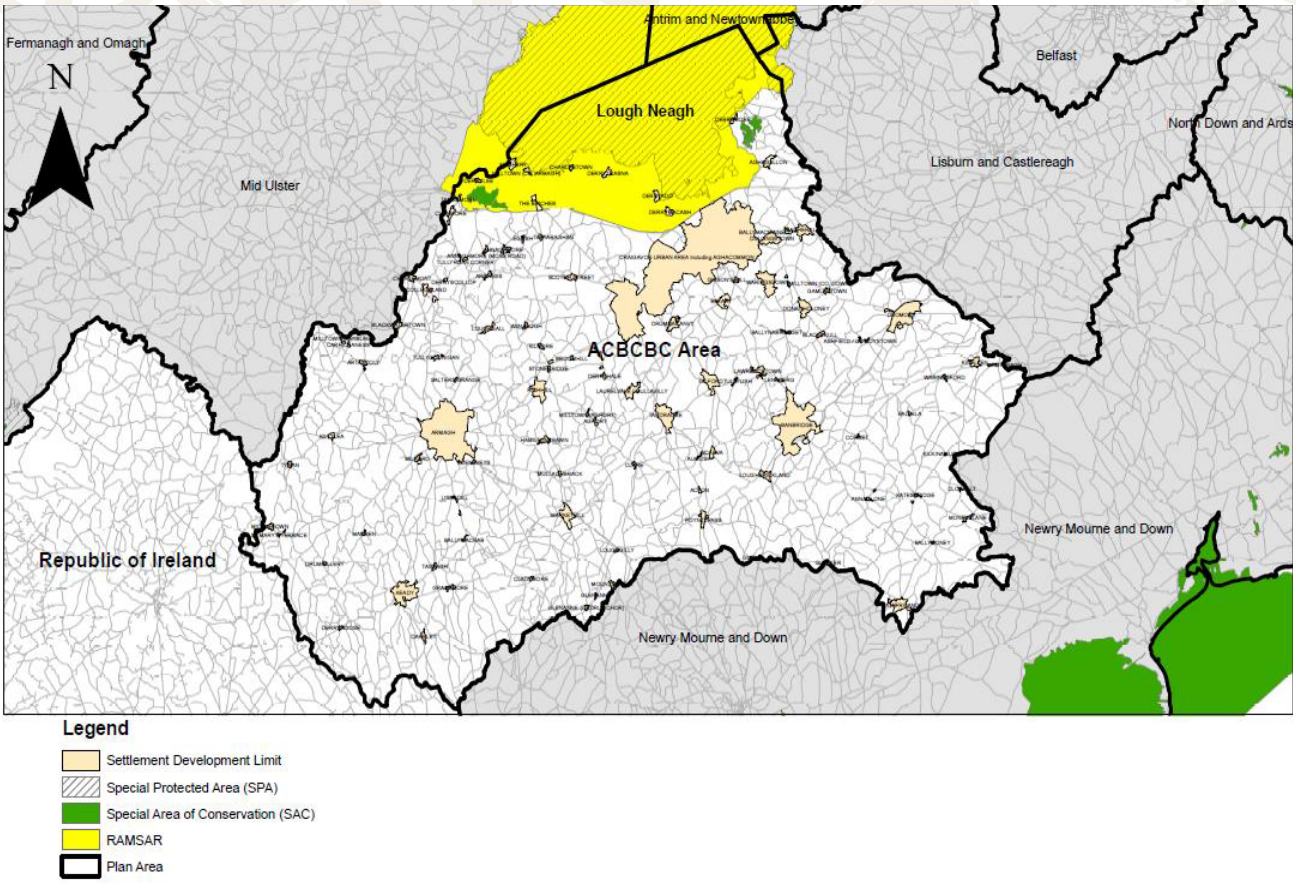


Figure 22. International Nature Conservation Designation 2016. Source: Planning.

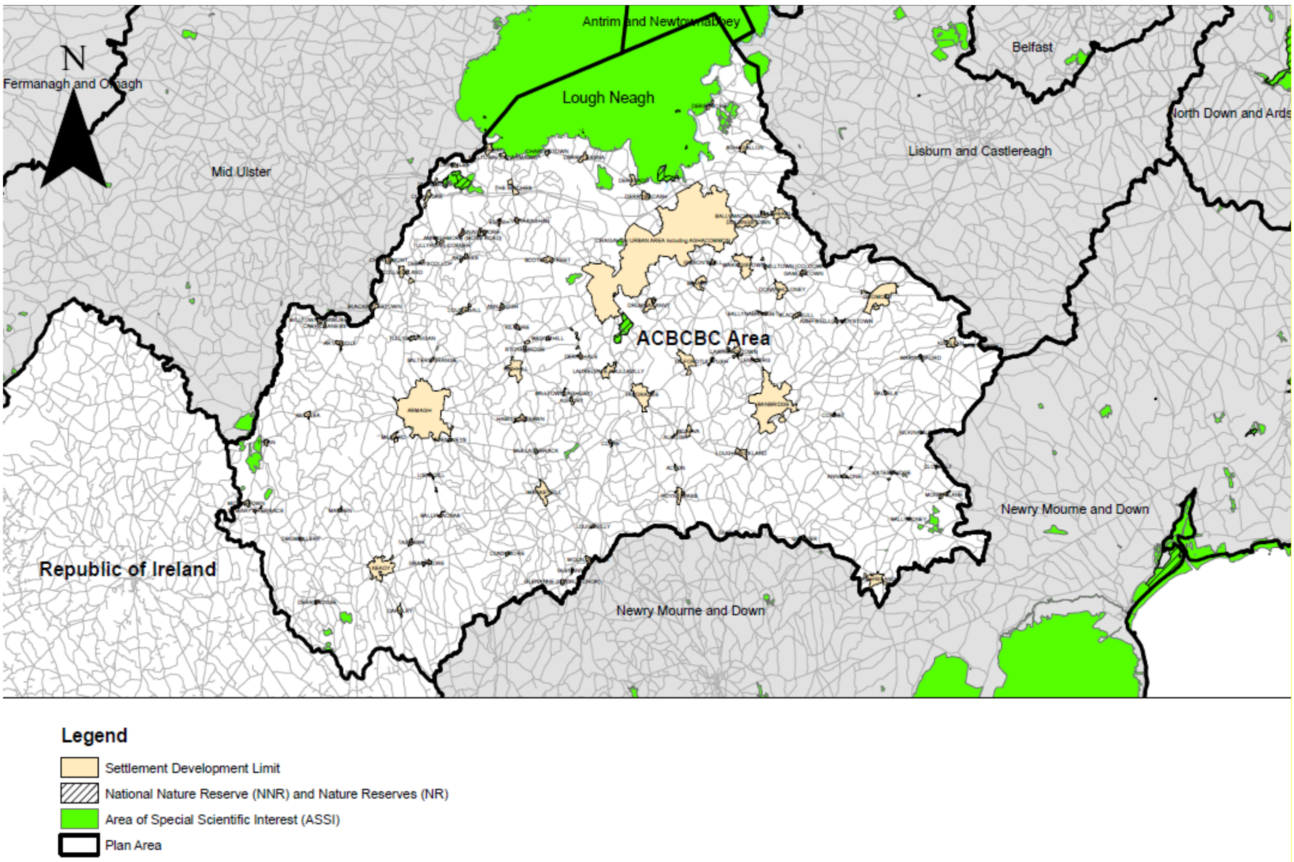


Figure 23. National Nature Conservation Designation 2016. Source: Planning.

OPEN SPACES

Planning Department recently summarised information on existing open space and recreation provision in their 'Paper 10: Open Space, Recreation and Leisure, May 2016', one of a series of papers for the local development plan.

The paper described how within the main hubs of Armagh and Banbridge, all of the zoned open space has been developed, apart from 1.4ha of grassland at Milford, Armagh. There still remains a significant amount of zoned open space in the Craigavon Urban Area where over 24 hectares have not been developed.

The paper also details how an audit was carried out of open space provision against the Fields in Trust (FIT) recommended standard for outdoor sport and children's play space – 6 acres (2.4ha) per 1,000 population. This benchmark is made up of 1.6ha outdoor sports and 0.8ha children's play space. Having established the current provision, the paper also projected the future recreation needs for Armagh City, Banbridge and Craigavon Borough to 2030. The distribution and accessibility of such provision has also been assessed.

A general overview of open space and recreation lands within the Council area indicates that the Council and other bodies provide a total of approximately 186 hectares of outdoor recreation space within the hubs and local towns of Armagh City, Banbridge and Craigavon Borough, of which approximately 62 hectares are children's play space and 124 hectares are outdoor sport.

All of the three hubs (Armagh City, Banbridge Town & Craigavon Urban Area) present a shortfall to varying degrees in relation to current provision against the FIT benchmark recommendation of 2.4 hectares per 1,000 population. This shortfall will grow by 2030 if the population rises as projected and the current provision is maintained. There are lesser shortfalls within five of the six local towns (Keady, Tandragee, Dromore, Gilford and Rathfriland) with only Markethill in surplus.

Although the FIT audit findings suggest an outdoor sports and children's play space provision shortfall in the Armagh City, Banbridge and Craigavon Borough Hubs and Local Towns, there are other recreation facilities and opportunities for exercise that are not considered within the narrow FIT guidelines. The Borough benefits from a range of informal and passive recreation facilities distributed across the main urban areas and in parts of the countryside. These are not included in the open space calculations but do provide invaluable recreational spaces. The Borough also benefits from a range of indoor recreational and leisure facilities such as gyms, swimming pools, halls and indoor play areas. These are primarily located in the Hubs and local towns.

The FIT open space audit findings along with the Councils Sports Development Action Plan (2015-17) and the developing Council Play Strategy and Sports facility Strategy will help inform the new Local Development Plan Open Space Strategy.

GREEN FLAG PARKS

The Green Flag Award scheme recognises and rewards the very best green spaces. In 2015, a record number of awards were made with 1,627 parks and green spaces currently flying a Green Flag or Green Flag Community Award. Armagh City, Banbridge and Craigavon has a total of 8 parks flying the Green Flag:

- Lurgan Park
- Bann Boulevard
- Tannaghmore Gardens
- Edenvilla Park
- Dromore Park
- Solitude Park
- Loughbrickland Park
- Scarva Park

Two further applications have been made in 2016/2017 to achieve a Green Flag Award for Clare Glen and Armagh Palace Demesne.

NATIONAL CYCLE NETWORK

The National Cycle Network is a millennium project, the aim of which is to provide a safe, attractive, high quality network of traffic-free paths and traffic calmed roads running through and connecting to major urban centres of the United Kingdom. The following is a list of the National Cycle Routes in the Armagh City, Banbridge Craigavon Borough:

- Newry Canal (Route 9) - This cycle and walking route travels along the Newry Canal Towpath from the Bann Bridge in Portadown to the Town Hall in Newry along a 20 mile path. The towpath passes through Scarva and Poyntzpass.
- Loughshore Trail (Route 94) - This route starts at Maghery, travels through Portadown and back towards the Lough at Kinnego Marina (Oxford Island). The route then follows the Lough up towards Antrim past Aghagallon and Gawleys Gate past Portmore Lough where it leaves the Borough.
- Ulster Canal (Route 11) - The portion of this cycle route within the Borough starts at Maghery past Peatlands Park through Clonmore, Tamnamore, Collegeland and Charlemont before leaving the Borough at Blackwatertown.

  (Data Source: Sustrans National Cycle Network website 2015, via Planning).
- There are also lesser portions of Route 91 (Portadown to Tynan) and Route 95 (Tynan to Lough Neagh shores) within the Borough.

CANALS AND WATERWAYS

The following Canals run through portions of the ABC Borough. The waterways linked Lough Neagh and Portadown to Newry and the Irish Sea (Newry Canal), Lough Neagh to Belfast Lough (Lagan Canal) and the Ulster Canal (Maghery to Lough Erne and the Shannon).

Angling, boating, jet skiing, canoeing, cycling, walking, rowing and sailing are all available along these waterways. Service facilities along the route are provided at Oxford Island on Lough Neagh, Scarva Visitors Centre on the Newry Canal and various points along the Lagan Towpath. (Data Source: http://www.waterwaysireland.org via Planning)

BIODIVERSITY

Biodiversity encompasses the whole variety of life on Earth. It includes all species of plants and animals, their genetic variation and the complex ecosystems of which they are part. It is not restricted to rare or threatened species but includes the whole of the natural world from the commonplace to the critically endangered.

Valuing Nature - the NI Biodiversity Strategy for 2020, released in 2015, has a mission “to make progress towards halting overall biodiversity loss, establish an ecosystem approach and help business and society in general have a greater understanding of the benefits that nature can bring to everyday life in Northern Ireland.” The strategy uses an ecosystem-based approach – this is a framework for action that considers the entire ecosystem, including humans, with the goal of maintaining it in a healthy, productive and resilient condition, so that it can provide the services that are both wanted and needed. It is a method for working towards sustainable development so that nature can indefinitely support essential services and provide benefits for all without deterioration.

The Local Biodiversity Action Plan (LBAP) for the Borough, published in 2014, recognised that, as throughout much of Northern Ireland many species and valued habitats are declining within the Armagh, Banbridge and Craigavon area. When damaged or destroyed many of our habitats are impossible to restore or re-create. Adverse impact is often caused by human activity. Fortunately this means that we can change our behaviour to stop the damage this is causing to biodiversity. The action plan identified priority species and habitats for conservation action.

The following species are those that have been prioritised for conservation action in the Armagh, Banbridge and Craigavon area. They reflect a range of animals and plants and include national, Northern Ireland and local priority species.

Group	Species	NI Priority	Local Priority
Moth	Centre-barred Sallow	✓	
Moth	Narrow- bordered Five- spot Burnet Moth		✓
Damselfly	Irish Damselfly	✓	
Butterfly	Cryptic Wood White	✓	
Bird	Great Crested Grebe		✓
Bird	Owls: Long-eared Owl, Barn Owl	✓	
Bird	House Martin		✓
Bird	Yellowhammer	✓	
Agriculture	Rare Farm Breeds, Old Apple Varieties		✓
Mammal	Hedgehog	✓	
Mammal	Bats	✓	✓
Amphibian	Smooth Newt		✓
Plant	Orchids (various)	✓	✓
Plant	Primrose		✓

Table 18. Priority species identified for conservation action. Source: Armagh, Banbridge and Craigavon Local Biodiversity Action Plan, 2014.

Six broad habitats have been identified, along with specific habitats prioritised for conservation action in the Borough. These include Northern Ireland and local habitats.

Woodland	**Rivers and Canals**	**Wetlands**
• Parkland • Mixed Ashwoods • Wet woodland • Species-rich hedgerows	• Rivers • Canals	• Lowland fens • Reedbeds • Ponds
Peatlands	**Grassland and Arable**	**Open mosaic habitats on previously developed land**
• Lowland raised bog	• Lowland meadows • Floodplain grazing marsh	• Quarries • Landfill sites • Road verges • Waste ground • Parks and Gardens

Table 19. Priority habitats identified for conservation action. Source: Armagh, Banbridge and Craigavon Local Biodiversity Action Plan, 2014.

The Local Biodiversity Action Plan describes how detailed action plans will be produced for the priority species and habitats in consultation with stakeholders and the local community. The action plans will set out exactly how the council intend to enhance and protect both species and habitats and will be strongly focused on community and partnership involvement.

The council is currently involved in a number of biodiversity projects, at an international, NI and local level. They are currently managing species rich meadows and restoring Brackagh Bog within the Borough and working with partners to restore the Blackwater River throughout the catchment and restoring wetlands in NI, ROI and western Scotland.

BUILT HERITAGE

Northern Ireland has a rich heritage of archaeological sites, monuments and buildings representing the aspirations and achievements of past societies, providing evidence of settlement, agricultural, industrial and ritual activity from 9,000 years ago to the present day. Armagh City, Banbridge & Craigavon Borough Council have an established built heritage containing a considerable number of listed buildings, archaeological sites and monuments, conservation areas and historic parks, gardens and demesnes. The built heritage forms an integrate part of our environment.

The council area contains:

- 15 State Care Sites & Monuments
- 169 Scheduled Sites & Monuments
- 1,292 Unscheduled Monuments
- 1 Areas of Significant Archaeological Interest (Navan Fort complex)
- 21 Areas of Archaeological Potential (AAP)
- 1,063 Listed Buildings
- 14 Historic Parks, Gardens and Demesnes (Registered Sites)
- 15 Historic Parks, Gardens and Demesnes (Supplementary Sites)
- 5 Conservation Areas (Armagh City, Loughgall, Richhill, Dromore and Lurgan)
- 16 Areas of Townscape / Village Character (ATC / AVC)
- 101 Local Landscape Policy Areas (LLPAs)

There are no World Heritage Sites within the Armagh Banbridge Craigavon Borough. However the Navan Fort complex is on the tentative list of potential sites for World Heritage Site nomination.

As part of the Local Development plan preparation process, it is intended all existing LLPA and plan designations will be reviewed and additional LLPAs / ATCs identified as required.

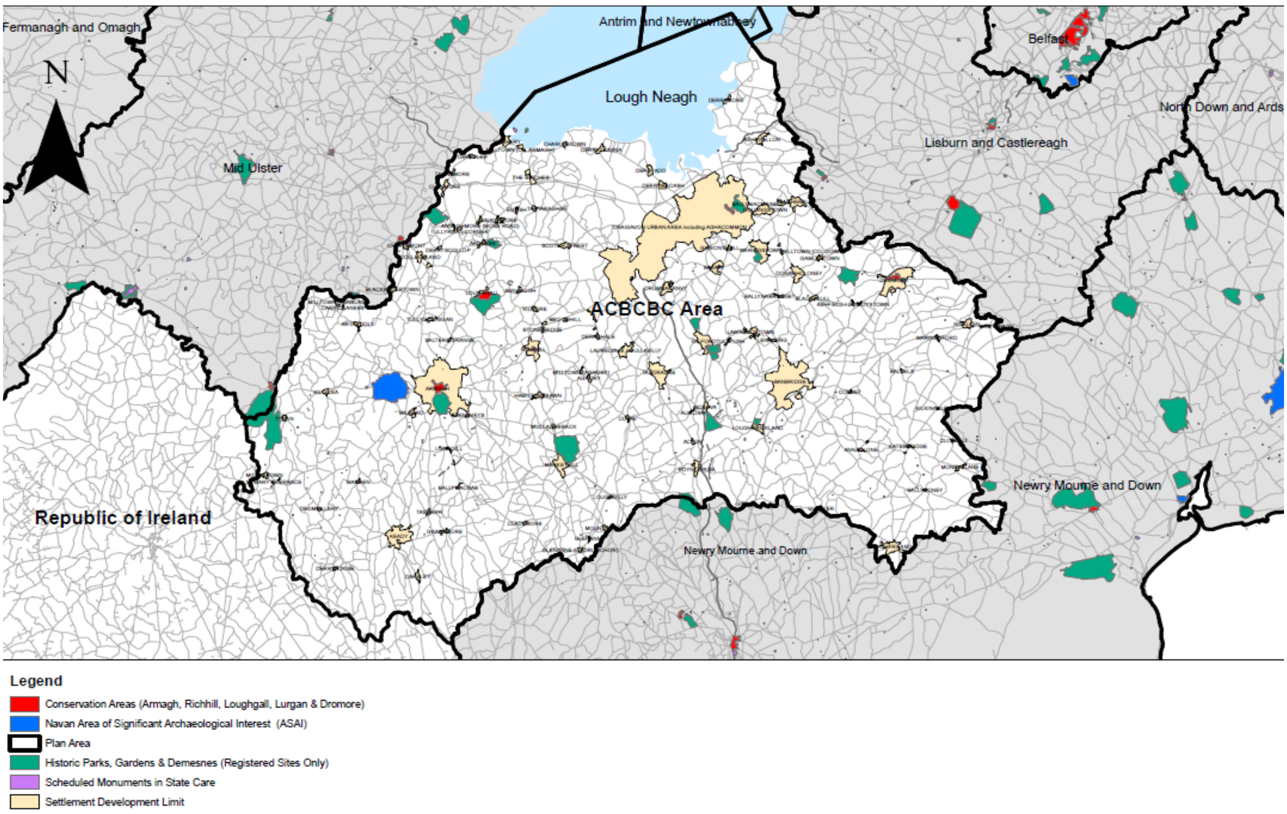


Figure 24. Key Built Heritage Designation 2016. Source: Planning.

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