



# Housing Demand and Composition Assessment Report

Large Scale Residential Development (LRD)  
Taylors Lane, Ballyboden, Dublin 16

**March 2023**

Prepared by: KPMG Future Analytics



**Future Analytics**

## Document review and approval

### Revision history

Version	Author	Date	Revision
V0.1	N. Conway, M. O'Connor, S.M.Purcell	10 March 2023	Initial Draft
V1.0	N. Conway, M. O'Connor, S.M.Purcell	16 March 2023	Report
V2.0	N. Conway, M. O'Connor, S.M.Purcell	29 March 2023	Report

### This document has been reviewed by

	Reviewer	Date reviewed
1	Stephen Purcell	29 March 2023
2		
3		
4		
5		

## Glossary

[BTR] Build-to-Rent

[CDP] County Development Plan

[CSO] Central Statistics Office

[DHLGH] Department of Housing, Local Government and Heritage

[ED] Electoral Division

[ESRI] Economic and Social Research Institute

[HNDA] Housing Need and Demand Assessment

[LA] Local Authority

[LECP] Local Economic and Community Plan

[LRD] Large-scale Residential Development

[MASP] Metropolitan Area Strategic Plan

[NPF] National Planning Framework

[NPO] National Planning Objective

[PRS] Private Rental Sector

[RTB] Residential Tenancies Board

[SDCC] South Dublin County Council

[SHD] Strategic Housing Development

# Table of Contents

i. Executive Summary	6
1. Introduction	9
1.1 Subject Site	10
1.2 The Proposed Scheme	10
2 Methodology	13
3 Policy Context	16
3.1 National Planning Framework: Ireland 2040 Our Plan	16
3.2 Eastern and Midland Regional Assembly-Regional Spatial and Economic Strategy	19
3.2.1 Growth Strategy	19
3.2.2 People and Place	19
3.2.3 Connectivity	20
3.2.4 Quality of Life	20
3.3 Guidelines for Planning Authorities on Sustainable Urban Housing: Design Standards for New Apartments (2020)	20
3.4 Key Policy Findings	21
3.4.1 South Dublin County Development Plan (2022-2028)	21
3.4.2 County Development Plan H1 Housing Objectives	22
3.4.3 SDCC Housing Need and Demand Assessment (HNDA) 2022	23
3.4.4 SDCC Housing Delivery Action Plan 2022-2026	25
4 Demographics and Changing Demand	26
4.1 Demographic Profile and Demand Analysis	26
4.2 Low Density Area	27

4.3	Housing Mix Profile	27
4.4	Walking Time Catchment Analysis	28
5	Demand and Supply of Housing across the County	31
5.1	Planning Pipeline	33
5.2	Application Pipeline Findings 10-minute and 15-minute Walking Time Catchments	34
5.3	Walking Catchment Area Findings	35
5.4	Non-Catchment Area Findings	36
6	Taylor's Lane: Assessment	38
6.1	BTR and Non-BTR Schemes in the Walking Time Catchments	39
6.2	Sales and Rental findings	39
7	Conclusions and Recommendations	42
7.1	Recommendations	43

## i. Executive Summary

This household demand composition report provides guidance on unit mix suitability in the area proximate to Taylors Lane, Ballyboden, Dublin 16 where a Large-Scale Residential Development is proposed. Specifically, the report addresses H1 Objective 12 of the South Dublin County Development Plan (2022-2028) (CDP) which requires a minimum of 30% 3-bedroom units per residential scheme. In response to commentary in the Council's Opinion, the report provides a justification for a reduction in 3-bedroom units in the scheme from 30% to 15%.

Its contents are framed within wider projections that there will be an additional 490k-540k people in the "Eastern and Midland Region (NPO 1b) by 2040 and that the over-65 age cohort in South Dublin will increase by 51% between 2016- 2031.

The report, therefore, analyses a range of topics. This includes relevant policy and objectives, along with the demographic profile and housing composition around the Taylors Lane site. It also examines the planning application pipeline data and relevant development activity in the local and wider catchment.

On consideration of the study findings, KPMG Future Analytics view is that the scheme will make a positive contribution in the following ways:

- The proposed development is consistent with the requirements of national, regional and local policy objectives. It represents an efficient use of a constrained brownfield site through densification (i.e. limiting urban sprawl) and will help ensure that future housing type needs are adequately addressed.
- Since the area's demographic and housing profile is over-saturated by large under-occupied two-story-homes, the proposed scheme will help rebalance the area's current housing variety in the following ways:
  - The proposed unit mix provides starter-home options to single people, couples and small families in this highly accessible, commuter area.
  - The proposed unit mix provides options to an older demographic who may consider 'down-sizing' within their local area.
- County and local planning application pipeline, sales and rental data indicates that:
  - there is a strong demand for one- and two-bedroom units in the area, with these units currently accounting for 86.6% of the active application pipeline
  - there will be a future shortfall in one- and two-bed units in the area (even considering the current granted applications).
  - The large majority of one- and two-bed units within the local Electoral Division catchment are dominated by a single Build-to-Rent (58.6%). This

BTR will add a more transient dimension to the otherwise settled community which could potentially be 'rebalanced' and offset by the Taylors Lane scheme once the units are on the open market.

Pending further research, other initial findings from the study include the following:

- As per the SDCC Housing Delivery Action Plan 2022-2026,<sup>1</sup> the developers 10% Part V contribution of 40 units will help the council to meet its wider social and affordable housing targets.
- The Taylors Lane area is a highly accessible area, being served by 16 bus stops and 5 routes within a 10-minute walking time catchment.
- Pending the forthcoming results of the 2022 Census, KPMG Future Analytics notes that there are limitations with the 2016 Census data which has informed the council's housing demand projections. This is in addition to the planning application pipeline data which suggests that there is currently an adequate supply of smaller units.

To ensure that the development provides the right supply to the market, KPMG Future Analytics recommends that the Planning Authority consider removing the 30% prescribed requirement per scheme. The council could instead consider applying the requirement to a general county level target. This will ultimately help ensure that unit mix requirements are appropriate to the local context.

---

<sup>1</sup> [Housing Delivery Action Plan \(2022-2026\) | SDCC](#)



1

# Introduction

# 1. Introduction

This report explores and analyses household demand composition and provides guidance on unit mix suitability in the area proximate to Taylors Lane, Ballyboden, Dublin 16 where a Large-Scale Residential Development (LRD) (comprising 402 no. units) is proposed.

The report is intended to provide a robust rationale and defence for the proposed scheme's unit mix. Specifically, this refers to the provisions of H1 Objective 12 of the South Dublin County Development Plan (2022-2028)<sup>2</sup> which requires a higher proportion (minimum of 30%) of 3-bedroom units than the Taylors Lane proposal (15.2% 3-bedroom units).

In doing so, it will address the relevant policies and objectives of local, regional and national plans and will provide a contextual analysis of the site profile. (i.e. the prevailing housing and demographic character).

The study also uses available housing demand and supply information. (including data in the CDP, the Housing Strategy Interim HNDA, social and affordable housing targets) in order compare the current situation with future projections. This also includes the local planning pipeline and development activity in the area, along with extracts from the forthcoming 2022 Census results, upon which future decisions by the council will be based.

---

<sup>2</sup> [County Development Plan 2022 - 2028 | SDCC](#)

## 1.1 Subject Site

The Taylors Lane site is in Ballyboden, Dublin 16 at the junction of Taylor’s Lane and Edmondstown Road. The site currently contains a three-storey institutional building and a series of associated small outbuildings/sheds in the western portion of the site with an area of overgrown landscaping to the east. Vehicular access is currently from the Edmondstown Road with a separate pedestrian gate in the northwest corner of the site off the roundabout in that location.

The net site at 3.5 hectares is quite large and is located at a strategic node on the north south axis towards Rathfarnham and the city centre and the east west access to Dundrum and Sandyford. The catchment is currently served by 16 bus stops and 5 different bus routes, meaning that the site is highly accessible for a commuter population.

## 1.2 The Proposed Scheme

The proposed Large-scale Residential Development (LRD) scheme has been designed to address the council’s policy and standards around Quality Design and Healthy Placemaking, Sustainable Movement, and Community Infrastructure and Open Space.

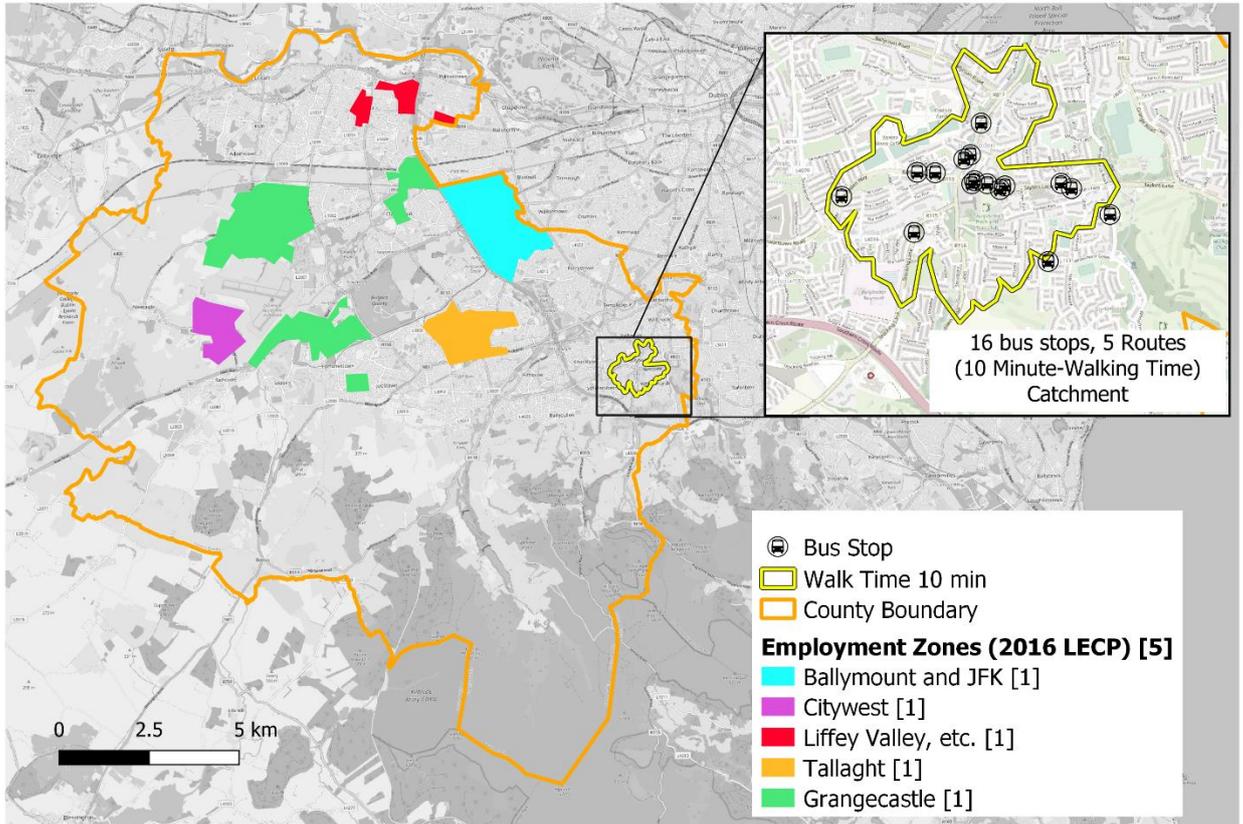
The scheme comprises of the construction of 402 residential units within 3 apartment/duplex blocks ranging in height from 2- 5 storeys and comprising of 33 no. 1-Beds; 309 no. 2-Beds; and 61 no. 3-Beds all with associated private balconies/terraces to the north/south/east/west elevations. Each block has a shared basement car park area serving all the buildings within a block.

The development will also consist of the provision of a new public park along Taylor’s Lane, 290 no. car parking spaces and c.1,029 no. cycle parking spaces, as well as revised vehicular access from Edmondstown Road and an emergency vehicular access off Taylor’s Lane along with provision of pedestrian/cyclist accesses to the site.

The scheme will also fulfil the developer’s Part V obligations by delivering approx. 40 apartment/duplex units (approx. 11 x 1 beds and 29 x 2 beds) over apartment blocks A, B and C. These ground-floor units will be especially suitable for candidates on the Councils medical priority list.

**Table 1: Taylors Lane Apartments - LRD Stage 3 - Schedule of Accommodation**

Unit Type	No. Units	%
1 Bed	39	9.7%
2 Bed	302	75.1%
3 Bed	61	15.2%
<b>Total</b>	<b>402</b>	<b>100.0%</b>



**Figure 1: Context Map of SDCC, the Subject Site, and 5 Established Employment Zones (2016 Local Economic and Community Plan)<sup>3</sup>**

<sup>3</sup> [Local Economic and Community Plan \(2016-2021\) | SDCC](#)



2

Methodology

## 2 Methodology

In developing this report and as detailed in subsequent sections, KPMG Future Analytics pursued a preliminary identification, collation, assessment, and review of baseline data inputs (socio-economic, population and housing). For comparison purposes, this includes a review of available data in the South Dublin County Development Plan (2022-2028) and the county's Housing Need Demand Assessment (HNDA) (2022).<sup>4</sup>

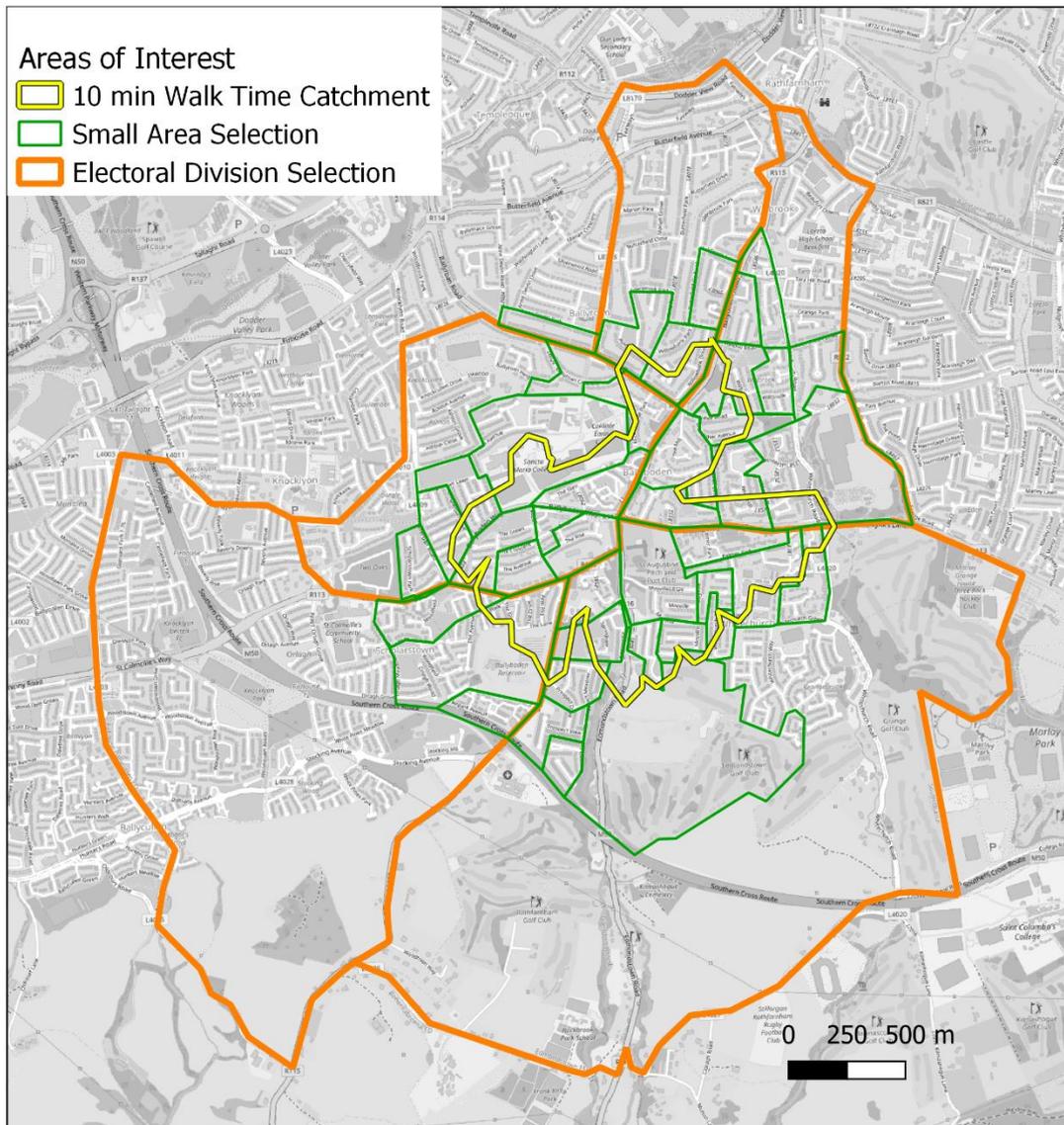
It also includes a review of the planning pipeline application details, and market and affordability information. To understand the demographic and market breakdown structure in the area, KPMG performed a detailed analysis of the 2016 Census data (along with available 2022 Census data). This included insights into the household composition, size, and tenure type.

In terms of the geographic scope of the Housing Demand and Composition Assessment study, KPMG Future Analytics uses several levels. For the immediate locality analysis, we used the required 10-minute walking catchment surrounding the proposed Taylors Lane site. The scope of the study was also extended to 15-minute walking time catchment to better understand the wider development activity in the area. For the additional contextual purposes, this scope was extended once again to include additional active planning pipeline applications within both the Electoral Division areas and the Dublin 16 postcode.

Although this study is not an affordability assessment, sales and rental data has been used for initial market analysis purposes, as well as to confirm some of the local activity conclusions which were derived. This information can be analysed in depth if required at a later stage.

---

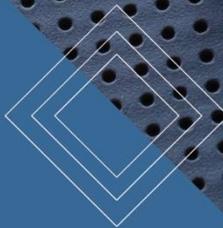
<sup>4</sup> [Housing Strategy and HNDA \(Appendix-11\) | SDCC](#)



**Figure 2: Electoral Divisions and Small Areas (Source: CSO)**

**Spatial Analysis of Census Data:** Electoral Divisions have been used for this analysis since they provide a longer temporal timeline and allow for intercensal change predictions. Small Areas, meanwhile, provides a similar range of data which can be analysed at a more granular level.

POLICY



3

Policy Context

### 3 Policy Context

This study of the Taylors Lane development has been framed within a wider regional and national relevant policy context and objectives alongside the local statutory planning policy context. This includes the National Planning Framework: Ireland 2040 Our Plan (2018) which projects a population increase and 550,000 additional homes by 2040. This is in addition to policies such as the Eastern and Midland Regional Assembly-Regional Spatial and Economic Strategy (RSES)<sup>5</sup> (2019) and the Greater Dublin Area (GDA) Transport Strategy (2022-2042) (National Transport Authority).<sup>6</sup>

Our policy analysis is framed against a backdrop of an on-going housing and cost of living crisis which has placed significant pressure on local authorities, home-owners and first-time buyers, as well as on developers. It is also framed against arguments that the 'vast bulk of missing housing' is apartment stock, with estimates that up to 200,000 apartments are needed in Dublin County.<sup>7</sup>

#### 3.1 National Planning Framework: Ireland 2040 Our Plan

The National Planning Framework (NPF)<sup>8</sup> is the Government's high-level strategic plan for shaping the future growth and development of the country to the year 2040. The core principles that run through the framework are that of sustainable development and the creation of sustainable high-quality communities. A key theme and recognised National Strategic Outcome of the NPF is Compact Growth. It is also recognised that carefully managing the sustainable growth of compact cities, towns and villages will require the consolidation of development within the footprints of existing urban settlements.

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

Key NPOs are detailed below, and it is firmly considered that the potential for residential development in Taylors Lane is consistent with them and their principles. A residential component to the scheme is a progressive and proactive proposition to secure additional population growth within the existing urban envelope of Dublin MASP, thereby supporting more sustainable residential densities and land-use intensities (NPOs 1b, 2a, 3a, 3b, 33 and 35).

---

<sup>5</sup> [RSES | Eastern & Midland Regional Assembly](#)

<sup>6</sup> [Greater Dublin Area Transport Strategy | National Transport](#)

<sup>7</sup> [Trinity College Dublin | Business Post](#)

<sup>8</sup> [Ireland 2040 Our Plan | National Planning Framework](#)

This supports the bolstering of critical mass to justify the provision of services and at a location close to public transport, employment opportunities and a host of services, amenities, and facilities. Importantly, the sustainable use and densification of urban land will have environmental benefits by protecting undeveloped lands, promoting active and public modes of transport, reducing greenhouse gas emissions, and improving air quality (NPOs 52 and 64).

- **NPO 1b:** “Eastern and Midland Region: 490,000-540,000 additional people i.e., a population of around 2.85 million.”
- **NPO 2a:** “A target of half (50%) of future population and employment growth will be focused in the existing five cities and their suburbs.”
- **NPO 3a:** “Deliver at least 40% of all new homes nationally, within the built-up footprint of existing settlements.”
- **NPO 3b:** “Deliver at least half (50%) of all new homes that are targeted in the five Cities and suburbs of Dublin, Cork, Limerick, Galway and Waterford, within their existing built-up footprints.”
- **NPO 33:** “Prioritise the provision of new homes at locations that can support sustainable development and at an appropriate scale of provision relative to location.”
- **NPO 35:** “Increase residential density in settlements, through a range of measures including reductions in vacancy, reuse of existing buildings, infill development schemes, area or site-based regeneration and increased building heights.”
- **NPO 52:** “The planning system will be responsive to our national environmental challenges and ensure that development occurs within environmental limits, having regard to the requirements of all relevant environmental legislation and the sustainable management of our natural capital.”
- **NPO 64:** “Improve air quality and help prevent people being exposed to unacceptable levels of pollution in our urban and rural areas through integrated land use and spatial planning that supports public transport, walking and cycling as more favourable modes of transport to the private car, the promotion of energy efficient buildings and homes, heating systems with zero local emissions, green infrastructure planning and innovative design solutions.”

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

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

**Table 2: Future Population Growth in Co. Dublin by LA, 2022-2026 (NPF High Migration Scenario).**

Area	2016 (CSO)	2022	2023	2024	2025	2026
Dublin City	554,554	606,984	613,969	620,604	627,211	633,465
Dún Laoghaire-Rathdown	218,018	240,513	243,855	247,069	250,310	253,606
Fingal	296,020	317,514	321,963	326,364	330,402	334,190
South Dublin	278,767	301,146	305,274	309,299	313,048	316,709
<b>Dublin (All LAs)</b>	<b>1,347,359</b>	<b>1,466,157</b>	<b>1,485,060</b>	<b>1,503,336</b>	<b>1,520,971</b>	<b>1,537,971</b>

**Table 3: Future Population Growth in Co. Dublin by LA, 2027-2032 (NPF High Migration Scenario).**

Area	2027	2028	2029	2030	2031	2032
Dublin City	639,394	645,121	650,639	656,072	661,310	666,548
Dún Laoghaire-Rathdown	256,700	259,816	262,918	265,901	268,876	271,805
Fingal	337,969	341,453	344,725	347,727	350,507	353,074
South Dublin	320,271	323,678	326,906	330,006	332,953	335,741
<b>Dublin (All LAs)</b>	<b>1,554,334</b>	<b>1,570,069</b>	<b>1,585,190</b>	<b>1,599,707</b>	<b>1,613,646</b>	<b>1,627,169</b>

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

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

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

### 3.2.1 Growth Strategy

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

**Objective 3.3:** *“Local authorities shall, in their core strategies, identify regeneration areas within existing urban settlements and set out specific objectives relating to the delivery of development on urban infill and brownfield regeneration sites in line with the Guiding Principles set out in the RSES and to provide for increased densities as set out in the ‘Sustainable Residential Development in Urban Areas’, ‘Sustainable Urban Housing; Design Standards for new Apartments Guidelines’ and the ‘Urban Development and Building Heights Guidelines for Planning Authorities’.”*

### 3.2.2 People and Place

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

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

### 3.2.3 Connectivity

**Objective 8.3:** *“That future development is planned and designed in a manner which maximises the efficiency and protects the strategic capacity of the metropolitan area transport network, both existing and planned and to protect and maintain regional accessibility.”*

### 3.2.4 Quality of Life

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

## 3.3 Guidelines for Planning Authorities on Sustainable Urban Housing: Design Standards for New Apartments (2020)

South Dublin County Council’s height and density requirements are contained within the Guidelines for Planning Authorities on Sustainable Urban Housing: Design Standards for New Apartments (2020).<sup>9</sup> The Guidelines were updated in 2022 to consider Build-to-Rent schemes. The specific planning policy requirements (SPPRs) of the Guidelines aim to support more sustainable development densities in recognition of the relationship between densification, sustainable communities, increased public transport and lower energy demands. According to the guidelines, where there is a majority of homes with three bedrooms or more within a short walking distance of any planned development, such consideration may normally be relevant for infill development in established metropolitan areas.

SPPR1 of the Guidelines specify that “Housing developments may include up to 50% one-bedroom or studio type units (with no more than 20-25% of the total proposed development as studios) and there shall be no minimum requirement for apartments with three or more bedrooms. Statutory development plans may specify a mix for apartment and other housing developments, but only further to an evidence-based Housing Need and Demand Assessment (HNDA), that has been agreed on an area, county, city or metropolitan area basis and incorporated into the relevant development plan(s).”

In terms of Implementation, the SPP1 specifies that the HNDA should demonstrate a requirement to incorporate 30% 3-bedroom units unless justified to cater for the housing needs of the existing and future population in the County with regards to Policy H1 Objective 13 and Section 12.5.2 of Chapter 12 Implementation and Monitoring set out objectives and requirements.”

---

<sup>9</sup> [Design Standards for New Apartments \(2018\) | Gov.ie](#)

## 3.4 Key Policy Findings

The following section seeks to determine if and how the proposed Taylors Lane scheme fits within the local, regional and national policy context. Our findings confirm that the Taylors Lane proposal aligns with these short- to long-term objectives.

### 3.4.1 South Dublin County Development Plan (2022-2028)

The South Dublin County Development Plan (2022-2028) is the main housing and growth strategy for the County. This Core Strategy quantitatively establishes a medium to long term strategy for the spatial development of the County and ensures alignment and consistency with the objectives and policies of the NPF and RSES.

This report has considered the CDP future housing supply and settlement policy considerations, the countywide decline in average household size and the growing need for more housing variety (incl. starter homes and 'down-sizing' options).

Key points on demographic and household changes from the CDP include the following:

- There will be an increase in the over 65 (51%) and 15-24 (30%) age-group from 2016- 2031.
- In terms of household composition, there is an increase in 'empty nest' homes across the county. Approximately 12% of current Council housing tenancies comprised solely of households of 1 or 2 persons, aged 55+, and with no other declared occupants (and living in 3 or 4-bedroom homes).

To adapt to these demographic trends, the CDP Housing Needs Demand Assessment highlights the need to change the current housing stock composition across the county. This is considering the plan's projections that 1, 2, and 3-person dwellings will account for 65% of all households (the largest cohort) in the County.

**Table 4: Household Size Cohort Forecast in South Dublin (2016-2028) – Historic Trends and Future Forecast (by % households)**

Person per Household	2016	2028
1-Person	17.8%	19.6%
2-Person	26.6%	27.9%
3-Person	18.3%	17.4%
4-Person	21.7%	21.4%
5-Person+	15.7%	13.7%

### 3.4.2 County Development Plan H1 Housing Objectives

In consideration of the current and future housing needs, the following section will outline how the proposed Taylors Lane LRD scheme will align with the key Housing (H1) Objectives contained within the SDCC County Development Plan (2022-2028). This is intended to help justify the need to remove the 30% requirement which is specified in the above-mentioned CDP and the Apartment Guidelines.

- **H1-3:** The Taylors Lane development will help ensure that adequate and appropriate housing is available to meet the needs of people of all incomes and needs, including older persons. This will be achieved through the delivery of an 'appropriate mix of unit types and tenures provided in appropriate locations and in a manner appropriate to their specific needs'.
- **H1-4:** The Taylor's Lane developer will meet its Part V commitments to help the 'urgent need for the increased provision of social and affordable housing to ensure that all its residents have access to a home which will be delivered through a selection of housing units to purchase or lease by the Council'.
- **H1-5:** In meeting its Part V obligations, the developer will ensure that a selection of housing units is available to purchase or lease by the Council and thereby promote the development of sustainable and mixed income communities.
- **H1-6:** In adapting its unit mix based on demand projections identified in this study (and with consideration to the Housing Strategy and interim HNDA forecasted future housing needs), the developer will contribute to the provision of adequate social and affordable housing over the Plan period.
- **H1-12:** With regards to the requirement for proposals to provide a minimum of 30% 3-bedroom units, the adapted proposed unit mix for the Taylors Lane development is based on our understanding of the proposed housing unit 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. This is demonstrated in later stages of this report.
- **H1-13:** The Taylors Lane will support the council's objectives to provide a mix of tenure types across the County and rebalance the catchments tenure mix which is currently over-proliferated by a single tenure (i.e. privately-owned 3+ bed houses) within the local area's 10-minute walking distance or Local Electoral Area.
- **H1-15:** As per the council's existing objectives for the Tallaght LAP lands and the City Edge area regeneration lands and in anticipation of the council's objective to develop a Local Area Plan for Ballyboden (and to build on the previous proposals for the Ballyboden village in the earlier CDP), the development will help ensure a balanced mix of tenure is provided.

### 3.4.3 SDCC Housing Need and Demand Assessment (HNDA) 2022

*Table 5: Household Size Cohort Forecast*

Persons per Household	2016	2028
1-person household	16.83%	17.68%
2-person household	27.13%	27.38%
3-person household	19.77%	19.88%
4-person household	20.29%	19.75%
5-person+ household	15.91%	15.85%

The South Dublin Housing Need and Demand Assessment (HNDA) which was published in 2022 provide insight into the intercensal change of housing demand in South Dublin over the 2021-2030 period). The purpose of the HNDA tool<sup>10</sup> is to:

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

According to the HNDA report:<sup>11</sup> produced by the council in late 2022, SDCC have stated:

- The projected growth in the 65 and over age group forms the largest change up to 2031. For South Dublin, 65 years and over is projected to increase by 56.4% (17,447 persons) by 2031. This is a continuation of the trend from previous years where the cohort increased by 33% (23,053 to 30,925) between 2011 and 2016 which is an increased rate from the 29% (17,861 to 23,053 persons) between 2006 and 2011 Census. In total, representing a 73% growth over the 10-year period of 2006 - 2016.
- The main informative piece for new development arising from the Housing Strategy and Interim HNDA is for a 30% benchmark on housing tenure type and

---

<sup>10</sup> [Guidance on the Preparation of a Housing Need and Demand Assessment | Gov](#)

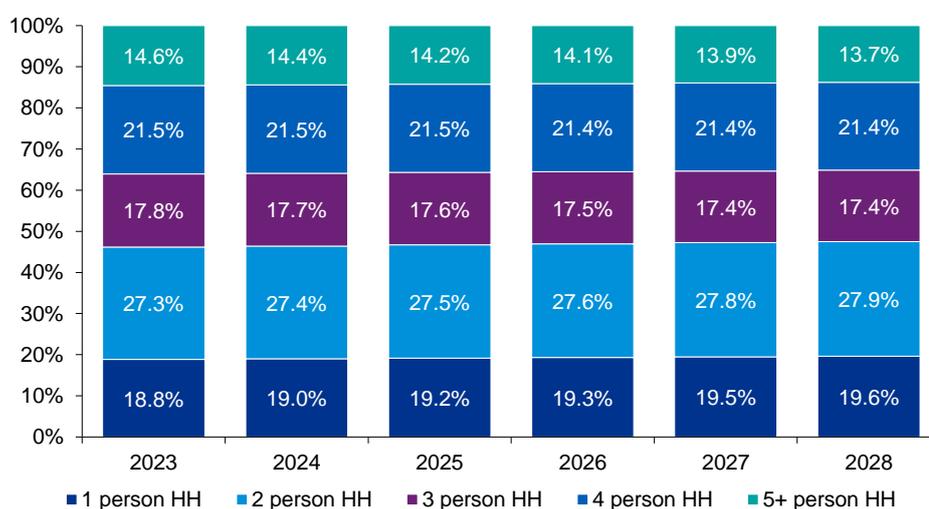
<sup>11</sup> [Housing Strategy and HNDA | SDCC](#)

a minimum of 30% 3-bed unit mix for the Development Plan period. This range is a benchmark as the Housing Strategy and Interim HNDA demonstrates that each part of the County has different needs and that deviation from the benchmark must be justified. Schemes which take people off the SDCC housing list are exempt.

As per the following tables, KPMG Future Analytics own assessment of the area predicts a higher proportion of one- and two-beds compared to the council's HNDA results. We also expect a lower proportion of 3 beds.

**Table 6: KPMG Future Analytics Forecasted Household Composition (2023-2028)**

Forecasted Composition	2023	2024	2025	2026	2027	2028
1 person HH	18.8%	19.0%	19.2%	19.3%	19.5%	19.6%
2 person HH	27.3%	27.4%	27.5%	27.6%	27.8%	27.9%
3 person HH	17.8%	17.7%	17.6%	17.5%	17.4%	17.4%
4 person HH	21.5%	21.5%	21.5%	21.4%	21.4%	21.4%
5+ person HH	14.6%	14.4%	14.2%	14.1%	13.9%	13.7%
<b>Total Households</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>



**Figure 3: Future Analytics forecasted housing composition**

### 3.4.4 SDCC Housing Delivery Action Plan 2022-2026

Considering the Part V contribution which the Taylors Lane development will make, it is important to address the relevant social and affordable housing policy. The national housing plan, Housing for All, includes a commitment for each local authority to produce a Housing Delivery Action Plan, setting out details of social and affordable housing delivery in the County for the period 2022-2026.

These plans require councils to show “how, where and when” social and affordable housing projects will be delivered to meet this Council’s target for social housing delivery and to contribute to overall housing delivery in Housing for All.

In terms of household size, the Housing Delivery Action Plan 2022-2026 for South Dublin County indicates the following:

- There will be an anticipated shortfall of one- and two-beds - in particular, that 82.7% of social-housing households now require one-or two-bedroom homes.
- Over 60% of existing social homes are three-bedroom homes, meaning there is a need to “rebalance delivery to align better with demand typology”.
- Meanwhile, larger households requiring four-bedroom or larger accommodation represent a small percentage of overall housing need (2.1%). Note: this point is also underline in the plan which refers to the Our Age Friendly County Strategy 2020-2024 – i.e. that the aging population (the largest priority need category for such accommodation (13%)) is projected to increase by 51% from 2016 to 2031.



## 4 Demographics and Changing Demand

The following section examines the demographic and housing demand profiles of the Taylors Lane catchment. Together with our analysis of the various policy documents such as the CDP, the NPF, the ESRI Analysis on Housing Demand, and the HNDA, KPMG Future Analytics finds that the scheme would be positive addition to the Ballyboden area. This is considering the oversaturation of larger housing units within an area, the aging demographic profile and subsequently the inadequate unit-mix options on the market.

Considering the volume and scale of developments across the wider economy since the 2016 Census, it is likely that these trends will become even more pronounced across the catchment in the future. For this reason, the 'blanket rule' for a minimum of 30% for schemes across the county could be considered inappropriate for the Ballyboden area.

### 4.1 Demographic Profile and Demand Analysis

The following section provides a breakdown of the key profile findings from the Taylors Lane study. It is based on an analysis of the Census 2016 data.

*Table 7: Local Demographic Profile from Census 2016*

South Dublin	2016
Workforce (15-64)	65.9 % (183,754)
Dependent Population: Young (0-14)	22.9%
Dependent Population: Old (65+)	11%

The key demographic findings within the 10-minute walking time catchment include the following:

- Households that have young children (Pre-adolescent) account for 29.4%.
- Retired or Empty Nest households account for 19.1%. This is indicative of the growing need for smaller 'down-sizing' housing options within the resident's locality.
- The residential population under the age of 35 is 45%
- The unemployed rate of the catchment's 15-65 age cohort population (as Principle Economic Status) is 4.8%. This indicates that there is a string local workforce and market for the Taylors Land units.
- The average commute time of the local population is approx.32 minutes, indicating that the Taylors Lane scheme is highly accessible for both workers and students.

- Of these commuters, 21.6% of residents either walk, cycle or take public transport to work.

**Table 8: Socio-economic Indicator Findings (10 min Catchment)**

10-minute Walking Catchment (2,525 pop.)	
Workforce (15-64)	57%
Dependent Population: Young (0-14)	19.8%
Dependent Population: Old (65+)	12.2%

## 4.2 Low Density Area

Based on our analysis of the 2016 Census data, the Taylors Lane area can be defined as low-density suburban in nature. Our findings include:

- The area is mostly comprised of large family houses (94.4%).
- In terms of private household composition (and size), one- and two-person households account for 19.5% and 26% respectively.
- The average year of construction of the residential building stock is 1979. 96% of these households were built before 2010.

**Table 9: Catchment Housing Profile (2016)**

Profile	Unit #	%
Housing Stock	2,451 Units	100%
Households in Rented Accommodation	270 Units	11%
Households in that are Owner-Occupied	2,024 Units	80.3%
Residential Vacancy Rate	115 Units	4.7%

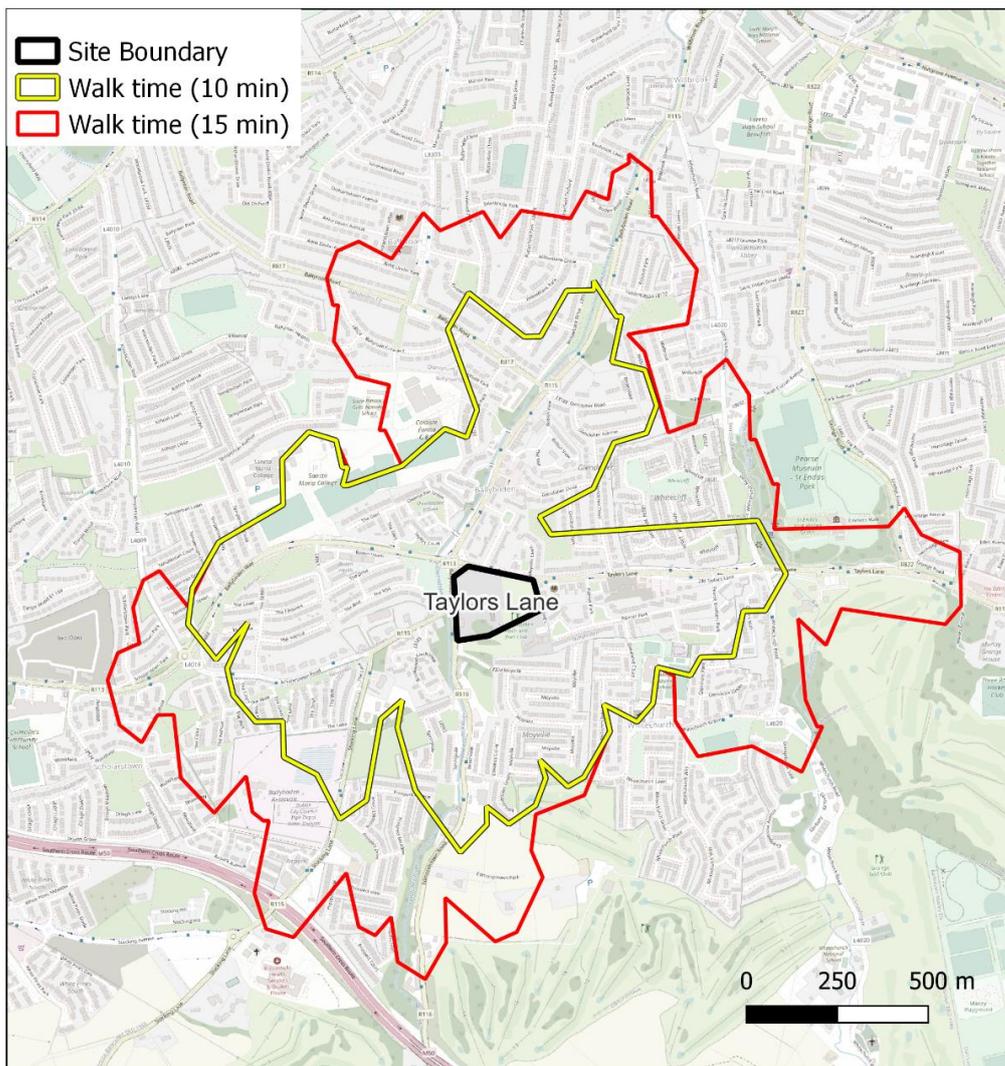
## 4.3 Housing Mix Profile

In terms of the accommodation type in the Taylors Lane area, KPMG Future Analytics find that there is a lack of tenure variety and availability to meet the needs of the age cohorts identified in the CDP. This includes the following:

- Family houses vastly outnumbered apartments (94.4% vs 4.9%).
- Regarding housing tenure, 81.7% of houses were owner-occupied, while social housing and private rentals accounted for only 15.7% combined (9.9% and 5.8% respectively).
- The dwellings occupancy rate of the area is 96.1%.

## 4.4 Walking Time Catchment Analysis

The population of the immediate 10-minute catchment is 2,525, growing to 4,008 in the 15-minute catchment.



**Figure 4: 10-minute and 15-minute walking catchment around Taylors Lane Site**

The following section provides a comparison between the immediate 10-minute walking time catchment (as per the SDCC study area requirements) and an extended 15-minute walking time catchment area. As per the next section, this wider contextual scope also allows for consideration of major housing developments which will influence the housing

demand and composition of the wider area. As demonstrated in the following census profile, there is minimal difference between the two in the distribution of key themes.

**Table 10: Household Composition Breakdown**

Breakdown	10 Min	15 Min
Households with Children	40.0%	41.7%
Households with Young Children (Pre-Adolescent)	29.4%	30.8%
Households Retired or Empty Nest	19.1%	19.9%

Reflecting the aging demographic within the local context, the above table indicates that the proportion of ‘empty nester’ homes increases as one moves further from the Taylors Lane site. This increases from 19.1% in the 10-minute walking catchment to 19.9% in the 15-minute walking catchment.

**Table 11: Persons per Household Breakdown**

Persons per Breakdown	10 Min	15 Min
1 Person Household	19.0%	19.5%
2 Person Household	25.8%	26.0%
3 Person Household	18.5%	17.9%
4 Person Household	21.0%	21.4%
5 Person Household	15.7%	15.2%
<b>Total</b>	<b>2,525</b>	<b>4,008</b>

Reflecting the suburban nature of the local context, the above table indicates that the proportion of one and two person households increases as one moves further from the Taylors Lane site. This increases from 44.8% in the 10-minute walking catchment to 45.5% in the 15-minute walking catchment.

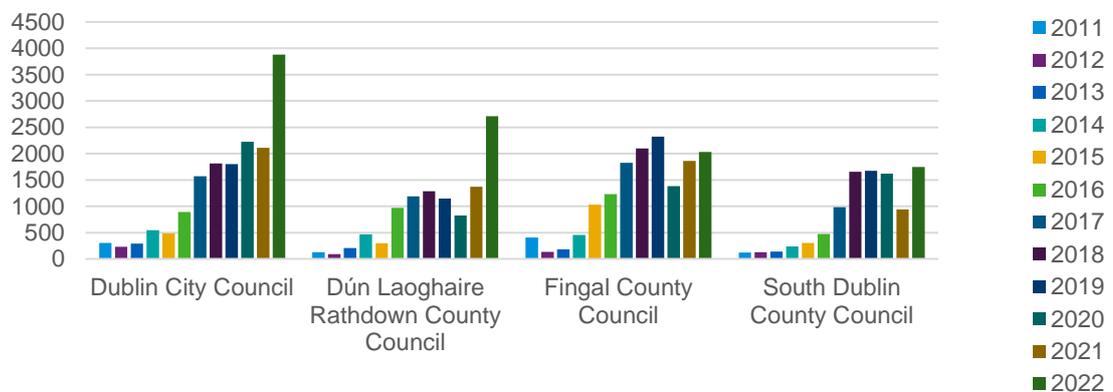


5

Demand and  
Supply of Housing  
across the County

## 5 Demand and Supply of Housing across the County

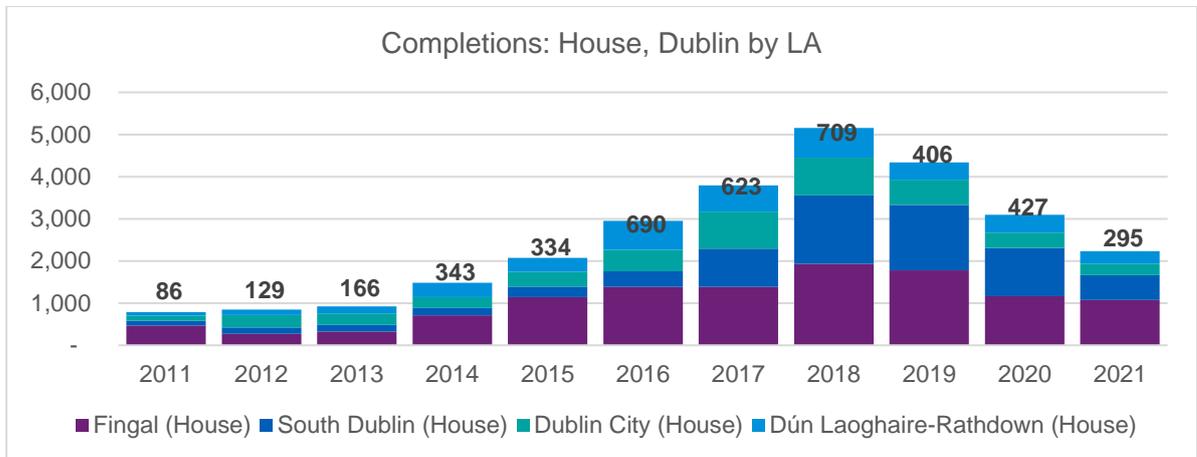
This section provides an overview of the planning pipeline and the potential supply issues across both the county and walking time catchments. It builds on our findings that one and two-persons households will increase their percentage share by 2028 (from 44% to 45%) while 4-person and 5-person+ household will reduce (from 36.2% to 35%). It assumes that a smaller proportion of 4 person households in the future will result in a corresponding increased need for 1- and 2-bedroom units.



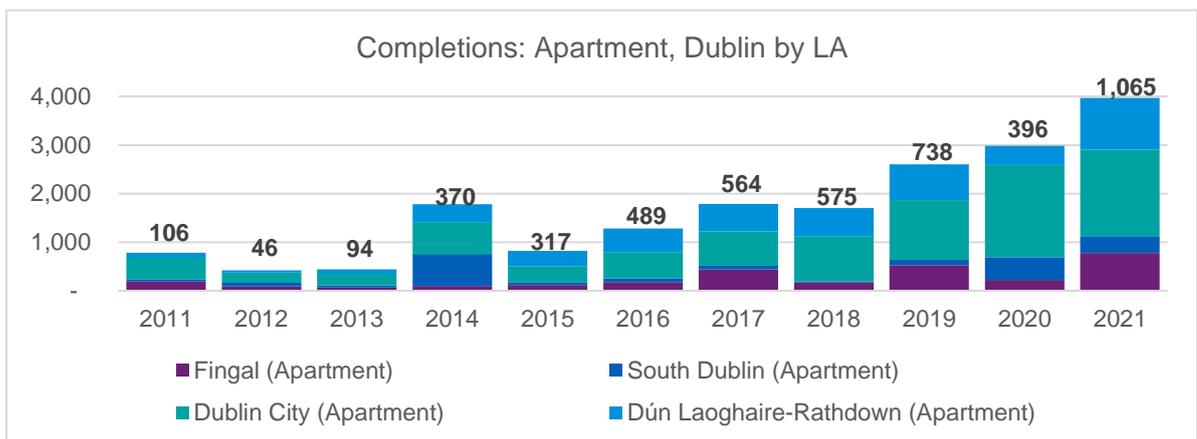
**Figure 5: Historic Supply: Housing Completions 2011 – 2020 By Apartment and House Type (Source: CSO)**

KPMG Future Analytics findings into housing completions include the following:

- Between 2011 and 2022, 85% of all completions were houses and only 15% were apartments (see figure 6).
- Apartment completions in South Dublin County rose from 7% in 2019 to 32% in 2022.
- Since 2019, 4,500 houses have been completed compared to 1,483 apartments.
- Development completion rates in South Dublin County have only marginally increased since 2018.



**Figure 6: Co. Dublin House Completions by LA, 2011-2021.**



**Figure 7: Co. Dublin Apartment Completions by LA, 2011-2021.**

According to the above graph, apartments take a significantly larger market share in other counties, even typically 'suburban' counties such as Dun Laoghaire-Rathdown.



**Figure 8: SDCC - Proportion of Housing Completions by Local Authority 2011 - 2022**

## 5.1 Planning Pipeline

The study of the planning application pipeline by KPMG Future Analytics indicates that there is a strong demand for smaller units across the county. According to our initial analysis:

- 58.6% of units within the active planning pipeline for SDCC are for one- and two-bed units.
- In terms of the ‘completed’ application pipeline, there are a total of 1992 units fully completed. Of this figure, one- and two-beds account for only 34.5%

While the above figures indicates that there is a significant demand for smaller units (which will need to be considered alongside further market and census conclusions), there is also a significant shortfall in completions which needs to be addressed and accelerated.

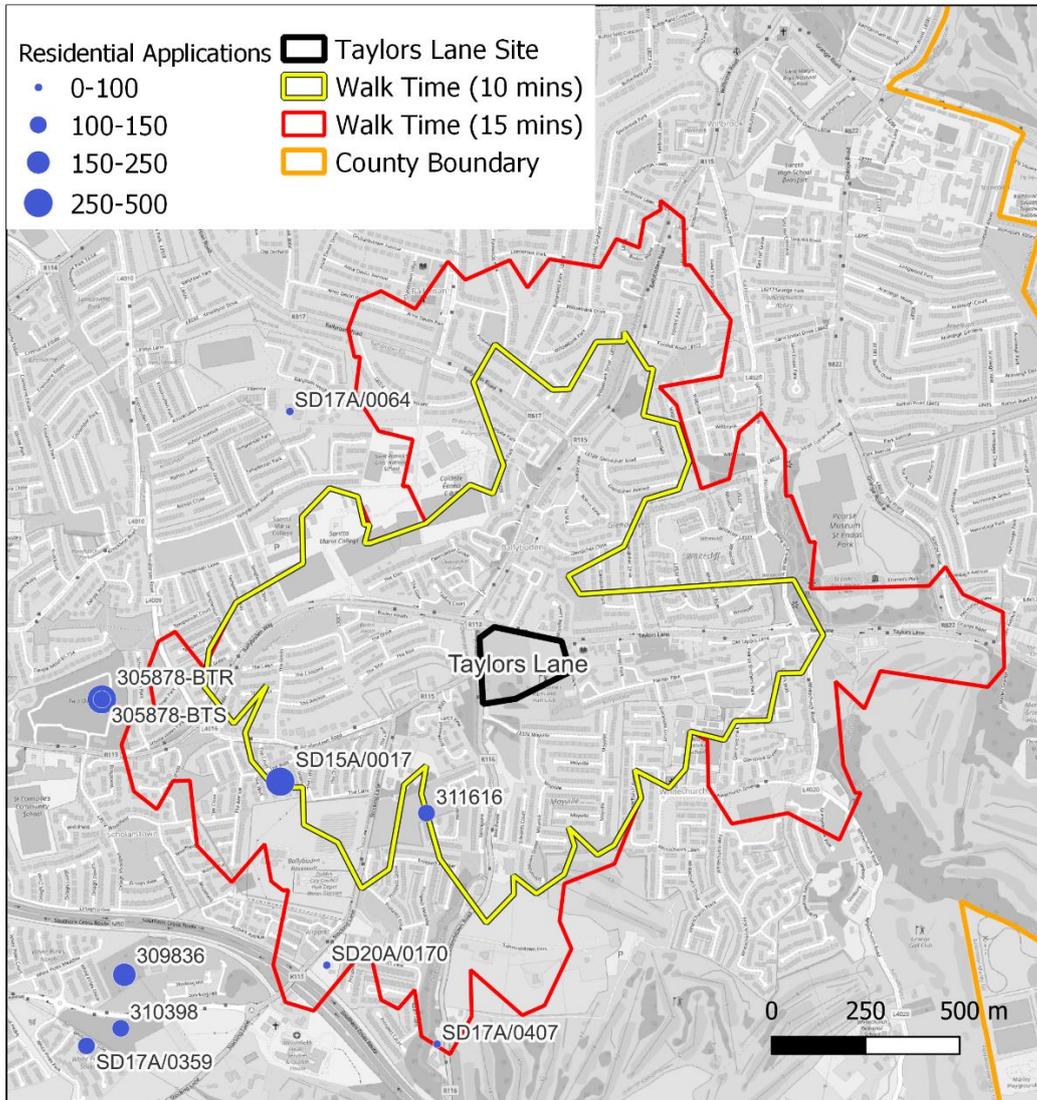
**Table 12: Residential Planning Pipeline (March 2023)**

Area	Units		%	1 Bed	2 Bed	3 Bed	4 Bed	5 Bed
SDCC	10,878	-	100	21.6	37	32.9	7.6	0.2
Taylor's Lane	1,143	-	100	35.5	50.7	11.1	1.9	0.8
		% of LA	11	17.3	14.4	3.5	2.7	42.9

## 5.2 Application Pipeline Findings 10-minute and 15-minute Walking Time Catchments

*Table 13: Relevant Developments as per Pipeline Data (subset of above table)*

Name		Status	Units	Bed1	Bed2	Bed3	Bed4	Bed5	15min	10min
Scholarstown Rd (BTR)	305878-BTR	Commenced	480	246	234	-	-	-	In	Out
Scholarstown Rd (Non-BTR)	305878-BTS	Commenced	110		55	55	-	-	In	Out
Stocking Lane (Nth)	311616	Granted	131	29	61	21	11	9	In	In
Stocking Lane (Sth)	SD20A/0170	Fully Commenced	24		8	8	8	-	In	Out
Scholarstown Rd Rathfarnham	SD15A/0017	On Market	317	14	62	124	102	15	In	In
White Pines, Stocking Ave (Nth)	309836	Granted	241	93	148	-	-	-	Out	Out
White Pines, Stocking Ave (Sth)	310398	Granted	114	32	53	29	-	-	Out	Out
White Pines, Stocking Ave (Sth)	SD17A/0359	On Market	99	0	0	38	47	14	Out	Out



**Figure 9: Significant Residential Planning Applications in the Planning Pipeline (Feb 2023)**

### 5.3 Walking Catchment Area Findings

An analysis of planning consents data for the Taylor's Lane walking time catchments indicates that there is a cumulative 1,100 units across 7 schemes in the relevant Electoral Divisions as of February 2022. The following points include key findings from our 10-minute and 15-minute walking time catchment analysis.

- The Taylor's Lane Area contains 17.3% of consented 1-bed and 14.4% of consented 2-bed units in SDCC. Compared to the rest of the county, the area has a 20% greater demand for these units.

- Of the c. 1,100 units in the area 700 (63%) are in an un-commenced status.
- 1 and 2-bed units account for 86.6% of units in the active application pipeline. It is estimated that only 14% of units available on the market are 1 or 2 beds.
- The Scholarstown BTR scheme accounts for the majority of 58.6% of 1- and 2-bedroom units in the walking time catchment.

## **5.4 Non-Catchment Area Findings**

As illustrated in the above table, the 'White Pines' schemes are outside both study catchments (10 and 15-minute). These three applications have been included in our wider contextual study since 326 (72%) of the 454 units are one- and two-bed units. This is indicative of the strong demand for smaller units across the wider context.

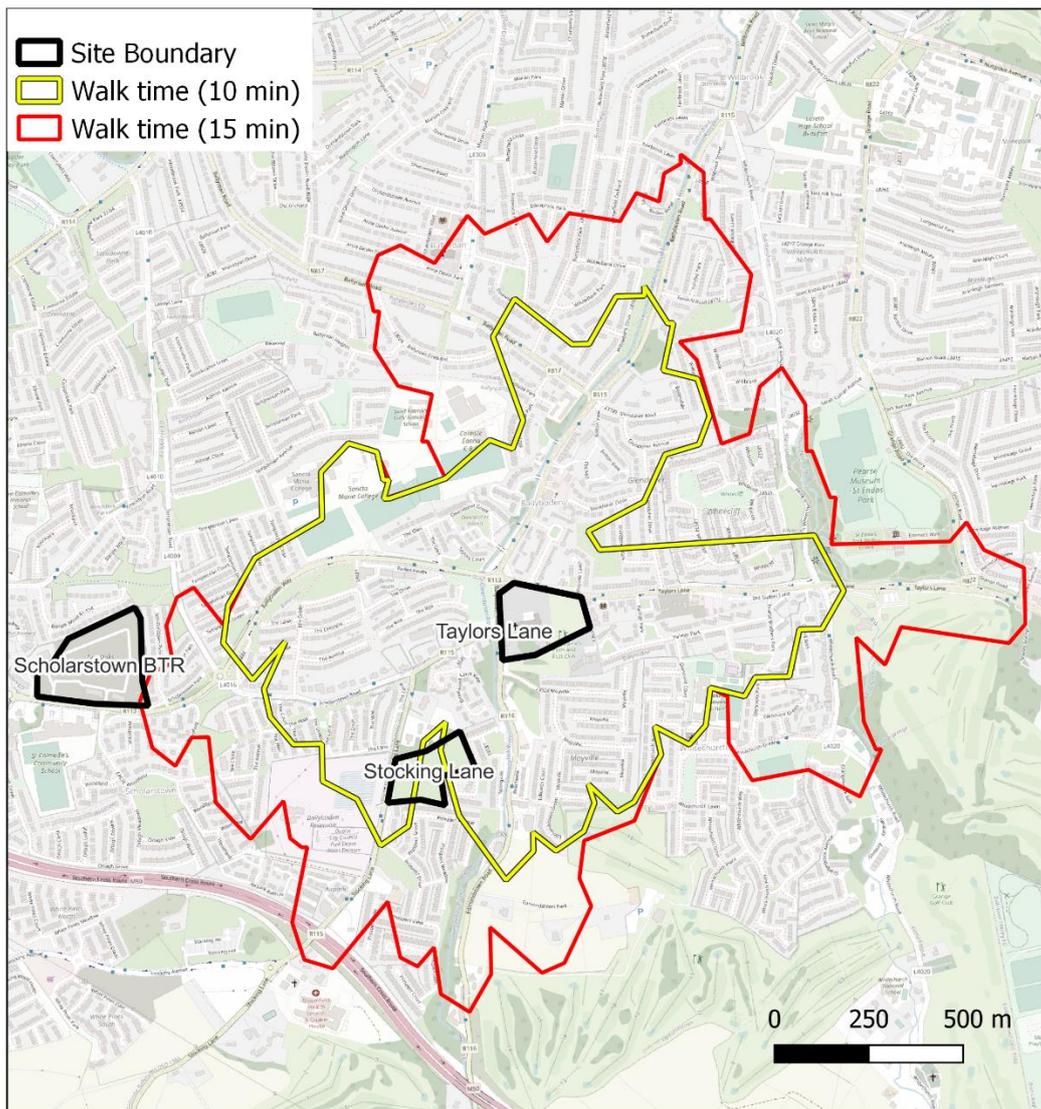


6

# Taylor's Lane: Assessment

## 6 Taylors Lane: Assessment

The following section highlight some notable developments of significance within the 10-minute and 15-minute walking time catchments, along with key sales and rental findings. These findings are intended to highlight the importance of the Taylors Lane development and to support the case for reducing the required unit mix within the scheme.



**Figure 10: Overview Map of Granted Developments in the 10- and 15-minute walking time catchments**

## 6.1 BTR and Non-BTR Schemes in the Walking Time Catchments

Due to its significance and size, KPMG's Future Analytics has incorporated an analysis of the implications of the Build-to-Rent scheme on the wider area. The no-completed Scholarstown Build-to-Rent scheme, which intersects the 15-minute walking time catchment, consists of 590 apartment units and accounts for the vast majority of the one and 2 bed units in the pipeline for the area (58.6%). Some key findings from this include:

- The scheme (which does not specify itself as age friendly housing) will, due to its BTR profile, target a more transient tenant. In comparison, the Taylors Lane scheme could potentially contribute to the development of a more settled community if the units eventually go on the open market.
- The Strategic Housing Development (SHD) activity skews the pipeline analysis results to indicate that the area has sufficient one- and two-bed units when, in fact, these are mostly limited to one single application which is already 'online'.
- Excluding the 480 BTR units of the scheme (i.e. 246 1-bed, 234 2-bed units), would leave only 55 2-beds and 55 3-beds for sale within this scheme. The implications of excluding BTR from the analysis means that the proportion of 1-bed and 2-bed units in the 'planning pipeline' for sale drops from 36% to 25%. In addition, the proportion of 3+ bed units would increase from 13% to 22% of consented units.

## 6.2 Sales and Rental findings

According to our study findings, there was an increased proportion of sales in the Taylors Lane Electoral Division walking time catchment area from 2016/2017 onwards (primarily new build). This indicates that there could be substantial changes to demographic data once 2022 census is released.

Considering the 10-minute and 15-minute walking time catchment activity and the current provision in the area, we, therefore, expect there to be more 3 beds in the area and a subsequent increased demand for one- and two-beds approvals. Furthermore, pending a review of the applications, the drop in new build price in the walking time catchment for 2022 indicates that the sales are primarily apartments. The majority of new-build sales refer to those from the 317 unit mixed-use development in Scholarstown Road, Rathfarnham, Dublin 16 (planning ref. SD15A/0017) where 76% of units are 3+bed. This supports the argument that the area is pre-dominantly 3+beds.

The current rental situation in Ireland indicates that the market shift from owner-occupier towards the private rental sector (PRS) is now being followed by an exit of landlords from the market, leading to major supply shortages. KPMG Future Analytics analysis of the

Rental Tenancy Board (RTB) Active Tenancy Register<sup>12</sup> for D16 indicates that there is a high demand for 2 bed units.

Including the adjoining Knocklyon townland to the west of Ballyboden, close to 50% of all active tenancies are either 1 or 2 bed units. In addition, DAFT<sup>13</sup> and CSO data focused on the Rathfarnham (D16 Postcode) indicates an approximate 20% increase in rents and a high market demand.

**Table 14: Rental Data at Postcode Level – Dublin 16 (3-year intervals)**

Area	2007	2010	2013	2016	2019	2022	Grand Total
<b>Knocklyon</b>	<b>€1,429</b>	<b>€1,125</b>	<b>€1,161</b>	<b>€1,478</b>	<b>€1,766</b>	<b>€1,981</b>	<b>€1,415</b>
All bedrooms	€1,429	€1,126	€1,160	€1,454	€1,803	€1,981	€1,451
One bed							
Two bed		€1,023	€1,003		€1,616		€1,262
Three bed		€1,134	€1,149	€1,433	€1,842		€1,384
Four plus bed		€1,262	€1,375	€1,753			€1,486
<b>Rathfarnham</b>	<b>€1,599</b>	<b>€1,129</b>	<b>€1,174</b>	<b>€1,510</b>	<b>€1,861</b>	<b>€2,007</b>	<b>€1,490</b>
All bedrooms	€1,510	€1,147	€1,188	€1,528	€1,854	€2,042	€1,509
One bed		€795	€838	€1,083	€1,312	€1,499	€1,060
Two bed	€1,371	€1,042	€1,072	€1,387	€1,658	€1,719	€1,345
Three bed	€1,493	€1,185	€1,247	€1,575	€1,943	€2,127	€1,560
Four plus bed	€2,020	€1,478	€1,522	€1,976	€2,539	€2,647	€1,947
<b>Grand Total</b>	<b>€1,565</b>	<b>€1,128</b>	<b>€1,170</b>	<b>€1,500</b>	<b>€1,827</b>	<b>€2,002</b>	<b>€1,464</b>

<sup>12</sup> [Check The Register | RTB](#)

<sup>13</sup> [Rathfarnham | Daft.ie](#)



7

# Conclusions and Recommendations

## 7 Conclusions and Recommendations

This report addresses South Dublin County Council's opinions around the Taylors Lane, Large-Scale Residential Development (LRD) scheme in Ballyboden, Dublin 16. Specifically, it is intended to provide a robust rationale and defence for the proposed scheme's unit mix of 15.2% 3-bedroom units. The report is focussed specifically on the provisions of H1 Objective 12 of the County Development Plan (2022-2028) which requires a higher proportion (minimum of 30%) of 3-bedroom units.

In terms of the geographic scope of the Housing Demand and Composition Assessment study, KPMG Future Analytics uses several levels, each of which reveal insights into the local and wider housing demand and composition. Therefore, in framing its key arguments, the scope of the report addresses the council's local and wider plan and policy-making priorities, the key housing demand and supply considerations. It also addresses the demographic and housing profile and the planning and development activities within the surrounding walking time catchment. In doing so, the report thereby comprehensively assesses the overall suitability of the proposal's tenure mix.

The key report findings include the following:

- **Local, Regional and National Policy:** the National Planning Framework, the RSES and the CDP recognise and highlight the need to address the ongoing housing issues through suitable housing policy. This includes accommodating an additional 490k-540k additional population in the "Eastern and Midland Region (NPO 1b) by 2040. According to the CDP the over-65 age cohort will increase by 51% between 2016- 2031
- **Meeting the housing requirements** of the countries aging population whilst limiting urban sprawl (through densification) is, therefore, a core priority in both documents. This proposed scheme represents a highly efficient use of an otherwise constrained yet highly accessible brownfield site.
- **Local profile and Variety:** within both the 10-minute and 15-minute walking time catchments of the Taylors Lane site, there is an over-saturation of a single housing type. Older, larger family homes largely occupied by 'empty nesters' (19.1% of households) means that there is a lack of variety in the area. This includes younger people who may be looking for smaller starter homes from which they can commute to and from work. It also includes older members of the community who may wish to 'down-size' and resettle in the locality. Currently, there is an acute shortage of appropriate one- and two-bed units in the area, like those contained in the proposed Taylors Lane scheme. Based on adjustments to the Census 2016 figures (and subject to local development over the interim period), the proportion of apartments in the area would change from 5.6% to 18.5% if the scheme were to be developed.
- **Planning Pipeline:** compared to the CDP projections, the local planning pipeline indicates that there is a much stronger demand for 1- and 2-bedroom units (accounting for 86.6% of units in the active application pipeline).

- **Scholarstown BTR SHD:** of the 3 larger granted SHD developments in the 10-minute and 15-minute walking time catchments, one development (Scholarstown SHD in the 15-minute catchment) makes up a large proportion of the one- and two-bed units in the application pipeline. The 590 unit development accounts for most of the 1- and 2-bed units in the pipeline for the area (58.6%).
- The near-exclusively Built-to-Rent development raises other issues. Firstly, the near-exclusively BTR element works against the council's objective of developing settled, vibrant communities since it attracts more transient rental tenants. Secondly, excluding these BTR (for sale) units from the analysis means that there is an even larger proportion of 3 beds in both the pipeline and in the locality.

## 7.1 Recommendations

Following a detailed analysis of available data, it is KPMG Future Analytics view that the unit-mix requirements of the Council's Development Plan and Apartment Guidelines are incompatible with the current and future market demand. Therefore, we believe that the council should re-consider and deviate from these requirements. This is considering the aging demographic and lack of available smaller housing options in the walking time catchment, as well as the transient influence of the BTR development on the local community character.

For the above reason, our analysis of the 10-minute and 15-minute walking time catchment indicate that the wider area needs a 'rebalance'. Therefore, the key recommendations in this document are as following:

- the council consider the positive contribution which the Taylors Lane scheme will make to meeting the council's housing delivery targets as well for offsetting the more 'transient' nature of the BTR development's target market.
- the council consider adopting a more flexible approach to its tenure mix requirements, to change the 30% minimum 3-bed unit rate from a per-scheme basis to a general county level target.
- the council consider the temporal accuracy of the application pipeline results – in particular, the lag that is likely to exist between the application pipeline and sales figures.
- likewise, that the council questions the accuracy of the Census 2016 data upon which it is basing many of its important housing supply decision. Until superseded by 2022 Census data, it is the view of KPMG Future Analytics that the Census 2016 data is restrictive for decision-making purposes.

## Contact us

### Stephen Purcell

#### KPMG Future Analytics

T +353 87 6344507

E [stephen.purcell@kpmg.ie](mailto:stephen.purcell@kpmg.ie)

### Niall Conway

#### KPMG Future Analytics

T +353 87 1308149

E [niall.conway@kpmg.ie](mailto:niall.conway@kpmg.ie)

### Martin O'Connor

#### KPMG Future Analytics

T +353 87 7441291

E [martin.oconnor@kpmg.ie](mailto:martin.oconnor@kpmg.ie)

## [www.kpmg.com](http://www.kpmg.com)

© 2023 KPMG, an Irish partnership and a member firm of the KPMG global organization of independent member firms affiliated with KPMG International Limited, a private English company limited by guarantee. All rights reserved.

The information contained herein is of a general nature and is not intended to address the circumstances of any particular individual or entity. Although we endeavour to provide accurate and timely information, there can be no guarantee that such information is accurate as of the date it is received or that it will continue to be accurate in the future. No one should act on such information without appropriate professional advice after a thorough examination of the particular situation.

The KPMG name and logo are registered trademarks of KPMG International Limited ("KPMG International"), a private English company limited by guarantee.