# Glasgow and the Clyde Valley Housing Market Partnership

# Housing Need and Demand Assessment

**Final**

June 2011

HNDA

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## Foreword

This is the first comprehensive Housing Need and Demand Assessment (HNDA) for the Glasgow and the Clyde Valley (GCV) Area – covering all housing tenures across the eight constituent Council areas. Its preparation has required new ways of joint working to integrate planning and housing perspectives, resulting in the establishment of the GCV Housing Market Partnership (HMP).

The HNDA has to serve a range of purposes. As well as being a Background Report (BR12) to the Strategic Development Plan, it also provides important supporting evidence for the eight local authorities' Local Housing Strategies and Local Development Plans. Meeting these different requirements has involved complex analysis, at different geographical scales and different projection periods, both in terms of projected demand for private or market housing (owner occupied and private rented), and projected need for affordable housing (social rented and intermediate sector).

A key component of this assessment is the modelling of affordability as a means of identifying the tenure of projected households. Independent consultants were appointed to undertake this specialised component of the analysis, in the process developing an innovative and more sophisticated behavioural model of the housing system. The GCV HMP is satisfied that the approach adopted in preparing the HNDA is consistent with the spirit of the Scottish Government's published HNDA Guidance.

The HNDA was published as a working draft, which supported the SDP Main Issues Report, in November 2011 and has been re-drafted in the light of comments and suggestions received from a number of stakeholder organisations and interested groups. Further amendments were made to respond to recommendations from the Scorttish Government's Centre for Housing Market Analysis (CHMA) on an initial submission in April 2011. I would put on record my thanks to them all for taking the time to prepare thoughtful and useful responses which have resulted in a much-improved document. The HNDA was assessed as 'robust and credible' by the CHMA on 21st June 2011.

Preparation of the HNDA has been a complex undertaking, made all the more challenging by the economic downturn. I should like to express my appreciation to my housing and planning colleagues in the eight authorities, and in the GCV team, for their expertise and commitment throughout the process.

The HNDA is an important step in planning for the homes which households in the GCV area will require. The next challenge is to get them built and occupied!

Fergus J Macleod

Chair: GCV Housing Market Partnership

Planning Policy and Property Manager,
Regeneration and Planning,
Inverclyde Council

June 2011

## Acknowledgements

The Housing Need and Demand Assessment has been produced following a complex process, and is underpinned by a considerable amount of research and analysis. Many organisations have made important contributions in terms of information and advice. The Glasgow and the Clyde Valley Housing Market Partnership wishes to record its gratitude to the staff of the following organisations for their time and commitment, whether in providing data or offering of their experience and insight. Without their cooperation it would not have been possible to produce such a comprehensive assessment.

East Dunbartonshire Council
East Renfrewshire Council
Glasgow City Council
Inverclyde Council
North Lanarkshire Council
Renfrewshire Council
South Lanarkshire Council
West Dunbartonshire Council
Glasgow and the Clyde Valley Strategic Development Planning Authority
National Records of Scotland: Household Estimates & Projections
Scottish Government: Centre for Housing Market Analysis
Scottish Government: Housing Investment Division
Scottish Government: Statistics Group
The Scottish Housing Regulator
Access Apna Ghar Housing (part of Sanctuary Group)
Age Scotland
Arklet Housing Association
Association of Circus Proprietors of Great Britain
Council of Mortgage Lenders
Clyde Gateway Urban Regeneration Company
Equality Scotland (an initiative of Trust, Hanover Scotland and Bield HAs)
Glasgow Centre for Population Health
Glasgow & West of Scotland Forum of Housing Associations
Govanhill Housing Association
Homes for Scotland
Inclusion Scotland
Ownership Options Scotland
Positive Action in Housing
Scottish Association of Landlords
Scottish Federation of Housing Associations
Scottish Women’s Aid
Showmen’s Guild of Great Britain (Scottish Section)
Southside Housing Association
West of Scotland Regional Equality Council
Optimal Economics
Oxford Economics
Tribal Group
David Johnston (formerly of Glasgow City Council)
Alison More (formerly of South Lanarkshire Council)
Sheena Stevely (formerly of Renfrewshire Council)

## Quick Guide to 'Core Outputs'

| Core Output | Description | Location within the HNDA |
|---|---|---|
| **1** | Estimates of current dwellings in terms of size, type, condition, tenure, occupancy and location | Technical Appendices TA02 *Current Dwellings/ Stock Profile* |
| **2** | Analysis of past and current housing market trends, including balance between supply and demand in different housing sectors and price/affordability. Description of key drivers underpinning the housing market | Chapter 4: Market Commentary |
| **3** | Estimate of total future number of households | Chapter 5: Housing Supply and Demand/ Need Comparison; TA06 *Review of Supply and Demand/Need for Housing* |
| **4** | Estimate of household groups who have specific housing requirements, e.g. families, older people, minority ethnic groups, disabled people, young people, etc. | Chapter 6: Household Groups with Specific Housing Requirements |
| **5** | Estimate of current number of households in housing need | Chapter 5: Housing Supply and Demand/ Need Comparison; TA03 *Gross Current/Backlog Need* provides 'gross' figures after discounting for in-situ solutions; TA06 *Review of Supply and Demand/Need for Housing* |
| **6** | Estimate of future households that will require affordable housing | Chapter 5 Housing Supply and Demand/ Need Comparison; TA06 *Review of Supply and Demand/Need for Housing* |
| **7** | Estimate of future households requiring market housing | Chapter 5 Housing Supply and Demand/ Need Comparison; TA06 *Review of Supply and Demand/Need for Housing* |
| **8** | Estimate of total future households requiring either affordable or market housing | Chapter 5 Housing Supply and Demand/ Need Comparison; TA06 *Review of Supply and Demand/Need for Housing* |

## Abbreviations used in the text

| | |
|---|---|
| **ASHE** | Annual Survey of Hours and Earnings |
| **CACI** | CACI Paycheck – commercially developed income dataset |
| **CHMA** | Centre for Housing Market Analysis |
| **CML** | Council of Mortgage Lenders |
| **CoSLA** | Convention of Scottish Local Authorities |
| **DWP** | Department for Work and Pensions |
| **EDC** | East Dunbartonshire Council |
| **ERC** | East Renfrewshire Council |
| **EU** | European Union |
| **GCC** | Glasgow City Council |
| **GCV** | Glasgow and the Clyde Valley |
| **GCVSDPA** | Glasgow and the Clyde Valley Strategic Development Planning Authority |
| **GRO** | Grant for Owner Occupation |
| **GROS*** | General Register Office for Scotland |
| **HA** | Housing Association |
| **HfS** | Homes for Scotland |
| **HLA** | Housing Land Audit |
| **HMA** | Housing Market Area |
| **HMO** | Houses in Multiple Occupation |
| **HMP** | Housing Market Partnership |
| **HNA** | Housing Needs Assessment |
| **HNDA** | Housing Need and Demand Assessment |
| **HSMA** | Housing Sub Market Area |
| **IC** | Inverclyde Council |
| **LA** | Local Authority |
| **LCHO** | Low Cost Home Ownership |
| **LDP** | Local Development Plan |
| **LGBT** | Lesbian Gay Bisexual and Transgender |
| **LHA** | Local Housing Allowance |
| **LHS** | Local Housing Strategy |
| **LIFT** | Low cost Initiative for First Time buyers |
| **LLTI** | Limiting Long Term Illness |
| **ME** | Minority Ethnic |
| **MIR** | Main Issues Report |
| **NINo** | National Insurance Number |
| **NLC** | North Lanarkshire Council |
| **NRS*** | National Records of Scotland |
| **NSSE** | New Supply Shared Equity |
| **OMSEP** | Open Market Shared Equity Pilot |
| **OO** | Owner Occupied |
| **PRS** | Private Rented Sector |
| **RC** | Renfrewshire Council |
| **RSL** | Registered Social Landlord |
| **SCORE** | Scottish Continuous Recording System – monitoring new lets by registered social landlords |
| **SDP** | Strategic Development Plan |
| **SDPA** | Strategic Development Planning Authority |
| **SHCS** | Scottish House Condition Survey |
| **SHE** | Survey of English Housing |
| **SHIP** | Strategic Housing Investment Plan |
| **SHQS** | Scottish Housing Quality Standard |
| **SHS** | Scottish Household Survey |
| **SIMD** | Scottish Index of Multiple Deprivation |

| | |
|---|---|
| **SLC** | South Lanarkshire Council |
| **SNS** | Scottish Neighbourhood Statistics |
| **SPP** | Scottish Planning Policy |
| **SRS** | Social Rented Sector |
| **UCS** | Urban Capacity Study |
| **WDC** | West Dunbartonshire Council |

* On 1st April 2011 the General Register Office for Scotland amalgamated with the National Archives of Scotland to form a new body called the National Records of Scotland (NRS).

# 1

# Developing the HNDA Process

1.1 This Housing Need and Demand Assessment (HNDA) relates to the Glasgow and the Clyde Valley Strategic Development Plan area, comprising eight constituent local authorities:

- East Dunbartonshire Council
- East Renfrewshire Council
- Glasgow City Council
- Inverclyde Council
- North Lanarkshire Council
- Renfrewshire Council
- South Lanarkshire Council; and
- West Dunbartonshire Council (excluding the Loch Lomond and the Trossachs National Park).

Extensive previous experience of joint working between the authorities in the City Region has been developed through the Glasgow and the Clyde Valley Strategic Development Planning Authority (GCVSDPA) and the GCV Local Housing Strategy Group.

**Policy Context**

1.2 The statutory basis for the HNDA is contained in the Housing (Scotland) Act 2001, which requires local authorities to:

- carry out an assessment of housing provision and provision of related services, and
- prepare, and submit to the Scottish Ministers, a Local Housing Strategy.

The assessment of housing provision must include:

- the nature and condition of the housing stock
- the needs of persons in the area for housing accommodation
- the demand for, and availability of, housing accommodation
- the needs of persons in the area for, and the availability of, housing accommodation designed or adapted for persons with special needs.

1.3 The Local Housing Strategy (LHS) provides the strategic direction for addressing housing need and demand at a local authority level, and informs future investment in housing through the authority's Strategic Housing Investment Plan (SHIP).

1.4 Scottish Planning Policy (SPP) reinforces the Scottish Government's commitment to increasing the supply of new homes, and notes that the planning system should enable the development of well designed, energy efficient, good quality housing in sustainable locations, and should allocate a generous supply of land to meet identified housing requirements across all tenures. The important role of the HNDA is identified:

*“Housing need and demand assessment provides the evidence base for defining housing supply targets in local housing strategies and allocating land for housing in development plans.*

*The assessment should be undertaken at a functional housing market area level and consider the operation of the housing system as a whole, covering all tenures”.*

(Scottish Government (2010) *SPP*, paras. 66-91)

1.5 The HNDA therefore has to provide accurate and reliable data as input to the SDP, LHSs and LDPs. It must be robust enough to support the eight GCV Councils in their policy-making role as housing and planning authorities, including specific policies such as Affordable Housing Policies.

1.6 To ensure greater consistency the Scottish Government issued its HNDA Guidance in March 2008, and in the same year established the Centre for Housing Market Analysis (CHMA). The Guidance sets out the framework that local authorities should follow to assess how local housing markets operate. If the HNDA is considered by CHMA to be ‘robust and credible’ then the approach used will not normally be open to debate at a development plan examination[1].

*“A housing need and demand assessment should be considered robust and credible if, as a minimum, it provides all of the core outputs, meets all of the requirements of the process criteria in the checklists below and has made reasonable assumptions based on the information available, which will be confirmed by the Scottish Government.”*

(Scottish Government (2008) *HNDA Guidance,* page 7)

1.7 The Core Outputs judged necessary as a minimum for the HNDA to be considered ‘robust and credible’ by the Scottish Government’s CHMA, are listed in the HNDA Guidance, and reproduced below as Figure 1.1. The Process Criteria checklist is reproduced as Figure 1.2. The HNDA is structured to clearly meet both the Process Criteria and Core Outputs.

[1] This policy does not override the provisions of Part 4 of the Town and Country Planning (Development Planning) (Scotland) Regulations 2008.

| Figure 1.1 | Core Outputs |
|---|---|
| 1 | Estimates of current dwellings in terms of size, type, condition, tenure, occupancy and location. |
| 2 | Analysis of past and current housing market trends, including balance between supply and demand in different housing sectors and price/affordability. Description of key drivers underpinning the housing market. |
| 3 | Estimate of total future number of households. |
| 4 | Estimate of household groups who have specific housing requirements e.g. families, older people, minority ethnic groups, disabled people, young people, etc. |
| 5 | Estimate of current number of households in housing need. |
| 6 | Estimate of future households that will require affordable housing. |
| 7 | Estimate of future households requiring market housing. |
| 8 | Estimate of total future households requiring either affordable or market housing. |

| Figure 1.2 | Process Checklist |
|---|---|
| 1 | Approach to identifying housing market area(s) is consistent with accepted approaches to identifying housing market areas. |
| 2 | Housing market conditions are assessed within the context of the housing market area and any component markets contained within it. |
| 3 | Involves key stakeholders. |
| 4 | Contains a full technical explanation of the methods employed, with any limitations noted. |
| 5 | Assumptions, judgements and findings are fully justified and presented in an open and transparent manner, in particular in relation to economic growth, demographic change and migration, income estimates and translation of the assessment of need and demand at housing market area level into housing supply targets. |
| 6 | Uses and reports upon effective quality control mechanisms. |
| 7 | Explains how the assessments findings have or will be monitored and updated (where appropriate). |

*Source:* Scottish Government, March 2008, *HNDA Guidance,* page 7

**Purpose of the HNDA**

1.8 The HNDA is intended to assist policy development, decision-making and resource-allocation processes for the GCV area by:

- enabling the eight local authorities to develop *long-term strategic views* of housing need and demand to inform local housing strategies and development plans;

- enabling the constituent local authorities to *think spatially about the nature and influence of the housing markets* in relation to the GCV area;
- providing robust evidence to inform policies aimed at providing the right mix of housing across *the whole housing system/all tenures* – both market and affordable housing;
- providing evidence to inform policies about the *level of affordable housing required,* including the need for different types and sizes of affordable housing;
- supporting local authorities to develop a strategic approach to housing through consideration of housing need and demand in all housing sectors and *assessment of the key drivers and relationships within the housing market.*

1.9 The approach differs from that previously used in preparing the GCV Joint Structure Plan and from that adopted in preparing LHS documents (which generally consider need and demand at local authority (LA) and sub-LA geographies).

1.10 The HNDA provides estimates of the number of additional new homes that are required to meet need and demand for the private and social housing sectors including affordable housing and housing for particular needs. The estimates are presented at various geographies in order to fulfil strategic planning requirements for each local authority at housing market and sub-market area levels, which generally cross Council administrative boundaries, as well as at local authority and other sub-area geographies.

1.11 To ensure clarity for purposes of technical assessment, brief definitions used in the HNDA are outlined here and expanded upon in appropriate sections later in the document.

***Housing need*** refers to households without housing or living in housing which is inadequate or unsuitable. It is unlikely that these households will be able to meet their needs in the housing market without some assistance.

***Housing demand*** is the quantity and type/quality of housing which households wish to buy or rent in a particular area and are able to afford.

***Intermediate housing products*** are available at a cost below full market value to meet an identified need and include: subsidised low cost housing for sale (discounted, shared ownership or shared equity); low cost housing without subsidy (entry-level housing for sale) if offered below full market value; and mid market renting.

***Housing market areas*** are geographical areas which are relatively self-contained in terms of housing demand, i.e. a large percentage of people moving house or settling in the area will have sought a dwelling only in that area.

**Working in Partnership**

1.12 The GCV authorities gained considerable experience of successfully working together to deliver the Structure Plan over many years, and this has been built upon for the HNDA. The new Housing Market Partnership (HMP) signals a significant change in approach to strategic planning of housing requirements in the GCV area, in response to recent encouragement from the Scottish Government[2].

[2] Scottish Government (2007) *Firm Foundations*, Discussion Document;

1.13 The GCV Housing Market Partnership aims:

- to share information and intelligence, including relevant contextual material and policy information
- to assist with the development of an HNDA and to ensure its findings are disseminated and regularly reviewed
- to support core members in the analysis and interpretation of housing market intelligence.

1.14 The GCV HMP therefore seeks to develop a clear *shared understanding* of the operation of the housing market across the city region.

1.15 In addition a *long term* strategic view is required which addresses both the interaction of *various tenures* in the housing system and the actual dynamics of housing systems, which operate across *local authority administrative boundaries*.

1.16 The GCV HMP also aims to encourage and support dialogue between various players at regional level; in doing so a greater *multi-disciplinary perspective* on the operation of the housing system/market, complementing existing activity at local authority level is achieved.

1.17 The majority of the research and analysis supporting the HNDA has been conducted by staff of the eight constituent authorities. Two senior planning analysts with Glasgow City Council provided ‘internal consultancy’ particularly in relation to demographic projections, testing of housing market system geography, and housing supply/demand comparison. The core GCVSDPA team provided support with coordination and administration, wider engagement and technical work. The authorities funded a temporary post of HNDA Project Manager to promote and coordinate activities.

1.18 As well as being consistent with the HNDA Guidance, this approach has provided the following benefits:

- improved understanding of components, such as current/backlog need, through jointly debating issues relating to methodology, data sources and their limitations, assumptions required, and the explanation of differences between authorities
- enhanced understanding of the GCV housing system
- combining the experience gained by planning and housing professionals in the strategic analysis of housing market issues.

1.19 As part of the wider technical work for the Strategic Development Plan, GCVSDPA commissioned Oxford Economics in May 2009 to provide an overview of the economic implications of the recession, and again in February 2010 to provide more detailed economic modelling. This provided useful context for the HNDA as well as informing specific decisions, such as on migration assumptions.

1.20 It was also considered appropriate to appoint specialist external consultants, to undertake the task of modelling the Affordability Study for the HNDA, leading to tenure projections. Tribal Group with Optimal Economics were commissioned, and

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Scottish Government and CoSLA (2008) *Local Housing Strategy Guidance*;
Scottish Government (2008) *HNDA Guidance*;
Scottish Government (2010) *Scottish Planning Policy*, Housing, para. 68.

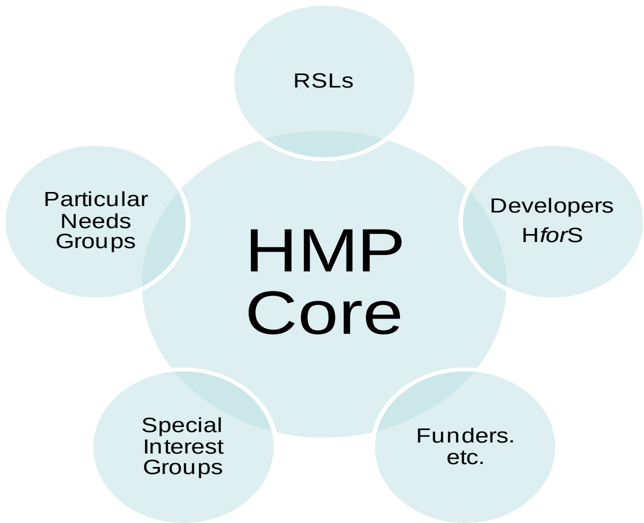
worked closely with the GCV HMP to develop an innovative approach which sought to increase understanding of household behaviour within housing markets.

1.21 As well as quantitative data derived from analytical work and modelling, the HMP sought to complement this with more qualitative information in order to highlight specific issues and provide a better understanding and commentary on the operation of the GCV housing system. Much of this additional commentary came from interviews with a range of external stakeholders.

**Partnership Structure**

1.22 Given the scale and diversity of the GCV area, the HMP has a 'Core + Network' structure, enabling it to manage both the technical work involved in preparation of the HNDA, and wider engagement activity (Figure 1.3).

**Figure 1.3 GCV HMP Structure**




1.23 The HMP ***Core Group*** comprises:

- planning and housing representatives from the eight constituent local authorities. This group provides detailed understanding of the local planning context and of local housing issues and markets; its members are responsible for inputs to the statutory Strategic and Local Development Plans and Local Housing Strategies
- representatives of the GCVSDPA, charged with preparing the Strategic Development Plan, and with coordinating the preparation of the HNDA
- a representative of the Scottish Government's area team within the Housing Investment Division.

Figure 1.4 lists the HMP Core Group membership as at 1 June 2011.

**Figure 1.4 GCV HMP Core Group Membership**

| Local Authority | Function | Name |
|---|---|---|
| East Dunbartonshire | Housing<br>Housing<br>Planning | Karen Finlayson<br>Anna Gribben<br>Stuart Newland |
| East Renfrewshire | Housing<br>Housing<br>Planning | Liz Currie<br>Lisa Burrett<br>Dorothy McDonald |
| Glasgow City | Housing<br>Housing<br>Planning<br>Planning | Steve McGowan<br>Jennifer Sheddan<br>Jan Freeke<br>David McAllister |
| Inverclyde | Housing<br>Planning | Victoria Kapke<br>Fergus Macleod |
| North Lanarkshire | Housing<br>Housing<br>Planning<br>Planning | Tony Donohoe<br>Lee Valantine<br>Linda Wilson<br>Michael Wright |
| Renfrewshire | Housing<br>Housing<br>Planning | Lesley Muirhead<br>Jane Davis<br>Sharon Marklow |
| South Lanarkshire | Housing<br>Planning | Jennifer Murphy<br>Laura Gaddis |
| West Dunbartonshire | Housing<br>Planning<br>Planning | Jamie Dockery<br>Alan Williamson<br>Moira Clark |
| Glasgow and the Clyde Valley Strategic Development Planning Authority – Core Team | Strategic Planner<br>HNDA Project Manager | Angela Adams<br>David Horner |
| Scottish Government (Observer) | Housing Investment Division | Lisa Bullen |

*Note:* The list includes those officers most involved in the Partnership's work on the HNDA, at 1 June 2011. Not all would attend every meeting, and from time to time other substitutes attended.

1.24 Beyond the core membership of the HMP it is recognised that there is a ***wider network*** of key stakeholder/interest groups with a contribution to make including social and private landlords, developers and builders, funders, and representatives of particular housing needs groups. Some of these have an interest in the supply side of housing, while others are concerned with aspects of need/demand. The HMP has sought to complement rather than replicate the well developed existing consultation structures for both the LHS and LDP processes in each local authority.

1.25 Two sub groups support the work of, and report to, the HMP Core Group:

- the ***Planning Sub Group*** addresses technical Planning issues, and is made up of planning officers representing the eight GCV authorities;

- the ***Housing Sub Group*** addresses technical Housing issues, and is made up of housing officers representing the eight GCV authorities.

1.26 The HMP Core Group is accountable, in turn, through the GCVSDPA Steering Group to the GCVSDPA Joint Committee. The HMP Core Group ensured progress on key tasks for the HNDA by means of a detailed work programme, reviewed on a regular basis. A progress report on the HNDA has been a standing item on the agendas of both the Steering Group and Joint Committee.

1.27 The HMP and the HNDA process has strong support and commitment from all eight GCV authorities. Responsibility for chairing the HMP Core Group and sub groups has been shared, at various times including Inverclyde, North Lanarkshire, South Lanarkshire and West Dunbartonshire Councils. A positive approach to team work has developed, permitting constructive debate about issues arising and shared decision making.

1.28 Given the very broad corporate responsibilities held by many of the authorities' Directors of Housing and of Planning, specific efforts in the form of reports and briefing meetings were made to ensure their understanding and support of the HNDA process.

**Engaging 'wider network' stakeholders**

1.29 The HMP Core Group has sought to engage with wider network stakeholders in various ways, including face-to-face meetings, briefing seminars on key issues, by way of a summary leaflet, and as a virtual network using an HNDA page on the GCV website. It also maintains dialogue with the GCV LHS Group and the CHMA.

1.30 The majority of the larger private housing developers active in the GCV area are members of the representative trade body, *Homes for Scotland*. Our engagement with this key group of stakeholders included:

- an initial briefing meeting on the role of the HNDA and the process being adopted for the GCV area

- a tripartite meeting involving Homes for Scotland, South Lanarkshire Council and GCVSDPA to resolve disputed sites and agree the 2009 housing land audit

- other authorities reviewing their housing land audits in consultation with Homes for Scotland

- inviting representatives of Homes for Scotland to attend meetings of the HMP Core Group to discuss implications of the recession for the industry, and progress on the HNDA.

1.31 Some local authorities also undertook local consultation/engagement with developers related to their specific local circumstances.

1.32 Another key group of stakeholders is *Registered Social Landlords* (RSLs), of which there are over 100 active in the GCV area. As well as having a local community focus, the group also includes a number of national and specialist housing associations. There are two large stock transfer associations: River Clyde Homes (established to take transfer of the majority of Inverclyde Council's housing stock) and Glasgow Housing Association (established to take Glasgow City Council's housing stock). It was agreed that all local authorities should use their usual liaison mechanisms to keep RSLs in their area up to date and engage with the HNDA process. In practice, of course, various components of the HNDA necessitated requests for data as input to the analyses.

1.33 The *Scottish Federation of Housing Associations* is a national representative body, of which many associations in the GCV area are members. Following a meeting with a representative of the policy team, a briefing seminar on the HNDA process was held in January 2010. This was attended by representatives of six national or regional RSLs and several local RSLs.

1.34 The *Glasgow and West of Scotland Forum of Housing Associations* represents a number of RSLs. Most are community-based associations in Glasgow City, but with some members in other authority areas. Informal briefings were held with a representative and with the Director Designate, and an offer made to give a briefing seminar to Forum members.

1.35 The private rented segment of the market is growing in significance. It is very diverse ranging from landlords with a single property to let, to companies with substantial property portfolios. Contact was made with the representative body, the *Scottish Association of Landlords*.

1.36 An important function of the HNDA is to assess the range of particular needs arising in Household Groups with Specific Housing Requirements, including older people households, those with disabilities or limiting long term illness, students, minority ethnic communities, Gypsies/ Travellers and travelling showpeople.

1.37 Representatives from the following organisations took part in the initial engagement process:

Age Scotland
Glasgow Centre for Population Health
Inclusion Scotland
Ownership Options Scotland
Positive Action in Housing
Scottish Women's Aid
Showmen's Guild of Great Britain (Scottish Section)
West of Scotland Regional Equality Council.

1.38 A number of RSLs have developed considerable expertise and experience in meeting particular needs, and the following organisations assisted with issues relating to their specific area of expertise:

Access Apna Ghar Housing [part of Sanctuary Group]
Arklet HA
Equality Scotland [an initiative of Trust, Hanover Scotland and Bield HAs]
Govanhill HA
Southside HA.

1.39 Full details of the work of the HMP Core Group, and of its engagement with wider stakeholders, are available on request.

1.40 An early meeting was held with Professor Glen Bramley, and, in drafting the HNDA, we drew on the expertise of consultants *Oxford Economics* and *Tribal Group (with Optimal Economics)*, as well as the *CHMA*. The *Council of Mortgage Lenders (CML)* was contacted through its consultant in Scotland, who provided various CML documents and briefing papers to assist us in better understanding relevant specific aspects of the housing market.

**Consultation**

1.41 A Working Draft HNDA was published in November 2010 as a Background Report (BR 10) to the SDP Main Issues Report, and formal consultation extended to 14 January 2011.

1.42 A total of 87 responses were received, of which 10 were addressed to the Working Draft HNDA, and 21 contained issues specifically related to the HNDA. Further representations related to private sector housing and were mainly relevant to the SDP. Consultation responses were discussed by the GCV HMP on 17 February 2011, and a full report was considered by the GCVSDPA Joint Committee on 14 March 2011. This report is available on request. All the responses were made available in full to the planning and housing representatives of the eight GCV authorities so that relevant issues could be taken into account in the preparation of LHSs and LDPs.

1.43 A number of key themes emerged from the consultation of direct or indirect relevance to the HNDA, including:

- recognition that the strategy is long-term and requires to be driven by sustainability principles
- general support for the population and household Planning Scenario (C2)
- recognition of the impact of the current economic climate on the short to medium term deliverability of key components of the strategy, in particular housing. Many respondents promoted additional flexible, short-term land release
- the importance of the HNDA being the evidential base for the identification of a ‘generous’ land supply to meet the overall scale and distribution of the total housing land requirement across all tenures in the SDP
- many developers questioned the ‘effectiveness’ of the current land supply; 11 specific additional sites were promoted; and two community groups requested the removal of two Community Growth Areas
- suggestion that the Final HNDA be updated to take account of recent policy changes, and suggested changes to text
- further explanation of HNDA results and their implications at local level.

1.44 The following actions were taken by the GCV HMP in response to the formal consultation:

- meeting held with a Scottish Government representative
- meeting held with representatives of Homes for Scotland
- agreement to re-structure the Final Draft HNDA document and more clearly identify Core Outputs
- agreement to re-draft key sections of the document in the light of the responses received

- decision that responses more appropriate at a local level should be considered in the context of LHSs and LDPs.

**Quality Control**

1.45 It is important that the outputs of the HNDA are both valid and reliable, as they form the key evidence base for both Strategic and Local Development Plans and for Local Housing Strategies. The GCV HMP devoted considerable time and attention to detail to ensure the quality of results. A four stage approach was adopted:

I. Getting the **methodology** and modelling processes right – where appropriate agreeing the use of 'procedure notes' and data gathering *pro formas* to ensure improved consistency between the eight authorities

II. Collecting the best available **data**

III. Using alternative approaches or data sources for **triangulation** purposes, and

IV. Checking the credibility of our **interpretation of results** by comparison between authorities or against qualitative information or other means.

1.46 The guiding principle is one of openness about data sources and their limitations, referencing information, and acknowledging assumptions required and judgements made. The Technical Appendices to this HNDA provide full details of validation procedures for various stages of the assessment.

1.47 For the most part the Scottish Government's HNDA Guidance (2008) served as the methodological handbook, and we are confident that we have fulfilled the spirit of the Guidance in delivering all the Core Outputs and meeting the process criteria. In two areas we developed new approaches which are considered to be at least as robust and credible as those in the Guidance: Affordability Analysis and Household Groups with Specific Housing Requirements. In both cases we liaised closely with the Scottish Government's representative on the Core Group and with the CHMA to ensure the validity of the approach taken.

1.48 ***Affordability Study:*** In attempting to determine levels of housing need and demand, it is important to analyse the likely ability of households to meet their own housing requirements in the market now and in the future, so that housing need can be determined. Those households without the means to meet their own housing needs will therefore be dependent on social rented housing. A similar affordability test has to be applied both to backlog need and to projected households. For our purposes it seemed important also to try to ascertain the likely extent to which the private rented sector and the intermediate sector could potentially be expected to contribute to meeting housing need/demand.

1.49 In the past the Structure Plan had simply identified the proportion of households likely to require private sector housing. The remaining households were assumed to require social rented housing. The projected tenure ratio was based on historic patterns of tenure change. Local Housing Strategies adopted a different approach, focussing on new households and attempting to measure 'affordability' using the ratio of household income to house price and applying affordability thresholds, for example: 3.5 times gross household income for single earner households, 2.9 times for double income households, or up to 25% of gross household income for private renting.

1.50 The HNDA Guidance advises the use of income: house price ratios and affordability thresholds. As this is a complicated area of analysis, the GCV HMP appointed consultants Tribal Group with Optimal Economics to carry out this work. The approach, fully explained in Technical Appendix TA04 *Affordability Study*, seeks to model the behaviour and housing choices made by households in different age cohorts. It recognises, for instance, the inter-tenure moves which occur, particularly among households in the 25-35 age band, as many move from an initial temporary period of private rental into long term settled tenure of owner occupation. Income is also identified as a relatively weak predictor of tenure compared to employment status.

Developing this new approach was time-consuming and challenging. The task completed, the HMP is satisfied that its decision to deviate from the Guidance in this way was fully justified by gaining a more sophisticated understanding of the operation of different aspects of the GCV housing market.

1.51 ***Household Groups with Specific Housing Requirements:*** The HNDA Guidance is limited with regard to this very broadly defined and diverse category. Reference was therefore made to previous guidance issued by the former Communities Scotland[3] in developing an approach to meet GCV's requirements for the HNDA. It should be noted that the HNDA is concerned with supply and demand of housing to meet these needs, rather than with support services.

**Approval of the HNDA**

1.52 The HNDA Guidance suggests that the HMP would sign off the HNDA. This inevitably has implications for current SDPA structures (which have a planning focus) as well as for appropriate approval processes within the GCV constituent authorities.

1.53 As a statutory part of the planning system in Scotland, the GCVSDPA has established procedures and structures for processing strategic planning issues and documents such as the Strategic Development Plan – principally the Steering Group and Joint Committee. This mechanism would be appropriate for agreeing and 'signing off' the HNDA as a key source document for the SDP and LDPs.

1.54 However, the HNDA is a statutory requirement under the Housing (Scotland) Act 2001 and is a key building block for the LHS, it also requires to be approved by individual housing authorities. The HMP has therefore ensured that both the planning and housing functions of all eight GCV authorities have 'signed-off' the Final HNDA for submission to the CHMA.

1.55 Throughout the preparation of the HNDA, the process involved a strong partnership approach, including planning and housing staff from all eight authorities.

**Monitoring and Review**

1.56 The housing system is complex and dynamic and for this reason, it is not possible to provide definitive estimates of demand and need, or an assessment of market conditions. However, the HNDA provides valuable insights into how the GCV housing system currently operates and is likely to operate in the future[4]. As such, it can serve as a shared evidence base to inform local authorities and their partners in developing

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[3] *Local Housing Systems Analysis: Good Practice Guide* (September 2004) Chapter 11: "Community Care Housing Needs Assessment". Communities Scotland.
[4] *Housing Need and Demand Assessment Guidance*, 2008, Scottish Government (p. 7)

housing supply targets in their LHS, and in allocating land to meet these targets through housing policies in Local Development Plans.

1.57 Future projections of population, households and of housing need and demand, are always subject to a degree of uncertainty. The further forward the projection the greater this becomes. The following factors are noted in particular:

- the 2001 Census, the starting point for various population assumptions, is now out of date
- the impact of inward migration from accession states in the expanded European Union (EU), and whether this will continue
- demographic change in the form of an ageing population may increase the need and demand for housing which has to meet particular needs
- the recession has had a significant impact on the housing system, severely reducing new supply and developer capacity, and affecting household demand and need; the long term consequences of the recession are unclear
- the potential of the 'intermediate' housing sector to meet segments of need and demand, especially in the context of planned fiscal restraint over a number of years.

1.58 A number of these points are developed more fully in other sections of the document. These are clearly important issues as the HNDA process models future housing need and demand and supply requirements over a period of up to 15 years.

1.59 The GCV HMP will undertake a comprehensive review of the HNDA on a five-yearly basis, linked to the review of Development Plans and Local Housing Strategies. This will provide an opportunity to take account of data from the 2011 Census, as well as evidence of changes in demographics, market circumstances and relevant policy impacts, and will ensure that strategic planning for housing across the GCV area is kept as up to date as practicable.

1.60 The HMP will also provide a means for the eight authorities to jointly research specific issues or review individual components as appropriate on an interim basis, between formal reviews. This will ensure that the authorities maintain a current and shared understanding of the evolving nature of the GCV housing system. To facilitate this, the GCV Housing Market Partnership Core Group has agreed to continue to meet on a quarterly basis.

# 2

# Overview of the HNDA Model

## Developing the HNDA model

2.1 This Chapter seeks to provide a broad overview of the HNDA model, so that the general reader may understand how the various components fit together to deliver the Core Outputs required by the Scottish Government. It simplifies what has proved to be a complex process. More technical detail on each of the major components is contained in the relevant Chapters and Technical Appendices.

2.2 The model builds on the existing analytical expertise in the constituent authorities and the GCVSDPA, particularly in terms of demographic projection and housing market assessment for the private or market sector; and Housing Needs Assessments for the social rented sector, and for particular needs. Various additional studies have been undertaken to help develop a more rounded and integrated understanding of the GCV housing system.

2.3 It should be noted that the model is primarily a means of conducting an analytical assessment of current and future housing market conditions. Although the HNDA provides an important part of the evidence base, it is a separate activity from policy development and appraisal, which is undertaken for the GCV Strategic Development Plan, Local Housing Strategies and Local Development Plans.

2.4 This distinction between the inputs and assumptions used in modelling the housing system/market and policy is not a hard and fast one, since the task involved in producing a robust and credible HNDA requires a number of trade-offs between each. An agreed understanding and appreciation of current policy and how it has influenced the assumptions around the data inputs has been one of the important roles of the HMP in reaching the stage we are now at.

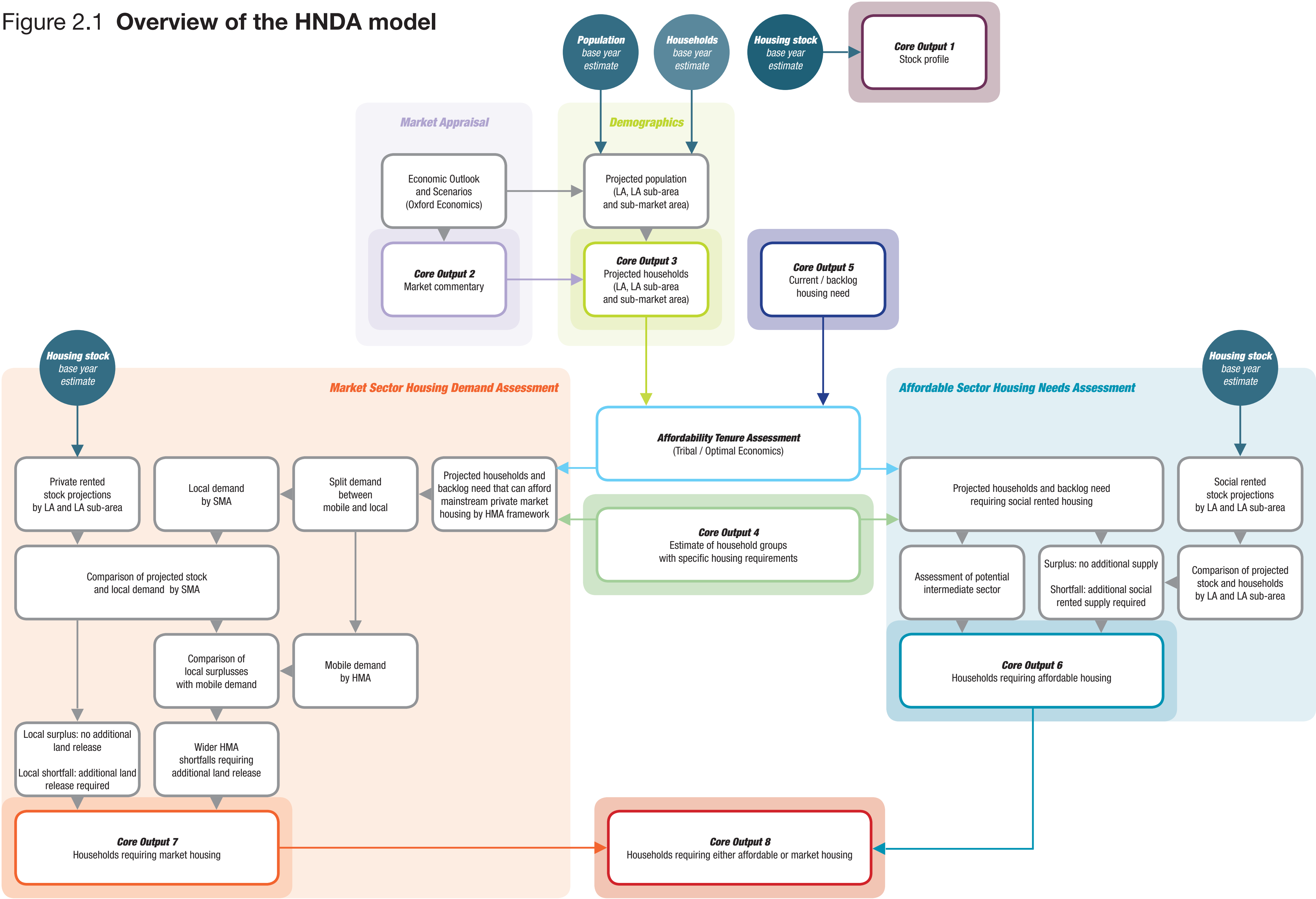
## The model and its components: an overview

2.5 An overview of the HNDA Model is illustrated overleaf in the form of a block diagram (Figure 2.1). The key components are described briefly below, together with an indication of the Core Output to which they contribute.

2.6 **Stock Profile:** This part of the HNDA examines the existing housing stock in the GCV area. This is analysed fully in Technical Appendix TA02 *Current Housing Supply/Stock Profile*.

This produces CORE OUTPUT 1: Estimates of current dwellings in terms of size, type, condition, tenure, occupancy and location.

# Figure 2.1 **Overview of the HNDA model**



2.7 A **Market Commentary** assessing the recent and projected drivers of change and development in the GCV housing market is provided in Chapter 4.

This produces CORE OUTPUT 2: Analysis of past and current housing market trends, including balance between supply and demand in different housing sectors and price/affordability. A description of the key drivers underpinning the housing market is also given.

2.8 **Demographic projections of Population and Households:** The projections underpin subsequent components of the model. Two projection scenarios have been identified for the HNDA, using different assumptions relating to migration: firstly, a ***lower migration scenario*** (also known as scenario A) which assumes that, after the initial five years or so, the net migration will be constant, at a rate of -1,050 per year, for the remainder of the projection period to 2025; and secondly, a ***planning scenario*** (known as scenario C) which assumes a constant net migration of +1,050 per year for ten years, with a resumption of further trend growth thereafter. The ten year delay before improvement in migration resumes has been incorporated in the planning scenario in response to the ***economic appraisal*** by Oxford Economics, and is due to the economic downturn.

A commentary on the patterns of Demographic Change in the GCV Area is provided in Chapter 3, while Chapter 5 summarises Housing Supply and Demand/Need comparisons. Technical Appendix TA06 *Review of Supply and Demand/Need for Housing* details population and household projections. The report by Oxford Economics, *Economic Outlook and Scenarios for the Glasgow and Clyde Valley City-Region*, is published as a Background Report (BR01) to the GCV Strategic Development Plan.

This produces CORE OUTPUT 3: Estimate of total future number of households.

2.9 **Household Groups with Specific Housing Requirements** are identified and assessed in some detail in Chapter 6.

This produces CORE OUTPUT 4: Estimate of household groups who have specific housing requirements, including older people, minority ethnic groups and disabled people.

2.10 **Current/Backlog Need:** This component examines those households considered to be currently in housing need (at March 2009), including households experiencing homelessness, concealed households, overcrowding, and households which have support needs or are in poor quality accommodation, and/or experiencing harassment.

Chapter 5 summarises Housing Supply and Demand/Need comparisons, including current need. Technical Appendix TA03 *Gross Current/ Backlog Need* details the approach adopted, methodology and results, together with the assumptions made by each authority.

This produces CORE OUTPUT 5: Estimate of current number of households in housing need.

2.11 **Affordability Study/Tenure Assessment:** The HMP commissioned consultants to undertake this analysis. This is a key component of the HNDA model, allowing an assessment to be made of the likely tenure of newly arising and migrant households, and the ability of households in current housing need to resolve their situation in the market without subsidy or other assistance. The consultants developed an innovative behavioural economics approach to tenure analysis, which considers the complex decisions made by households in relation to their housing requirements at different stages in life. It also incorporates inter-tenure flows, recognising the dynamic and inter-connected nature of the housing system. This contrasts with the conventional and more static approach, using assumed income**:** house price ratios to determine affordability thresholds.

The affordability assessment was applied to new and emerging households and to households in backlog need. Outputs from this component of the modelling work were used as inputs to the market and affordable sector supply and demand/need comparisons. The Study also explored the future potential for demand in the relatively new 'intermediate' housing sector.

Technical Appendix TA04 *Affordability Study* provides the Final Report of the Affordability Study by Tribal (with Optimal Economics), detailing the methodology, assumptions and results. TA05 *House Price Analysis* provides contextual information.

2.12 **Affordable Sector Housing Needs Assessment:** This component adopts a methodology consistent with the approach detailed in the HNDA Guidance, using outputs from the Affordability Study/Tenure Assessment and the assessment of Current/Backlog Need to quantify projected households unable to meet their needs in the market and thus requiring social rented housing. Consideration is also given to the potential future role of the 'intermediate' housing sector, through Low Cost Home Ownership (LCHO) measures such as shared equity/shared ownership, to meet some of these needs. A summary of process and results is provided in Chapter 5: Housing Supply and Demand/Need Comparison. A more detailed explanation of the methodology and results may be found in Technical Appendix TA06 *Review of Supply and Demand/Need for Housing.*

This produces CORE OUTPUT 6: Estimate of future households that will require affordable housing.

2.13 **Market Sector Housing Demand Assessment:** Market housing includes both owner occupied and privately rented housing. As the HNDA Guidance provides limited direction on a preferred approach to assessing market housing demand, the 'all stock, all households' approach previously developed for the GCV Structure Plan has been adopted, using outputs from the Affordability Study/Tenure Assessment to quantify projected demand. The approach compares projected households with projected supply to reveal shortfalls or surpluses. It incorporates local and mobile demand within the context of the ***Housing Market Framework*** identified for the GCV area, and described briefly below.

A summary of process and results is provided in Chapter 5: Housing Supply and Demand/Need Comparison. A detailed explanation of the methodology and results can be found in Technical Appendices TA01 *A Housing Market Framework*, and TA06 *Review of Supply and Demand/ Need for Housing.*

This produces CORE OUTPUT 7: Estimate of future households requiring market housing.

2.14 The sum of Core Outputs 6 and 7 results in CORE OUTPUT 8: Estimate of total future households requiring either affordable or market housing.

The opportunity is also taken to discuss the potential of ***intermediate housing*** to contribute to meeting housing demand/need. A summary is given in Chapter 5: Housing Supply and Demand/Need Comparison, and a more detailed explanation in Technical Appendix TA06 *Review of Supply and Demand/ Need for Housing.*

## Location Of Core Outputs Within the HNDA

2.15 Figure 2.2 summarises where the various Core Outputs can be found most readily within the HNDA.

**Figure 2.2 LOCATION OF CORE OUTPUTS WITHIN THE HNDA**

| Core Output | Description | Location within the HNDA |
|---|---|---|
| **1** | Estimates of current dwellings in terms of size, type, condition, tenure, occupancy and location | Technical Appendices TA02 *Current Housing Supply/ Stock Profile* |
| **2** | Analysis of past and current housing market trends, including balance between supply and demand in different housing sectors and price/affordability. Description of key drivers underpinning the housing market | Chapter 4: Market Commentary |
| **3** | Estimate of total future number of households | Chapter 5: Housing Supply and Demand/ Need Comparison; TA06 *Review of Supply and Demand/Need for Housing* |
| **4** | Estimate of household groups who have specific housing requirements, e.g. families, older people, minority ethnic groups, disabled people, young people, etc. | Chapter 6: Household Groups with Specific Housing Requirements |
| **5** | Estimate of current number of households in housing need | Chapter 5 Housing Supply and Demand/ Need Comparison; TA03 *Gross Current/Backlog Need* provides 'gross' figures after discounting for in-situ solutions; TA06 *Review of Supply and Demand/Need for Housing.* |
| **6** | Estimate of future households that will require affordable housing | Chapter 5 Housing Supply and Demand/ Need Comparison; TA06 *Review of Supply and Demand/Need for Housing* |
| **7** | Estimate of future households requiring market housing | Chapter 5 Housing Supply and Demand/ Need Comparison; TA06 *Review of Supply and Demand/Need for Housing* |
| **8** | Estimate of total future households requiring either affordable or market housing | Chapter 5 Housing Supply and Demand/ Need Comparison; TA06 *Review of Supply and Demand/Need for Housing* |

### Validating the model

2.16 Any such modelling work is only as good as the methodology adopted, the sources of data, and the assumptions and judgements applied. The GCV HMP adopted a rigorous approach to the work, and all data sources, their limitations and assumptions adopted are identified and explained in the relevant chapters and Technical Appendices.

2.17 Additional steps were also taken to triangulate our results at specific stages, for example in relation to backlog need, and in terms of population and household projections. These steps are detailed in the appropriate Technical Appendices.

2.18 The 'all stock, all households' approach adopted for private sector/market housing produces a residual figure which can be categorised as non-market housing. These figures were compared with the figures from the Housing Needs Assessment approach adopted for the affordable sector, consistent with HNDA Guidance. In doing so, discrepancies were identified. As both model components use largely the same inputs, in terms of household projections and inter-tenure flows, additional work had to be undertaken to explain these differences.

2.19 The key difference relates to the modelling of household terminations and inter-tenure flows. These have been modelled by Tribal/OE based on behavioural assumptions. In the case of the social rented sector, household terminations and outflows usually give rise to a re-let of the vacated property. Recent turnover rates are available to help inform projected future supply, and are used in the Housing Needs Assessment; such data is unavailable for the private sector. This is discussed more fully in Technical Appendix TA06 *Review of Supply and Demand for Housing.*

2.20 Two final caveats should be noted. Firstly, it is not possible to model future policy decisions, but these will impact actual outcomes. For example, the model identifies potential demand for 'intermediate' housing products, but as these require public subsidy in one form or another, outcomes are supply constrained and dependent on public spending plans. Secondly, the economic downturn has introduced significant uncertainty into the housing market, both in terms of demand and supply. Some allowance has been made for this in certain key assumptions, but the full implications of the recession and recovery from it are still by no means clear.

### Deriving the Housing Market Area framework

2.21 The HNDA Guidance (2008) encourages local authorities to assess housing need and demand in terms of housing market areas (HMAs). These are defined as:

> *"geographical areas which are relatively self-contained in terms of housing demand, i.e. a large percentage of people moving house or settling in the area will have sought a dwelling only in that area."*
>
> Scottish Government *HNDA Guidance* (2008) page 10

2.22 The use of a Housing Market Area (HMA) framework was developed in the 1980s for the Strathclyde Structure Plan and this was revised for the 2000 Glasgow and the Clyde Valley Joint Structure Plan and updated in 2006. The framework relates to the operation of functional housing markets relating to demand for private/market housing. A comprehensive review of the HMA framework has been conducted for this HNDA.

2.23 The HMA framework used for the GCV area was derived through an iterative process as follows:

- the underlying geography of 63 settlement areas was defined by the eight Councils
- analysis of new and second-hand house-buying moves, from the Sasines (Land Register), allowed movers' origin and destination addresses to be linked with sufficient detail to allow construction of an origin/destination matrix showing moves in and between the 63 areas
- where links between areas were strongest, these areas could be merged; once the matrix was reformulated for the reduced number of areas, the process was repeated
- four iterations reduced the original 63 settlement areas to thirteen building blocks which formed the basis of the HMA framework; these were examined to determine if they were self-contained or formed part of a wider market area.

2.24 The resulting HMA framework comprises:

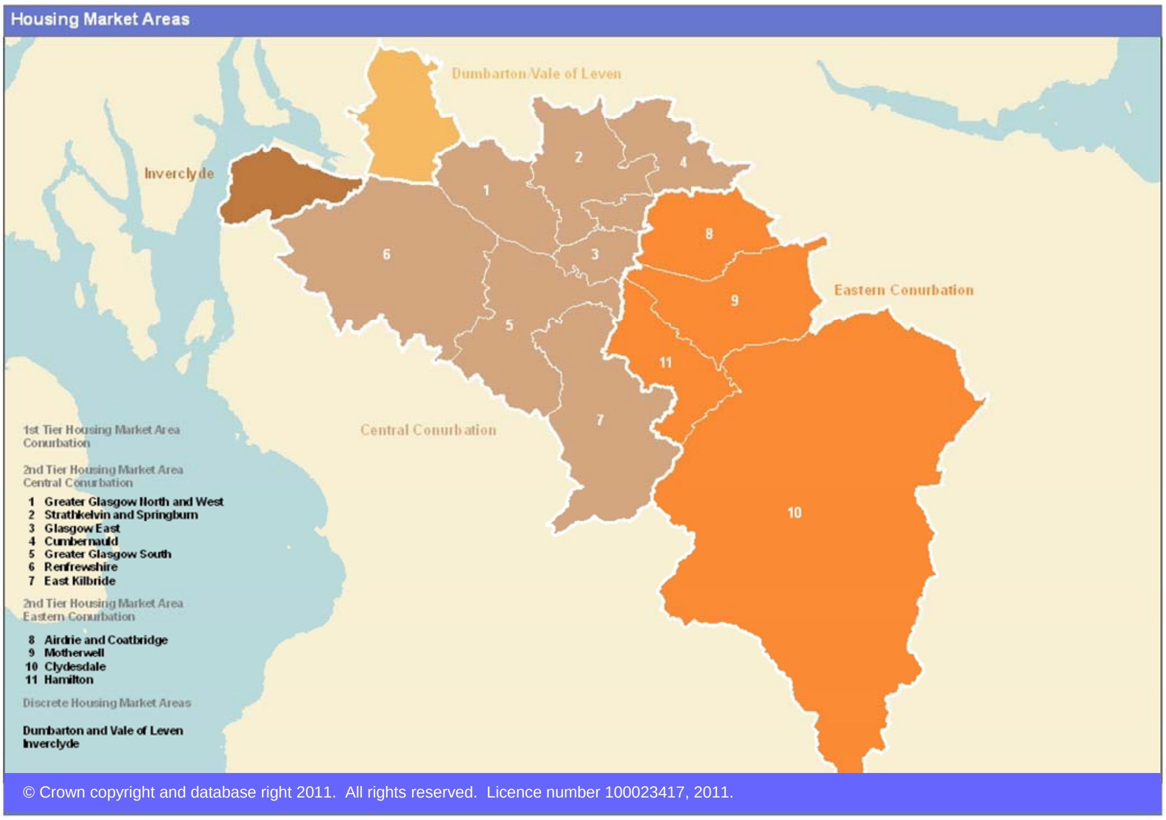
- **Dumbarton and Vale of Leven**: separate self-contained HMA
- **Inverclyde**: separate self-contained HMA
- Wider HMA operating in the **Eastern Conurbation** with 4 Sub Market Areas:
  - Airdrie and Coatbridge
  - Motherwell
  - Clydesdale
  - Hamilton
- Wider HMA operating in the **Central Conurbation** with 7 Sub Market Areas:
  - Greater Glasgow North and West
  - Strathkelvin and Springburn
  - Glasgow East
  - Cumbernauld
  - Greater Glasgow South
  - Renfrewshire
  - East Kilbride
- Wider HMA operating across the **GCV Conurbation**.

2.25 A three-tier system therefore provides the framework for comparing (private sector housing) supply and demand in the GCV area. This tiered structure allows account to be taken of the complexity of the HMAs in the Conurbation by allocating that element of housing demand regarded as mobile across groups of Sub Market Areas. For instance, the limits to mobility between the Eastern and Central Conurbation imply that most mobile demand should be met at this second tier level; only a small proportion of mobile demand should be met at first tier, GCV Conurbation level. Local demand on the other hand should be met at third tier, Sub Market Area level. Dumbarton and Vale of Leven and Inverclyde (excluding Kilmacolm and Quarriers Village) operate as self-contained HMAs.

2.26 A detailed explanation of the methodology for defining housing market and sub market areas is given in Technical Appendix TA01 *A Housing Market Framework.*

2.27 Figure 2.3 illustrates the GCV Housing Market Area Framework.

**Figure 2.3 GCV Housing Market Area Framework**




2.28 With regard to the consideration of ***housing need*** (i.e. predominantly the requirement for social rented housing), the GCV HMP concluded that the most appropriate geographical framework was the eight Local Authority areas made up of 31 sub-areas. This reflects the way in which housing registers and allocation systems for social rented housing are currently operated by Local Authorities and Registered Social Landlords (RSLs). For many in housing need, housing choices are constrained by low incomes, but also by allocation policies and availability of property at the time. This approach also recognises that demand for owner occupied and private rented housing, and need for social rented housing, are complementary components of the GCV housing system but with quite different dynamics and geographies.

2.29 Some cross-boundary movement of tenants is acknowledged, and the HMP sought to explore this at an early stage in the process. Each authority reviewed its housing waiting list, as an indicator of intention, and noted that few applications were for inter-authority moves. The use of SCORE (Scottish Continuous Recording System) data was also considered – this system logs a range of data each time a let is made by participating organisations. However, SCORE only relates to registered social landlords, not Councils, and one of the largest RSLs in the city-region, River Clyde Homes, is not a participant. The various letting systems used by local authorities had variable ability to extract appropriate data, and in some cases a considerable amount of manual checking of source geography/postcode would have been required. An issue was also identified regarding matching of tenancies, for instance where the spouse/partner of the named tenant of one landlord may become the applicant to/tenant of the new landlord. The HMP concluded that the data currently available is insufficient to construct any satisfactory understanding of these cross-boundary movements. This position may change, particularly if there is wider development in future of Common Housing Registers.

2.30 The use of Local Authority areas and LA sub-areas is consistent with the approach adopted in the past for local Housing Needs Assessments. For some authorities it has been possible and convenient for the same Housing Market Sub Area boundaries, identified in relation to private/market housing demand, to be used also for assessing affordable housing need.

2.31 Although using local authority boundaries as market areas would have the merit of simplicity and more readily available data, this approach is considered unsatisfactory, since local authority administrative boundaries do not necessarily represent functional housing markets.

# 3

# Demographic Change in the GCV Area

## INTRODUCTION

3.1 As part of the Housing Need and Demand Assessment (HNDA) for the Glasgow and the Clyde Valley (GCV) area, a set of population and household projections has been prepared. The present paper provides a context for these projections, via a commentary on (a) recent demographic change in the GCV area, and (b) the main results of these projections.

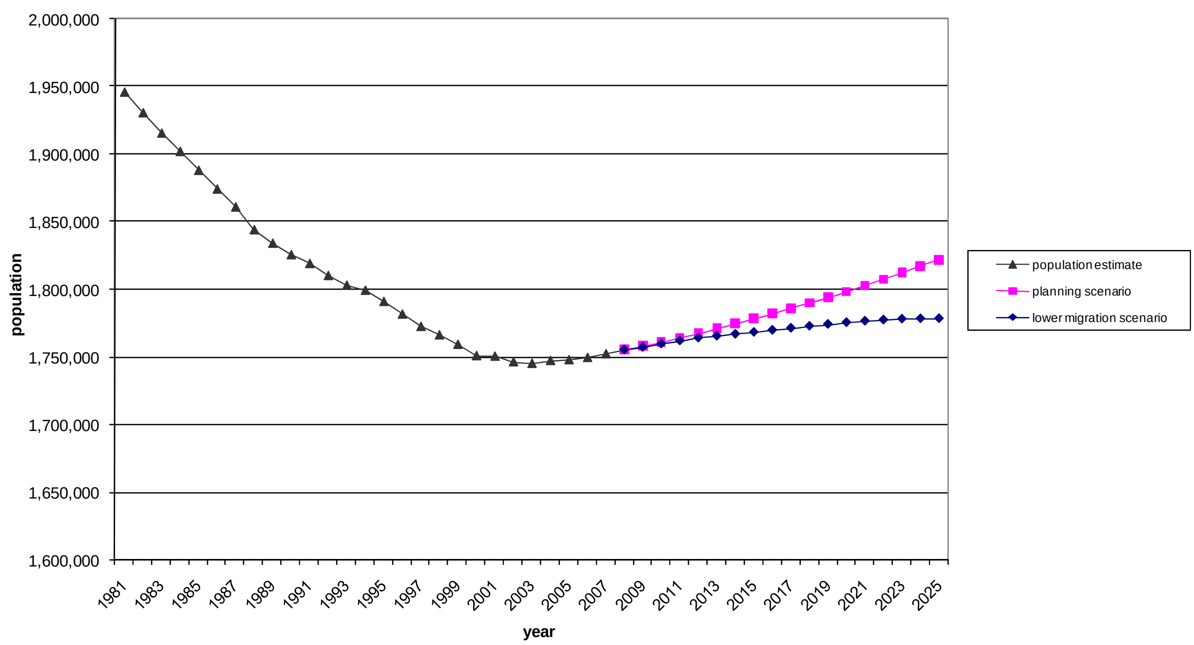
3.2 The paper covers the topics:
(1) Population change by Component (section 2),
(2) Population change by Age (section 3), and,
(3) Household change (section 4).

3.3 The paper covers demographic change both Conurbation-wide and at local level. For the latter, the paper uses the eight Council areas within the Conurbation and/or the 31 Council sub areas defined for use in Local Housing Strategies. The area under consideration includes the Loch Lomond & the Trossachs National Park area.

## POPULATION CHANGE BY COMPONENT

### Estimated and Projected Population – HNDA scenarios

**Figure 3.1 - Estimated and Projected Population Glasgow and Clyde Valley area 1981 to 2025**



3.4 Figure 3.1 shows that between 1981 and 2003 there was a steady decline in the population of the GCV area: from 1,946,000 in 1981 to 1,745,000 in 2003. This means a total loss of around 200,000 people. In the 1980s the rate of population loss was 12,700 per year. In the 1990s the rate of population loss reduced to 6,900 per year.

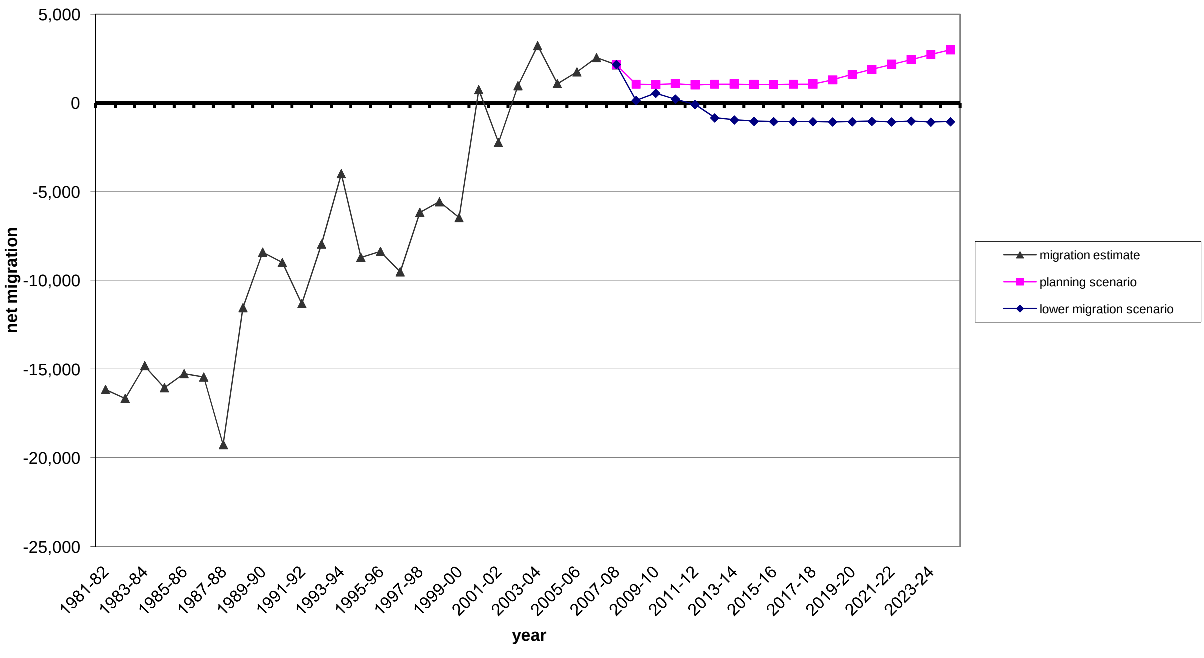
3.5 Since 2003, the GCV area population has risen by approximately 10,000: from 1,745,000 in 2003 to 1,755,000 in 2008.

3.6 For the period beyond 2008, the HNDA has identified two scenarios: a planning scenario and a lower migration scenario. More detail on these scenarios will be given below. The planning scenario shows further population growth of 67,000, to a population level of 1,822,000 by 2025. The lower migration scenario shows a more moderate growth of 23,000, to a population level of 1,778,000 by 2025.

## Estimated and Projected Net Migration – HNDA scenarios

3.7 The two scenarios identified in the HNDA differ in the migration assumptions used (see Figure 3.2). The planning scenario assumes a constant net migration of +1,050 per year for the next 10 years, with a resumption of further trend growth thereafter. The lower migration scenario assumes that, after the initial years, the net migration will be constant, at a rate of -1,050 per year, for the whole projection period. Further detail on these assumptions, and how they were derived, can be found in Technical Appendix TA06 *Review of Supply and Demand/Need for Housing.*

**Figure 3.2 - Estimated and Projected Net Migration Glasgow and the Clyde Valley area 1981 to 2025**




3.8 The planning scenario assumes that the upward trend in migration for the Conurbation, which is evident from Figure 3.2, will continue into the future, although at a lower rate than in the past decades. The initial assessment by Oxford Economics has resulted in the assumption of a 10-year delay, due to the economic downturn, before the annual rise in migration will resume. The final assessment by Oxford

Economics has indicated that the lower migration scenario is more consistent with their assessment of economic prospects for the GCV area.

**Figure 3.3 - Net Migration 2007/08 by Origin for 8 Council areas in Glasgow and Clyde Valley Area**

| | Net Migration with Rest of GCV area | Net Migration with Rest of Scotland | Net Migration with Rest of UK | Net Migration with Overseas | Net Migration Total |
|---|---|---|---|---|---|
| East Dunbartonshire | 200 | -275 | 38 | -76 | -113 |
| East Renfrewshire | 581 | -411 | -125 | -118 | -73 |
| Glasgow City | -2,889 | 710 | 879 | 3,111 | 1,811 |
| Inverclyde | -46 | -139 | 70 | -63 | -178 |
| North Lanarkshire | 564 | -380 | 245 | -225 | 204 |
| Renfrewshire | 512 | -397 | 120 | -94 | 141 |
| South Lanarkshire | 997 | -381 | 236 | -421 | 431 |
| West Dunbartonshire | 81 | -201 | 56 | -88 | -152 |
| GCV area total | 0 | -1,474 | 1,519 | 2,026 | 2,071 |

**Source: National Records of Scotland - CROWN COPYRIGHT 2009**

**Note:** Rest of Scotland is here defined as Scotland excluding the GCV area. Migration with Overseas for Glasgow City includes asylum seekers.

3.9 Figure 3.3 gives the pattern of net migration flows in 2007/08. It shows that the total net inflow into the Conurbation (2,071) is accounted for by international migration (2,026). There have been sizable net flows into ***Glasgow*** from Overseas (3,111), Rest of UK (879) and Rest of Scotland (710). There has been a net flow from ***Glasgow*** to ***Rest of the GCV area*** (-2,889), particularly to North and South Lanarkshire, Renfrewshire and East Renfrewshire.

3.10 This pattern of long-distance migration flow into Glasgow City, with a re-distribution of the population to the Rest of the Conurbation, has led to a substantial rise in the ethnic minority population in Glasgow. A recent study[5] indicates that, between 2001 and 2008, Glasgow's ethnic minority population (including the category "Other White") has risen by around 25,000 (from 7.2% of the population in 2001 to 11.4% of the population in 2008).

**Figure 3.4 - Net Migration 2007/08 by Age for 8 Council areas in Glasgow and Clyde Valley Area**

| | age 0 to 14 | age 15 to 29 | age 30 to 44 | age 45 to 59 | age 60+ | total |
|---|---|---|---|---|---|---|
| East Dunbartonshire | 289 | -456 | 221 | -67 | -105 | -118 |
| East Renfrewshire | 272 | -388 | 191 | -131 | -16 | -72 |
| Glasgow City | -945 | 4,797 | -1,295 | -199 | -549 | 1,809 |
| Inverclyde | -12 | -141 | -12 | 24 | -40 | -181 |
| North Lanarkshire | 145 | 54 | 127 | -73 | -48 | 205 |
| Renfrewshire | 66 | 87 | 65 | -52 | -24 | 142 |
| South Lanarkshire | 148 | -95 | 157 | 139 | 79 | 428 |
| West Dunbartonshire | 5 | -2 | -41 | -40 | -69 | -147 |
| GCV area total | -32 | 3,856 | -587 | -399 | -772 | 2,066 |

**Source: National Records of Scotland - CROWN COPYRIGHT 2009**

3.11 Figure 3.4 gives the estimated net migration by age band in 2007/08. The Table shows the sizable net inflow of young adults (3,856, age 15 to 29) into the GCV area, and particularly into Glasgow City (4,797). There have been net outflows from East Dunbartonshire (-456), East Renfrewshire (-388) and Inverclyde (-141). Glasgow City has lost families (-945, age 0 to 14, and -1,295, age 30 to 44) and East

[5] Glasgow City Council (2010): Population by Ethnicity in Glasgow: Estimates of Changes 2001 – 2008 for Community Planning Partnership Areas and Neighbourhoods

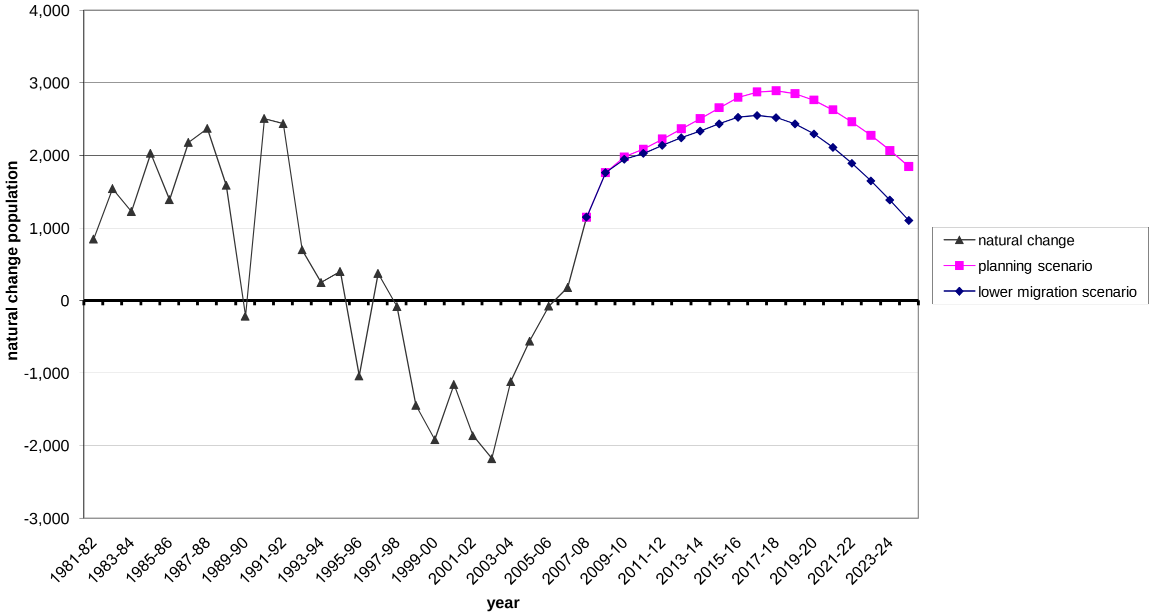
Dunbartonshire, East Renfrewshire, North and South Lanarkshire have been net gainers of families.

3.12 The above illustrates Glasgow's position within the Conurbation as an area, where young people move to and settle. Once they are older and form a family, there is a tendency to move out to the Rest of the Conurbation. This has implications for the age structures of the population in Glasgow and in the Rest of the Conurbation, which are different. This issue will be explored further in Section 3.

## Estimated and Projected Natural Population Change – HNDA scenarios

3.13 The change in population due to natural change, i.e. the difference between the number of births and deaths, represented an annual gain of about 1,500 in the 1980s, but turned to an average annual loss of nearly 1,000 in the second half of the 1990s. Since 2003/04, there has been a substantial rise to a gain of over 1,000 in 2007/08 (see Figure 3.5).

**Figure 3.5 - Estimated and Projected Natural Change Glasgow and the Clyde Valley area 1981 to 2025**




3.14 Natural change accounts for the major part of the projected future population growth in the period 2008 to 2025. For the HNDA planning scenario, the projected population growth of 67,000 in 2008-2025 is the result of an accumulated natural change of 41,000 and accumulated net migration gains of 26,000. For the HNDA lower migration scenario, the projected population growth of 23,000 in 2008-2025 is the result of an accumulated natural change of 35,000 and accumulated net migration losses of 12,000.

3.15 Net in-migration is positively related to natural change, as the inflow of young adult females has a positive impact on the number of births. For that reason the HNDA planning scenario, with a higher migration assumption, also has a higher population gain due to natural change than the lower migration scenario (see Figure 3.5).

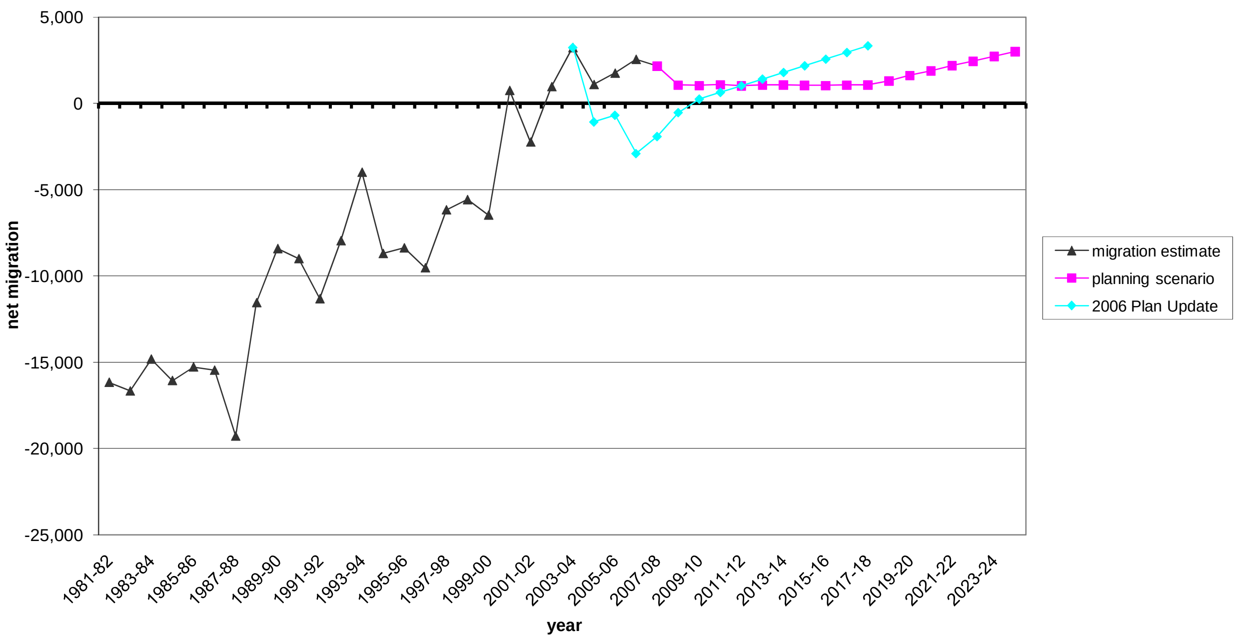
3.16 The projected sizable gains in population due to natural change are a feature of the early part of the projection period (see Figure 3.5). After 2018, the ageing population is expected to lead to a falling number of births and a rising number of deaths.

### Projected Population Change – Comparison with 2006 Plan projections

3.17 This section gives a comparison of the projection results for the HNDA Planning Scenario and the projection results used for the 2006 Structure Plan Update (2006 Plan). Differences have arisen, due to changes in the ***migration*** assumptions and in the outlook on ***natural change***.

3.18 The ***migration assumptions*** for the 2006 Plan (see Figure 3.6) were based on an upward trend in migration, estimated for the base period 1992 to 2004. The fluctuations in assumed migration values for the initial years reflect the expected impact of the asylum seeker contract for Glasgow. This contract was for the period up till July 2006, which led to the assumption of a negative impact on net migration after that date.

**Figure 3.6 - Estimated and Projected Net Migration Glasgow and the Clyde Valley area 1981 to 2025**
**Comparison HNDA Planning Scenario and 2006 Structure Plan Update projections**

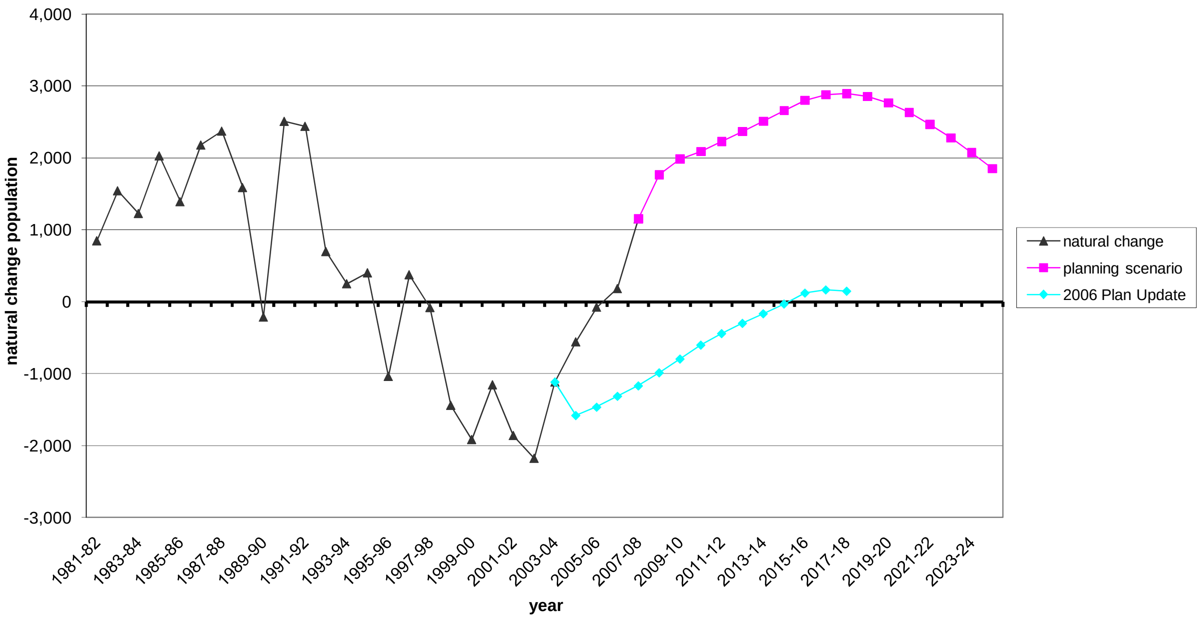



3.19 In the period 2004 to 2008 actual net migration levels for the GCV area have been higher than projected, which can be explained by the extension of the asylum seeker contract, the arrival of Eastern European migrants, as well as a more positive migration position for migrants to and from England and Wales.

3.20 It has been noted above that, for the HNDA planning scenario, the annual rise in net migration is assumed to be delayed by ten years, due to the economic downturn. In the period beyond 2012, therefore, the net migration assumed for that scenario is considerably lower than the net migration assumed for the 2006 Plan.

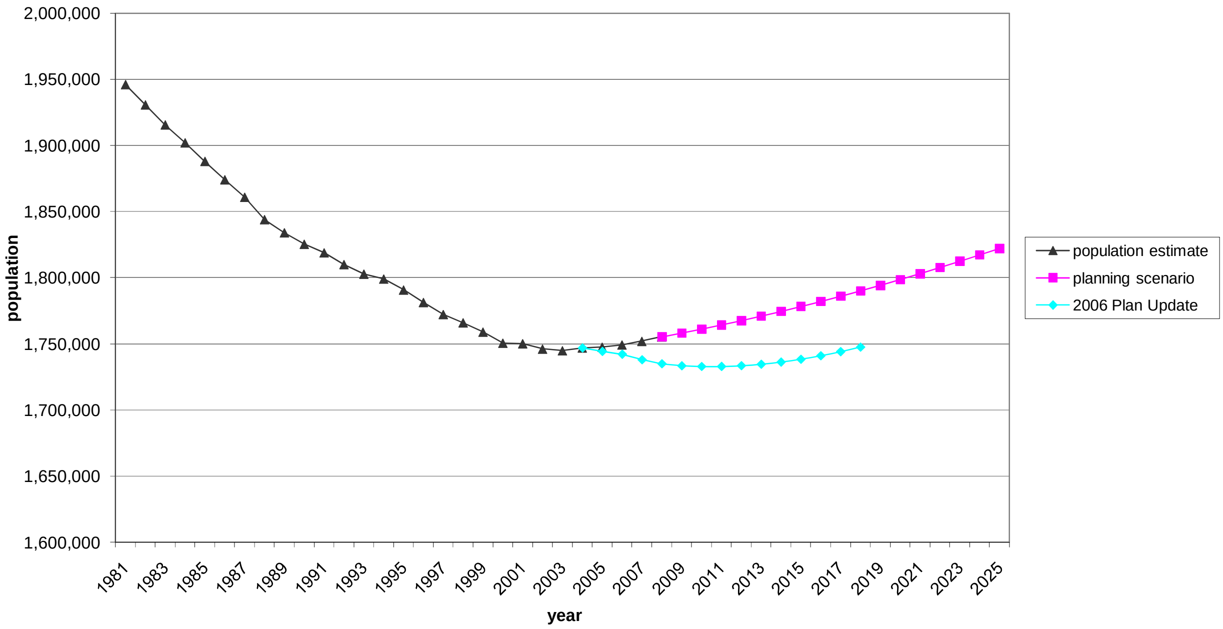
3.21 It is clear from Figure 3.7, that the upward change in the ***natural change position*** for the GCV area in recent years, was much faster than projected for the 2006 Plan. This is mainly the result of a sizable increase in the number of births: from 18,600 in 2001/02 to 20,800 in 2007/08. Over that period, the number of deaths reduced by almost 1,000: from 20,500 in 2001/02 to 19,600 in 2007/08.

**Figure 3.7 - Estimated and Projected Natural Change Glasgow and the Clyde Valley area 1981 to 2025**
**Comparison HNDA Planning Scenario and 2006 Structure Plan Update projections**




3.22 The combination of actual migration levels, which were higher than projected in the initial years 2004 to 2008 (see Figure 3.6), and a more positive natural change position for the whole projection period (see Figure 3.7), have resulted in higher projected ***population levels*** for the HNDA planning scenario, as compared with the 2006 Plan projection (see Figure 3.8).

**Figure 3.8 - Estimated and Projected Population Glasgow and the Clyde Valley area 1981 to 2025**
**Comparison HNDA Planning Scenario and 2006 Structure Plan Update projections**




## Estimated Population Change 2001-2008 for Council Sub Areas

3.23 The GCV area has been divided into 31 Council sub areas for use in Local Housing Strategies (see Annex, Map A1). The Annex contains a series of Maps and Tables, which show various aspects of recent demographic change for these areas. Maps A2 to A4 show, respectively, the annual population change, the natural change and the net migration for the period 2001 to 2008.

3.24 It is clear from Annex Table A1 and Map A2, that the highest annual rates of population growth have been in two areas in Glasgow, i.e. “Central and West” (1.0% per year) and “Greater Pollok and Newlands/Auldburn” (0.8% per year), and that “Inverclyde East” has had the highest rate of population decline (-1.2% per year).

3.25 A comparison of total population change (Annex Map A2) and net migration (Annex Map A4) shows the effect of ***natural change*** on the total population change. Some areas are relatively stable in terms of net migration, but show population decline due to natural change, e.g. “Govan and Craigton”.

3.26 Natural change and net migration can work ***in the same direction***: in “Clydebank”, “Bearsden and Milngavie”, “Maryhill/Kelvin and Canal”, “Johnstone/Elderslie”, “Paisley/Linwood” and “Inverclyde East”, the population has ***declined*** through both natural change and net migration loss. On the other hand, the population in “Pollokshields and Southside Central” has ***grown*** through both natural change and net migration gain.

3.27 Natural change and net migration can also work ***in opposite directions***: in “Cumbernauld”, “East Kilbride” and “West Renfrewshire”, sizable natural change population gains have compensated for net migration losses, resulting in stable overall populations. Some areas with substantial in-migration have reduced rates of population growth due to natural change, e.g. “Glasgow West”, “East Centre and Calton”, “Rutherglen and Cambuslang”, “Clydesdale” and “Inverclyde West”.

### Projected Population Change 2008-2025 for Council Areas

3.28 The migration assumptions for the Council area projections have been based on net migration in the 10-year period 1998-2008. Therefore the projected population change by Council area generally reflects patterns in the recent past (see Figure 3.9 and Annex, Table A2). It was noted before that the higher ***projected*** annual population changes, in comparison with ***estimated*** annual population change in 2001-2008, are mainly due to higher natural change.

**Figure 3.9 - Estimated and Projected Annual Population Change by Council area**

| | Estimate | Planning Scenario | | Lower Migration Scenario | |
|---|---|---|---|---|---|
| | 2001-2008 | 2008-2016 | 2016-2025 | 2008-2016 | 2016-2025 |
| East Dunbartonshire | -504 | -237 | -217 | -335 | -395 |
| East Renfrewshire | -27 | 285 | 442 | 175 | 262 |
| Glasgow City | 790 | 1,475 | 2,084 | 882 | 457 |
| Inverclyde | -481 | -321 | -300 | -378 | -413 |
| North Lanarkshire | 620 | 992 | 1,012 | 776 | 600 |
| Renfrewshire | -436 | -141 | -62 | -250 | -334 |
| South Lanarkshire | 1,107 | 1,395 | 1,513 | 1,107 | 985 |
| West Dunbartonshire | -340 | -100 | -33 | -180 | -219 |
| GCV area total | 729 | 3,347 | 4,440 | 1,798 | 943 |

3.29 Because migration assumptions for Council areas have been based on average net migration in ***1998-2008***, a comparison with average net migration in ***2001-2008***, shows up some differences (see Annex, Table A2). For that reason, the migration assumptions for East Dunbartonshire and East Renfrewshire are higher, and the migration assumption for Glasgow City is lower, than average net migration in 2001-2008.

### Changes in Natural Change Position 2001-2008 for Council Areas

3.30 Between 2001 and 2008 the “natural” population change for the GCV area rose by 3,010 (from a loss of -1,859 in 2001/02 to a gain of 1,151 in 2007/08, see Figure 3.10).

**Figure 3.10 - Change 2001 to 2008 in Natural Change for 8 Council areas in Glasgow and Clyde Valley Area**

| | 2001/02 | | | 2007/08 | | | difference |
|---|---|---|---|---|---|---|---|
| | births | deaths | natural change | births | deaths | natural change | |
| East Dunbartonshire | 968 | 959 | 9 | 958 | 970 | -12 | -21 |
| East Renfrewshire | 924 | 854 | 70 | 880 | 848 | 32 | -38 |
| Glasgow City | 6,423 | 7,569 | -1,146 | 7,248 | 6,851 | 397 | 1,543 |
| Inverclyde | 794 | 1,158 | -364 | 872 | 983 | -111 | 253 |
| North Lanarkshire | 3,702 | 3,435 | 267 | 4,101 | 3,473 | 628 | 361 |
| Renfrewshire | 1,794 | 2,036 | -242 | 1,984 | 1,926 | 58 | 300 |
| South Lanarkshire | 3,068 | 3,312 | -244 | 3,592 | 3,430 | 162 | 406 |
| West Dunbartonshire | 943 | 1,152 | -209 | 1,127 | 1,130 | -3 | 206 |
| GCV area total | 18,616 | 20,475 | -1,859 | 20,762 | 19,611 | 1,151 | 3,010 |

3.31 Figure 3.10 shows that the natural change has not increased for East Dunbartonshire and East Renfrewshire. All other Council areas show an increase, and about half of the overall increase has taken place in Glasgow City (1,543 of 3,010).

3.32 The above change is also reflected in the projections. Table A2 (see Annex) gives the estimated (for 2001-2008) and projected (for 2008-2016 and 2016-2025) population change, split by the components, i.e. natural change and net migration. For the Planning Scenario, the higher annual “natural” population change, at 2,299 in 2008-2016, compared with -636 in 2001-2008, represents a rise of 2,935. Over half of this rise (1,649=1,121-(-528)) is expected to take place in Glasgow. This is related to the different age profile of Glasgow’s population, compared to the population living in the Rest of the Conurbation.

## POPULATION CHANGE BY AGE

### Estimated and Projected Population by Age – GCV Area

3.33 Figure 3.11 gives details on the age-breakdown of the GCV area population in 1991 to 2025. The Table shows that, since 1991, the population has declined by 68,000, to 1,751,000 in 2000. After that year the population continued to decline until 2003, after which the population started to rise, reaching 1,755,000 in 2008. The population is projected to rise further in both scenarios for the HNDA.

**Figure 3.11 - Estimated/Projected Population (' 000s) in GCV Area by Age**

| | | | | Planning Scenario | | Low migration Scenario | |
|---|---|---|---|---|---|---|---|
| | 1991 | 2000 | 2008 | 2016 | 2025 | 2016 | 2025 |
| 0 to 15 | 372 | 348 | 315 | 313 | 319 | 311 | 309 |
| **children** | **372** | **348** | **315** | **313** | **319** | **311** | **309** |
| 16 to 29 | 405 | 318 | 346 | 327 | 302 | 323 | 293 |
| 30 to 44 | 379 | 411 | 370 | 354 | 382 | 349 | 365 |
| 45 to 59 | 303 | 318 | 357 | 383 | 335 | 382 | 329 |
| 60 to 64 | 44 | 42 | 46 | 87 | 123 | 86 | 122 |
| 65 to 65 | 0 | 0 | 0 | 0 | 22 | 0 | 22 |
| **working age** | **1,132** | **1,089** | **1,118** | **1,150** | **1,164** | **1,140** | **1,131** |
| 60 to 64 | 52 | 48 | 50 | 15 | 0 | 15 | 0 |
| 65 to 65 | 19 | 17 | 17 | 18 | 0 | 18 | 0 |
| 66 to 74 | 136 | 135 | 131 | 145 | 165 | 145 | 164 |
| 75+ | 109 | 114 | 124 | 140 | 174 | 140 | 173 |
| **retirement age** | **315** | **314** | **322** | **318** | **339** | **318** | **338** |
| **total population** | **1,819** | **1,751** | **1,755** | **1,782** | **1,822** | **1,770** | **1,778** |

**Please note that some of the figures may not add up to the (sub)total, due to rounding errors.**

3.34 Figure 3.11 has incorporated the effect of the planned rise in the pensionable age in the definitions of people of working age and of retirement age. According to current UK Government plans (these changes are still to be approved by Parliament) the state pension age will be 65 for men, 60 for women until 2010. Between 2010 and 2018 the pensionable age for women will increase to 65, and between 2018 and 2020 the pensionable age for both men and women will increase to 66.

3.35 Since 1991, the number of ***children*** has reduced by 57,000, at an annual rate of 2,700 in 1991-2000 and 4,100 per year in 2000-2008. The numbers are projected to stabilise at the 2008 level of around 315,000. The HNDA planning scenario shows a limited growth to 319,000 and the HNDA low migration scenario shows a small decline to 309,000.

3.36 The ***working age population*** has reduced by 43,000 in 1991-2000 (an annual rate of -4,800) and has increased by 29,000 in 2000-2008 (an annual rate of +3,600). At 2008 the working age population is 1,118,000. After 2008 the projected HNDA scenarios give different results:

- the planning scenario shows a further rise by 4,100 per year, to 1,150,000 in 2016, with, subsequently, a smaller rise of 1,500 per year, to 1,164,000 in 2025.
- the low migration scenario shows a rise by 2,800 per year, to 1,140,000 in 2016, with a subsequent fall by 1,000 per year, to 1,131,000 in 2025.

3.37 Over the full projection period, 2008-2025, the planning scenario envisages a somewhat lower growth in the working age population (of 2,700 per year, compared with 3,600 per year in 2000-2008) and the low migration scenario envisages only limited growth (an increase of 800 per year) in the working age population. However, this includes the effect of the rise in the pensionable age on the working age population. Without the rise in the pensionable age, the working age population would have been projected to reduce by 2,500 per year in the planning scenario, and by 4,400 per year in the low migration scenario, in the period 2008-2025 (see Figure 3.12).

3.38 In 1991-2000, the number of ***people of retirement age*** has been almost constant, despite a considerable fall in the overall population. Since 2000, the number of people of retirement age has increased by 1,000 per year, to 322,000 in 2008. After 2008, the retirement-age population is projected to decline by about 500 per year in 2008-2016, and to rise by around 2,200 per year in 2016 to 2025. However, this includes the effect of a rise in the pensionable age. Without this rise in the pensionable age, the projected retirement-age population would have increased much faster, i.e. by over 6,000 per year, as compared with around 1,000 per year, over the whole projection period, 2008-2025 (see Figure 3.12).

**Figure 3.12 - Projected Population (' 000s) in GCV area by Age**

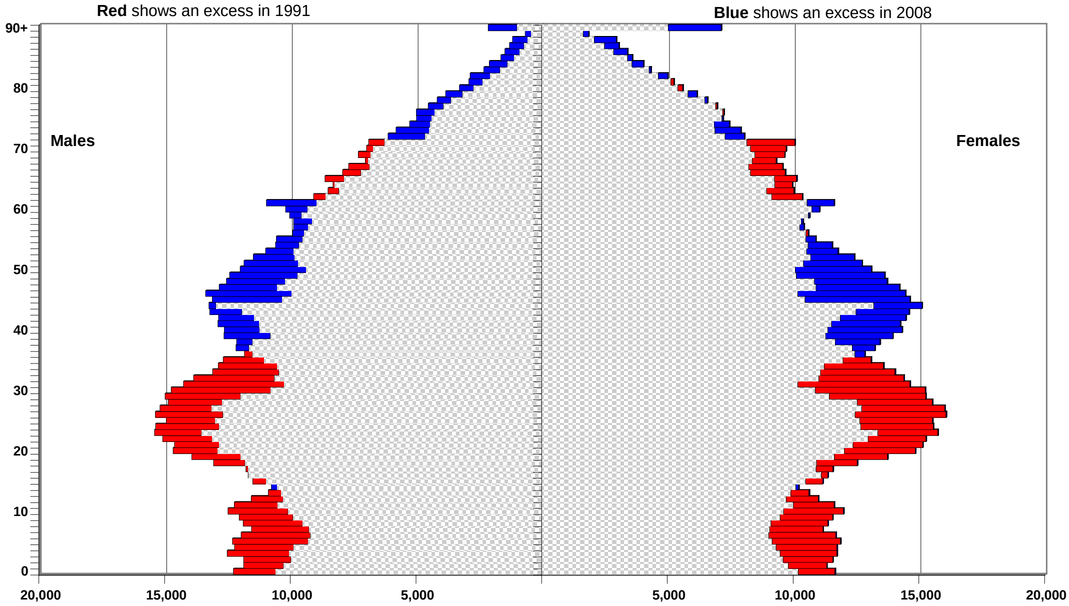
| | population (' 000s) | | | annual change (rounded) | | annual ch |
|---|---|---|---|---|---|---|
| | 2008 | 2016 | 2025 | 2008-2016 | 2016-2025 | 2008-2025 |
| **HNDA planning scenario** | | | | | | |
| Rise in pensionable age included | | | | | | |
| children | 315 | 313 | 319 | -200 | 600 | 200 |
| working age | 1,118 | 1,150 | 1,164 | 4,100 | 1,500 | 2,700 |
| retirement age | 322 | 318 | 339 | -500 | 2,300 | 1,000 |
| total | 1,755 | 1,782 | 1,822 | 3,300 | 4,400 | 3,900 |
| Assuming no change in pensionable age | | | | | | |
| children | 315 | 313 | 319 | -200 | 600 | 200 |
| working age | 1,118 | 1,112 | 1,076 | -700 | -4,000 | -2,500 |
| retirement age | 322 | 357 | 428 | 4,300 | 7,900 | 6,200 |
| total | 1,755 | 1,782 | 1,822 | 3,300 | 4,400 | 3,900 |
| **HNDA low migration scenario** | | | | | | |
| Rise in pensionable age included | | | | | | |
| children | 315 | 311 | 309 | -500 | -200 | -300 |
| working age | 1,118 | 1,140 | 1,131 | 2,800 | -1,000 | 800 |
| retirement age | 322 | 318 | 338 | -600 | 2,200 | 900 |
| total | 1,755 | 1,770 | 1,778 | 1,800 | 900 | 1,300 |
| Assuming no change in pensionable age | | | | | | |
| children | 315 | 311 | 309 | -500 | -200 | -300 |
| working age | 1,118 | 1,102 | 1,044 | -2,000 | -6,500 | -4,400 |
| retirement age | 322 | 356 | 425 | 4,200 | 7,700 | 6,000 |
| total | 1,755 | 1,770 | 1,778 | 1,800 | 900 | 1,300 |

**Please note that some of the figures may not add up to the (sub)total, due to rounding errors.**

3.39 Figure 3.12 gives the projected population change by age-band category, both with and without the planned rise in the pensionable age included, for the total projection period and for the two periods 2008-2016 and 2016-2025.

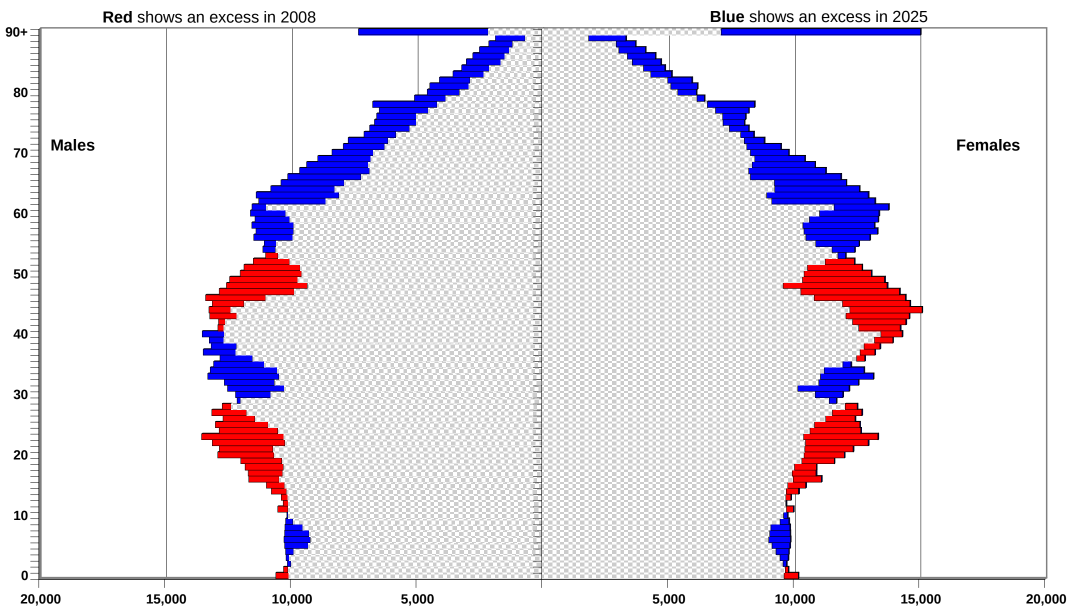
3.40 Past and projected population change can also be examined by looking at population age/sex pyramids (see Figures 3.13 and 3.14).

**Figure 3.13 - Population GCV area Age Pyramid - Comparison of estimate for 1991 with 2008**




3.41 Figure 3.13 gives a comparison of the age profile of the GCV area population in 1991 and in 2008. Over these 17 years there have been sizable reductions in the numbers of children and young adults (in their twenties or early thirties) and significant increases of middle-aged people (in their forties and fifties) and elderly people (age 70+).

**Figure 3.14 - Population GCV area Age Pyramid - Comparison of estimate 2008 with projection 2025**



3.42 Figure 3.14 gives a comparison of the age profile of the GCV area population in 2008 and in 2025. The 2025 position reflects the projected value for the HNDA planning scenario. Over these 17 years it is projected that there will be reductions in the numbers of young adults (in their twenties) and middle-aged (in their forties). The number of children is projected to show very little change. This Figure demonstrates the expected ***ageing of the population***, with sizable increases projected for pre-retirement and elderly people (age 55+).

**Estimated Population Age Profile for Council Sub Areas**

3.43 Detail on the population age profile for the Council sub areas is given in the Appendix, Table A3. Using statistical analysis, the sub areas have been grouped into clusters with a similar age profile. This led to the following five clusters (see also Annex, Table A4):

1. Concentration of young adults, with 35% of the population in age group 16-29
2. More young adults, with 48% of the population in age group 16-44
3. Average age profile, with 23% of the population in age group 16-29
4. Average age profile, with 40% of the population in age groups 0-15 and 45-59
5. More pre-retirement and elderly, with 56% of the population in the age group 45+

Clusters 3 and 4 have an age profile that is closest to the average for the GCV area.

3.44 Annex Map A5 in the Appendix shows the geographical distribution of these clusters. Cluster 1 consists of one sub area, “Glasgow Central and West”, an area with high numbers of young people and students. Clusters 2 and 3 represent sub areas with, proportionately, higher numbers of young adults. These sub areas are all within Glasgow City. There are relatively more elderly in cluster 3 areas (21% age 60+), than in cluster 2 areas (17% age 60+).

3.45 Outside Glasgow City, there is little difference in the age profiles for the sub areas, with the exception of cluster 5 sub areas “Bearsden and Milngavie” and “Kilmacolm and Quarriers Village”. For these sub areas, the number of pre-retirement and elderly people is well above average (56% age 45+, compared with GCV area average of 47% age 45+).

3.46 The two sub areas “Baillieston, Shettleston and Greater Easterhouse” and “Greater Pollok and Newlands/Auldburn”, which are in Glasgow City, have an age profile that is closer to the profile for the rest of the Conurbation, rather than the profile for the rest of Glasgow City.

3.47 The above illustrates a point made earlier, i.e. that the age profile of Glasgow’s population is significantly different from that of the rest of the Conurbation. The same issue arises, when the population change by age band in 2001-2008 is compared for the various clusters (see Figure 3.15 below).

**Figure 3.15 - Population Change 2001-2008 by Age Profile Cluster of Sub Areas in the GCV area**

| **Cluster of Sub Areas** | 0-15 | 16-29 | 30-44 | 45-59 | 60-74 | 75+ | total |
|---|---|---|---|---|---|---|---|
| **Average annual change** | | | | | | | |
| Concentration of young adults - more 16-29 | 48 | 256 | 253 | 293 | -41 | -42 | 767 |
| More young adults - more 16-44 | -171 | 486 | -80 | 345 | -277 | -18 | 284 |
| Average age profile - more 16-29 | -369 | 1,192 | -442 | 278 | -655 | -164 | -161 |
| Average age profile - more 0-15 and 45-59 | -1,188 | 1,843 | -5,345 | 1,873 | 1,404 | 1,363 | -50 |
| More pre retirement and elderly - more 45+ | -60 | 30 | -294 | -2 | 112 | 102 | -112 |
| **Glasgow and the Clyde Valley area** | **-1,740** | **3,806** | **-5,909** | **2,788** | **544** | **1,241** | **729** |

3.48 The population age 60+ has increased by 1,785 (=544+1,241) per year in the GCV area, but all of this increase has taken place in the “Rest of Conurbation” clusters 4 and 5. In the “Glasgow City” clusters 1 to 3 the population age 60+ has actually decreased.

3.49 The population age 30-44 has reduced by 5,909 per year, but this reduction has almost totally occurred in the “Rest of Conurbation” clusters 4 and 5.

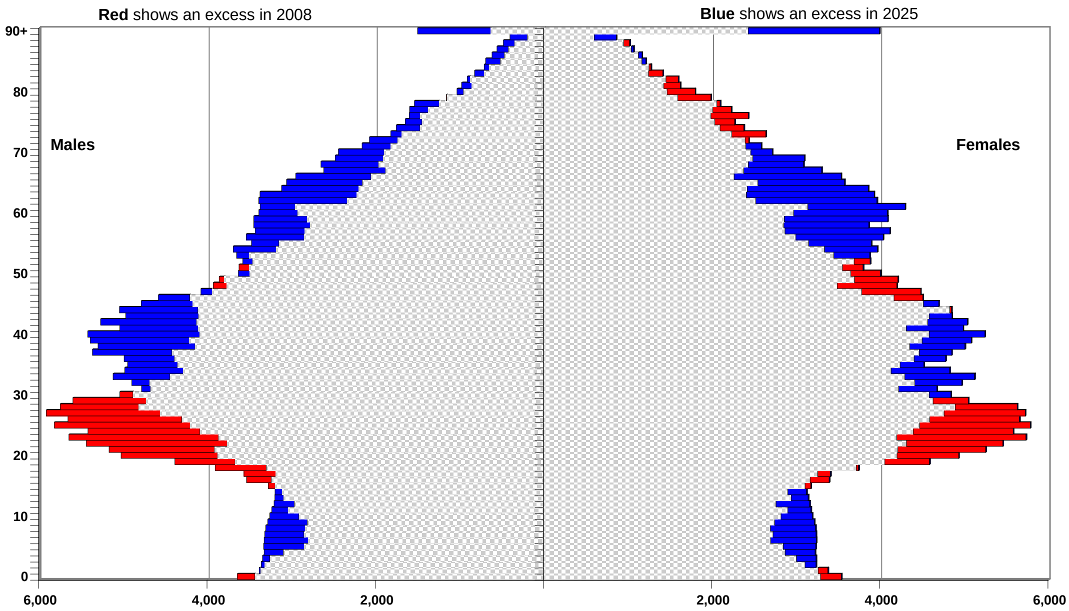
3.50 The population age 16-29 has increased by 3,806 per year in the GCV area. It is clear from Figure 6.15 that more than half of this increase has taken place in the “Glasgow City” clusters 1 to 3.

3.51 Given this discrepancy in the age profile of Glasgow City and the Rest of the Conurbation, the next section will look at projected change for Glasgow City and the Rest of the Conurbation separately, within the context of an analysis by Council area.

## Projected Population Change 2008-2025 by Age for Council Areas

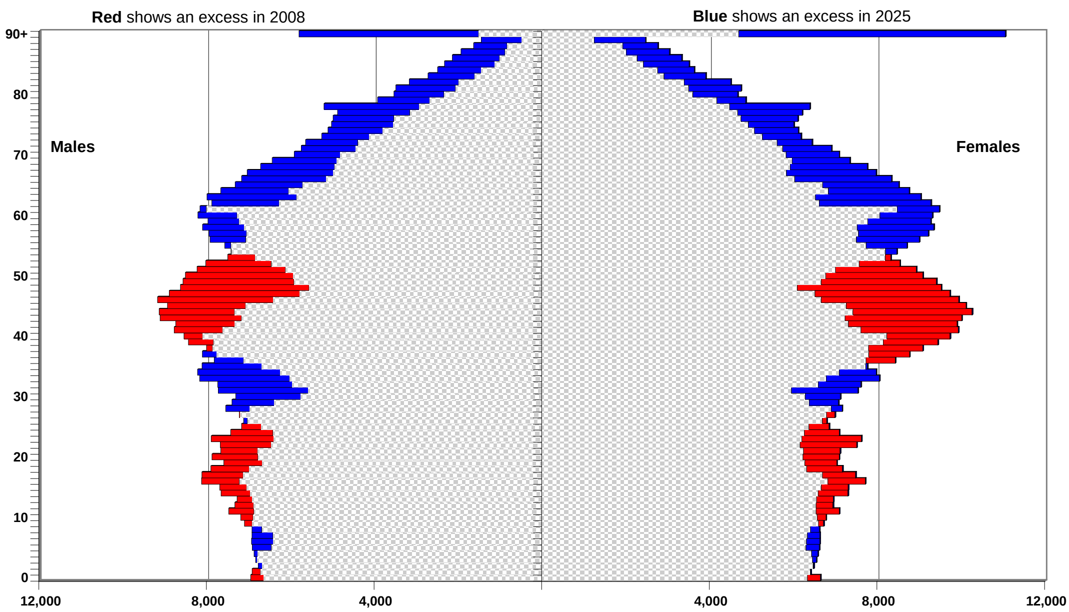
3.52 Figure 3.16 shows that, under the Planning Scenario, for Glasgow, the number of young adults in their twenties is projected to reduce considerably. Increases are projected in the numbers of children, adults in their thirties/early forties, and adults in their late fifties and sixties.

**Figure 3.16 - Population Glasgow Age Pyramid - Comparison of estimate 2008 with projection 2025**




3.53 Figure 3.17 shows that the projected changes from the Planning Scenario projections for the Rest of the GCV area are quite different. The number of people in their forties/early fifties is expected to reduce. Sizable increases are projected in the number of people of all ages 55 and over.

**Figure 3.17 - Population Rest GCV Age Pyramid - Comparison of estimate 2008 with projection 2025**



3.54 It was already observed previously that the number of ***children*** is expected to be relatively constant over the next 17 years. This is a significant change relative to the situation in 2001-2008, when the number of children reduced by 4,100 per year. The planning scenario projects an initial reduction at 197 per year in 2008-2016, with a subsequent rise of 612 per year in 2016-2025. The lower migration scenario projects reductions of 451 per year in 2008-2016 and 247 per year in 2016-2025 (see Figure 3.18).

**Figure 3.18 - Estimated and Projected Average Annual Change in Number of Children by Council area**

| | Estimate | Planning Scenario | | Lower Migration Scenario | |
|---|---|---|---|---|---|
| | 2001-2008 | 2008-2016 | 2016-2025 | 2008-2016 | 2016-2025 |
| East Dunbartonshire | -391 | -255 | -11 | -278 | -55 |
| East Renfrewshire | -178 | -119 | 161 | -131 | 119 |
| Glasgow City | -1,430 | 534 | 380 | 447 | -10 |
| Inverclyde | -305 | -98 | -50 | -110 | -84 |
| North Lanarkshire | -319 | -13 | -9 | -47 | -107 |
| Renfrewshire | -404 | -45 | -11 | -63 | -81 |
| South Lanarkshire | -357 | -104 | 161 | -154 | 34 |
| West Dunbartonshire | -315 | -98 | -9 | -116 | -64 |
| GCV area total | -3,700 | -197 | 612 | -451 | -247 |

3.55 Figure 3.18 shows that, in 2008-2016, the number of children is expected to rise in Glasgow City and to decline in the Rest of the Conurbation, with East Dunbartonshire showing the highest reduction. In 2016-2025, the number of children is expected to rise in East Renfrewshire and, under the planning scenario, also in Glasgow City and South Lanarkshire.

3.56 A different geographical split is again evident for the ***working age population.*** Under both scenarios, the working age population is expected to rise in 2008-2016, with the largest increases projected for Glasgow City, North and South Lanarkshire, and East Renfrewshire (see Figure 3.19). In East Dunbartonshire, Inverclyde and Renfrewshire the working age population is expected to reduce.

3.57 For the period 2016-2025, the planning scenario shows a slowdown in the rise of the working age population (1,521 per year, compared with 4,058 per year in 2008-2016). The lower migration scenario indicates that the working age population will reduce after 2016, which will result in a working age population in 2025, which will be around 13,000 above the 2008 level.

**Figure 3.19 - Estimated and Projected Average Annual Change in Working Age Population by Council area**

| | Estimate | Planning Scenario | | Lower Migration Scenario | |
|---|---|---|---|---|---|
| | 2001-2008 | 2008-2016 | 2016-2025 | 2008-2016 | 2016-2025 |
| East Dunbartonshire | -472 | -117 | -419 | -192 | -547 |
| East Renfrewshire | -128 | 326 | 64 | 231 | -63 |
| Glasgow City | 3,541 | 2,241 | 1,424 | 1,760 | 236 |
| Inverclyde | -238 | -214 | -320 | -260 | -395 |
| North Lanarkshire | 298 | 736 | 460 | 567 | 167 |
| Renfrewshire | -267 | -103 | -177 | -187 | -366 |
| South Lanarkshire | 641 | 1,147 | 617 | 920 | 245 |
| West Dunbartonshire | -56 | 42 | -128 | -29 | -261 |
| GCV area total | 3,319 | 4,058 | 1,521 | 2,810 | -986 |

3.58 The number of ***people of pensionable age*** is expected to reduce by about 500 per year during 2008-2016. Numbers are expected to reduce in Glasgow and to increase in North and South Lanarkshire, East Dunbartonshire and East Renfrewshire (see Figure 3.20).

3.59 The population of pensionable age is expected to rise substantially after 2016 in all Council areas, with the highest increases in North and South Lanarkshire.

**Figure 3.20 - Estimated and Projected Average Annual Change in Pensionable Age Population by Council area**

| | Estimate | Planning Scenario | | Lower Migration Scenario | |
|---|---|---|---|---|---|
| | 2001-2008 | 2008-2016 | 2016-2025 | 2008-2016 | 2016-2025 |
| East Dunbartonshire | 359 | 134 | 213 | 135 | 207 |
| East Renfrewshire | 279 | 79 | 217 | 75 | 206 |
| Glasgow City | -1,321 | -1,300 | 281 | -1,324 | 231 |
| Inverclyde | 61 | -9 | 70 | -9 | 66 |
| North Lanarkshire | 641 | 268 | 561 | 255 | 541 |
| Renfrewshire | 236 | 7 | 126 | 0 | 113 |
| South Lanarkshire | 823 | 351 | 735 | 342 | 707 |
| West Dunbartonshire | 30 | -44 | 105 | -35 | 106 |
| GCV area total | 1,109 | -513 | 2,307 | -562 | 2,176 |

3.60 Figure 3.20 shows that, despite an ***ageing population*** in the GCV area, the number of people of retirement age is expected to go down by, on average, about 500 per year in 2008-2016. This is due to the planned rise in the pensionable age, which is expected to take place over the projection period.

**Figure 3.21 - Estimated and Projected Average Annual Change in Population Age 75+ by Council area**

| | Estimate | Planning Scenario | | Lower Migration Scenario | |
|---|---|---|---|---|---|
| | 2001-2008 | 2008-2016 | 2016-2025 | 2008-2016 | 2016-2025 |
| East Dunbartonshire | 224 | 269 | 366 | 273 | 364 |
| East Renfrewshire | 158 | 178 | 281 | 178 | 276 |
| Glasgow City | -148 | -91 | 369 | -104 | 344 |
| Inverclyde | 56 | 89 | 203 | 88 | 200 |
| North Lanarkshire | 316 | 617 | 915 | 610 | 905 |
| Renfrewshire | 145 | 244 | 430 | 240 | 421 |
| South Lanarkshire | 445 | 640 | 970 | 638 | 960 |
| West Dunbartonshire | 45 | 54 | 204 | 60 | 208 |
| GCV area total | 1,241 | 2,000 | 3,738 | 1,984 | 3,680 |

3.61 Figure 3.21 shows sizeable increases in the population age 75+, of around 2,000 per year in 2008-16, and around 3,700 per year in 2016-2025. Again the highest increases are projected for North and South Lanarkshire Council areas.

3.62 Tables A5 and A6 (see Annex) give more detail on the projected population by age-band for the Council areas within the Glasgow and the Clyde Valley area.

## HOUSEHOLD CHANGE
## Population in Households and in Communal Establishments

3.63 In 2001, 24,246 people were resident in a Communal Establishment (CE) in the GCV area (see Annex, Table A7). Between 2001 and 2008, it is estimated that the number of residents in CEs has gone up by 200 per year (see Figure 3.22). In Glasgow and Renfrewshire, the number of CE residents has risen by 435 per year, but elsewhere in the Conurbation there have been significant reductions. These estimates are based on the GROS 2006 estimates of population in CEs by age band for the 8 Council areas. From these estimates, rates by population age band have been derived, and these rates have been applied to the 2008 population estimates, and to the population projections for 2016 and 2025.

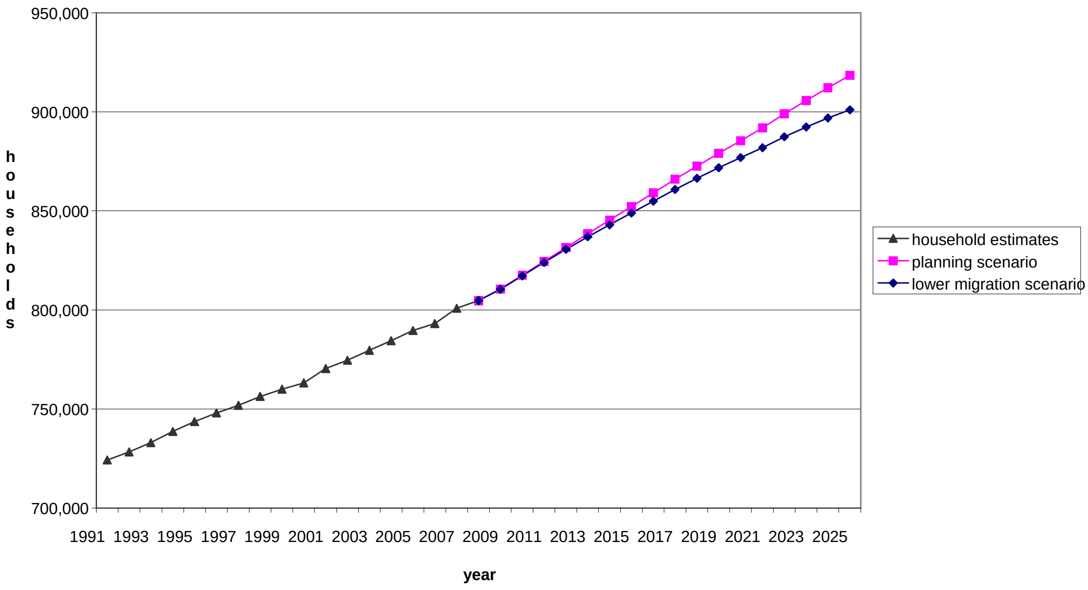
**Figure 3.22 - Estimated and Projected Annual Change of Population in Communal Establishments**

| | Estimate | Planning Scenario | | Lower Migration Scenario | |
|---|---|---|---|---|---|
| | 2001-2008 | 2008-2016 | 2016-2025 | 2008-2016 | 2016-2025 |
| East Dunbartonshire | -68 | 16 | 24 | 15 | 23 |
| East Renfrewshire | -17 | 15 | 22 | 15 | 22 |
| Glasgow City | 407 | -110 | 56 | -125 | 28 |
| Inverclyde | -15 | 8 | 16 | 8 | 15 |
| North Lanarkshire | -29 | 54 | 81 | 52 | 78 |
| Renfrewshire | 28 | 24 | 42 | 23 | 39 |
| South Lanarkshire | -74 | 72 | 105 | 71 | 102 |
| West Dunbartonshire | -33 | 6 | 13 | 6 | 13 |
| Glasgow & Clyde Valley | 200 | 85 | 358 | 66 | 321 |

3.64 The number of CE residents is expected to go up further over the projection period. The largest increases are expected in North and South Lanarkshire, Renfrewshire, East Renfrewshire and East Dunbartonshire. These expected increases are the result of an ageing population in these Council areas.

### Estimated and Projected Households – GCV Area

**Figure 3.23 - Estimated and Projected Households - HNDA scenarios**



3.65 The annual household change in 2001-2008, at 4,900 per year, was only marginally above the annual household change in 1991-2001, at 4,600 per year (Figure 3.23 shows no upward change after 2001 in the slope of the curve). This is somewhat surprising as, in 1991-2001, the population ***fell*** by 6,900 per year, and, in 2001-2008, the population ***rose*** by 700 per year. That such a change in the population position would have such a small impact on the rate of household change, points to a significant change in the rate of household formation.

3.66 This conclusion is confirmed by a comparison of the actual change in the number of households between 2001 and 2008, with the change that would have occurred if the rate of household formation during the 1990s had continued. Figure 3.24 shows that the estimated annual change, at 4,902 for the GCV area, was 454 lower than the projected change, at 5,356 (based on household formation rates in the 1990s). This difference was entirely due to a lower than projected household growth for Glasgow City: an ***estimated*** annual change of 1,253, compared with a ***projected*** annual change of 2,600. For the other 7 Council areas, the estimated change has been higher than the projected change.

**Figure 3.24 - Comparison of estimated and projected annual change in households 2001-2008**

| | changes due to population size and age 2001-2008 | changes due to household formation 2001-2008 | total projected annual change 2001-2008 | stock-based estimated annual change 2001-2008 | estim change minus proj annual change 2001-2008 |
|---|---|---|---|---|---|
| East Dunbartonshire | 2 | 43 | 45 | 116 | 71 |
| East Renfrewshire | 70 | 15 | 85 | 107 | 23 |
| Glasgow City | **787** | **1,812** | **2,600** | **1,253** | **-1,347** |
| Inverclyde | -120 | 131 | 11 | 14 | 2 |
| North Lanarkshire | 564 | 556 | 1,120 | 1,343 | 223 |
| Renfrewshire | -56 | 255 | 199 | 319 | 120 |
| South Lanarkshire | 793 | 416 | 1,209 | 1,587 | 378 |
| West Dunbartonshire | -61 | 149 | 88 | 163 | 75 |
| Glasgow & Clyde Valley | **1,980** | **3,376** | **5,356** | **4,902** | **-454** |

3.67 Figure 3.24 gives a split of the ***projected*** annual household change by component. Changes in the population size, and in the age profile of the population, account for 1,980 of the projected annual household change. The remainder, at 3,376 per year, or almost two thirds of the projected change, is due to people forming smaller households. In Glasgow the evidence indicates that the latter component has slowed down considerably in 2001-2008.

3.68 An examination of household changes for Glasgow City over 2001-2008, using data from the Scottish Household Survey (SHS), indicates a virtually constant average household size, of 2.09. This compares with a projected reduction in the average household size from 2.05 in 2001 to 1.94 in 2008, based on household formation rates in the 1990s. For the Rest of the GCV area, SHS data indicates a reduction in average household size (from 2.40 in 2001 to 2.29 in 2008), which corresponds more closely to the projected reduction (from 2.35 in 2001 to 2.26 in 2008).

3.69 This analysis raises questions about the validity of using the household formation rates in the 1990s, as a basis for the HNDA household projections. It is uncertain, however, whether the changes found in 2001-2008 reflect a permanent change in household formation trends, or a temporary difference due to e.g. higher house prices in 2001-2008. The HNDA household projections are used to assess need and demand in the future. It would not be appropriate, therefore, to reduce future requirements, based on a lower rate of household formation in 2001-2008, which could be a result of supply constraints. There was a need to consider, what adjustments should be made to the HNDA household projections.

3.70 For the ***lower migration scenario*** (with projection results close to those of the GROS principal projection) it was considered important to be consistent with the methodology applied by GROS in their projections. The GROS methodology is based on household formation between 1991 and 2001, the two Census years, without an adjustment for household formation post 2001 (except for a household calibration at the base year and the following year). Therefore, it has been decided to apply the GROS household projection methodology to this option without any adjustment. Implicitly it has been assumed that, following the recent (2001-2008) changes, household formation will get back on track with the trends seen in the 1990s.

3.71 For the ***planning scenario***, a different approach has been chosen to address the above issues. Future household formation trends have been based on household formation in the **1991-2008** period, rather than **1991-2001**. This has the advantage that use is made of the most up-to-date information. The more extended period 1991-2008 was taken as a base, rather than 2001-2008, in order to avoid relying exclusively on household formation in a particular set of circumstances, i.e. higher house prices in 2001-2008, as a basis for projecting the future.

3.72 The impact on the household projection results, of using either of the two approaches on household formation, is limited for the GCV area as a whole. However, as the slowdown in household formation did take place in Glasgow, using the 1991-2008 base period does result in a significant reduction of future household growth in Glasgow. To some extent this is matched by higher future household growth elsewhere in the Conurbation.

3.73 With respect to the household projection results for the GCV area, the **planning scenario** shows an increase from 804,700 in 2008 to 859,100 in 2016 (annual rate of 6,800) and to 918,400 in 2025 (annual rate of 6,600). The **lower migration scenario** shows an increase from 804,700 in 2008 to 854,900 in 2016 (annual rate of 6,300) and to 901,100 in 2025 (annual rate of 5,100).

3.74 These household projections indicate an accelerated annual rise in the number of households, relative to the rate of household change in 2001-2008. ***It is important to emphasize here, that these projections are based on past trends in household formation (in the 1990s) and have been prepared to assess future need and demand. As the result of the economic slowdown, with lower levels of private sector housing completions, and housing completions in the social sector likely to be affected by public sector expenditure constraints, it is expected that actual household growth will be considerably below projected levels in the coming years.***

**Figure 3.25 - Estimated and Projected Annual Change in Households by Type - GCV area**

| | Estimate 2001-2008 | | Planning Scenario | | Lower Migration Scenario | |
|---|---|---|---|---|---|---|
| household type | projected | using SHS | 2008-2016 | 2016-2025 | 2008-2016 | 2016-2025 |
| 1 adult | 5,567 | 2,961 | 6,707 | 6,377 | 6,572 | 5,809 |
| 2 adults | 1,365 | 2,728 | 2,062 | 1,629 | 1,924 | 1,302 |
| 3+ adults | -644 | 1,167 | -821 | -1,146 | -851 | -1,209 |
| 1 adult with child(ren) | 1,310 | -994 | 1,338 | 1,424 | 1,257 | 1,189 |
| 2+ adults with child(ren) | -2,696 | -961 | -2,481 | -1,699 | -2,626 | -1,964 |
| total households | 4,902 | 4,902 | 6,805 | 6,585 | 6,276 | 5,126 |

3.75 The same warning also applies to the projected households by type (see Figure 3.25). Again, the projected changes by household type reflect household formation trends in the 1990s. Scottish Household Survey (SHS) data for 2001-2008 indicate that the actual rate of growth for single person households (at 2,961 per year) has been far less than projected (at 5,567 per year). For single adult family households the SHS data indicate a drop in numbers (-994 per year), rather than a rise, as projected (1,310 per year). Households with 3 or more adults have risen (1,167 per year) rather than fallen, as projected (-644 per year), and family households with two or more adults have not fallen at the rate projected (a fall of only -961 per year, and not -2,696 per year). ***In view of the changes in household formation that have taken place in 2001-2008, it is pointed out that the projections by household type must be used with caution and interpreted in the light of the differences, as presented in Figure 3.25 (columns 1 and 2) and Table A8 (see Annex).***

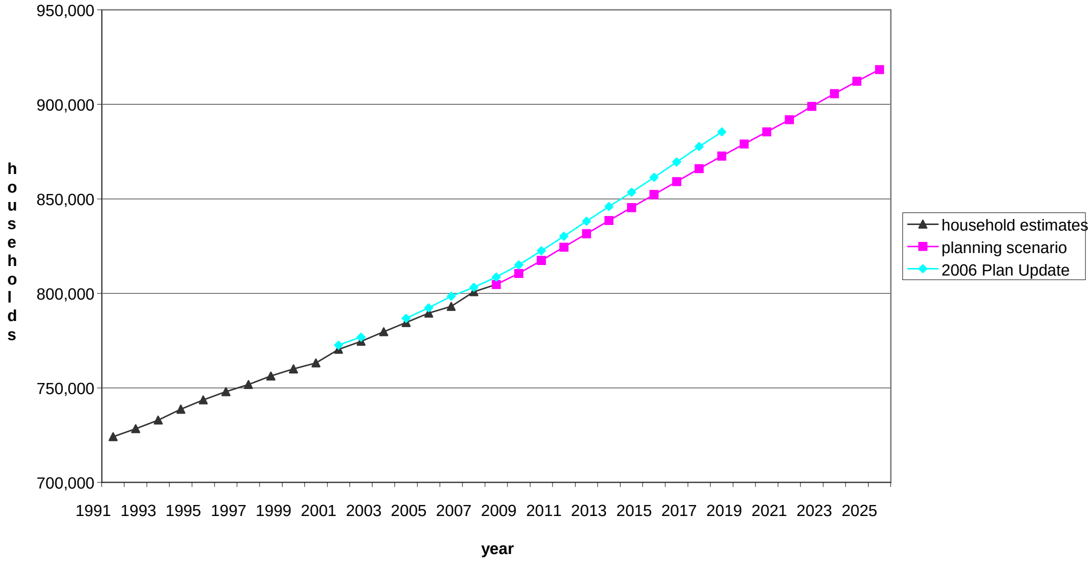
**Figure 3.26 - Estimated and Projected Annual Change in Households by Age of HRP - GCV area**

| age - household | Estimate | Planning Scenario | | Lower Migration Scenario | |
|---|---|---|---|---|---|
| reference person | 2001-2008 | 2008-2016 | 2016-2025 | 2008-2016 | 2016-2025 |
| 16 to 29 | 1,909 | 368 | -190 | 240 | -410 |
| 30 to 44 | -1,708 | 351 | 3,488 | 53 | 2,677 |
| 45 to 59 | 3,919 | 3,203 | -2,502 | 3,146 | -2,777 |
| 60 to 74 | -6 | 1,476 | 3,064 | 1,444 | 2,977 |
| 75+ | 788 | 1,406 | 2,725 | 1,394 | 2,659 |
| total households | 4,902 | 6,805 | 6,585 | 6,276 | 5,126 |

3.76 Figure 3.26 gives the projected changes in the number of households by age of the household reference person. The number of households with a reference person aged 60+ increased by almost 800 per year in 2001-2008 and is projected to grow by about 2,800 in 2008-2016 and by about 5,700 per year in 2016-2025.

## Projected Household Change – Comparison with 2006 Plan Projections

**Figure 3.27 - Estimated and Projected Households Glasgow and Clyde Valley area 1991 to 2025**
**Comparison of HNDA Planning Scenario and 2006 Structure Plan Update projections**




3.77 The 2006 Structure Plan Update projections showed, for the period 2008-2018, a population growth of 1,300 per year and a household growth of 7,700 per year. Despite the projection of a higher rate of population growth, at 3,500 per year, the HNDA planning scenario shows a lower rate of household growth, at 6,800 per year (see Figure 3.27). It was noted before (in section 2), that the higher annual population changes are mainly due to natural change, in particular a higher number of births. The latter affects the distribution of households by type (more families), but has a limited impact on the projected number of households. Another factor is that the projections for the 2006 Structure Plan update used household formation rates, derived from 1991 and 2001 Census data, for a different set of household types. The HNDA projections have used the household formation rates obtained from GROS, which have also been used in the GROS household projections. Use of the latter rates has reduced the projected annual household growth.

### Estimated Household Change 2001-2008 for Council Sub Areas

3.78 Map A6 in the Annex shows the geographical pattern, within the Conurbation, of annual household change in 2001-2008. A comparison with Map A2, which gives the pattern for the annual population change, shows some differences. This mainly reflects a difference in the rate of change for the average household size, with some sub areas showing a faster reduction, than others. Table A9 in the Annex gives a comparison of annual population and household change. In several sub areas of Glasgow, the annual population growth exceeds the annual household growth, which indicates an increase in average household size. This will be related to the slowdown in the rate of household formation in Glasgow, which was noted in earlier sections. In contrast, a faster change towards more smaller households has taken place in Glasgow “Central and West” and “East Centre and Calton”, as well as in “Dumbarton/Vale of Leven”, and parts of South Lanarkshire, i.e. “Hamilton” and “Clydesdale”.

## Estimated Household Type Profile 2001 for Council Sub Areas

3.79 Detail on the household type profile for the Council sub areas is given in the Annex, Table A10. Using statistical analysis, the sub areas have been grouped into clusters with a similar household type profile. This led to the following four clusters (see also Annex, Table A11):

1. Smaller adult and family households – with fewer families - 23% of households
2. Average household profile, with some more families – 28% of households
3. Somewhat larger households, with some more families – 29% of households
4. Larger adult and family households, with more families – 31% of households

3.80 Map A7 in the Annex shows the geographical distribution of these clusters. Sub areas of Cluster 1, with higher concentrations of single person households, are mainly in Glasgow City, but also include Paisley/Linwood. Cluster 2 sub areas contain more family households relative to Cluster 1 areas and tend to be located in urban areas with a greater concentration of social rented housing, e.g. “Inverclyde East”, “Clydebank”, “Baillieston, Shettleston and Greater Easterhouse” and “Motherwell”. The household size for Cluster 3 sub areas is larger than the Conurbation average. These sub areas are predominantly to be found in South Lanarkshire, and in parts of North Lanarkshire and East Dunbartonshire. Cluster 4 sub areas have the largest households. These sub areas are primarily located in areas of predominantly owner occupied housing, e.g. “Bearsden and Milngavie”, “Eastwood”, “West Renfrewshire” and “Kilmacolm and Quarriers Village”.

## Projected Household Change 2008-2025 for Council Areas

3.81 Figure 3.28 gives the estimated and projected annual household change for each of the Council areas. Tables A12 to A15 (see Annex) give more detail on estimated and projected number of households by household type, and by age of the household reference person (see also Figures 3.25 and 3.26, which present that information at GCV area level).

**Figure 3.28 - Estimated and Projected Annual Household Change by Council area**

| | Estimate | Planning Scenario | | Lower Migration Scenario | |
|---|---|---|---|---|---|
| | 2001-2008 | 2008-2016 | 2016-2025 | 2008-2016 | 2016-2025 |
| East Dunbartonshire | 116 | 173 | 171 | 105 | 70 |
| East Renfrewshire | 107 | 225 | 288 | 170 | 205 |
| Glasgow City | 1,253 | 2,533 | 2,289 | 2,830 | 2,123 |
| Inverclyde | 14 | 86 | 43 | 60 | -8 |
| North Lanarkshire | 1,343 | 1,511 | 1,472 | 1,309 | 1,163 |
| Renfrewshire | 319 | 359 | 347 | 255 | 164 |
| South Lanarkshire | 1,587 | 1,653 | 1,704 | 1,350 | 1,257 |
| West Dunbartonshire | 163 | 264 | 271 | 198 | 152 |
| Glasgow & Clyde Valley | 4,902 | 6,805 | 6,585 | 6,276 | 5,126 |

3.82 As expected, the GCV area annual household growth in 2008-2016 is higher for the planning scenario (6,805 per year), then for the lower migration scenario (6,276 per year). However, that is not the case for Glasgow City. This is a result of the decision to use different household formation trends for the two migration scenarios. For the planning scenario, the positive impact on household growth from higher net migration in Glasgow is “cancelled out” by the use of household formation rates from a base (1991-2008), which includes the lower than average household growth in Glasgow in 2001-2008.

3.83 With respect to the projected household change by household type (Annex Tables A12 and A13), it was noted before (in paragraph 3.75) that caution is needed in the use of these projections. This applies particularly to Glasgow City, where there was a change in the pattern of household formation in 2001-2008, as compared with the inter-Census period 1991-2001 (see Annex, Table A8). Future household growth could be significantly different from these projections.

3.84 The projected household change by age of household reference person (Annex Tables A1 and A15) mirrors the projected population change by age-band (see paragraph 3.33). For example, the sizable increase in the number of older people households (with a household reference person age 60+) in 2008-2016, is projected to take place in the seven Council areas, excluding Glasgow City. After 2016, an increase in older people households is expected for Glasgow City, but at a lesser rate than for other Council areas in the GCV area.

**CHAPTER 3**
**ANNEX A**

## List of Tables



## List of Maps

**Table A1 - Annual Population Change 2001-2008 by Component for GCV Sub Areas**

| Council area or sub area | % annual population change | % annual natural change | % annual net migration |
|---|---|---|---|
| Bearsden and Milngavie | -0.33% | -0.10% | -0.24% |
| Strathkelvin | -0.55% | -0.02% | -0.53% |
| **East Dunbartonshire** | **-0.47%** | **-0.05%** | **-0.41%** |
| Eastwood | 0.07% | 0.06% | 0.01% |
| Levern Valley | -0.30% | -0.01% | -0.28% |
| **East Renfrewshire** | **-0.03%** | **0.04%** | **-0.07%** |
| Baillieston and Shettleston and Greater Easterhouse | -0.68% | -0.13% | -0.55% |
| Central and West | 0.99% | -0.01% | 1.00% |
| East Centre and Calton | 0.12% | -0.55% | 0.67% |
| Govan and Craigton | -0.26% | -0.33% | 0.08% |
| Greater Pollok and Newlands/Auldburn | 0.80% | 0.17% | 0.64% |
| Langside and Linn | -0.43% | 0.11% | -0.54% |
| Maryhill/Kelvin and Canal | -0.42% | -0.30% | -0.12% |
| North East | 0.49% | 0.15% | 0.34% |
| Pollokshields and Southside Central | 0.61% | 0.33% | 0.28% |
| West | 0.32% | -0.24% | 0.56% |
| **Glasgow City** | **0.14%** | **-0.09%** | **0.23%** |
| Inverclyde East | -1.23% | -0.21% | -1.03% |
| Inverclyde West | 0.61% | -0.38% | 0.99% |
| Kilmacolm and Quarriers Village | 0.56% | -0.08% | 0.63% |
| **Inverclyde** | **-0.57%** | **-0.25%** | **-0.32%** |
| Airdrie and Coatbridge | 0.28% | 0.09% | 0.19% |
| Cumbernauld | 0.19% | 0.36% | -0.17% |
| Motherwell | 0.13% | 0.03% | 0.10% |
| **North Lanarkshire** | **0.19%** | **0.13%** | **0.06%** |
| Johnstone/Elderslie | -0.36% | -0.25% | -0.11% |
| North Renfrewshire | -0.13% | 0.01% | -0.14% |
| Paisley/Linwood | -0.40% | -0.17% | -0.23% |
| Renfrew | 0.09% | 0.08% | 0.01% |
| West Renfrewshire | -0.02% | 0.18% | -0.19% |
| **Renfrewshire** | **-0.25%** | **-0.08%** | **-0.17%** |
| Clydesdale | 0.62% | -0.17% | 0.79% |
| East Kilbride | -0.01% | 0.12% | -0.12% |
| Hamilton | 0.42% | 0.03% | 0.39% |
| Rutherglen and Cambuslang | 0.59% | -0.11% | 0.69% |
| **South Lanarkshire** | **0.37%** | **-0.01%** | **0.38%** |
| Clydebank | -0.35% | -0.19% | -0.16% |
| DMA Dumbarton/Vale of Leven | -0.37% | -0.08% | -0.30% |
| **West Dunbartonshire** | **-0.36%** | **-0.13%** | **-0.23%** |
| **Glasgow and the Clyde Valley area** | **0.04%** | **-0.04%** | **0.08%** |

**Source: National Records of Scotland**

**Table A2 - Estimated and Projected Annual Population Change by Component**

| | Estimate | Planning Scenario | | Lower Migration Scenario | |
|---|---|---|---|---|---|
| | 2001-2008 | 2008-2016 | 2016-2025 | 2008-2016 | 2016-2025 |
| **TOTAL CHANGE** | | | | | |
| East Dunbartonshire | -504 | -237 | -217 | -335 | -395 |
| East Renfrewshire | -27 | 285 | 442 | 175 | 262 |
| Glasgow City | 790 | 1,475 | 2,084 | 882 | 457 |
| Inverclyde | -481 | -321 | -300 | -378 | -413 |
| North Lanarkshire | 620 | 992 | 1,012 | 776 | 600 |
| Renfrewshire | -436 | -141 | -62 | -250 | -334 |
| South Lanarkshire | 1,107 | 1,395 | 1,513 | 1,107 | 985 |
| West Dunbartonshire | -340 | -100 | -33 | -180 | -219 |
| GCV area total | 729 | 3,347 | 4,440 | 1,798 | 943 |
| **NATURAL CHANGE** | | | | | |
| East Dunbartonshire | -56 | 33 | 1 | 25 | -25 |
| East Renfrewshire | 37 | 127 | 238 | 116 | 203 |
| Glasgow City | -528 | 1,121 | 1,443 | 1,085 | 1,205 |
| Inverclyde | -210 | -108 | -127 | -115 | -150 |
| North Lanarkshire | 426 | 755 | 613 | 739 | 563 |
| Renfrewshire | -146 | 68 | 63 | 59 | 26 |
| South Lanarkshire | -36 | 263 | 225 | 241 | 151 |
| West Dunbartonshire | -123 | 40 | 64 | 28 | 22 |
| GCV area total | -636 | 2,299 | 2,519 | 2,178 | 1,994 |
| **NET MIGRATION** | | | | | |
| East Dunbartonshire | -449 | -270 | -218 | -360 | -370 |
| East Renfrewshire | -65 | 158 | 204 | 59 | 59 |
| Glasgow City | 1,318 | 354 | 641 | -203 | -748 |
| Inverclyde | -271 | -213 | -173 | -263 | -263 |
| North Lanarkshire | 194 | 237 | 399 | 37 | 37 |
| Renfrewshire | -290 | -209 | -125 | -309 | -360 |
| South Lanarkshire | 1,144 | 1,132 | 1,289 | 866 | 834 |
| West Dunbartonshire | -217 | -140 | -97 | -208 | -242 |
| GCV area total | 1,364 | 1,049 | 1,921 | -381 | -1,051 |

**Table A3 - Population Age Profile 2008 for Council Areas and Sub Areas in the GCV area**

| Council area or sub area | 0-15 | 16-29 | 30-44 | 45-59 | 60-74 | 75+ |
|---|---|---|---|---|---|---|
| Bearsden and Milngavie | 12.8% | 14.9% | 16.5% | 29.3% | 17.2% | 9.3% |
| Strathkelvin | 12.8% | 17.1% | 18.4% | 28.1% | 16.1% | 7.5% |
| **East Dunbartonshire** | **12.8%** | **16.2%** | **17.7%** | **28.6%** | **16.5%** | **8.2%** |
| Eastwood | 14.1% | 15.0% | 18.1% | 28.9% | 15.2% | 8.7% |
| Levern Valley | 13.6% | 17.5% | 18.8% | 27.5% | 15.3% | 7.2% |
| **East Renfrewshire** | **14.0%** | **15.7%** | **18.3%** | **28.5%** | **15.3%** | **8.3%** |
| Baillieston, Shettleston and Gr. Easterhouse | 13.5% | 20.0% | 20.4% | 26.0% | 13.2% | 6.9% |
| Central and West | 7.7% | 35.4% | 23.8% | 18.6% | 9.1% | 5.4% |
| East Centre and Calton | 10.2% | 25.6% | 21.6% | 21.6% | 13.2% | 7.8% |
| Govan and Craigton | 12.0% | 22.6% | 21.3% | 23.4% | 12.7% | 7.9% |
| Greater Pollok and Newlands/Auldburn | 14.1% | 20.1% | 22.2% | 25.3% | 12.0% | 6.3% |
| Langside and Linn | 11.6% | 21.9% | 25.0% | 24.1% | 11.2% | 6.2% |
| Maryhill/Kelvin and Canal | 11.4% | 24.5% | 20.8% | 23.0% | 13.3% | 6.9% |
| North East | 13.1% | 22.7% | 24.4% | 22.6% | 11.1% | 6.2% |
| Pollokshields and Southside Central | 12.2% | 23.2% | 25.3% | 22.6% | 10.6% | 6.1% |
| West | 12.9% | 20.8% | 21.5% | 24.2% | 12.3% | 8.1% |
| **Glasgow City** | **11.7%** | **24.1%** | **22.5%** | **23.1%** | **11.8%** | **6.7%** |
| Inverclyde East | 12.9% | 19.5% | 18.9% | 26.0% | 15.2% | 7.6% |
| Inverclyde West | 11.6% | 15.6% | 19.9% | 28.0% | 15.9% | 9.0% |
| Kilmacolm and Quarriers Village | 12.8% | 10.9% | 18.0% | 29.7% | 18.4% | 10.2% |
| **Inverclyde** | **12.4%** | **17.7%** | **19.2%** | **26.9%** | **15.6%** | **8.2%** |
| Airdrie and Coatbridge | 13.7% | 18.5% | 21.7% | 26.0% | 13.9% | 6.3% |
| Cumbernauld | 13.9% | 17.4% | 21.7% | 27.0% | 14.4% | 5.6% |
| Motherwell | 13.3% | 18.4% | 21.5% | 25.8% | 14.3% | 6.7% |
| **North Lanarkshire** | **13.6%** | **18.2%** | **21.6%** | **26.1%** | **14.2%** | **6.3%** |
| Johnstone/Elderslie | 13.4% | 17.0% | 19.9% | 25.6% | 16.1% | 8.0% |
| North Renfrewshire | 13.1% | 16.5% | 19.9% | 29.4% | 14.5% | 6.6% |
| Paisley/Linwood | 12.5% | 19.0% | 20.9% | 25.1% | 14.8% | 7.8% |
| Renfrew | 12.2% | 17.8% | 20.8% | 27.0% | 15.4% | 6.8% |
| West Renfrewshire | 13.1% | 13.8% | 20.8% | 30.2% | 16.1% | 6.0% |
| **Renfrewshire** | **12.7%** | **17.6%** | **20.6%** | **26.6%** | **15.1%** | **7.3%** |
| Clydesdale | 12.5% | 15.8% | 20.2% | 28.0% | 15.9% | 7.6% |
| East Kilbride | 13.4% | 17.2% | 20.6% | 26.8% | 14.4% | 7.5% |
| Hamilton | 12.9% | 17.8% | 20.8% | 26.4% | 15.3% | 6.8% |
| Rutherglen and Cambuslang | 12.8% | 17.8% | 20.8% | 26.8% | 14.2% | 7.6% |
| **South Lanarkshire** | **12.9%** | **17.3%** | **20.6%** | **26.9%** | **15.0%** | **7.3%** |
| Clydebank | 13.2% | 19.0% | 20.1% | 25.4% | 14.2% | 8.2% |
| DMA Dumbarton/Vale of Leven | 12.6% | 18.4% | 20.1% | 27.1% | 15.1% | 6.8% |
| **West Dunbartonshire** | **12.9%** | **18.7%** | **20.1%** | **26.3%** | **14.6%** | **7.5%** |
| **Glasgow and the Clyde Valley area** | **12.6%** | **19.7%** | **21.1%** | **25.6%** | **13.9%** | **7.1%** |

**Source: National Records of Scotland - Data Zone estimates**

**Table A4 - Population Age Profile 2008 for Clusters of Sub Areas in the GCV area**

| **Cluster of Sub Areas** | 0-15 | 16-29 | 30-44 | 45-59 | 60-74 | 75+ |
|---|---|---|---|---|---|---|
| Concentration of young adults - more 16-29 | 7.7% | 35.4% | 23.8% | 18.6% | 9.1% | 5.4% |
| More young adults - more 16-44 | 12.3% | 22.6% | 24.9% | 23.1% | 11.0% | 6.2% |
| Average age profile - more 16-29 | 11.7% | 23.3% | 21.3% | 23.1% | 12.9% | 7.7% |
| Average age profile - more 0-15 and 45-59 | 13.2% | 17.9% | 20.5% | 26.7% | 14.6% | 7.1% |
| More pre retirement and elderly - more 45+ | 12.8% | 14.4% | 16.7% | 29.3% | 17.3% | 9.4% |
| **Glasgow and the Clyde Valley area** | **12.6%** | **19.7%** | **21.1%** | **25.6%** | **13.9%** | **7.1%** |

**Table A5 - Estimated and Projected Population GCV area by Age-Band - HNDA planning scenario Comparison Results for Change in Pensionable Age Included/Not Included**

**HNDA Planning Scenario**

| | Change in pensionable age included | | | | | Assuming no change in pensionable age | | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2001 | 2008 | 2016 | 2025 | | 2001 | 2008 | 2016 | 2025 |
| **GCV area** | | | | | **GCV area** | | | | |
| 0 to 15 | 340,900 | 315,002 | 313,425 | 318,931 | 0 to 15 | 340,900 | 315,002 | 313,425 | 318,931 |
| 16 to ret | 1,094,614 | 1,117,847 | 1,150,308 | 1,163,995 | 16 to 64/59 | 1,094,614 | 1,117,847 | 1,111,876 | 1,075,546 |
| ret to 74 | 199,088 | 198,168 | 178,062 | 165,191 | 65/60 to 74 | 199,088 | 198,168 | 216,494 | 253,640 |
| 75+ | 115,608 | 124,293 | 140,293 | 173,931 | 75+ | 115,608 | 124,293 | 140,293 | 173,931 |
| total | 1,750,210 | 1,755,310 | 1,782,088 | 1,822,048 | total | 1,750,210 | 1,755,310 | 1,782,088 | 1,822,048 |
| **East Dunbartonshire** | | | | | **East Dunbartonshire** | | | | |
| 0 to 15 | 21,966 | 19,230 | 17,192 | 17,094 | 0 to 15 | 21,966 | 19,230 | 17,192 | 17,094 |
| 16 to ret | 66,208 | 62,901 | 61,969 | 58,195 | 16 to 64/59 | 66,208 | 62,901 | 59,399 | 52,602 |
| ret to 74 | 13,041 | 13,989 | 12,910 | 11,533 | 65/60 to 74 | 13,041 | 13,989 | 15,480 | 17,126 |
| 75+ | 7,035 | 8,600 | 10,752 | 14,047 | 75+ | 7,035 | 8,600 | 10,752 | 14,047 |
| total | 108,250 | 104,720 | 102,823 | 100,869 | total | 108,250 | 104,720 | 102,823 | 100,869 |
| **East Renfrewshire** | | | | | **East Renfrewshire** | | | | |
| 0 to 15 | 19,166 | 17,918 | 16,964 | 18,416 | 0 to 15 | 19,166 | 17,918 | 16,964 | 18,416 |
| 16 to ret | 53,755 | 52,859 | 55,463 | 56,041 | 16 to 64/59 | 53,755 | 52,859 | 53,336 | 51,041 |
| ret to 74 | 10,197 | 11,046 | 10,251 | 9,676 | 65/60 to 74 | 10,197 | 11,046 | 12,378 | 14,676 |
| 75+ | 6,292 | 7,397 | 8,823 | 11,349 | 75+ | 6,292 | 7,397 | 8,823 | 11,349 |
| total | 89,410 | 89,220 | 91,501 | 95,482 | total | 89,410 | 89,220 | 91,501 | 95,482 |
| **Glasgow City** | | | | | **Glasgow City** | | | | |
| 0 to 15 | 106,342 | 96,330 | 100,600 | 104,017 | 0 to 15 | 106,342 | 96,330 | 100,600 | 104,017 |
| 16 to ret | 367,242 | 392,028 | 409,952 | 422,767 | 16 to 64/59 | 367,242 | 392,028 | 398,729 | 396,005 |
| ret to 74 | 64,669 | 56,460 | 46,792 | 46,001 | 65/60 to 74 | 64,669 | 56,460 | 58,015 | 72,763 |
| 75+ | 40,457 | 39,422 | 38,692 | 42,010 | 75+ | 40,457 | 39,422 | 38,692 | 42,010 |
| total | 578,710 | 584,240 | 596,036 | 614,795 | total | 578,710 | 584,240 | 596,036 | 614,795 |
| **Inverclyde** | | | | | **Inverclyde** | | | | |
| 0 to 15 | 16,306 | 14,169 | 13,387 | 12,933 | 0 to 15 | 16,306 | 14,169 | 13,387 | 12,933 |
| 16 to ret | 51,438 | 49,775 | 48,061 | 45,185 | 16 to 64/59 | 51,438 | 49,775 | 46,224 | 40,889 |
| ret to 74 | 10,176 | 10,213 | 9,430 | 8,230 | 65/60 to 74 | 10,176 | 10,213 | 11,267 | 12,526 |
| 75+ | 6,230 | 6,623 | 7,335 | 9,162 | 75+ | 6,230 | 6,623 | 7,335 | 9,162 |
| total | 84,150 | 80,780 | 78,213 | 75,510 | total | 84,150 | 80,780 | 78,213 | 75,510 |
| **North Lanarkshire** | | | | | **North Lanarkshire** | | | | |
| 0 to 15 | 65,466 | 63,235 | 63,133 | 63,052 | 0 to 15 | 65,466 | 63,235 | 63,133 | 63,052 |
| 16 to ret | 202,390 | 204,476 | 210,363 | 214,502 | 16 to 64/59 | 202,390 | 204,476 | 203,097 | 198,005 |
| ret to 74 | 35,135 | 37,406 | 34,617 | 31,435 | 65/60 to 74 | 35,135 | 37,406 | 41,883 | 47,932 |
| 75+ | 18,189 | 20,403 | 25,339 | 33,574 | 75+ | 18,189 | 20,403 | 25,339 | 33,574 |
| total | 321,180 | 325,520 | 333,452 | 342,563 | total | 321,180 | 325,520 | 333,452 | 342,563 |
| **Renfrewshire** | | | | | **Renfrewshire** | | | | |
| 0 to 15 | 33,517 | 30,686 | 30,325 | 30,229 | 0 to 15 | 33,517 | 30,686 | 30,325 | 30,229 |
| 16 to ret | 107,830 | 105,960 | 105,136 | 103,543 | 16 to 64/59 | 107,830 | 105,960 | 101,391 | 94,751 |
| ret to 74 | 20,138 | 20,776 | 18,879 | 16,143 | 65/60 to 74 | 20,138 | 20,776 | 22,624 | 24,935 |
| 75+ | 11,365 | 12,378 | 14,331 | 18,197 | 75+ | 11,365 | 12,378 | 14,331 | 18,197 |
| total | 172,850 | 169,800 | 168,671 | 168,112 | total | 172,850 | 169,800 | 168,671 | 168,112 |
| **South Lanarkshire** | | | | | **South Lanarkshire** | | | | |
| 0 to 15 | 59,552 | 57,052 | 56,224 | 57,675 | 0 to 15 | 59,552 | 57,052 | 56,224 | 57,675 |
| 16 to ret | 188,264 | 192,751 | 201,930 | 207,479 | 16 to 64/59 | 188,264 | 192,751 | 194,415 | 190,699 |
| ret to 74 | 34,984 | 37,629 | 35,319 | 33,206 | 65/60 to 74 | 34,984 | 37,629 | 42,834 | 49,986 |
| 75+ | 19,540 | 22,658 | 27,777 | 36,508 | 75+ | 19,540 | 22,658 | 27,777 | 36,508 |
| total | 302,340 | 310,090 | 321,250 | 334,868 | total | 302,340 | 310,090 | 321,250 | 334,868 |
| **West Dunbartonshire** | | | | | **West Dunbartonshire** | | | | |
| 0 to 15 | 18,585 | 16,382 | 15,600 | 15,515 | 0 to 15 | 18,585 | 16,382 | 15,600 | 15,515 |
| 16 to ret | 57,487 | 57,097 | 57,434 | 56,283 | 16 to 64/59 | 57,487 | 57,097 | 55,285 | 51,554 |
| ret to 74 | 10,748 | 10,649 | 9,864 | 8,967 | 65/60 to 74 | 10,748 | 10,649 | 12,013 | 13,696 |
| 75+ | 6,500 | 6,812 | 7,244 | 9,084 | 75+ | 6,500 | 6,812 | 7,244 | 9,084 |
| total | 93,320 | 90,940 | 90,142 | 89,849 | total | 93,320 | 90,940 | 90,142 | 89,849 |

**Table A6 - Estimated and Projected Population GCV area by Age-Band - HNDA low migration scenario Comparison Results for Change in Pensionable Age Included/Not Included**

**HNDA Low Migration Scenario**

| Change in pensionable age included | | | | | Assuming no change in pensionable age | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2001 | 2008 | 2016 | 2025 | | 2001 | 2008 | 2016 | 2025 |
| **GCV area** | | | | | **GCV area** | | | | |
| 0 to 15 | 340,900 | 315,002 | 311,393 | 309,168 | 0 to 15 | 340,900 | 315,002 | 311,393 | 309,168 |
| 16 to ret | 1,094,614 | 1,117,847 | 1,140,329 | 1,131,459 | 16 to 64/59 | 1,094,614 | 1,117,847 | 1,102,017 | 1,043,716 |
| ret to 74 | 199,088 | 198,168 | 177,806 | 164,273 | 65/60 to 74 | 199,088 | 198,168 | 216,118 | 252,016 |
| 75+ | 115,608 | 124,293 | 140,162 | 173,281 | 75+ | 115,608 | 124,293 | 140,162 | 173,281 |
| total | 1,750,210 | 1,755,310 | 1,769,690 | 1,778,181 | total | 1,750,210 | 1,755,310 | 1,769,690 | 1,778,181 |
| **East Dunbartonshire** | | | | | **East Dunbartonshire** | | | | |
| 0 to 15 | 21,966 | 19,230 | 17,006 | 16,511 | 0 to 15 | 21,966 | 19,230 | 17,006 | 16,511 |
| 16 to ret | 66,208 | 62,901 | 61,366 | 56,444 | 16 to 64/59 | 66,208 | 62,901 | 58,805 | 50,904 |
| ret to 74 | 13,041 | 13,989 | 12,891 | 11,473 | 65/60 to 74 | 13,041 | 13,989 | 15,452 | 17,013 |
| 75+ | 7,035 | 8,600 | 10,780 | 14,060 | 75+ | 7,035 | 8,600 | 10,780 | 14,060 |
| total | 108,250 | 104,720 | 102,043 | 98,488 | total | 108,250 | 104,720 | 102,043 | 98,488 |
| **East Renfrewshire** | | | | | **East Renfrewshire** | | | | |
| 0 to 15 | 19,166 | 17,918 | 16,870 | 17,944 | 0 to 15 | 19,166 | 17,918 | 16,870 | 17,944 |
| 16 to ret | 53,755 | 52,859 | 54,709 | 54,141 | 16 to 64/59 | 53,755 | 52,859 | 52,601 | 49,243 |
| ret to 74 | 10,197 | 11,046 | 10,216 | 9,579 | 65/60 to 74 | 10,197 | 11,046 | 12,324 | 14,477 |
| 75+ | 6,292 | 7,397 | 8,823 | 11,310 | 75+ | 6,292 | 7,397 | 8,823 | 11,310 |
| total | 89,410 | 89,220 | 90,618 | 92,974 | total | 89,410 | 89,220 | 90,618 | 92,974 |
| **Glasgow City** | | | | | **Glasgow City** | | | | |
| 0 to 15 | 106,342 | 96,330 | 99,904 | 99,817 | 0 to 15 | 106,342 | 96,330 | 99,904 | 99,817 |
| 16 to ret | 367,242 | 392,028 | 406,104 | 408,226 | 16 to 64/59 | 367,242 | 392,028 | 394,923 | 381,663 |
| ret to 74 | 64,669 | 56,460 | 46,696 | 45,678 | 65/60 to 74 | 64,669 | 56,460 | 57,877 | 72,241 |
| 75+ | 40,457 | 39,422 | 38,594 | 41,694 | 75+ | 40,457 | 39,422 | 38,594 | 41,694 |
| total | 578,710 | 584,240 | 591,298 | 595,415 | total | 578,710 | 584,240 | 591,298 | 595,415 |
| **Inverclyde** | | | | | **Inverclyde** | | | | |
| 0 to 15 | 16,306 | 14,169 | 13,293 | 12,538 | 0 to 15 | 16,306 | 14,169 | 13,293 | 12,538 |
| 16 to ret | 51,438 | 49,775 | 47,699 | 44,141 | 16 to 64/59 | 51,438 | 49,775 | 45,866 | 39,874 |
| ret to 74 | 10,176 | 10,213 | 9,434 | 8,229 | 65/60 to 74 | 10,176 | 10,213 | 11,267 | 12,496 |
| 75+ | 6,230 | 6,623 | 7,328 | 9,130 | 75+ | 6,230 | 6,623 | 7,328 | 9,130 |
| total | 84,150 | 80,780 | 77,754 | 74,038 | total | 84,150 | 80,780 | 77,754 | 74,038 |
| **North Lanarkshire** | | | | | **North Lanarkshire** | | | | |
| 0 to 15 | 65,466 | 63,235 | 62,863 | 61,901 | 0 to 15 | 65,466 | 63,235 | 62,863 | 61,901 |
| 16 to ret | 202,390 | 204,476 | 209,013 | 210,513 | 16 to 64/59 | 202,390 | 204,476 | 201,754 | 194,103 |
| ret to 74 | 35,135 | 37,406 | 34,568 | 31,292 | 65/60 to 74 | 35,135 | 37,406 | 41,827 | 47,702 |
| 75+ | 18,189 | 20,403 | 25,283 | 33,425 | 75+ | 18,189 | 20,403 | 25,283 | 33,425 |
| total | 321,180 | 325,520 | 331,727 | 337,131 | total | 321,180 | 325,520 | 331,727 | 337,131 |
| **Renfrewshire** | | | | | **Renfrewshire** | | | | |
| 0 to 15 | 33,517 | 30,686 | 30,182 | 29,455 | 0 to 15 | 33,517 | 30,686 | 30,182 | 29,455 |
| 16 to ret | 107,830 | 105,960 | 104,463 | 101,167 | 16 to 64/59 | 107,830 | 105,960 | 100,716 | 92,408 |
| ret to 74 | 20,138 | 20,776 | 18,858 | 16,080 | 65/60 to 74 | 20,138 | 20,776 | 22,605 | 24,839 |
| 75+ | 11,365 | 12,378 | 14,298 | 18,091 | 75+ | 11,365 | 12,378 | 14,298 | 18,091 |
| total | 172,850 | 169,800 | 167,801 | 164,793 | total | 172,850 | 169,800 | 167,801 | 164,793 |
| **South Lanarkshire** | | | | | **South Lanarkshire** | | | | |
| 0 to 15 | 59,552 | 57,052 | 55,820 | 56,125 | 0 to 15 | 59,552 | 57,052 | 55,820 | 56,125 |
| 16 to ret | 188,264 | 192,751 | 200,107 | 202,310 | 16 to 64/59 | 188,264 | 192,751 | 192,629 | 185,683 |
| ret to 74 | 34,984 | 37,629 | 35,256 | 32,976 | 65/60 to 74 | 34,984 | 37,629 | 42,734 | 49,603 |
| 75+ | 19,540 | 22,658 | 27,764 | 36,404 | 75+ | 19,540 | 22,658 | 27,764 | 36,404 |
| total | 302,340 | 310,090 | 318,947 | 327,815 | total | 302,340 | 310,090 | 318,947 | 327,815 |
| **West Dunbartonshire** | | | | | **West Dunbartonshire** | | | | |
| 0 to 15 | 18,585 | 16,382 | 15,455 | 14,877 | 0 to 15 | 18,585 | 16,382 | 15,455 | 14,877 |
| 16 to ret | 57,487 | 57,097 | 56,868 | 54,517 | 16 to 64/59 | 57,487 | 57,097 | 54,723 | 49,838 |
| ret to 74 | 10,748 | 10,649 | 9,887 | 8,966 | 65/60 to 74 | 10,748 | 10,649 | 12,032 | 13,645 |
| 75+ | 6,500 | 6,812 | 7,292 | 9,167 | 75+ | 6,500 | 6,812 | 7,292 | 9,167 |
| total | 93,320 | 90,940 | 89,502 | 87,527 | total | 93,320 | 90,940 | 89,502 | 87,527 |

**Table A7 - Population in Communal Establishments and in Households**

| | Estimate | Estimate | Planning Scenario | | Lower Migration Scenario | |
|---|---|---|---|---|---|---|
| | 2001 | 2008 | 2016 | 2025 | 2016 | 2025 |
| **Total population** | | | | | | |
| East Dunbartonshire | 108,250 | 104,720 | 102,823 | 100,869 | 102,043 | 98,488 |
| East Renfrewshire | 89,410 | 89,220 | 91,501 | 95,482 | 90,618 | 92,974 |
| Glasgow City | 578,710 | 584,240 | 596,036 | 614,795 | 591,298 | 595,415 |
| Inverclyde | 84,150 | 80,780 | 78,213 | 75,510 | 77,754 | 74,038 |
| North Lanarkshire | 321,180 | 325,520 | 333,452 | 342,563 | 331,727 | 337,131 |
| Renfrewshire | 172,850 | 169,800 | 168,671 | 168,112 | 167,801 | 164,793 |
| South Lanarkshire | 302,340 | 310,090 | 321,250 | 334,868 | 318,947 | 327,815 |
| West Dunbartonshire | 93,320 | 90,940 | 90,142 | 89,849 | 89,502 | 87,527 |
| Glasgow & Clyde Valley | 1,750,210 | 1,755,310 | 1,782,088 | 1,822,048 | 1,769,690 | 1,778,181 |
| **Population in Communal Establishments** | | | | | | |
| East Dunbartonshire | 1,278 | 804 | 930 | 1,142 | 927 | 1,132 |
| East Renfrewshire | 664 | 544 | 665 | 866 | 665 | 862 |
| Glasgow City | 11,895 | 14,747 | 13,866 | 14,371 | 13,748 | 14,002 |
| Inverclyde | 1,148 | 1,045 | 1,112 | 1,255 | 1,111 | 1,246 |
| North Lanarkshire | 2,944 | 2,740 | 3,172 | 3,900 | 3,159 | 3,863 |
| Renfrewshire | 2,160 | 2,359 | 2,551 | 2,926 | 2,540 | 2,891 |
| South Lanarkshire | 3,404 | 2,885 | 3,462 | 4,405 | 3,456 | 4,377 |
| West Dunbartonshire | 753 | 521 | 568 | 686 | 570 | 688 |
| Glasgow & Clyde Valley | 24,246 | 25,646 | 26,326 | 29,551 | 26,176 | 29,061 |
| **Population in Households** | | | | | | |
| East Dunbartonshire | 106,972 | 103,916 | 101,893 | 99,727 | 101,116 | 97,356 |
| East Renfrewshire | 88,746 | 88,676 | 90,836 | 94,616 | 89,953 | 92,112 |
| Glasgow City | 566,815 | 569,493 | 582,170 | 600,424 | 577,550 | 581,413 |
| Inverclyde | 83,002 | 79,735 | 77,101 | 74,255 | 76,643 | 72,792 |
| North Lanarkshire | 318,236 | 322,780 | 330,280 | 338,663 | 328,568 | 333,268 |
| Renfrewshire | 170,690 | 167,441 | 166,120 | 165,186 | 165,261 | 161,902 |
| South Lanarkshire | 298,936 | 307,205 | 317,788 | 330,463 | 315,491 | 323,438 |
| West Dunbartonshire | 92,567 | 90,419 | 89,574 | 89,163 | 88,932 | 86,839 |
| Glasgow & Clyde Valley | 1,725,964 | 1,729,664 | 1,755,762 | 1,792,497 | 1,743,514 | 1,749,120 |

**Table A8 - Estimated Annual Changes by Household Type 2001-2008**

| | 1 adult | 2 adults | 3+ adults | 1 adult with child(ren) | 2+ adults with child(ren) | total households |
|---|---|---|---|---|---|---|
| **East Dunbartonshire** | | | | | | |
| based on headship rates | 229 | 154 | -37 | 28 | -258 | 116 |
| based on SHS data | 108 | 311 | -31 | 68 | -340 | 116 |
| difference | -121 | 157 | 6 | 40 | -82 | 0 |
| **East Renfrewshire** | | | | | | |
| based on headship rates | 160 | 102 | -31 | 32 | -155 | 107 |
| based on SHS data | 250 | -155 | 73 | -60 | 0 | 107 |
| difference | 90 | -258 | 104 | -92 | 155 | 0 |
| **Glasgow City** | | | | | | |
| based on headship rates | 1,822 | -260 | -144 | 520 | -686 | 1,253 |
| based on SHS data | 174 | 1,036 | 963 | -726 | -193 | 1,253 |
| difference | -1,649 | 1,296 | 1,107 | -1,246 | 493 | 0 |
| **Inverclyde** | | | | | | |
| based on headship rates | 213 | 26 | -52 | 22 | -195 | 14 |
| based on SHS data | 106 | 19 | -43 | -75 | 6 | 14 |
| difference | -107 | -6 | 10 | -97 | 201 | 0 |
| **North Lanarkshire** | | | | | | |
| based on headship rates | 1,176 | 520 | -130 | 306 | -528 | 1,343 |
| based on SHS data | 723 | 890 | -122 | 113 | -262 | 1,343 |
| difference | -452 | 370 | 8 | -193 | 266 | 0 |
| **Renfrewshire** | | | | | | |
| based on headship rates | 508 | 151 | -106 | 86 | -320 | 319 |
| based on SHS data | 534 | -99 | -38 | -159 | 80 | 319 |
| difference | 26 | -250 | 68 | -245 | 400 | 0 |
| **South Lanarkshire** | | | | | | |
| based on headship rates | 1,163 | 608 | -87 | 277 | -374 | 1,587 |
| based on SHS data | 848 | 784 | 168 | -122 | -91 | 1,587 |
| difference | -315 | 176 | 255 | -399 | 283 | 0 |
| **West Dunbartonshire** | | | | | | |
| based on headship rates | 295 | 65 | -56 | 38 | -180 | 163 |
| based on SHS data | 217 | -58 | 196 | -33 | -160 | 163 |
| difference | -78 | -123 | 252 | -71 | 19 | 0 |
| **Glasgow and Clyde Valley** | | | | | | |
| based on headship rates | 5,567 | 1,365 | -644 | 1,310 | -2,696 | 4,902 |
| based on SHS data | 2,961 | 2,728 | 1,167 | -994 | -961 | 4,902 |
| difference | -2,606 | 1,363 | 1,811 | -2,303 | 1,736 | 0 |

**Table A9 - Annual Population and Household Change 2001-2008 for GCV Sub Areas**

| Council area or sub area | % annual population change | % annual household change | difference |
|---|---|---|---|
| Bearsden and Milngavie | -0.33% | 0.15% | -0.48% |
| Strathkelvin | -0.55% | 0.35% | -0.90% |
| **East Dunbartonshire** | **-0.47%** | **0.27%** | **-0.74%** |
| Eastwood | 0.07% | 0.32% | -0.25% |
| Levern Valley | -0.30% | 0.27% | -0.57% |
| **East Renfrewshire** | **-0.03%** | **0.30%** | **-0.34%** |
| Baillieston and Shettleston and Greater Easterhouse | -0.68% | -0.19% | -0.50% |
| Central and West | 0.99% | 2.49% | -1.49% |
| East Centre and Calton | 0.12% | 1.42% | -1.30% |
| Govan and Craigton | -0.26% | -0.03% | -0.23% |
| Greater Pollok and Newlands/Auldburn | 0.80% | 0.50% | 0.30% |
| Langside and Linn | -0.43% | 0.42% | -0.85% |
| Maryhill/Kelvin and Canal | -0.42% | -0.42% | 0.00% |
| North East | 0.49% | -0.63% | 1.12% |
| Pollokshields and Southside Central | 0.61% | 0.44% | 0.17% |
| West | 0.32% | -0.15% | 0.47% |
| **Glasgow City** | **0.14%** | **0.45%** | **-0.32%** |
| Inverclyde East | -1.23% | -0.43% | -0.81% |
| Inverclyde West | 0.61% | 0.78% | -0.17% |
| Kilmacolm and Quarriers Village | 0.56% | 1.76% | -1.20% |
| **Inverclyde** | **-0.57%** | **0.04%** | **-0.61%** |
| Airdrie and Coatbridge | 0.28% | 1.21% | -0.93% |
| Cumbernauld | 0.19% | 0.98% | -0.80% |
| Motherwell | 0.13% | 0.86% | -0.73% |
| **North Lanarkshire** | **0.19%** | **1.00%** | **-0.81%** |
| Johnstone/Elderslie | -0.36% | 0.03% | -0.39% |
| North Renfrewshire | -0.13% | 0.35% | -0.48% |
| Paisley/Linwood | -0.40% | 0.43% | -0.83% |
| Renfrew | 0.09% | 0.52% | -0.43% |
| West Renfrewshire | -0.02% | 0.74% | -0.76% |
| **Renfrewshire** | **-0.25%** | **0.41%** | **-0.67%** |
| Clydesdale | 0.62% | 1.72% | -1.10% |
| East Kilbride | -0.01% | 0.84% | -0.85% |
| Hamilton | 0.42% | 1.43% | -1.01% |
| Rutherglen and Cambuslang | 0.59% | 1.05% | -0.47% |
| **South Lanarkshire** | **0.37%** | **1.25%** | **-0.88%** |
| Clydebank | -0.35% | -0.27% | -0.08% |
| DMA Dumbarton/Vale of Leven | -0.37% | 1.09% | -1.47% |
| **West Dunbartonshire** | **-0.36%** | **0.39%** | **-0.76%** |
| **Glasgow and the Clyde Valley area** | **0.04%** | **0.64%** | **-0.59%** |

**Table A10 - Household Type Profile 2001 for Council Areas and Sub Areas in the GCV area**

| Council area or sub area | 1 adult | 2 adults | 3+ adults | 1 adult family | 2+ adults family |
|---|---|---|---|---|---|
| Bearsden and Milngavie | 23.7% | 32.0% | 14.8% | 2.7% | 26.8% |
| Strathkelvin | 26.0% | 29.3% | 14.7% | 4.7% | 25.4% |
| **East Dunbartonshire** | **25.1%** | **30.3%** | **14.7%** | **3.9%** | **26.0%** |
| Eastwood | 25.1% | 30.3% | 13.4% | 2.9% | 28.3% |
| Levern Valley | 27.3% | 28.2% | 13.7% | 6.5% | 24.3% |
| **East Renfrewshire** | **25.7%** | **29.7%** | **13.5%** | **3.9%** | **27.2%** |
| Baillieston, Shettleston and Gr. Easterhouse | 33.9% | 24.2% | 11.0% | 10.4% | 20.6% |
| Central and West | 48.3% | 26.0% | 11.5% | 4.4% | 9.7% |
| East Centre and Calton | 46.3% | 24.6% | 8.6% | 8.6% | 11.9% |
| Govan and Craigton | 42.7% | 24.0% | 9.2% | 8.5% | 15.6% |
| Greater Pollok and Newlands/Auldburn | 34.6% | 24.3% | 10.7% | 9.3% | 21.2% |
| Langside and Linn | 40.9% | 25.2% | 9.4% | 7.5% | 16.9% |
| Maryhill/Kelvin and Canal | 43.3% | 24.0% | 9.4% | 9.1% | 14.2% |
| North East | 41.2% | 22.3% | 8.2% | 10.7% | 17.6% |
| Pollokshields and Southside Central | 46.2% | 24.3% | 8.2% | 6.4% | 14.9% |
| West | 40.6% | 23.9% | 9.3% | 9.8% | 16.4% |
| **Glasgow City** | **41.9%** | **24.4%** | **9.7%** | **8.3%** | **15.7%** |
| Inverclyde East | 37.1% | 24.6% | 11.1% | 8.6% | 18.6% |
| Inverclyde West | 30.5% | 31.1% | 12.0% | 3.3% | 23.2% |
| Kilmacolm and Quarriers Village | 27.0% | 35.9% | 11.7% | 1.9% | 23.6% |
| **Inverclyde** | **34.6%** | **27.1%** | **11.4%** | **6.7%** | **20.2%** |
| Airdrie and Coatbridge | 29.6% | 26.6% | 13.9% | 7.1% | 22.8% |
| Cumbernauld | 26.0% | 29.0% | 14.1% | 6.5% | 24.5% |
| Motherwell | 31.4% | 27.3% | 12.6% | 6.9% | 21.8% |
| **North Lanarkshire** | **29.5%** | **27.5%** | **13.4%** | **6.8%** | **22.8%** |
| Johnstone/Elderslie | 33.8% | 28.3% | 10.9% | 7.4% | 19.5% |
| North Renfrewshire | 20.6% | 30.6% | 16.0% | 3.4% | 29.3% |
| Paisley/Linwood | 37.7% | 27.6% | 9.6% | 7.0% | 18.1% |
| Renfrew | 34.3% | 27.7% | 12.0% | 5.6% | 20.3% |
| West Renfrewshire | 24.5% | 32.3% | 13.4% | 3.1% | 26.6% |
| **Renfrewshire** | **33.3%** | **28.6%** | **11.2%** | **6.0%** | **20.9%** |
| Clydesdale | 27.6% | 31.1% | 13.2% | 4.8% | 23.1% |
| East Kilbride | 28.1% | 29.8% | 12.7% | 5.1% | 24.3% |
| Hamilton | 30.4% | 28.1% | 13.5% | 6.3% | 21.7% |
| Rutherglen and Cambuslang | 34.4% | 27.6% | 11.4% | 6.9% | 19.6% |
| **South Lanarkshire** | **30.0%** | **29.1%** | **12.8%** | **5.8%** | **22.3%** |
| Clydebank | 36.2% | 25.5% | 11.5% | 8.5% | 18.3% |
| DMA Dumbarton/Vale of Leven | 32.1% | 27.3% | 12.4% | 6.7% | 21.4% |
| **West Dunbartonshire** | **34.2%** | **26.4%** | **11.9%** | **7.6%** | **19.8%** |
| **Glasgow and the Clyde Valley area** | **34.5%** | **26.9%** | **11.7%** | **6.9%** | **20.1%** |

**Source: National Records of Scotland - 2001 Census - Crown Copyright Reserved**

**Table A11 - Household Type Profile 2001 for Clusters of Sub Areas in the GCV area**

| **Cluster of Sub Areas** | 1 adult | 2 adults | 3+ adults | 1 adult family | 2+ adults family |
|---|---|---|---|---|---|
| Smaller adult and family households - fewer families | 43.0% | 24.9% | 9.4% | 7.8% | 14.9% |
| Average household profile - some more families | 33.8% | 26.2% | 11.7% | 7.9% | 20.5% |
| Somewhat larger households - some more families | 28.3% | 28.8% | 13.6% | 5.8% | 23.5% |
| Larger adult and family households - more families | 24.1% | 31.3% | 14.1% | 2.9% | 27.7% |
| **Glasgow and the Clyde Valley area** | **34.5%** | **26.9%** | **11.7%** | **6.9%** | **20.1%** |

**Table A12 - Estimated and Projected Households by Household Type**

| | total households | 1 adult households | 2 adults households | 3+ adults households | 1 adult families | 2+ adults families |
|---|---|---|---|---|---|---|
| **2008 estimate** | | | | | | |
| East Dunbartonshire | 43,227 | 12,340 | 13,827 | 4,696 | 2,158 | 10,206 |
| East Renfrewshire | 35,988 | 10,260 | 11,076 | 3,451 | 1,838 | 9,363 |
| Glasgow City | 284,533 | 128,367 | 64,370 | 22,352 | 29,198 | 40,246 |
| Inverclyde | 37,156 | 14,419 | 10,070 | 3,094 | 2,998 | 6,575 |
| North Lanarkshire | 143,715 | 48,022 | 40,086 | 14,173 | 12,496 | 28,938 |
| Renfrewshire | 79,037 | 29,213 | 22,764 | 6,371 | 5,879 | 14,810 |
| South Lanarkshire | 138,354 | 46,539 | 40,779 | 12,654 | 10,319 | 28,063 |
| West Dunbartonshire | 42,699 | 16,357 | 11,247 | 3,686 | 3,835 | 7,574 |
| Glasgow & Clyde Valley | 804,709 | 305,517 | 214,219 | 70,477 | 68,721 | 145,775 |
| **2016 planning scenario** | | | | | | |
| East Dunbartonshire | 44,607 | 14,358 | 15,307 | 4,132 | 2,494 | 8,316 |
| East Renfrewshire | 37,789 | 11,990 | 12,296 | 3,148 | 2,180 | 8,175 |
| Glasgow City | 304,798 | 148,615 | 64,857 | 20,835 | 33,835 | 36,656 |
| Inverclyde | 37,846 | 16,256 | 10,495 | 2,632 | 3,205 | 5,258 |
| North Lanarkshire | 155,806 | 58,787 | 45,229 | 12,962 | 14,628 | 24,200 |
| Renfrewshire | 81,912 | 33,500 | 24,161 | 5,541 | 6,390 | 12,320 |
| South Lanarkshire | 151,581 | 56,726 | 46,235 | 11,446 | 12,504 | 24,670 |
| West Dunbartonshire | 44,808 | 18,942 | 12,138 | 3,210 | 4,186 | 6,332 |
| Glasgow & Clyde Valley | 859,147 | 359,174 | 230,718 | 63,906 | 79,422 | 125,927 |
| **2025 planning scenario** | | | | | | |
| East Dunbartonshire | 46,149 | 16,593 | 16,510 | 3,039 | 3,005 | 7,002 |
| East Renfrewshire | 40,377 | 14,192 | 13,252 | 2,492 | 2,832 | 7,609 |
| Glasgow City | 325,398 | 169,122 | 65,427 | 19,656 | 38,086 | 33,107 |
| Inverclyde | 38,231 | 17,935 | 10,627 | 1,943 | 3,450 | 4,276 |
| North Lanarkshire | 169,057 | 70,851 | 49,729 | 10,494 | 17,404 | 20,579 |
| Renfrewshire | 85,036 | 37,765 | 25,355 | 4,249 | 7,288 | 10,379 |
| South Lanarkshire | 166,915 | 68,412 | 51,623 | 9,216 | 15,468 | 22,196 |
| West Dunbartonshire | 47,245 | 21,694 | 12,857 | 2,506 | 4,701 | 5,487 |
| Glasgow & Clyde Valley | 918,408 | 416,564 | 245,380 | 53,595 | 92,234 | 110,635 |
| **2016 lower migration** | | | | | | |
| East Dunbartonshire | 44,065 | 14,205 | 15,169 | 4,093 | 2,440 | 8,158 |
| East Renfrewshire | 37,349 | 11,883 | 12,185 | 3,117 | 2,135 | 8,029 |
| Glasgow City | 307,175 | 149,844 | 65,402 | 21,016 | 33,983 | 36,930 |
| Inverclyde | 37,632 | 16,179 | 10,456 | 2,621 | 3,167 | 5,209 |
| North Lanarkshire | 154,186 | 58,206 | 44,824 | 12,856 | 14,416 | 23,884 |
| Renfrewshire | 81,077 | 33,164 | 23,959 | 5,500 | 6,295 | 12,159 |
| South Lanarkshire | 149,154 | 55,868 | 45,588 | 11,286 | 12,233 | 24,179 |
| West Dunbartonshire | 44,280 | 18,744 | 12,030 | 3,181 | 4,104 | 6,221 |
| Glasgow & Clyde Valley | 854,918 | 358,093 | 229,613 | 63,670 | 78,773 | 124,769 |
| **2025 lower migration** | | | | | | |
| East Dunbartonshire | 44,693 | 16,132 | 16,133 | 2,948 | 2,849 | 6,631 |
| East Renfrewshire | 39,192 | 13,865 | 12,955 | 2,424 | 2,700 | 7,248 |
| Glasgow City | 326,281 | 169,927 | 65,876 | 19,781 | 37,695 | 33,002 |
| Inverclyde | 37,560 | 17,660 | 10,506 | 1,914 | 3,336 | 4,144 |
| North Lanarkshire | 164,656 | 69,140 | 48,645 | 10,255 | 16,780 | 19,836 |
| Renfrewshire | 82,555 | 36,697 | 24,776 | 4,149 | 6,979 | 9,954 |
| South Lanarkshire | 160,468 | 65,923 | 49,914 | 8,881 | 14,679 | 21,071 |
| West Dunbartonshire | 45,647 | 21,026 | 12,528 | 2,438 | 4,452 | 5,203 |
| Glasgow & Clyde Valley | 901,052 | 410,370 | 241,333 | 52,790 | 89,470 | 107,089 |

**Table A13 - Estimated and Projected Annual Household Change by Household Type**

| Household Type | Estimate | Planning Scenario | | Lower Migration Scenario | |
|---|---|---|---|---|---|
| | 2001-2008 | 2008-2016 | 2016-2025 | 2008-2016 | 2016-2025 |
| **1 adult** | | | | | |
| East Dunbartonshire | 229 | 252 | 248 | 233 | 214 |
| East Renfrewshire | 160 | 216 | 245 | 203 | 220 |
| Glasgow City | 1,822 | 2,531 | 2,279 | 2,685 | 2,231 |
| Inverclyde | 213 | 230 | 187 | 220 | 165 |
| North Lanarkshire | 1,176 | 1,346 | 1,340 | 1,273 | 1,215 |
| Renfrewshire | 508 | 536 | 474 | 494 | 393 |
| South Lanarkshire | 1,163 | 1,273 | 1,298 | 1,166 | 1,117 |
| West Dunbartonshire | 295 | 323 | 306 | 298 | 254 |
| Glasgow & Clyde Valley | 5,567 | 6,707 | 6,377 | 6,572 | 5,809 |
| **2 adults** | | | | | |
| East Dunbartonshire | 154 | 185 | 134 | 168 | 107 |
| East Renfrewshire | 102 | 153 | 106 | 139 | 86 |
| Glasgow City | -260 | 61 | 63 | 129 | 53 |
| Inverclyde | 26 | 53 | 15 | 48 | 6 |
| North Lanarkshire | 520 | 643 | 500 | 592 | 425 |
| Renfrewshire | 151 | 175 | 133 | 149 | 91 |
| South Lanarkshire | 608 | 682 | 599 | 601 | 481 |
| West Dunbartonshire | 65 | 111 | 80 | 98 | 55 |
| Glasgow & Clyde Valley | 1,365 | 2,062 | 1,629 | 1,924 | 1,302 |
| **3+ adults** | | | | | |
| East Dunbartonshire | -37 | -71 | -121 | -75 | -127 |
| East Renfrewshire | -31 | -38 | -73 | -42 | -77 |
| Glasgow City | -144 | -190 | -131 | -167 | -137 |
| Inverclyde | -52 | -58 | -77 | -59 | -79 |
| North Lanarkshire | -130 | -151 | -274 | -165 | -289 |
| Renfrewshire | -106 | -104 | -144 | -109 | -150 |
| South Lanarkshire | -87 | -151 | -248 | -171 | -267 |
| West Dunbartonshire | -56 | -60 | -78 | -63 | -83 |
| Glasgow & Clyde Valley | -644 | -821 | -1,146 | -851 | -1,209 |
| **1 adult family** | | | | | |
| East Dunbartonshire | 28 | 42 | 57 | 35 | 45 |
| East Renfrewshire | 32 | 43 | 72 | 37 | 63 |
| Glasgow City | 520 | 580 | 472 | 598 | 412 |
| Inverclyde | 22 | 26 | 27 | 21 | 19 |
| North Lanarkshire | 306 | 267 | 308 | 240 | 263 |
| Renfrewshire | 86 | 64 | 100 | 52 | 76 |
| South Lanarkshire | 277 | 273 | 329 | 239 | 272 |
| West Dunbartonshire | 38 | 44 | 57 | 34 | 39 |
| Glasgow & Clyde Valley | 1,310 | 1,338 | 1,424 | 1,257 | 1,189 |
| **2+ adults family** | | | | | |
| East Dunbartonshire | -258 | -236 | -146 | -256 | -170 |
| East Renfrewshire | -155 | -149 | -63 | -167 | -87 |
| Glasgow City | -686 | -449 | -394 | -415 | -436 |
| Inverclyde | -195 | -165 | -109 | -171 | -118 |
| North Lanarkshire | -528 | -592 | -402 | -632 | -450 |
| Renfrewshire | -320 | -311 | -216 | -331 | -245 |
| South Lanarkshire | -374 | -424 | -275 | -486 | -345 |
| West Dunbartonshire | -180 | -155 | -94 | -169 | -113 |
| Glasgow & Clyde Valley | -2,696 | -2,481 | -1,699 | -2,626 | -1,964 |

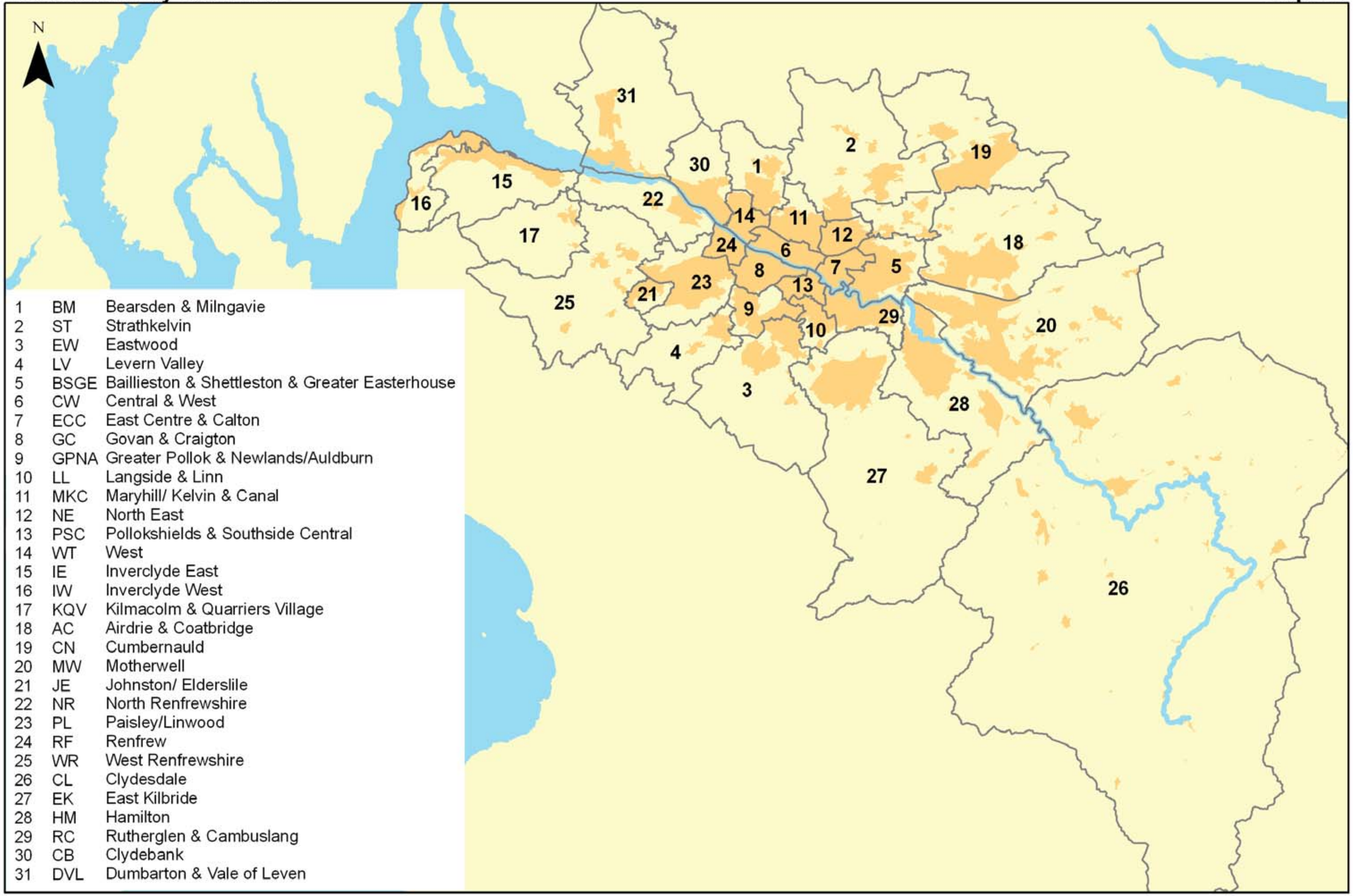
**Table A14 - Estimated and Projected Households by Age of Household Reference Person (HRP)**

| | total households | age hrp 16 to 29 | age hrp 30 to 44 | age hrp 45 to 59 | age hrp 60 to 74 | age hrp 75+ |
|---|---|---|---|---|---|---|
| **2008 estimate** | | | | | | |
| East Dunbartonshire | 43,227 | 2,522 | 10,063 | 13,725 | 10,604 | 6,313 |
| East Renfrewshire | 35,988 | 1,967 | 8,660 | 11,543 | 8,334 | 5,484 |
| Glasgow City | 284,533 | 51,114 | 86,878 | 71,564 | 46,257 | 28,720 |
| Inverclyde | 37,156 | 3,899 | 9,359 | 10,765 | 8,166 | 4,967 |
| North Lanarkshire | 143,715 | 15,866 | 41,868 | 40,205 | 30,403 | 15,373 |
| Renfrewshire | 79,037 | 8,955 | 21,696 | 22,431 | 16,770 | 9,185 |
| South Lanarkshire | 138,354 | 13,781 | 38,085 | 39,934 | 30,030 | 16,524 |
| West Dunbartonshire | 42,699 | 4,838 | 11,560 | 12,064 | 9,030 | 5,207 |
| Glasgow & Clyde Valley | 804,709 | 102,942 | 228,169 | 222,231 | 159,594 | 91,773 |
| **2016 planning scenario** | | | | | | |
| East Dunbartonshire | 44,607 | 2,897 | 8,812 | 13,578 | 11,375 | 7,945 |
| East Renfrewshire | 37,789 | 2,465 | 7,325 | 12,333 | 9,042 | 6,624 |
| Glasgow City | 304,798 | 48,406 | 99,223 | 82,157 | 47,505 | 27,507 |
| Inverclyde | 37,846 | 4,093 | 8,425 | 11,172 | 8,704 | 5,452 |
| North Lanarkshire | 155,806 | 17,432 | 39,594 | 46,249 | 33,423 | 19,108 |
| Renfrewshire | 81,912 | 9,701 | 19,433 | 24,581 | 17,602 | 10,595 |
| South Lanarkshire | 151,581 | 15,661 | 37,263 | 44,618 | 33,744 | 20,295 |
| West Dunbartonshire | 44,808 | 5,232 | 10,903 | 13,168 | 10,009 | 5,496 |
| Glasgow & Clyde Valley | 859,147 | 105,887 | 230,978 | 247,856 | 171,404 | 103,022 |
| **2025 planning scenario** | | | | | | |
| East Dunbartonshire | 46,149 | 2,702 | 10,854 | 9,738 | 12,351 | 10,504 |
| East Renfrewshire | 40,377 | 2,423 | 9,574 | 9,362 | 10,375 | 8,643 |
| Glasgow City | 325,398 | 46,521 | 108,777 | 82,839 | 58,135 | 29,126 |
| Inverclyde | 38,231 | 3,683 | 9,385 | 8,778 | 9,630 | 6,755 |
| North Lanarkshire | 169,057 | 18,340 | 44,149 | 42,712 | 38,431 | 25,425 |
| Renfrewshire | 85,036 | 9,336 | 22,445 | 20,320 | 19,508 | 13,427 |
| South Lanarkshire | 166,915 | 16,320 | 44,053 | 40,609 | 39,112 | 26,821 |
| West Dunbartonshire | 47,245 | 4,851 | 13,135 | 10,980 | 11,437 | 6,842 |
| Glasgow & Clyde Valley | 918,408 | 104,176 | 262,372 | 225,338 | 198,979 | 127,543 |
| **2016 lower migration** | | | | | | |
| East Dunbartonshire | 44,065 | 2,856 | 8,552 | 13,439 | 11,296 | 7,922 |
| East Renfrewshire | 37,349 | 2,414 | 7,138 | 12,200 | 8,986 | 6,611 |
| Glasgow City | 307,175 | 48,367 | 99,532 | 83,278 | 48,136 | 27,862 |
| Inverclyde | 37,632 | 4,049 | 8,301 | 11,125 | 8,711 | 5,446 |
| North Lanarkshire | 154,186 | 17,176 | 38,948 | 45,898 | 33,196 | 18,968 |
| Renfrewshire | 81,077 | 9,557 | 19,101 | 24,406 | 17,495 | 10,518 |
| South Lanarkshire | 149,154 | 15,320 | 36,364 | 44,011 | 33,358 | 20,101 |
| West Dunbartonshire | 44,280 | 5,119 | 10,659 | 13,038 | 9,964 | 5,500 |
| Glasgow & Clyde Valley | 854,918 | 104,858 | 228,595 | 247,395 | 171,142 | 102,928 |
| **2025 lower migration** | | | | | | |
| East Dunbartonshire | 44,693 | 2,600 | 10,215 | 9,351 | 12,132 | 10,395 |
| East Renfrewshire | 39,192 | 2,326 | 9,078 | 9,015 | 10,197 | 8,576 |
| Glasgow City | 326,281 | 45,732 | 106,763 | 84,281 | 59,642 | 29,863 |
| Inverclyde | 37,560 | 3,578 | 9,030 | 8,621 | 9,602 | 6,729 |
| North Lanarkshire | 164,656 | 17,766 | 42,303 | 41,716 | 37,835 | 25,036 |
| Renfrewshire | 82,555 | 8,989 | 21,376 | 19,762 | 19,220 | 13,208 |
| South Lanarkshire | 160,468 | 15,573 | 41,562 | 39,047 | 38,054 | 26,232 |
| West Dunbartonshire | 45,647 | 4,602 | 12,362 | 10,607 | 11,257 | 6,819 |
| Glasgow & Clyde Valley | 901,052 | 101,166 | 252,689 | 222,400 | 197,939 | 126,858 |

**Table A15 - Estimated and Projected Annual Household Change by Age of Household Reference Person**

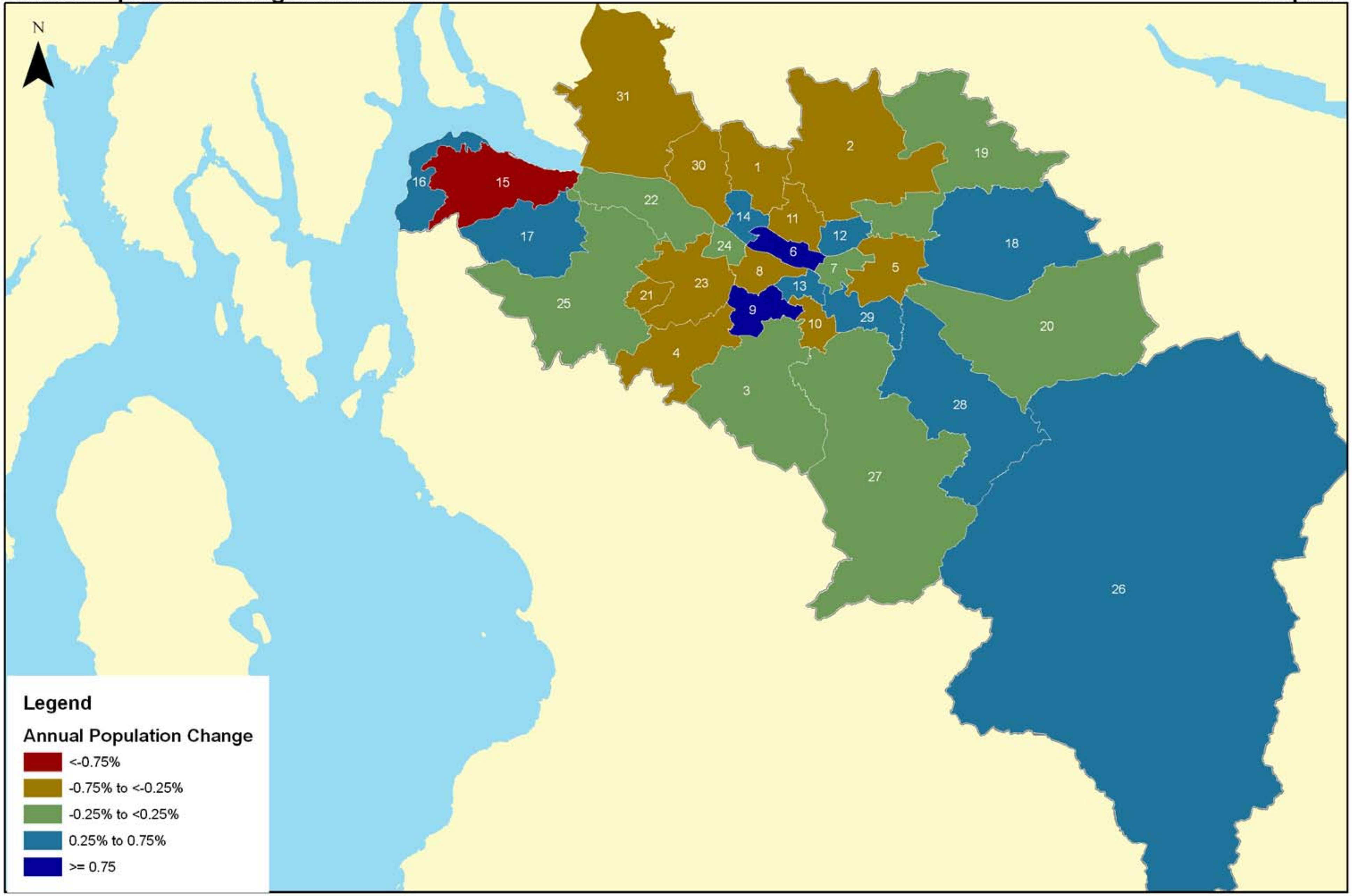
| Age of Household Reference Person | Estimate 2001-2008 | Planning Scenario 2008-2016 | Planning Scenario 2016-2025 | Lower Migration Scenario 2008-2016 | Lower Migration Scenario 2016-2025 |
|---|---|---|---|---|---|
| **16 to 29** | | | | | |
| East Dunbartonshire | 23 | 47 | -22 | 42 | -28 |
| East Renfrewshire | 4 | 62 | -5 | 56 | -10 |
| Glasgow City | 1,231 | -339 | -209 | -343 | -293 |
| Inverclyde | 35 | 24 | -46 | 19 | -52 |
| North Lanarkshire | 183 | 196 | 101 | 164 | 66 |
| Renfrewshire | 142 | 93 | -41 | 75 | -63 |
| South Lanarkshire | 228 | 235 | 73 | 192 | 28 |
| West Dunbartonshire | 64 | 49 | -42 | 35 | -57 |
| Glasgow & Clyde Valley | 1,909 | 368 | -190 | 240 | -410 |
| **30 to 44** | | | | | |
| East Dunbartonshire | -362 | -156 | 227 | -189 | 185 |
| East Renfrewshire | -301 | -167 | 250 | -190 | 216 |
| Glasgow City | -72 | 1,543 | 1,062 | 1,582 | 803 |
| Inverclyde | -220 | -117 | 107 | -132 | 81 |
| North Lanarkshire | -93 | -284 | 506 | -365 | 373 |
| Renfrewshire | -329 | -283 | 335 | -324 | 253 |
| South Lanarkshire | -167 | -103 | 754 | -215 | 578 |
| West Dunbartonshire | -164 | -82 | 248 | -113 | 189 |
| Glasgow & Clyde Valley | -1,708 | 351 | 3,488 | 53 | 2,677 |
| **45 to 59** | | | | | |
| East Dunbartonshire | 175 | -18 | -427 | -36 | -454 |
| East Renfrewshire | 195 | 99 | -330 | 82 | -354 |
| Glasgow City | 1,424 | 1,324 | 76 | 1,464 | 111 |
| Inverclyde | 149 | 51 | -266 | 45 | -278 |
| North Lanarkshire | 691 | 756 | -393 | 712 | -465 |
| Renfrewshire | 297 | 269 | -473 | 247 | -516 |
| South Lanarkshire | 805 | 586 | -445 | 510 | -552 |
| West Dunbartonshire | 183 | 138 | -243 | 122 | -270 |
| Glasgow & Clyde Valley | 3,919 | 3,203 | -2,502 | 3,146 | -2,777 |
| **60 to 74** | | | | | |
| East Dunbartonshire | 108 | 96 | 108 | 87 | 93 |
| East Renfrewshire | 85 | 89 | 148 | 82 | 135 |
| Glasgow City | -1,044 | 156 | 1,181 | 235 | 1,278 |
| Inverclyde | 14 | 67 | 103 | 68 | 99 |
| North Lanarkshire | 313 | 378 | 556 | 349 | 515 |
| Renfrewshire | 98 | 104 | 212 | 91 | 192 |
| South Lanarkshire | 372 | 464 | 596 | 416 | 522 |
| West Dunbartonshire | 48 | 122 | 159 | 117 | 144 |
| Glasgow & Clyde Valley | -6 | 1,476 | 3,064 | 1,444 | 2,977 |
| **75+** | | | | | |
| East Dunbartonshire | 171 | 204 | 284 | 201 | 275 |
| East Renfrewshire | 125 | 143 | 224 | 141 | 218 |
| Glasgow City | -286 | -152 | 180 | -107 | 222 |
| Inverclyde | 36 | 61 | 145 | 60 | 143 |
| North Lanarkshire | 249 | 467 | 702 | 449 | 674 |
| Renfrewshire | 111 | 176 | 315 | 167 | 299 |
| South Lanarkshire | 349 | 471 | 725 | 447 | 681 |
| West Dunbartonshire | 32 | 36 | 150 | 37 | 147 |
| Glasgow & Clyde Valley | 788 | 1,406 | 2,725 | 1,394 | 2,659 |

**Local Authority Sub Areas** **Map A1**



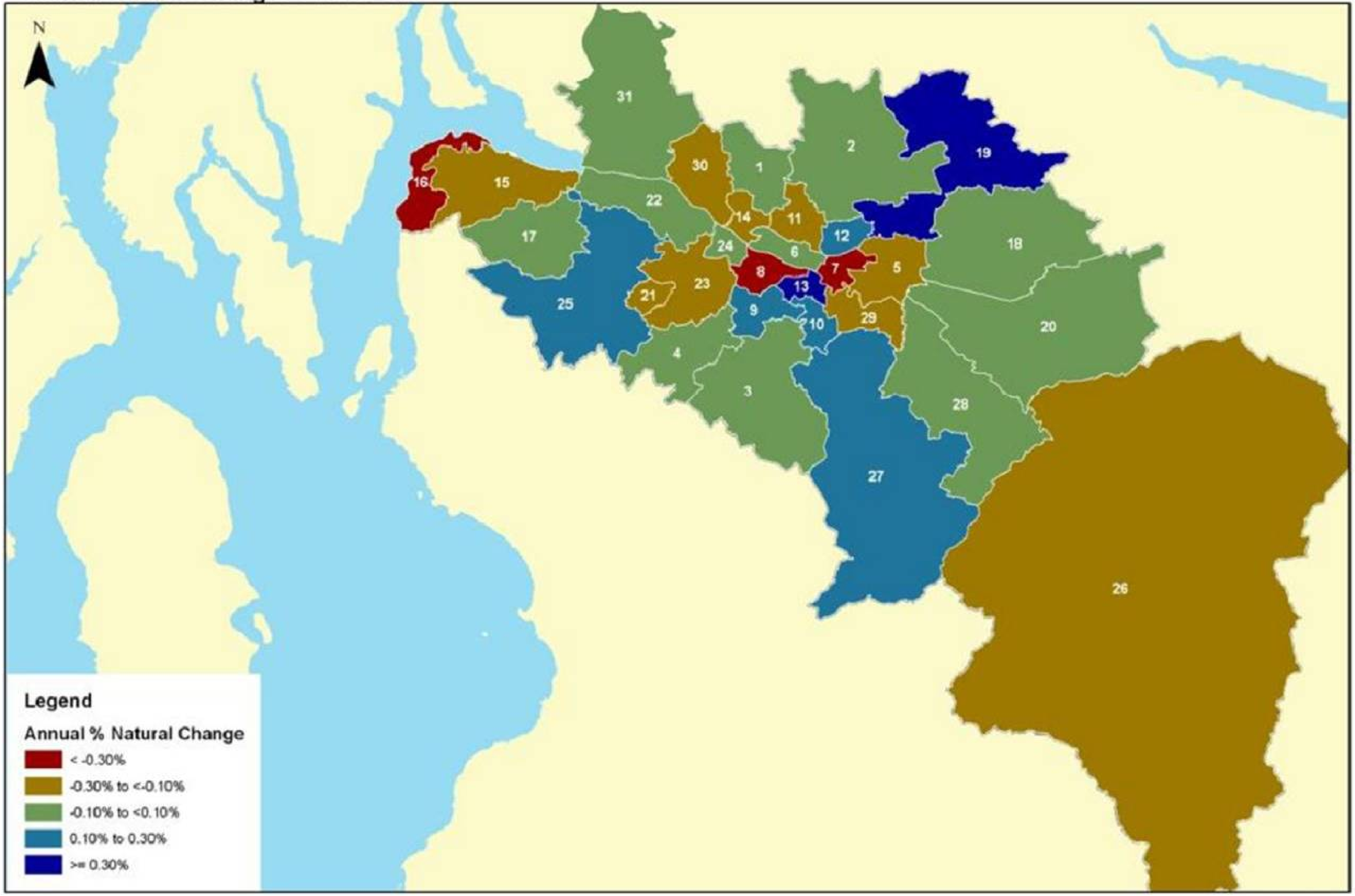
Annual Population Change 2001 to 2008

Map A2

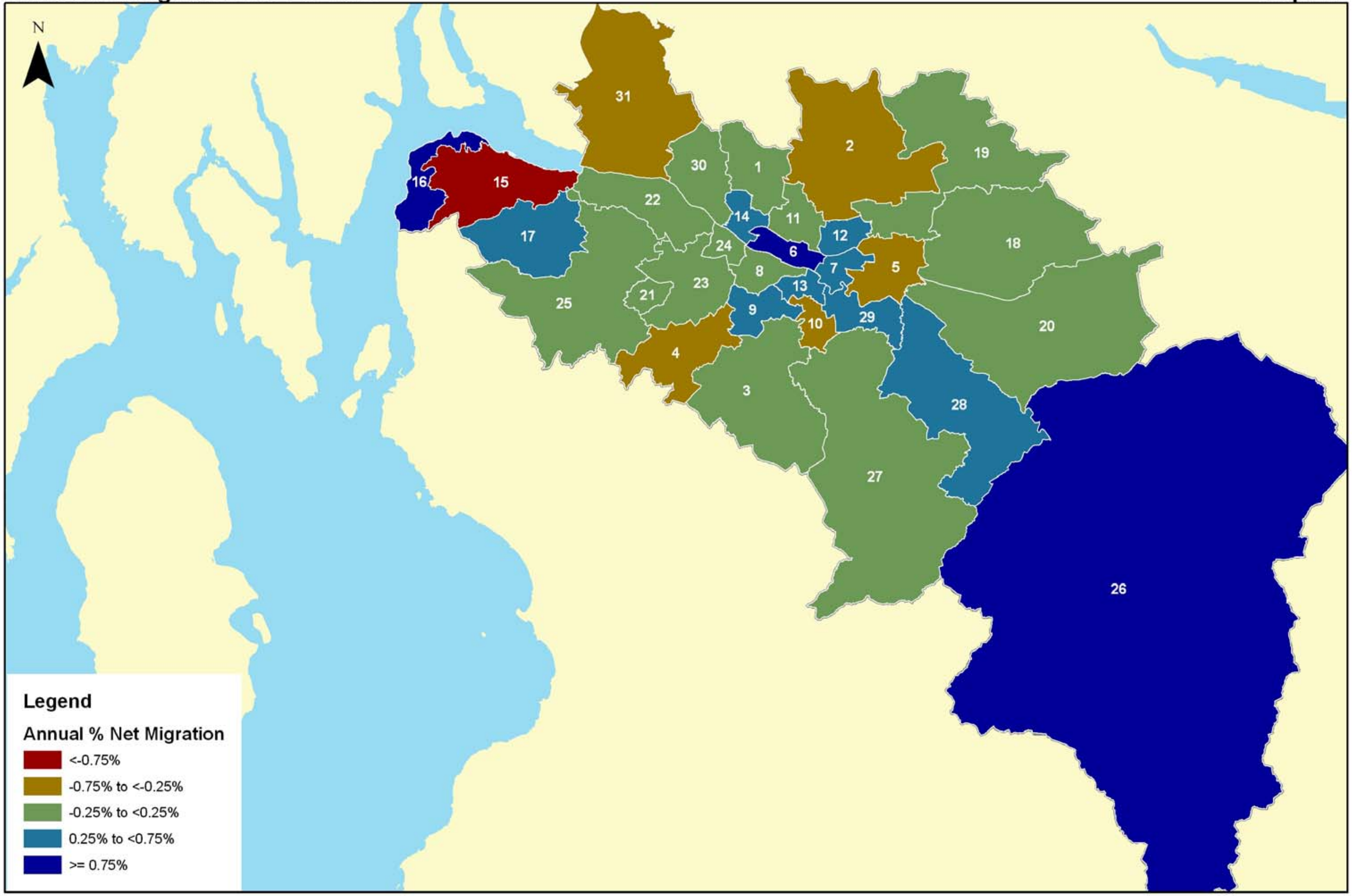


Annual Natural Change 2001 to 2008

Map A3

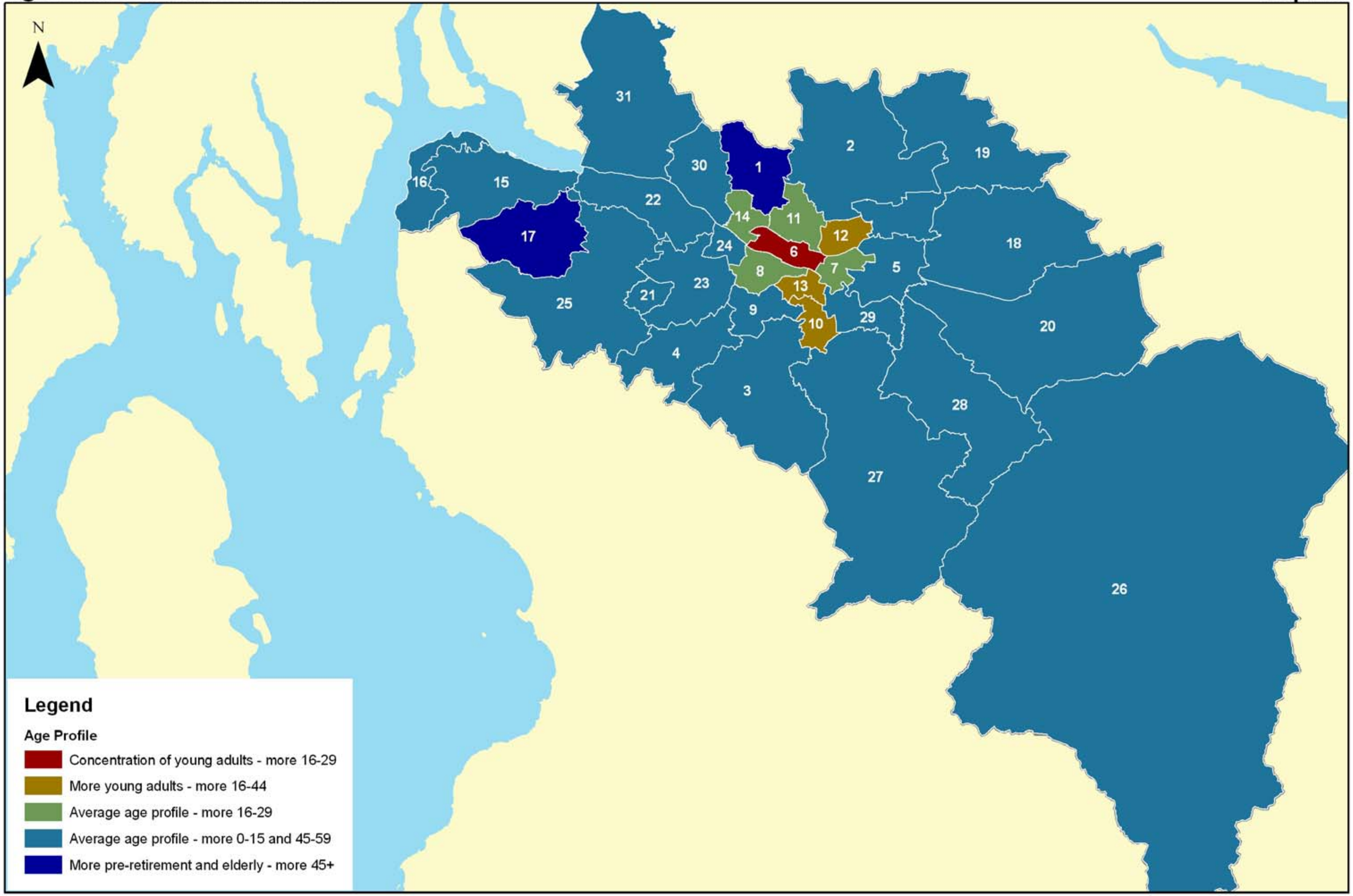


Annual Net Migration 2001 to 2008 Map A4



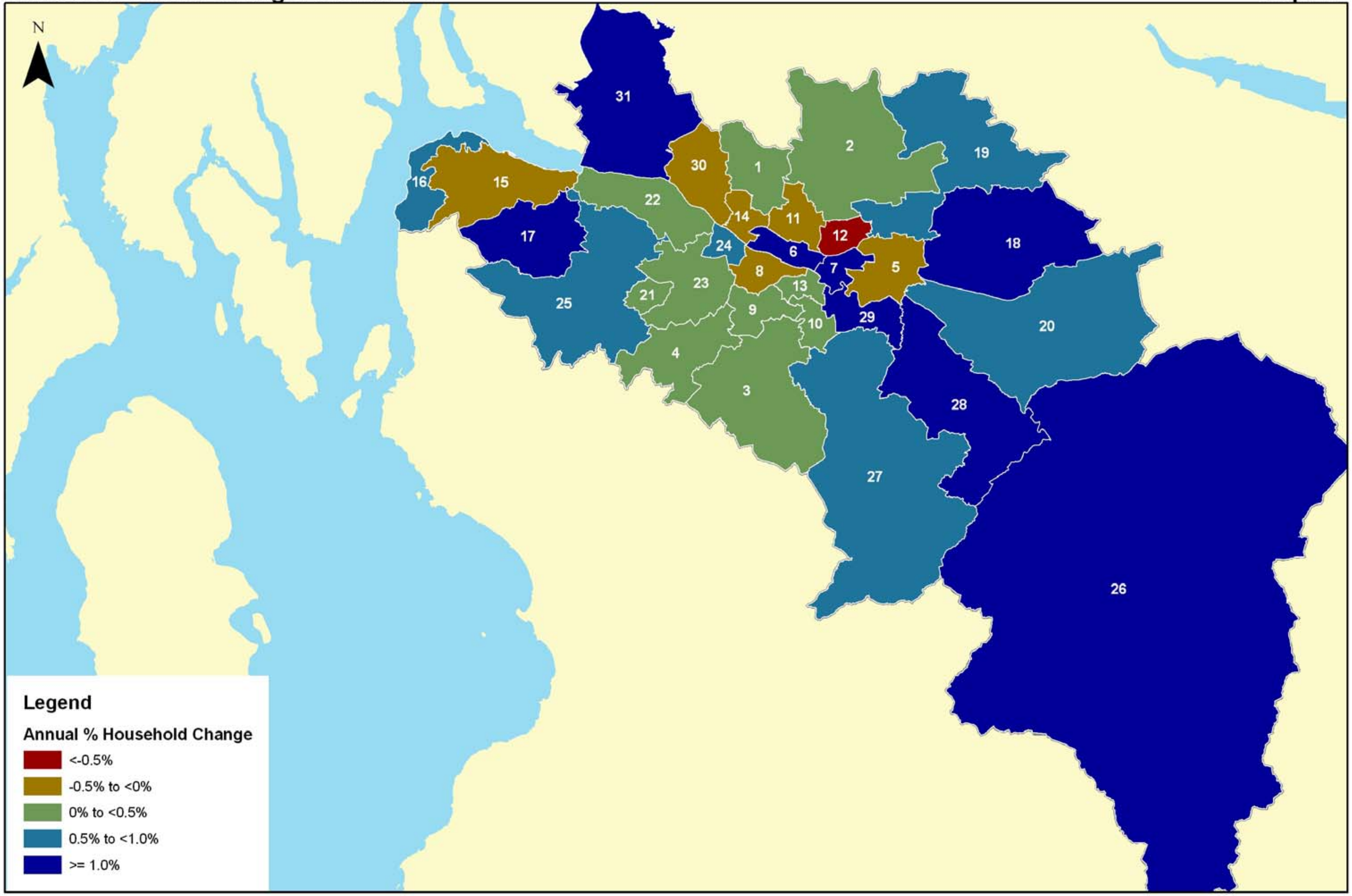
Age Profile Classification 2008

Map A5



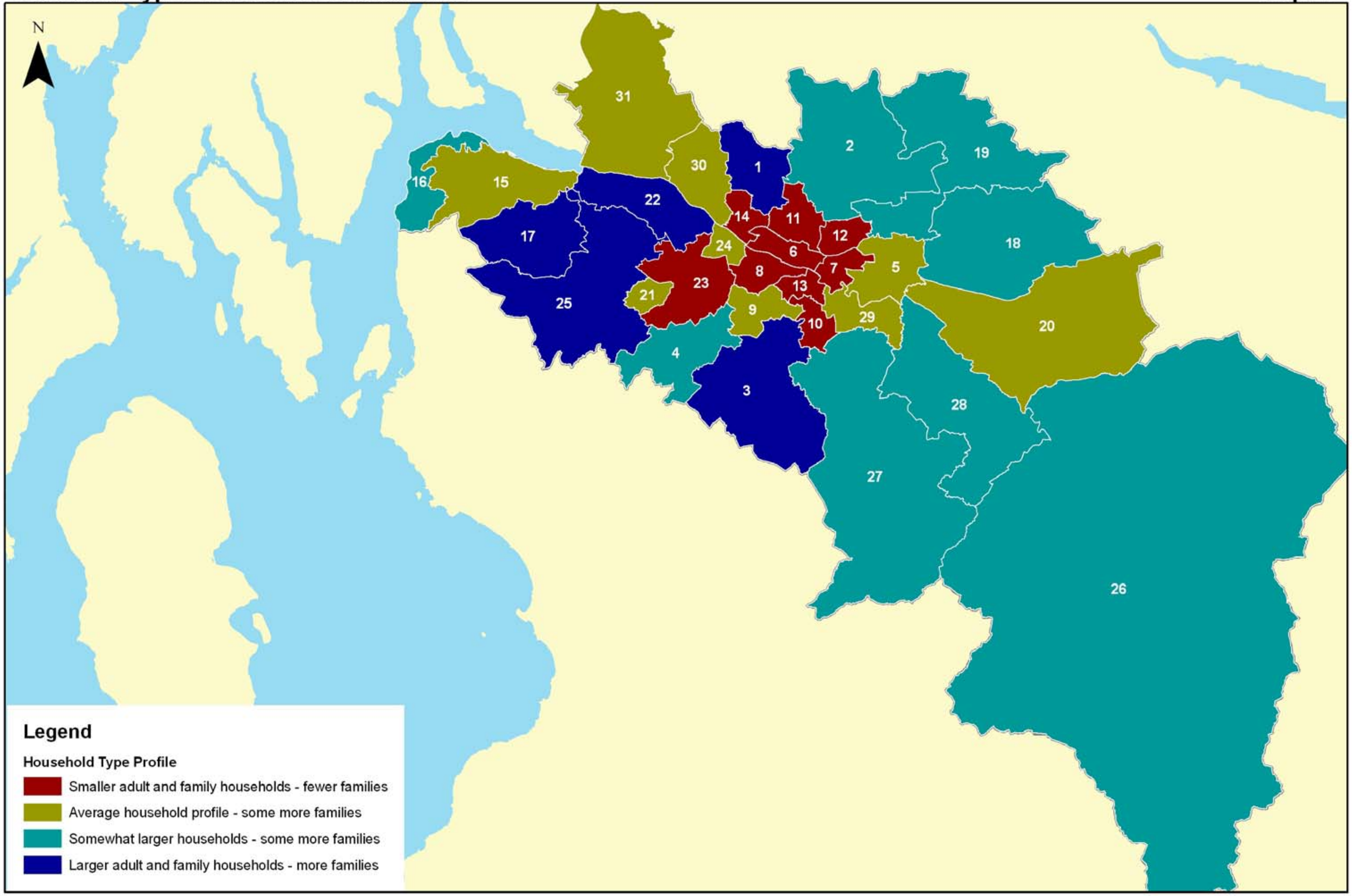
Annual Household Change 2001 to 2008

Map A6



# Household Type Profile Classification 2001

Map A7



# 4

# Market Commentary

**CORE OUTPUT 2**

***Analysis of past and current housing market trends, including balance between supply and demand in different housing sectors and price/affordability. Description of key drivers underpinning the housing market.***

- There are approximately 805,000 households living in 830,000 dwellings (2008).

- There has been a significant shift in tenure over the past 25 years or so, with steady growth in owner occupation, and a corresponding decline in the social rented sector. The greatest shifts have been in Inverclyde, North and South Lanarkshire and Renfrewshire. Glasgow City has experienced rapid growth in the private rented sector, accounting for 12% in 2008 and 15% in 2010.

- In all eight authorities the owner occupied sector is predominant, but there are large variations between (and within) authorities. For instance, in East Dunbartonshire and East Renfrewshire owner occupation accounts for over 80% of households, but represents only 50% in Glasgow City and less than 60% in West Dunbartonshire.

- All authority areas experienced rapid house price rises from 1999 to 2008.

- Volatility in the wider national housing market in the past decade has been reflected in the GCV area. However, more recent factors present significant challenges: restricted access to mortgage finance, reduced consumer confidence, curtailed housing supply, fiscal contraction and reduced public expenditure, and uncertainty regarding the route to recovery.

- Only limited employment growth is anticipated over the next twenty years. This may impact on the demand for owner occupied housing.

- The economic downturn is likely to impact on the rate of household formation, as [particularly young] people may not be able to afford to set up their own household.

- With the reduction in affordability of, and accessibility to, market sector owner occupation, there is likely to be greater demand for private rental and affordable housing, including increased need for subsidised social rented and intermediate market housing.

- Lack of access to mortgage credit may continue to affect levels of demand for owner occupied housing, at least in the short term.

- The annual household growth is projected to be significantly higher than in recent years. There are, however, considerable uncertainties, as
    - o migration over the next decade may be lower than assumed for the planning scenario, and
    - o the rate of household formation may be considerably less than the rate experienced during the 1990s.

  There is already evidence of a slowdown, since 2001, in the rate of household formation for Glasgow. In addition, the economic downturn, with lower levels of private sector housing completions, may well constrain rates of household formation over the next decade.

- The projection shows almost no change in the number of young adult households and a considerable increase in the number of pensioner households, as a result of an ageing population. This is likely to reduce rates of tenure change in the projection period.

- GCV area has around 59% of all datazones within the 15% most deprived in Scotland, a decrease of 9% since 2006. Glasgow City alone has some 31% of the 15% most deprived datazones in Scotland.

- There is a recognised relationship between multiple deprivation and tenure.

- While employment deprivation declined between 2002 and 2008 across all GCV authorities, this pattern was not repeated in terms of income deprivation. It is likely that the recession and its consequences will place further pressure on the social rented sector, and on affordability of, and accessibility to, private rental and owner occupation.

- An ageing population, and the need for people with disabilities to remain in their own homes, will lead to pressure for more properties designed or adapted to meet particular needs.

## Introduction

4.1 This chapter provides commentary on recent housing market trends in the GCV city region, together with an overview of the economic, demographic and social contexts which underpin and help to explain changes in the housing system. It concludes by identifying a number of other key drivers of change. The chapter should be read in conjunction with: Chapter 3: Demographic Change in the GCV Area; Chapter 5: Housing Supply and Demand/Need Comparison*;* and Technical Appendices TA02 *Current Housing Supply/ Stock Profile* and TA04 *Affordability Study*. These provide detailed consideration of the supply and demand/need elements of the housing system.

## Housing Market Trends

**Tenure Structure and Change**

4.2 The GCV area is home to some 805,000 households living in around 830,000 dwellings (2008 base year estimate). Because the area accounts for around one third of the Scottish population it broadly reflects the country as a whole in the structure of its housing market. Some differences may be identified between Scotland and the GCV area. For example, there is, proportionately, a slightly smaller owner occupied sector and a rather larger social rented sector (heavily influenced by the nature of Glasgow City and, to a lesser degree, West Dunbartonshire) than for Scotland. The private rented sector is also relatively smaller in the GCV area. However, it is often the differences within the GCV area – between authorities and LA sub-areas – that are most significant.

The GCV tenure structure for 2008 is shown in Figure 4.1, by local authority.

**Figure 4.1 GCV Tenure Structure, 2008**

| LA | Stock by Tenure | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | Council | | RSL | | Private Rented | | Owner Occupied | | Total |
| | *No.* | *%* | *No.* | *%* | *No.* | *%* | *No.* | *%* | *[100%]* |
| **ED** | 3,845 | 9% | 1,592 | 4% | 1,320 | 3% | 37,277 | 85% | 44,034 |
| **ER** | 3,113 | 8% | 1,034 | 3% | 1,248 | 3% | 31,352 | 85% | 36,747 |
| **GC*** | 0 | 0% | 113,314 | 38% | 34,687 | 12% | 147,949 | 50% | 295,950 |
| **IC*** | 0 | 0% | 11,469 | 29% | 2,213 | 6% | 25,652 | 65% | 39,334 |
| **NL** | 37,720 | 26% | 8,270 | 6% | 5,283 | 4% | 95,190 | 65% | 146,463 |
| **RC** | 13,893 | 17% | 7,243 | 9% | 4,338 | 5% | 56,793 | 69% | 82,267 |
| **SL** | 25,899 | 18% | 5,514 | 4% | 5,801 | 4% | 104,404 | 74% | 141,618 |
| **WD** | 11,626 | 26% | 5,582 | 13% | 1,275 | 3% | 25,631 | 58% | 44,114 |
| **GCV** | **165,175** | **20%** | **84,939** | **10%** | **56,165** | **7%** | **524,248** | **63%** | **830,527** |

*Source:* HNDA Technical Appendix TA06, Table 3.2. Estimates at base date: 30 June 2008.
Note: Percentages rounded to nearest integer. *Glasgow City Council and Inverclyde Council have transferred all their stock to RSLs.

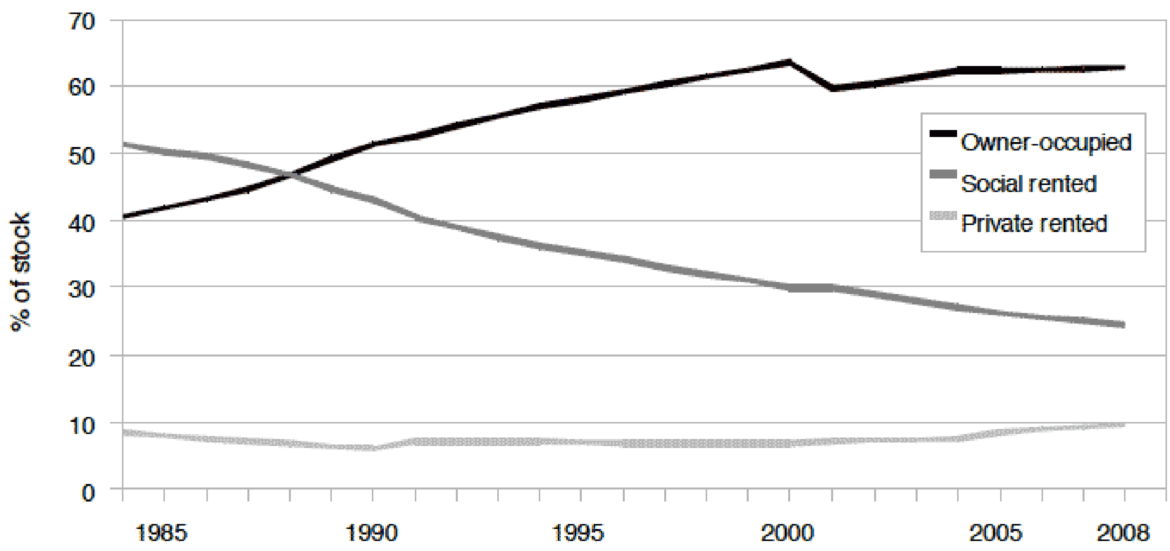
4.3 Broadly, the authorities fall into three groups. Those:

- with a larger social rented sector and smaller owner occupied sector, compared with GCV and other authorities, for example Glasgow and West Dunbartonshire
- where the predominant tenure is owner occupation, with a smaller social rented sector, for example East Dunbartonshire, East Renfrewshire and South Lanarkshire
- where the tenure split is closer to the GCV average, for example Inverclyde, North Lanarkshire and Renfrewshire.

The private rented sector is small in all areas other than Glasgow, where it accounted in 2008 for around 12% of households; according to Glasgow City this share had increased to 15% by 2010.

4.4 There has been a marked change in the tenure pattern across Scotland in recent decades, with growth in owner occupation matched by decline in social rental – the latter has halved since 1985. The stock in the private rented sector has remained fairly constant at around 10% over twenty five years. These trends, in terms of tenure of housing stock in Scotland, are illustrated in Figure 4.2. The reduction in the size of the social rented stock has come about through a combination of sitting tenants exercising their Right to Buy local authority homes (which transfer to private stock), and selective demolition of unfit and hard-to-let stock[6].

**Figure 4.2 Housing Tenure, Scotland, 1984 – 2008**

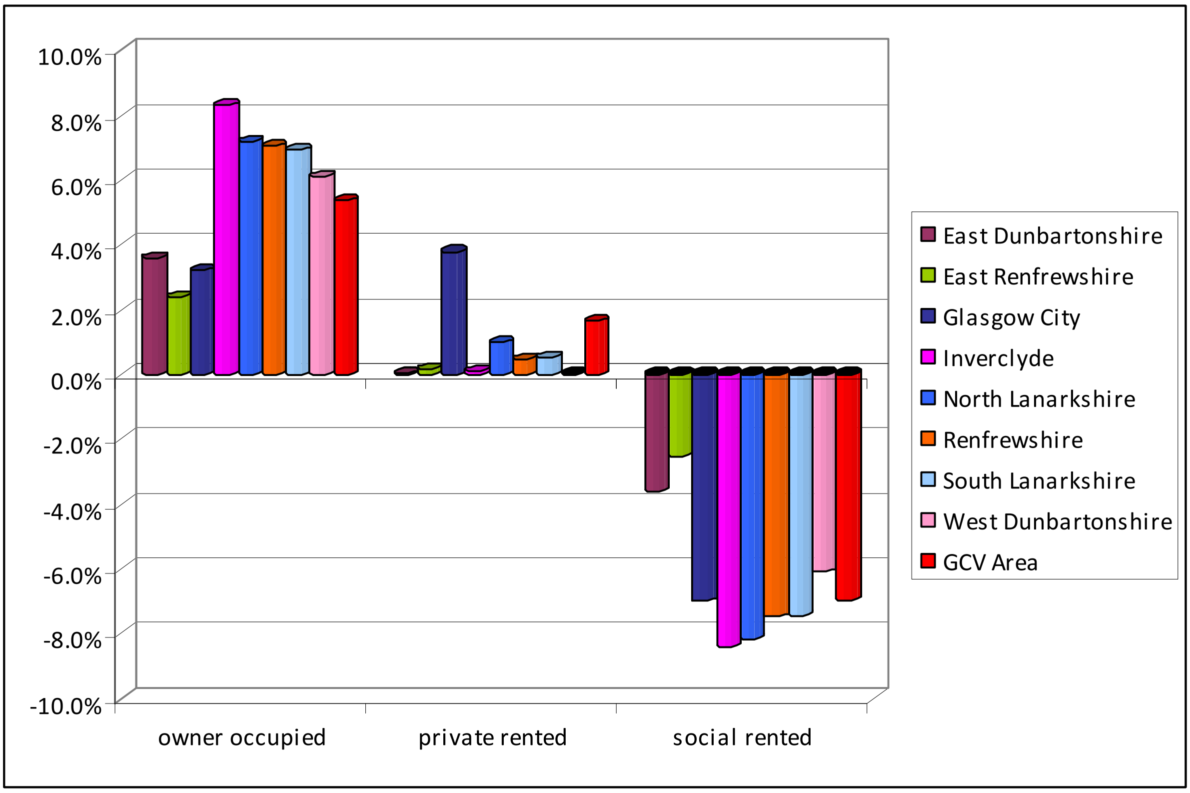



*Multiple Sources: NRS*, Census, SHS. Figures before 2001 are not directly comparable with later figures. Quoted as Chart 2.1 in : Fenton, Alex (2010) *The Contribution of Housing, Planning and Regeneration Policies to Mixed Communities in Scotland*. Scottish Government Social Research

4.5 A not dissimilar pattern of tenure change is seen in the GCV area. Figure 4.3 illustrates the percentage change in tenure share of households between 2001 and 2008, by each constituent authority.

[6] Fenton, Alex (2010) *The Contribution of Housing, Planning and Regeneration Policies to Mixed Communities in Scotland*. Scottish Government Social Research paper.

**Figure 4.3 % Change in Tenure Share, Households, 2001 – 2008**




*Source :* 2001 Census; 2008 GCVSDPA estimates (see also HNDA TA06 Review of Supply and Demand/ Need for Housing)

4.6 In general, owner occupation has grown at the expense of social rental, with the most substantial change in tenure being in Inverclyde, North Lanarkshire, Renfrewshire and South Lanarkshire. The private rented sector has increased, from a low baseline, driven in particular by increases in Glasgow City, followed by North Lanarkshire, Renfrewshire and South Lanarkshire. A range of factors may help to explain these changes, including the widespread aspiration towards home ownership, the impact of successive government policies such as the Right to Buy, and the growth of the 'buy-to-let' market.

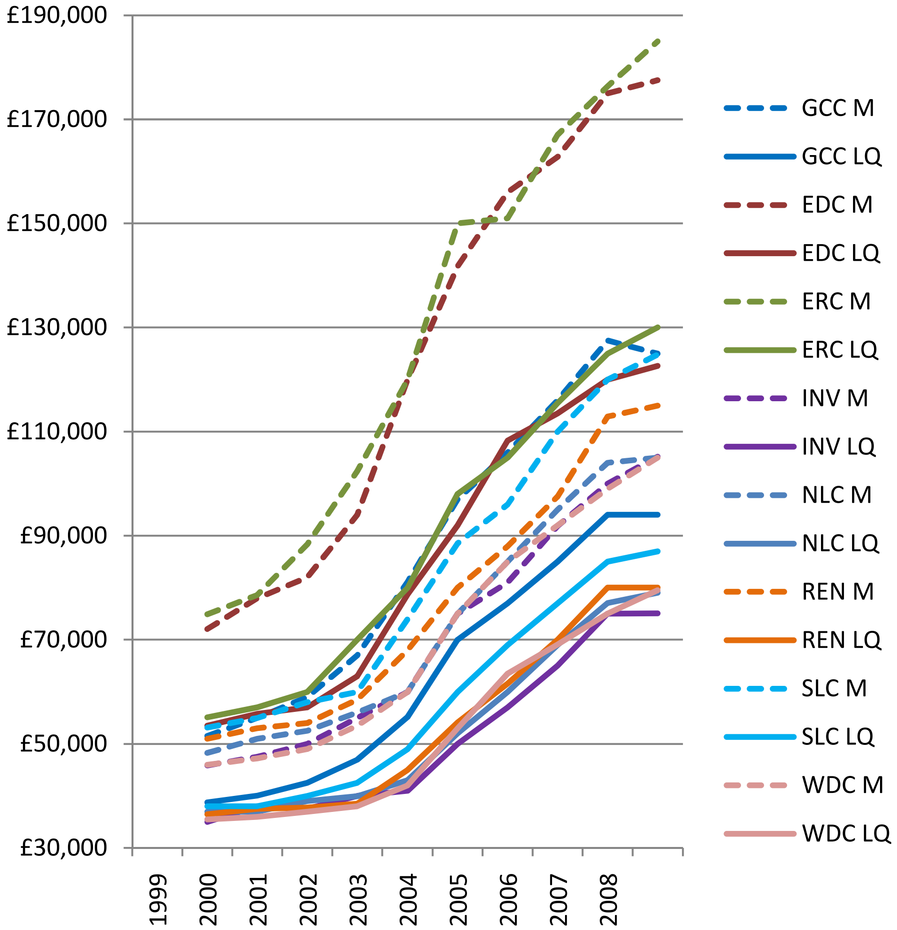
**Affordability**

4.7 House prices, as shown in Figure 4.4, increased in all areas from 1999 to 2008, tailing off in 2008 for many areas. The chart shows two sets of figures for each local authority – lower quartile and median prices.

4.8 It is noticeable that East Dunbartonshire and East Renfrewshire have significantly higher prices for both median and lower quartile prices, than the other local authority areas. Indeed, the lower quartile prices for these two authorities are similar to the median prices for Glasgow and South Lanarkshire. This highlights the issues of affordability which exist in some areas of the housing market. The other six local authorities fall within a band of prices, headed by Glasgow and with Inverclyde and West Dunbartonshire at the bottom. However, within each local authority there are some sub areas where there are significant price pressures which in turn give rise to localised affordability issues. It should also be recognised that it is more appropriate to look at house price trends in the HMA framework (TA05 *House Price Analysis*).

4.9 Median household income in the two areas dominated by owner occupation – East Renfrewshire and East Dunbartonshire – is around 20% above the Scottish figure, while Glasgow and West Dunbartonshire have median incomes 10% or more below the Scottish figure. According to Scottish Neighbourhood Statistics, the proportion of the working age population who were employment deprived in 2008 was 17% in Glasgow, 17% in Inverclyde, and 16% in West Dunbartonshire, but just 7% in East Renfrewshire and East Dunbartonshire.

**Figure 4.4 Lower quartile and median prices**

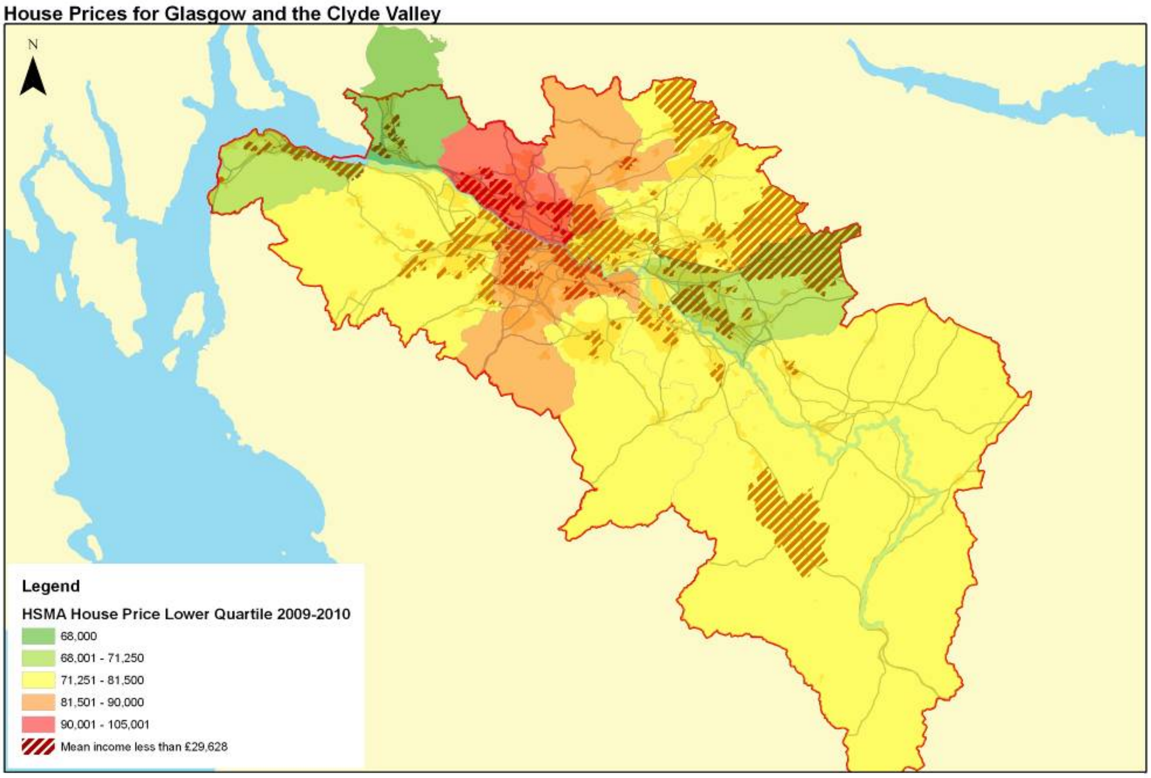



*Source:* Scottish Neighbourhood Statistics, 1999-2008

4.10 Affordability can be shown spatially in terms of housing sub market areas, mapping lower quartile house prices versus lower incomes (Figure 4.5). There is a spatial pattern to affordability, with lower quartile house prices highest in East Dunbartonshire, parts of East Renfrewshire, and many parts of Glasgow (particularly western Glasgow areas), and lowest in parts of Inverclyde, West Dunbartonshire and North Lanarkshire. The distribution pattern of lower incomes reflects to a considerable extent areas of industrial decline. Affordability is likely to be a particular problem where there are concentrations of low income in areas of relatively high house prices.

4.11 The challenge of affordability is not new, and is well recognised by government and local authorities. Various approaches have been advocated, from increasing the housing supply, to mid market rents, and alternative forms of home purchase such as shared ownership and shared equity. The need for this 'intermediate' sector in the housing market is particularly evident in the context of the steady decline in social housing over the past two decades.

**Figure 4.5 Lower quartile house prices vs low income**






*Source:* Sasines, 2009-10

4.12 The Scottish Government announced, in 2007, the Low Cost Initiative for First Time Buyers (LIFT) programme. With a target group of primarily first time buyers, especially those currently in the rental sector or living with relatives, LIFT provided a range of initiatives to assist people on low to moderate incomes to attain home ownership where this is sustainable for them:

- Shared Ownership – where people buy a share of a property, and make an occupancy payment to a Registered Social Landlord (RSL) on the remaining portion
- GRO Grants [Grants for Rent and Ownership] – grants to private developers to build affordable houses for sale, in areas with little or no private housing, or to help meet local shortages
- New Supply Shared Equity (NSSE) – to allow first time buyers to buy a new build property from either a housing association, or a private housebuilder
- Open Market Shared Equity (OMSE) – to allow first time buyers to buy a property on the open market
- Rural Home Ownership Grants (RHOG) – grants to help towards buying, building or renovating a home for people in rural areas who could not otherwise afford to buy.

4.13 A recent evaluation of the LIFT programme[7] revealed that approximately 16% of households housed through LIFT were local authority or RSL tenants, thus freeing up homes for new lets. A further 18% were not tenants but were on a social landlord's housing register, although only around a fifth of these believed they had a realistic chance of being housed by the landlord. A small proportion of LIFT purchasers (10%) felt they could have bought without support at the lower end of the open market.

4.14 The research confirms that various elements of LIFT have resulted in housing supply in each of the GCV authorities, though the main supply has been in Glasgow City. It remains, however, a very small component of the housing system – albeit with potential for future expansion.

**The national picture: volatility**

4.15 The Scottish Government has recently published a review of *The Scottish Housing System: Selected Economic and Social Trends*[8]. It provides a valuable overview of recent volatility in the housing market, and continuing uncertainty. The paper notes that the Scottish housing system has experienced considerable change over the last decade. A sharp increase in house prices, starting in the early 2000s, was driven by several factors, including:

- economic fundamentals (a sustained period of economic growth from 1982 until 2007 resulting in higher incomes and increased demand; a steady rise in the number of households; and a sustained period of low and stable inflation and mortgage interest rates making financing for house purchase more affordable)
- a likely 'bubble' in the housing market based on unsustainable expectations of future price increases
- a decline in lending standards.

4.16 As perceptions of risk changed rapidly across the global financial system, the boom was inevitably followed by the credit crunch and subsequent recession. This resulted in a drop in house prices and an even larger drop in housing activity levels, such as house sales and private-sector new build. The decline in private-sector new build was of such a scale that in 2009, despite social new build at its highest since 1981, total new build was at its lowest level since 1982.

4.17 The Scottish Government introduced a range of housing policy responses[9] to the economic and financial crisis, including: accelerating the Affordable Housing Investment programme; launching a new Home Owners Support Fund, alongside Mortgage to Rent and Mortgage to Shared Equity Schemes; inviting bids to share a £25m pot for new Council housing; extending the LIFT pilot; and launching the National Housing Trust model for affordable rented housing.

4.18 Although the Scottish economy has stabilised, a number of risks to the recovery remain, including potential re-emergence of widespread difficulties in the international financial system as well as the impact of the large fiscal contraction that the UK Government has chosen to implement.

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[7] Scott, John, MacMillan, Katy and Reid, Steven (2011) *The Evaluation of Low Cost Initiative for First Time Buyers (LIFT)* Scottish Government Social Research.

[8] *The Scottish Housing System: selected economic and social trends*, (February 2011) Scottish Government Community Analytical Services.

[9] Extracted from Box 2.1 in Gibb, Kenneth and Leishman, Chris (2011) *Delivering Affordable Housing in Troubled Times – Scotland National Report.* York: Joseph Rowntree Foundation.

4.19 The paper highlights four key challenges facing the Scottish housing system:

- the impact of the credit crunch on the banking sector and the resultant policy responses, which are likely to restrict the availability of mortgage finance for a considerable period; higher deposit requirements will provide a particular barrier to first-time buyers who do not have family assistance
- the rise of the private rented sector as an important form of tenure, especially for households under 35
- the growth in household numbers, due in part to demographic change and to the reduction in average household size; and the implications of an ageing population
- significant constraints on public funding to respond to such challenges, particularly capital budgets for housing and regeneration.

4.20 These national trends will inevitably be reflected more locally, and will have an impact on the housing system and dynamics of the housing market within the GCV area.

**Summary of Key Points**

4.21 The key points to take into account regarding trends in the GCV housing market are:

- There has been a significant shift in tenure structure over the past 25 years or so, with steady growth in owner occupation, largely at the expense of a declining social rented sector. The greatest shifts have been in Inverclyde and North and South Lanarkshire. Glasgow City alone has seen rapid growth in the private rented sector, which stands (in 2010) at around 15%.

- In all eight authorities the owner occupied sector is predominant, but there are large variations between (and within) authorities. For instance, in East Dunbartonshire and East Renfrewshire owner occupation accounts for over 80% of households, but represents only some 50% in Glasgow City and just under 60% in West Dunbartonshire.

- All authority areas experienced rapid house price rises from 1999 to 2008, giving rise to issues of affordability.

- Volatility in the wider national housing market in the past decade has been reflected in the GCV area, and poses significant challenges, including:
    - restricted access to mortgage finance
    - reduced consumer confidence
    - curtailed housing supply
    - fiscal contraction and reduced public expenditure, and
    - uncertainty regarding the route to recovery.

## Economic Context

4.22 There is a full economic discussion in the Oxford Economics report prepared in support of the SDP, *Background Report BR01: Economic Outlook and Scenarios for the Glasgow and Clyde Valley City-Region.*

4.23 The Chancellor's budget of June 2010 and Spending Review of October 2010 set the political and economic context for the next few years. The overriding issue is reduction of the deficit, through a combination of spending reductions and taxation increases. Given these tax increases (e.g. VAT), the relative weakness of the pound sterling and the increasing cost of imports, it is likely that prices will increase. At the same time, there is a general context of wage restraint in both the public and private sectors. Few employers are likely to offer general pay increases, and a two year pay freeze has been announced for the public sector. Under these circumstances disposable income will be squeezed, with a resulting downward impact on consumer spending. Any increase in interest rates, due to a higher inflation rate, will have a further downward impact on consumer confidence and expenditure levels.

**Employment Change**

4.24 The employment context for the GCV area largely mirrors the wider national and Scottish forecasts, with a sharp contraction in employment, followed by a few years of modest decline, as public sector cuts begin to bite. The recovery is expected to be steady, rather than spectacular, for employment levels. The medium term outlook offers only modest employment growth prospects, as is clear from Figure 4.6 below.

**Figure 4.6 Gross Value Added and Employment Past and Projected Change in GCV area**

| | 1998-2008 | 2008-2010 | 2010-2020 | 2020-2035 |
|---|---|---|---|---|
| GVA % pa | 2.6% | -1.3% | 2.4% | 1.9% |
| Employment % pa | 1.4% | -1.4% | 0.4% | 0.2% |
| Employment pa | 11,580 | -12,450 | 3,300 | 1,540 |

*Source*: Oxford Economics – Background Report BR02

4.25 Private services offer the main source of employment growth and the key difference, compared with the pre-recession years, is the much more challenging outlook for employment in public services. Over the course of the slow recovery decade (2010-2020), growth is projected at a relatively modest 3,300 net jobs per annum and 2.4% Gross Value Added (GVA) growth, before moderating to an annual average of 1,540 jobs per annum and 1.9% GVA growth in the period 2020-2035.

**Employment Position by Council area**

4.26 It is clear, from Figure 4.7 that employment and economic activity vary between council areas, with higher employment rates and lower unemployment rates for East Dunbartonshire and East Renfrewshire, as compared with other areas, notably Glasgow City, Inverclyde, North Lanarkshire and West Dunbartonshire. However, all areas have seen unemployment rise in the most recent year of 2009, a trend that is also evident across Scotland overall.

**Figure 4.7 Rates of Employment and Unemployment by Council area**

| | resident employment rate 2008 | unemployment rate 2009 | change in unemployment rate 2008-2009 |
|---|---|---|---|
| East Dunbartonshire | 78.3% | 2.7% | 1.2% |
| East Renfrewshire | 77.0% | 2.4% | 1.2% |
| Glasgow City | 66.6% | 5.5% | 1.8% |
| Inverclyde | 70.5% | 5.3% | 1.5% |
| North Lanarkshire | 72.1% | 5.0% | 2.3% |
| Renfrewshire | 75.5% | 4.2% | 1.7% |
| South Lanarkshire | 77.8% | 4.2% | 2.0% |
| West Dunbartonshire | 72.6% | 5.7% | 1.9% |
| Scotland | 72.9% | 4.5% | 1.7% |

*Source*: Oxford Economics - BR02 Table 3.2 and 3.3

4.27 Figure 4.8 shows that average resident wages are higher in East Dunbartonshire and East Renfrewshire, but average workplace wages are lower. The high resident-to-workplace ratio indicates that many commuters from these areas have a high earning job in Glasgow City. Figure 4.8 shows that workers living in Inverclyde, North Lanarkshire and West Dunbartonshire have lower wages, compared, in particular, to workers living in East Dunbartonshire and East Renfrewshire.

**Figure 4.8 Average weekly earnings GCV area by Council area, 2009**

| | average weekly wage - residence based 2009 | average weekly wage - workplace based 2009 | resident/ workplace ratio |
|---|---|---|---|
| East Dunbartonshire | £551.20 | £445.50 | 1.24 |
| East Renfrewshire | £540.60 | £387.70 | 1.39 |
| Glasgow City | £454.70 | £474.50 | 0.96 |
| Inverclyde | £428.80 | £388.50 | 1.10 |
| North Lanarkshire | £419.10 | £458.40 | 0.91 |
| Renfrewshire | £471.10 | £494.10 | 0.95 |
| South Lanarkshire | £457.50 | £424.60 | 1.08 |
| West Dunbartonshire | £412.60 | £408.20 | 1.01 |
| GCV area | £457.30 | £457.80 | 1.00 |
| Scotland | £457.00 | £455.50 | 1.00 |

*Source*: Oxford Economics - BR02 Table3.9

### Availability of Mortgage Credit

4.28 The financial crisis of the last two years has, among many other effects, led to a very sharp reduction in the availability of mortgage credit. The principal factor has been the withdrawal of overseas lenders from the UK market. This has been further reinforced by much more stringent lending conditions imposed by the FSA on mortgage lending. The consequence is that the overall level of lending to first time buyers has fallen sharply. There is also some evidence from house builders that buyers are much more cautious than before, and that there is now a greater tendency for prospective buyers to withdraw from purchases.

4.29 It is in some ways ironic that while stagnant or even falling house prices are making housing more “affordable” in conventional terms, lack of finance is making housing less accessible.

### Housing Supply

4.30 In parallel with these constraints on demand, housing developers have experienced constraints on the availability of loan finance for development purposes.

4.31 The Scottish Government introduced a number of initiatives to encourage housing supply, particularly of affordable housing (see paragraph 4.17). Although these have made an important contribution, severe reductions in public expenditure are likely to result in constrained levels of subsidy for a number of years.

4.32 New house completions[10], for all sectors in Scotland in 2009-10, stood at 17,372 – down 33% from the 2007-08 peak of 25,781. This was despite new build social sector completions (a relatively small proportion of the total) increasing by some 44% over the same period. Across the GCV area, the all sector decline in new build completions was steeper at 42% over the same period, despite a 78% increase in

[10] *Housing Statistics for Scotland*, Scottish Government, March 2011 update.

social sector completions. It should be noted that these regional statistics mask considerable variation between authorities.

**Summary of Key Points**

4.33 The key points to take into account from the economic context are:

a. Only limited employment growth is anticipated over the next twenty years. This is likely to have an impact on affordability of, and accessibility to, home ownership.

b. The economic downturn is likely to impact on the rate of household formation, as [particularly young] people may be unable to afford to set up their own household.

c. With the reduction in affordability of, and accessibility to, market sector owner occupation, there is likely to be greater demand for private rented and affordable housing, including an increased need for subsidised social rented and intermediate market housing.

d. Lack of access to mortgage credit may constrain the ability of households, particularly of young people, to access owner occupation without family support or other subsidy, at least in the short term.

## Demographic Context

4.34 This section summarises, by way of context for the HNDA results, some of the main results from Chapter 3, *Demographic Change in the GCV area*. It also considers the demographic outcomes in relation to the economic outlook for the area, from the Oxford Economics report. The focus is on the GCV area as a whole, although attention is given to Glasgow's unique position within the City Region.

### Population Size and Number of Households

4.35 In recent decades up till 2003, the GCV area has seen a steady decline in its population, with a loss of around 200,000 people in the period 1981 to 2003. Since 2003, the GCV area population has risen by approximately 10,000: from 1,745,000 in 2003 to 1,755,000 in 2008.

4.36 Despite this sizable rate of population decline, there has been a steady increase in the number of households. Between 1991 and 2003 the number of households rose by 4,600 per year. Since 2003 the number of households has risen at a rate of 5,000 per year, which is only marginally above the rate in the previous decade, despite a considerable improvement in the GCV area's migration position.

4.37 For the future the HNDA has identified two possible migration scenarios: the *planning scenario*, which assumes a constant net migration of +1,050 over the next 10 years, with a resumption of trend growth thereafter, and the *lower migration scenario*, which assumes a net migration of -1,050 for the whole projection period to 2025.

4.38 The planning scenario gives a projected population growth of 67,000, from 1,755,000 in 2008 to 1,822,000 in 2025, and a projected household growth of 113,000, from 805,000 in 2008 to 918,000 in 2025. The lower migration scenario gives a projected population growth of 23,000, from 1,755,000 in 2008 to 1,778,000 in 2025, and a projected household growth of 96,000, from 805,000 in 2008 to 901,000 in 2025.

**Figure 4.9 Past and Projected Annual Change in Population and Households**

| | 1991-2003 | 2003-2008 | 2008-2018 | 2018-2025 |
|---|---|---|---|---|
| **Planning scenario** | | | | |
| Net migration | -5,709 | 2,161 | 1,052 | 2,166 |
| Natural change | -458 | -83 | 2,416 | 2,415 |
| Population change | -6,167 | 2,078 | 3,468 | 4,580 |
| Household change | 4,622 | 5,008 | 6,792 | 6,540 |
| **Lower migration scenario** | | | | |
| Net migration | -5,709 | 2,161 | -515 | -1,051 |
| Natural change | -458 | -83 | 2,250 | 1,840 |
| Population change | -6,167 | 2,078 | 1,735 | 788 |
| Household change | 4,622 | 5,008 | 6,176 | 4,940 |

*Source*: NRS population estimates and GCVSDPA estimates and projections

4.39 Figure 4.9 gives the estimated and projected *annual* change in the population and households for the two scenarios. This shows, for the two scenarios, a projected increase in the annual rate of household growth, mainly due to higher "natural change" population growth.

4.40 The question arises, which of the two scenarios is the most likely to happen in the projection period? To answer this question, it is necessary to compare projected employment change and projected changes in the working age population.

### Changes in Employment and Working Age Population

4.41 In 1991-2003 the employment in the GCV area rose by 2,000 to 3,000 per year. During 2003 to 2008 the GCV area's employment rose much faster, at a rate of 11,000 to 12,000 per year. The economic assessment by Oxford Economics shows that, after reductions in the total employment in the first few years after 2008, the projected employment level for 2018 will be close to 2008 levels. After 2018 the rate of employment growth is projected to be at 1,000 to 2,000 per year.

4.42 Past and projected employment change can be compared with changes in the working age population. This has to take account of the fact that, according to current Government plans (these changes are still to be approved by Parliament), the state pension age will be 65 for women in 2018, and will be 66 for both men and women in 2020. Figure 4.10 below shows the annual change in the working age population, both with and without the effect of the rise in the pension age.

**Figure 4.10 Past and Projected Annual Change in Working Age Population**

| | 1991-2003 | 2003-2008 | 2008-2018 | 2018-2025 |
|---|---|---|---|---|
| **Planning scenario** | | | | |
| working age population | | | | |
| age 16 to 64 men/59 women | -2,623 | 3,511 | -1,431 | -3,998 |
| rise state pension age | 0 | 0 | 5,667 | 4,539 |
| total annual change | -2,623 | 3,511 | 4,236 | 541 |
| **Lower migration scenario** | | | | |
| working age population | | | | |
| age 16 to 64 men/59 women | -2,623 | 3,511 | -2,771 | -6,632 |
| rise state pension age | 0 | 0 | 5,645 | 4,471 |
| total annual change | -2,623 | 3,511 | 2,874 | -2,161 |

*Source*: NRS population estimates and GCVSDPA projections

4.43 Because of an ageing population in the GCV area, Figure 4.10 shows that, without a rise in the state pension age, the working age population is expected to reduce considerably, for both migration scenarios. However, the working age population is projected to rise in 2008-2018, due to the planned rise in the state pension age. Under a near constant employment level, as projected by Oxford Economics, employment rates can be expected to fall, with greater reductions under the planning scenario, than under the lower migration scenario. For the period beyond 2018, employment rates are likely to rise again, as the projected growth in employment of between 1,000 and 2,000 per year is above the projected annual change in the working age population.

4.44 The effect of the abolition, in October 2011, of the default retirement age of 65, has not been explored. This, however, also needs to be borne in mind.

4.45 In relation to the Oxford Economics assessment of the economic outlook for the GCV area, it would appear that the lower migration scenario looks more realistic in the next decade, as there would be a more limited reduction in employment rates, than under the planning scenario. However, the lower migration scenario looks too pessimistic in the longer term, as in the period beyond 2018, there would be sizable reductions in the working age population, but increases in employment levels for the GCV area.

### An Ageing Population

4.46 Over the last 17 years (1991 to 2008), there have been reductions in the numbers of children and young adults (age 20 to 34) and significant increases of those of middle-age (age 35 to 54) and elderly. For the next 17 year period (2008 to 2025) it is projected that the numbers of young adults and persons of middle-age will decrease, with little change in the number of children and a rise in the pre-retirement and elderly people (age 55+) – overall an ageing population.

4.47 The number of "older people households" (here defined as households with a reference person aged 60+) increased by almost 800 per year in 2001-2008. It is projected to grow by about 2,800 per year in 2008-2016, and by about 5,700 per year in 2016-2025. Further consideration of the implications of an ageing population is provided in Chapter 6 *Household Groups with Specific Housing Requirements*.

### Glasgow in relation to Rest of the City Region

4.48 In terms of a general profile, Glasgow is a location where young people move to and settle, tending to move outward to the rest of the Clyde Valley to form families. This has implications for the age structures of the population, as well as the household composition, which are different in Glasgow and in the rest of the Clyde Valley; consequently there are implications for market demand for housing in different locations.

4.49 Although there is a general ageing of the population, with numbers of pensionable age expected to increase in the rest of the Conurbation in the years to 2016, numbers of pensionable age are expected to reduce in Glasgow. After 2016, substantial rises for those of pensionable age are expected in all areas, particularly in North and South Lanarkshire.

4.50 Higher concentrations of single person households are mainly in Glasgow City, but also include parts of Renfrewshire (Paisley and Linwood). The largest households are primarily located in areas of predominantly owner occupied housing, e.g. East Dunbartonshire, East Renfrewshire, Kilmacolm in Inverclyde, and Renfrewshire West.

4.51 Since 2001, the rate of household formation has shown a significant slowdown in Glasgow City, as compared with the rate of household formation in 1991-2001. This reflects either (1) a different social trend, with more people choosing to live together, rather than setting up a single person household, or (2) housing supply constraints, with more people living together in a household, as they cannot afford setting up a separate household. If the first of these factors is the main reason, then the HNDA household projections for Glasgow may be too high.

### Summary of Key Points

4.52 The key points to take into account from the demographic context are:

a. The annual household growth is projected to be significantly higher than in recent years. There are, however, considerable uncertainties, as
   - migration over the next decade may be lower than assumed for the HNDA planning scenario, and
   - the rate of household formation may be considerably less than the rate experienced during the 1990s. There is already evidence of a slowdown, since 2001, in the rate of household formation for Glasgow. In addition, the economic downturn, with lower levels of private sector housing completions, may well constrain rates of household formation over the next decade.

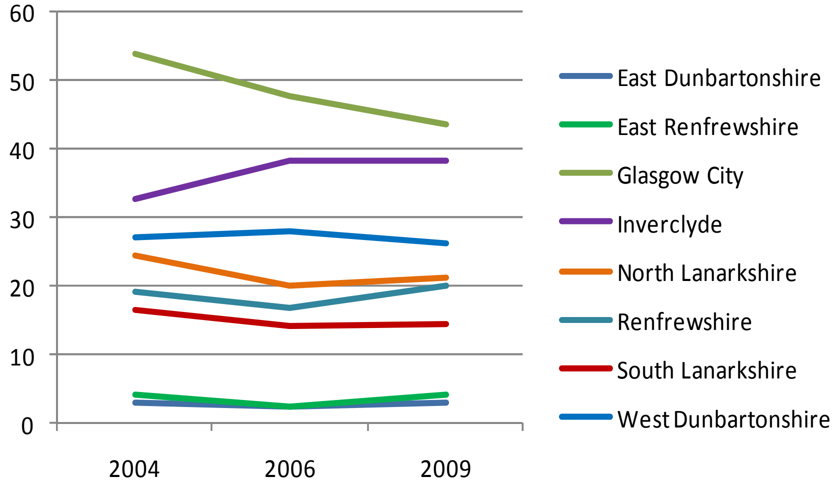
b. The projection shows almost no change in the number of young adult households and a considerable increase in the number of pensioner households in the future, as a result of an ageing population. This is likely to reduce rates of tenure change in the projection period.

## Social Context of Glasgow and the Clyde Valley

4.53 In terms of the social context, deprivation and regeneration are long-recognised priorities within Glasgow and the Clyde Valley. This has a close relationship with housing in terms of geographical neighbourhoods and tenure. One implication of the reduction in the size of the social sector, noted earlier, as a result of Right to Buy and selective demolition of unfit and hard-to-let stock, is that it has increasingly come to house mainly households that are income-poor or otherwise deprived. Spatial concentrations of deprived households and people have thus become closely tied to spatial concentrations of social housing[11].

4.54 Glasgow and the Clyde Valley has 59% of all datazones within the top 15% most deprived in Scotland (SIMD 2009). This is a decrease from 68% in 2006, with the biggest change occurring within Glasgow (which itself accounts for 31% of the 15% most deprived datazones in Scotland). The local authority and spatial context can also be considered, as shown in Figures 4.11 and 4.12.

**Figure 4.11 Percentage of local authority datazones within 15% most deprived**

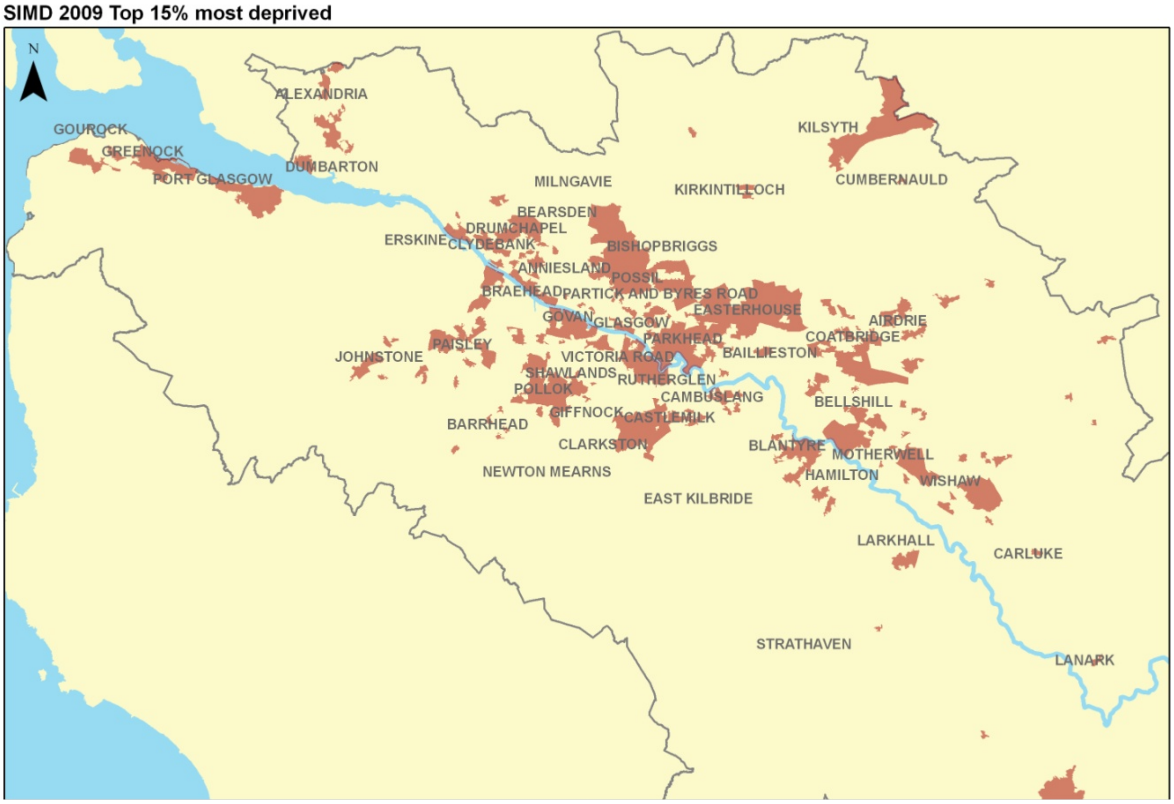



*Source:* Scottish Index of Multiple Deprivation, 2004-09 (Scottish Government)

[11] Fenton, Alex (2010) *The Contribution of Housing, Planning and Regeneration Policies to Mixed Communities in Scotland*. Scottish Government Social Research paper.

**Figure 4.12 Distribution of 15% most deprived datazones**

SIMD 2009 Top 15% most deprived



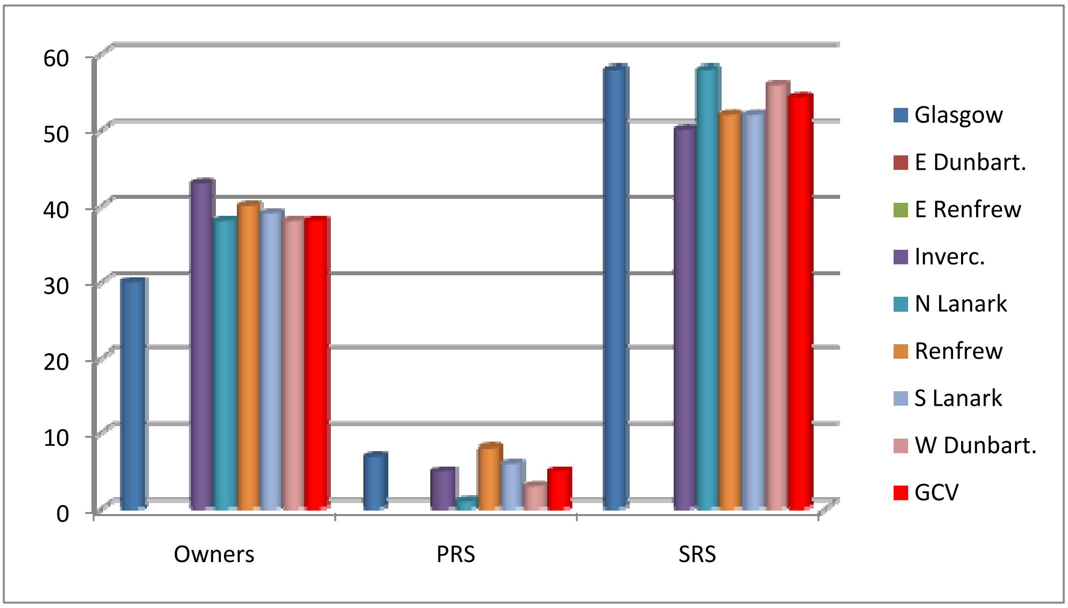



*Source:* Scottish Index of Multiple Deprivation, 2009 (Scottish Government)

4.55 When the issue of deprivation is considered by local authority and tenure (Figure 4.13), there is a clear pattern for most authorities, with the exception of East Dunbartonshire and East Renfrewshire, which do not feature[12].

[12] Data is not available in this dataset for East Dunbartonshire and East Renfrewshire.

**Figure 4.13 15% most deprived datazones by tenure by local authority**

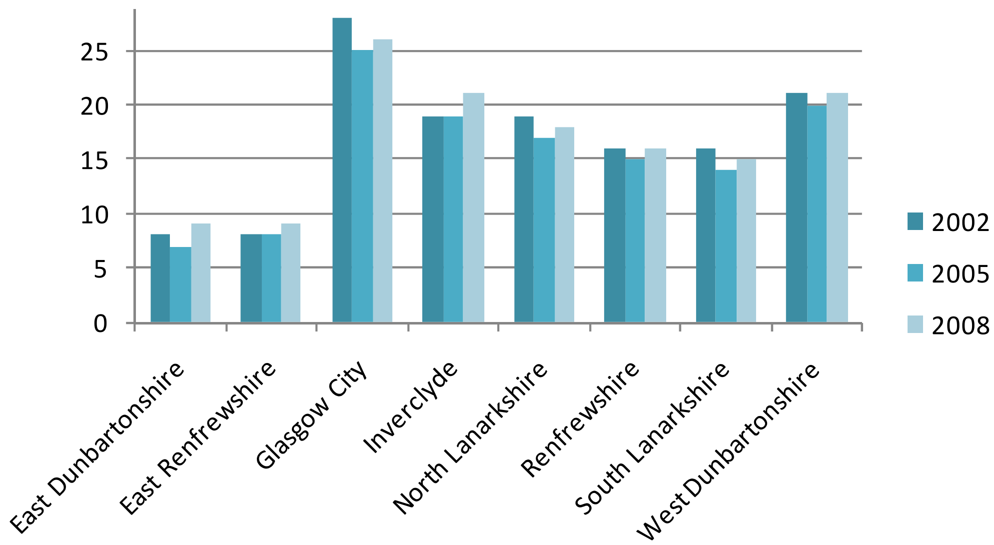



Source: 'Scotland's People' SHS Annual Report 2009 Table 3.3 (Scottish Government)

4.56 The social rented sector features prominently, with 50% or over of households in the 15% most deprived datazones for most local areas. The owner-occupied sector approaches some 40% of households (rather less in Glasgow and more in Inverclyde), and the private rented sector has typically around 5% within the 15% most deprived datazones,

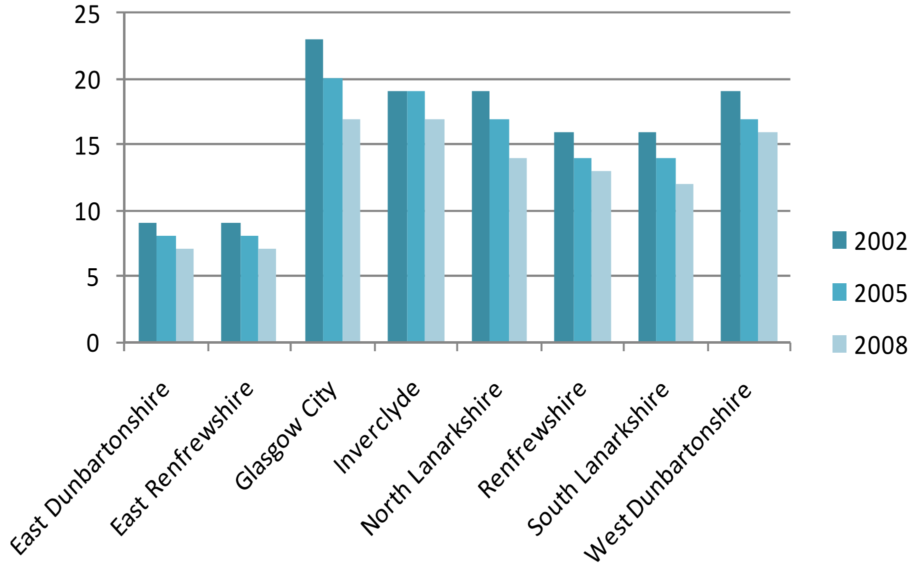
4.57 Income and employment deprivation are considered in more detail, as these relate to affordability issues at both the local authority and housing market area levels (Figure 4.14 and Figure 4.15). The most significant income deprived areas are Glasgow, West Dunbartonshire and Inverclyde. East Dunbartonshire and East Renfrewshire have the lowest levels of multiple deprivation and lowest income and employment deprivation. Despite consistent decline in employment deprivation between 2002 and 2008, income deprivation has in fact increased in several authorities in the same period.

**Figure 4.14 Percentage of population that is income deprived**




*Source:* Scottish Index of Multiple Deprivation (Scottish Government)

**Figure 4.15 Percentage of working age population that is employment deprived**




*Source:* Scottish Index of Multiple Deprivation (Scottish Government)

4.58 Disability and life expectancy are indicators of the general health of the population. Disability, measured crudely in terms of claimant rates for Disability Living Allowance (Figure 4.16), show a consistent pattern of increase across the GCV area from 2002 to 2008. Of course, this may also reflect to some extent increasing uptake of allowances and an ageing population more likely to experience some form of disability. Rates vary between authorities, with Glasgow City displaying the highest claimant rate and East Renfrewshire and East Dunbartonshire the lowest. Should this trend continue, it may be of concern in terms of housing stock provision to meet particular needs. Average life expectancy (Figure 4.17) reinforces the general comparative picture. All local authorities have seen evidence of an increase for both genders over the last decade, notwithstanding the generally greater life expectancy of females (roughly 5 to 8 years). However, East Renfrewshire and East Dunbartonshire have the highest average life expectancies for both genders, and notably the life expectancy for males in these two authorities has been similar to or greater than that of females in Glasgow City. Lowest life expectancies are found in Glasgow City, Inverclyde and West Dunbartonshire. It should be noted that average life expectancy figures at LA level will mask significant variation between sub areas within authorities.

**Figure 4.16 Disability Living Allowance Claimants per 100,000**

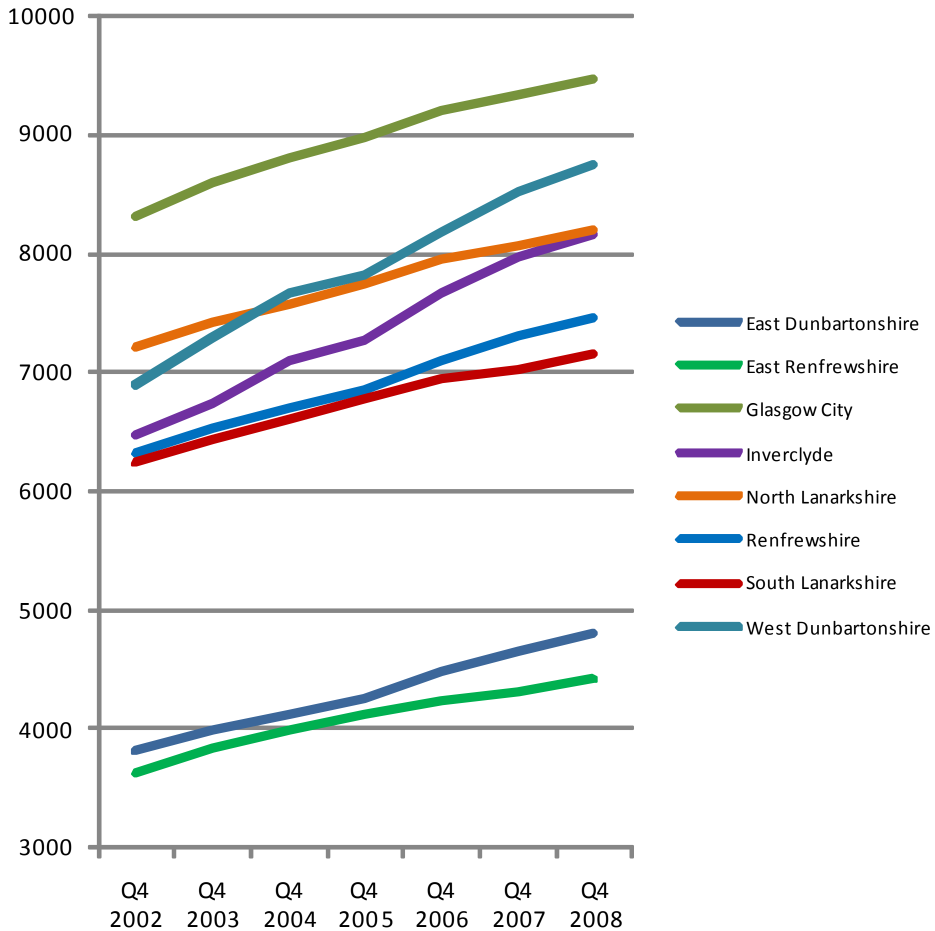
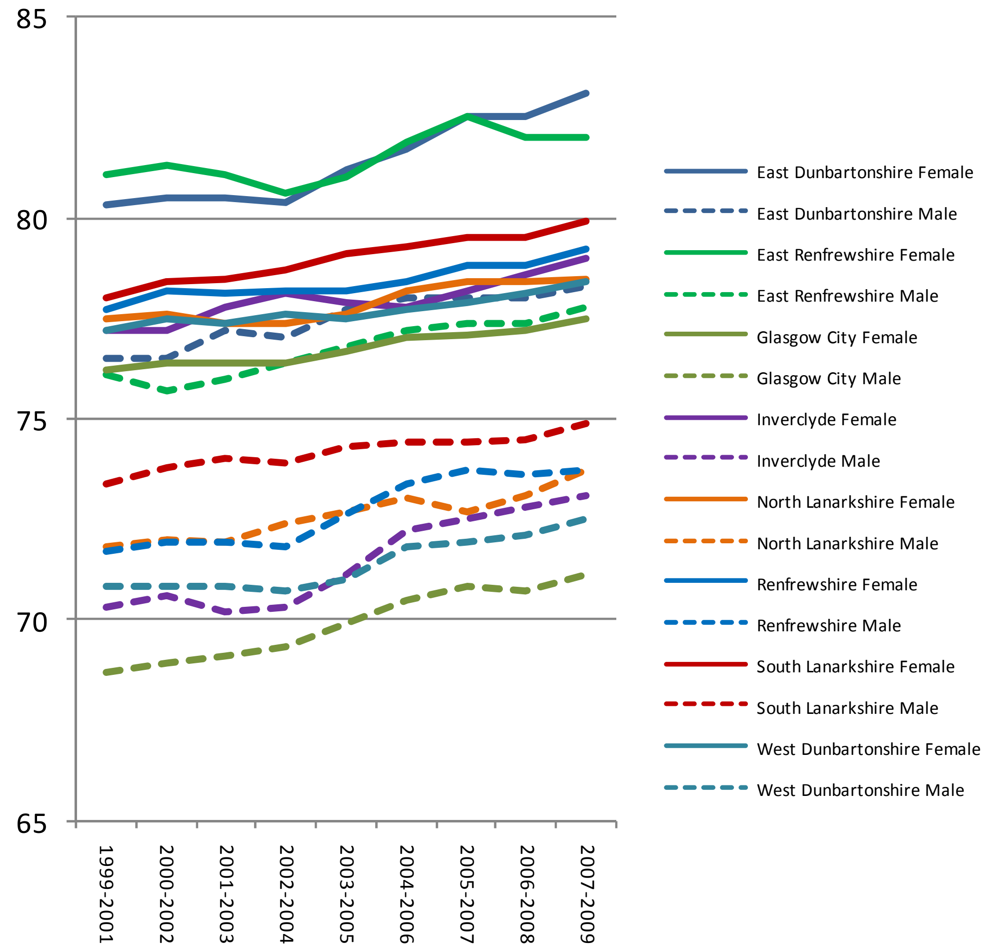



**Figure 4.17 Average Life Expectancy**




*Source:* SNS [Scottish Neighbourhood Statistics]

**Summary of Key Points**

4.59 The key points to take into account from the social context are:

a. GCV area has around 59% of all datazones within the 15% most deprived in Scotland, a decrease of 9% since 2006. Glasgow City alone has some 31% of the 15% most deprived datazones in Scotland.

b. There is a relationship between multiple deprivation and tenure.

c. While employment deprivation declined between 2002 and 2008 across all GCV authorities, this pattern was not repeated in terms of income deprivation. It is likely that the recent recession may place further pressure on the social rented sector, and on affordability of, and accessibility to, private renting and owner occupation.

d. There may also be an increased demand for housing in the social rented sector to meet the needs of households with particular needs.

## Other Key Drivers of Change

**Policy**

4.60 Although housing and related policy areas such as building standards and health are devolved matters, and the responsibility of the Scottish Parliament, various other important policy areas which influence and constrain the housing system are reserved to the UK Government. Examples include HM Treasury, tax and pensions, business regulation, employment, immigration and welfare. Policy decisions by local authorities and delivery agencies are also of direct significance across a range of matters including: planning/land use management; investment decisions; regeneration; allocations, rent and repairs in social rented housing; and housing support provision.

4.61 Previous and current national policy initiatives have had an important impact on the GCV housing system. These include:

- the promotion by successive governments since the late 1970s of owner occupation as the tenure of choice for the majority of households, and the use of Right To Buy to encourage tenure shift (now considerably restricted under the Housing [Scotland] Act 2010)
- light touch regulation of the finance industry which facilitated rapid expansion of credit and (indirectly) the recent housing bubble
- compulsory Landlord Registration to improve standards in the private rented sector
- national commitments to tackling homelessness by 2012
- the requirement for social landlords to achieve Scottish Housing Quality Standard (SHQS) for their housing stock by 2015
- the target to eradicate fuel poverty by 2016, and
- the requirement to meet challenging targets to tackle climate change by 2020.

4.62 Several important policy scenarios are emerging which are likely to have significant impacts on the GCV housing system, at least in the short term. Fiscal constraints and significant savings in public expenditure will impact both revenue and capital spending at Scottish Government and local government levels. Rising unemployment (especially in the public sector), tax increases, the effect of inflation and tightened financial regulation are likely to lead to reduced consumer confidence and continuing difficulties in accessing mortgage finance, resulting in downward pressure on demand and construction activity.

4.63 Cuts in public spending may mean less money being available for new-build social rented housing, and regeneration programmes having to be scaled back. There will be less subsidy available to support the intermediate sector, enabling infrastructure works, and grants or loans for improvements by home owners; and pressure may be placed on housing support requirements. In February 2011 the Scottish Government published *Homes Fit for the 21st Century*[13] setting out the need for new innovative approaches to increase the supply of affordable housing with some limited new funding streams identified.

4.64 The UK Government is proposing to introduce significant welfare reforms including changes to the Local Housing Allowance and housing benefit, which will have implications for Scotland. Glasgow City, for instance, has over twice as many claimants as any other authority in Scotland, and in three GCV authorities over 25% of all households are on housing benefit (Glasgow City, Inverclyde and West Dunbartonshire). A recently published Scottish Impact Assessment[14] suggests that, as well as having a negative impact on a significant number of recipients of housing benefit and their dependants, there are also likely to be impacts on the way in which benefits are best administered and on funding arrangements for local authorities. While Government's view is that the changes should force down rent levels, the report notes that the reaction of private landlords and the constraints they face, together with the size composition of the stock, will be crucial factors. A particular concern is the impact on progress to the 2012 Homelessness commitment, whereby the assessment for 'priority need' will be removed.

4.65 In the context of an ageing population and constraints on public expenditure, together with considerations for client preference, health and social care policy is increasingly moving away from institutional forms of care towards a model of housing support being provided to remain in one's own home for as long as possible. As well as changing the care delivery system, this will have implications for adaptations and conversion, and for the design of new properties.

**Technology**

4.66 There are various ways in which technology will influence housing, such as:

- telecare systems which can monitor clients in their own homes and offer 24hr call and support services
- energy-saving devices and microgeneration fitted to new properties and retro-fitted to older housing may contribute to reduced greenhouse gas emissions and fuel economy.

4.67 In the longer term, modern methods of construction (MMC) may come to play a role in boosting affordable housing supply in the medium to long term. Essentially components are manufactured under controlled conditions in a factory and delivered to site for rapid assembly, thus reducing time and cost. However, the relatively poor track record of past generations of non-traditional construction (relating to key issues such as durability, whole life costs, repairability, insurability and flood resilience) have given rise to concerns among lenders, insurers and other stakeholders. These

[13] *Homes Fit for the 21st Century: The Scottish Government's Strategy and Action Plan for Housing in the Next Decade 2011-2020* (2011) Edinburgh: The Scottish Government.
[14] *Housing Benefit changes: Scottish Impact Assessment* (January 2011) Scottish Government Community Analytical Services [final initial version].

concerns will have to be addressed and a new certification standard put in place for MMC properties before the potential can be realized.

**Alternative Delivery Mechanisms**

4.68 "After a decade of plenty, Scotland must find innovative cost-effective ways to deliver the public and private finance required to expand affordable housing."[15] All parts of the UK, including the GCV area, face problems in housing supply across all tenures, and particularly in funding affordable housing. In response, the Scottish Government adopted an explicitly pragmatic search for new ideas and new delivery models which work, through its *Fresh Thinking, New Ideas* discussion paper in 2010, and subsequent publication of its Strategy and Action Plan, *Homes Fit for the 21$^{st}$ Century*, in February 2011.

4.69 With significantly restricted finance for housing, traditional approaches cannot be relied upon, and the strategy document proposes to implement "a radically different and innovative approach". Key elements include:

- expanding the National Housing Trust model
- continuing to invest in shared equity schemes
- supporting development through an Innovation and Investment Fund which will invite bids from Councils, housing associations and private bodies
- exploration of a Scottish Housing Bond and access to pension and other institutional investment
- in the longer term, establishment of an Infrastructure Investment Loan Fund and a National Housing Investment Bank
- using new powers to reform Stamp Duty to encourage and incentivise new investment in the private rented sector
- further reform of the Right To Buy to cut discounts
- expansion of the housing options approach and provision of housing health checks.

4.70 In relation to the private housing sector, the strategy affirms the importance of the UK Government developing policies which enable the mortgage sector and the house building sector to recover. It identifies other issues, some of which have been highlighted also by the industry's representative body, Homes for Scotland:

- the need to develop new options for first time buyers, including New Supply Shared Equity with Developers and rent-to-buy schemes
- the importance of the planning system ensuring a generous supply of effective land in the right places, noting that "in the current economic climate, [planning authorities] may need to take a more flexible and responsive approach to the identification of housing sites"
- the major role played by planning conditions and agreements in securing the delivery of infrastructure and affordable housing – but the need also for these to be realistic, balancing the interests of the developer and the community
- the important role of the private rented sector.

4.71 The Scottish Government has recently launched a parallel discussion process on regeneration[16], which also acknowledges the need for new approaches and funding models.

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[15] Gibb, Kenneth and Leishman, Chris (2011) *Delivering affordable housing in troubled times: Scotland national report.* York: Joseph Rowntree Foundation.

[16] *Building a Sustainable Future: Regeneration Discussion Paper*. (2011) Edinburgh: The Scottish Government.

## Conclusion

4.72 This Chapter has outlined key housing considerations in the GCV area, and examined the economic, demographic and social context. It is important to recognise the impact of the recession on the housing system across all tenures. The significant reduction in the availability of public finance means that innovative new models of funding and delivery of housing are required. Although this has been recognised by the Scottish Government, it will be a number of years before the housing system recovers. In the short, it is necessary to plan future housing need and demand in a climate of unavoidable uncertainty.

# 5

# Housing Supply and Demand / Need Comparison

| |
|---|
| **CORE OUTPUT 3**<br>***Estimate of total future number of households.***<br>This output is provided in Figure 5.2 |
| **CORE OUTPUT 5**<br>***Estimate of current number of households in housing need.***<br>This output is provided in Figure 5.3 |
| **CORE OUTPUT 6**<br>***Estimate of future households that will require affordable housing.***<br>This output is provided in Figure 5.10 |
| **CORE OUTPUT 7**<br>***Estimate of future households requiring market housing.***<br>This output is provided in Figures 5.7 and 5.8 |
| **CORE OUTPUT 8**<br>***Estimate of total future households requiring either affordable or market housing.***<br>This output is provided in Figure 5.13 |

**Introduction**

5.1 This chapter summarises the assessment of housing supply against demand/need to establish future housing requirements in both the Private and Affordable sectors. A more detailed discussion is provided in Technical Appendix TA06 'Review of Supply and Demand/Need for Housing'. It is necessary to use two different methodologies for the Private and Affordable sectors.

**Overview of the approach**

5.2 The assessment of the requirement for additional housing land for the private sector covers two distinct time periods: 2008-20 and 2020-25. These are determined through SPP (and former SPP3) and the anticipated adoption of LDPs by 2015. There is a requirement for LDPs to ensure a 5 year effective land supply (2015-2020) and to plan for 10 years (hence up to 2025).

5.3 The assessment of any additional requirement in the affordable sector is provided for the same time periods as the private sector, but also, for LHS purposes to 2016. It should be noted that for the purposes of this assessment the affordable sector has been defined as the social rented sector and 'intermediate housing' products which have been identified as subsidised Low Cost Home Ownership (ref TA04 'Affordability Study') and 5.33 for more detail.

5.4 The supply and demand/need comparison recognises two broad tenure categories. The Private sector comprises owner occupied and private rented housing. The Affordable sector is made up of social rented housing and 'intermediate housing'. 'Intermediate' is defined as those newly-forming households that could access subsidised low cost home ownership (LCHO) products such as shared equity or shared ownership, if they were available, but excluding those who could afford either owner-occupation or private renting. It is therefore expressed as the *potential* minimum and maximum contribution that such housing products could make to meeting identified needs that otherwise would require social rented provision.

5.5 There are several steps in comparing housing supply with demand/need to determine housing requirements in each sector:

- determine the appropriate geographical framework to assess housing requirements
- estimate stock and households at the base date, 2008, and allow for current (backlog) need
- project population and households to 2016, 2020 and 2025
- project stock to 2016, 2020 and 2025
- tenure the household projections to ascertain private sector demand, and need for affordable housing
- compare this demand/need against supply to identify housing requirements by tenure.

5.6 The tenured projections require output within two different geographies. For the private sector, the appropriate geographical framework is the Housing Market Area (HMA) system, which was developed for the 2000 Joint Structure Plan and reaffirmed for the 2006 Plan. This framework of HMAs has been reviewed again using more recent data on house-buying moves, and reaffirmed for the HNDA. For the affordable (predominantly social rented) sector, the relevant geography is local authority level, together with defined LA sub-areas.

5.7 Two sets of household projections, the Planning Scenario (C2) and the Low Migration Scenario (A1) have been prepared for the GCV region, and both have been tenured by consultants Tribal/Optimal Economics, using their affordability study. The vision of the SDP Proposed Plan is to pursue an economic scenario aimed towards creating a low carbon sustainable economy for the city-region. This approach reflects the Scottish Government's 'A Low Carbon Economic Strategy for Scotland' (December 2010) and will focus in part on a shift away from the city-region's service economy towards a growth in specialist high-value products and related services associated with green technology sectors, green environmental sectors, tourism and leisure. On this basis Planning Scenario (C2) has been adopted by the GCVSDPA as the most appropriate demographic scenario to support the economic aspirations of the SDP. The HNDA therefore presents the results for the Planning Scenario (C2). Corresponding results for the Low Migration Scenario (A1) can be found in Annex C of TA06.

5.8 Two affordability assumptions have been applied to the household projections: the high affordability assumption assumes a willingness to spend a higher proportion of income on private rent, which results in a larger private sector, whilst low affordability assumes that households will only spend a lower proportion of their income on private rent.

5.9 When each of the affordability assumptions was applied, it was found that under the high affordability assumption the results for the affordable sector did not reflect results from previous local housing strategies or through the Bramley[17] model, whilst results under the low affordability assumption were more in keeping with authorities' understanding of the affordable sector. However, under the low affordability assumption, results for the private sector were unfeasibly low, running counter to authorities' understanding of the market and the Government's objective to plan for a generous supply of land. Consequently, to better reflect our understanding of the private and affordable sectors in the GCV area two different affordability assumptions have been used and the consequence of this is double counting of around 26,000 households (Figure 5.1).

**Figure 5.1 Household Projection Preferred Scenario by Tenure**

| | Preferred Scenario | Households 2025 |
|---|---|---|
| **All Households** | | **918,000** |
| Private sector demand | C2 High affordability assumption | 684,000 |
| Affordable sector need | C2 Low affordability assumption | 260,000 |
| **Total Private demand + Affordable need** | | **944,000** |
| Exceeds household projections by | | 26,000 |

*Source: Tribal/Optimal Economics Affordability Study, 2011, TA04 (Page 30, Table 7.1). See also TA06 Tables 6.5 and 6.6 for more summary detail and TA06 Tables 6.3 and 6.4 for LA level data*

### Household Tenure Projection Summary Results

5.10 Overall the GCV area is seeing a projected increase in households under the Planning scenario (C2) from 805,000 at the 2008 base date to 918,000 in 2025, an increase of 113,000 households over the projection period. A summary of the household tenure projection results is given for both affordability assumptions in Figure 5.2.

Private Sector

- *Planning scenario (C2) high affordability:* the private sector increases from 567,000 households in 2008 to 684,000 in 2025, an increase of 117,000 households.
- *Planning scenario (C2) low affordability:* the private sector increases from 567,000 households in 2008 to 658,000 in 2025, an increase of 92,000 households.

[17] Professor Glen Bramley's report – "*Local Housing Need and affordability model for Scotland – Update*" (2004)

Affordable Sector

- *Planning scenario (C2) high affordability:* social rented sector households decrease from 238,000 households in 2008 to 235,000 in 2025, a decrease of around 3,000 households with some fluctuation in the intervening years. This shows a slowing decline in the social rented sector, and indicates that the sector is stabilising.

- *Planning scenario (C2) low affordability:* social rented sector households increase from 238,000 households in 2008 to 260,000 in 2025, an increase of 22,000 households. This results in a corresponding lower increase in private sector households for the low affordability assumption.

5.11 The result for the GCV area is that:

- under the **low affordability** assumption, there is significantly slower growth in the private sector, but growth of nearly 10% in the social rented sector
- under the **high affordability** assumption, there is continued growth in the private sector albeit at a slower pace than in the past and more modest changes in social renting.

5.12 While application of the different affordability assumptions produces different results, the overall finding is of a more stable tenure profile suggesting that the rate of growth in the private sector has levelled, and the decline in the social rented sector is slowing. Uncertainty remains in relation to the role of the private rented sector, and the level of affordability in this sector, which has had an effect on the results/outcomes of the tenure projections for the private sector under both affordability assumptions.

**CORE OUTPUT 3**

***Estimate of total future number of households.***

**Figure 5.2 Summary of Household Projections for GCV Area 2008-25**

| | 2008 | 2025 | 2008-2025 Change |
|---|---|---|---|
| **All Households** | 805,000 | 918,000 | 113,000 |
| **Private Sector** | | | |
| Private sector C2 High | 567,000 | 684,000 | 117,000 |
| Private sector C2 Low | 567,000 | 658,000 | 92,000 |
| **Affordable (Social Rented) Sector** | | | |
| Social rented sector C2 High | 238,000 | 235,000 | -3,000 |
| Social rented sector C2 Low | 238,000 | 260,000 | 22,000 |

* figures may not total due to rounding

*Source: Tribal/Optimal Economics Affordability Study, 2011, TA04 (Page 30, Table 7.1). See also TA06 Tables 6.5 and 6.6 for more summary detail and TA06 Tables 6.3 and 6.4 for LA level data*

## Projected Tenure Change – Validation of Results

5.13 The results for the projected tenure change from the Tribal/Optimal Economics affordability study represent a significant change compared to the projected tenure change in the 2006 Joint Structure Plan Alteration. For the 2006 Plan it was projected that the social rented sector would reduce from 257,700 households in 2004 (or 33% of all households) to 197,500 households in 2018 (or 22% of all households). The present HNDA projections (planning scenario C2 – high affordability), used for the private sector housing supply/demand comparison, show a reduction from 238,000 in 2008 (or 30% of all households) to 235,000 (or 26% of all households) in 2025.

5.14 For validation purposes, a parallel exercise has been carried out alongside the affordability study, to project future tenure change for the GCV area. This involved the development of a cohort-component model, which projects future *populations* by tenure, using assumptions on the net population flows into/out of the various tenures. The projected populations are the basis for projected households by tenure.

5.15 This model uses estimated data for the periods 1991-2001 and 2001-2008. For the projection period 2008-2025, the results are remarkably close to the projections prepared by Tribal/Optimal Economics. The number of social rented households is projected to reduce from 237,900 in 2008 to 235,700 in 2025. This represents a marked slowdown in the rate of decline for the social rented sector (-100 per year in 2008-2025), in comparison with the earlier period (-6,200 per year in 2001-2008).

5.16 The model identifies the following factors, which “explain” the smaller decline of the social rented sector in the projection period:

1. A reduced net population outflow from the social rented sector, due to lower levels of Right-To-Buy sales (RTB). In 2001-2008 the net outflow from the social rented sector was about 12,000 people per year. For the projection period 2008-2025 the RTB levels are expected to reduce to 1,300 per year (compared with 5,100 per year in 2001-2008). This is expected to result in a smaller net population outflow, of about 4,000 per year.

2. A relatively younger population in the social rented sector. In the early 1990s the population living in social rented housing was, on average, considerably older than the population living in private sector housing. This has changed in recent decades. As a result, the population change due to natural causes (i.e. the difference between births and deaths) is expected to be positive in the projection period. In 2001-2008 the number of people living in the social rented sector reduced by almost 2,000 per year, due to fewer births than deaths.

3. Although the population living in the social rented sector is expected to continue to decline, these people are expected to live in, on average, smaller households. Therefore the number of households is expected to show only a small reduction.

## Current/Backlog Need

5.17 Housing requirements must take account of current as well as future need. Current need (or Backlog Need) and has been assessed as 72,000 units across the GCV area (Figure 5.3), and is considered over and above the household projections. An affordability test has been applied to those households in current need and it is estimated that 6,000 could potentially meet their needs in the private market, and these have been added to the private sector demand. The remaining 66,000 have been added to the affordable sector.

5.18 The HMP Core Group discussed the potential for double counting between the household projections and Backlog Need. In the affordable sector assessment, there is likely to be some double counting between newly forming households from the household projections and households in Backlog Need because the household projections make assumptions about household formation – some households counted in Backlog Need will form houses of their own accord in the future, and will be captured in the household projections. This is a widely recognised issue, but the level of double counting cannot be accurately quantified. CHMA advised that the Backlog Need in its entirety should be considered along with newly forming households in the HNDA.

**CORE OUTPUT 5**

***Estimate of current number of households in housing need.***

**Figure 5.3: Current Housing Need: Total Need and Those Able/Unable to Address Needs in the Market - LA level**

| Local Authority | Total Backlog Need | Total - Unable to make their own arrangements (upper)<br><br>i.e. added to Affordable sector household need | Total able to afford their own accommodation (lower)<br><br>i.e. added to Private sector household demand |
|---|---|---|---|
| East Dunbartonshire | 4,074 | 3,712 | 362 |
| East Renfrewshire | 2,918 | 2,635 | 283 |
| Glasgow City Council | 28,428 | 28,428 | 0 |
| Inverclyde Council | 4,117 | 3,536 | 581 |
| North Lanarkshire Council | 9,041 | 6,951 | 2,090 |
| Renfrewshire Council | 6,325 | 5,714 | 612 |
| South Lanarkshire Council | 13,417 | 11,607 | 1,810 |
| West Dunbartonshire Council | 4,517 | 4,091 | 427 |
| **Glasgow & Clyde Valley*** | **72,837** | **66,674** | **6,163** |

** Total not identical to HSMA total due to rounding*

*Note: Upper estimates of those in backlog need (and corresponding lower estimates of those able to afford to meet their own needs) are reached when we consider whether households can afford market (PRS) accommodation. The lower estimates of those in backlog need (and corresponding higher estimates of those able to afford to meet their own needs) are reached when we consider whether households can afford Intermediate (LIFT) accommodation.*
*Source: Tribal/Optimal Economics Affordability Study, 2011,summarised from TA04, Table SR.3 Page 103. See also TA06 Table 4.2*

## Comparisons of Supply with Demand/Need

5.19 Comparison of supply with demand and need now follow for the private and affordable sectors.

**Comparison of Private Sector Demand and Supply at 2020 and 2025**

5.20 In order to establish if there is a requirement for additional land for private housing at 2020 and 2025, the projected effective stock is compared with projected demand. This comparison is carried out within the housing market area framework, taking account of mobile demand i.e. while most demand is localised, there is an element that cannot simply be allocated to a particular area and can be considered to be mobile (house buyers may search in more than one housing sub-market area for a home). Dumbarton & Vale of Leven and Inverclyde HMAs are treated as self-contained market areas and the concept of mobile demand is not applicable.

5.21 Figure 5.4 summarises private sector housing requirements in the period 2009-2025 (taking in to account 2008/09 actual completions). Across the GCV area there is a requirement for 97,000 private sector units to be built, equating roughly to 6,000 private sector completions per annum (although this varies across the projection period). There are 108,000 projected completions resulting in a surplus of 11,000 units across the GCV area to 2025.

**Figure 5.4 Private Sector Housing Requirements 2009-25 GCV Area Summary Projection C2 High Affordability (including Lower Estimate of Backlog Need)**

| | **2009-25** |
|---|---|
| Net private sector new housing completions required | 97,000 |
| Total private sector completions | 108,000 |
| Comparison of new housing requirements and completions | 11,000 (surplus) |
| Average annual private sector completions required to 2025 | 6,000 |

*Source: GCVSDPA, 2011. Summarised from Figure 5.8 rounded to nearest 1,000. See also TA06 Table 8.7 for more detail*

5.22 There are no projected shortfalls in supply at any stage of the supply/demand comparison. Figures 5.5 and 5.6 show that a significant factor in the increasing surplus of stock over demand projected between 2020 and 2025 is the impact of Backlog Need. In accordance with HNDA Guidance, it is assumed that Backlog Need should be met over a ten-year period: 2009 to 2019. Consequently, the level of completions required to meet both the increase in private sector demand and Backlog Need by 2020 is significantly higher than that required to meet private sector demand only in the following five years.

**Figure 5.5 Projection C2 High Affordability**

**Comparison of Private sector supply and demand (including lower estimate Backlog Need*) at 2020**

| | |
|---|---|
| Total Demand | 660,000 |
| Total Supply (Stock) | 662,800 |
| Surplus | 2,800 |
| Required Completions | 73,700 |
| Required Annual Completions (2009-20) | 6,700 |

**Figures may not add due to rounding*

*Source: GCVSDPA, 2011. Summarised from Figure 5.7 rounded to nearest 100. See also TA06 Table 8.5*

**Figure 5.6 Projection C2 High Affordability**

**Comparison of Private sector supply and demand (including lower estimate Backlog Need*) at 2025**

| | |
|---|---|
| Total Demand | 689,800 |
| Total Supply (Stock) | 700,400 |
| Surplus | 10,600 |
| Required Completions | 97,400 |
| Required Annual Completions (2009-25) | 6,080 |

*Figures may not add due to rounding

*Source: GCVSDPA, 2011. Summarised from Figure 5.8 rounded to nearest 100. See also TA06 Table 8.6*

5.23 Figures 5.7 and 5.8 set out the results at HSMA level. The conclusion therefore is that sufficient land is currently allocated for private sector housing to meet demand.

5.24 For the purposes of this assessment, and recognising the role of intermediate housing products in helping to meet affordable housing needs, any sites in the Housing Land Audit and Urban Capacity Study that are identified for potential shared equity or shared ownership have been excluded from the projections of private sector supply.

**CORE OUTPUT 7**

***Estimate of future households requiring market housing.***

Figures 5.7 and 5.8

| FIGURE 5.7 PROJECTION C2 HIGH AFFORDABILITY | | | | |
|---|---|---|---|---|
| **Comparison of private supply and demand (including Lower Estimate Backlog Need*) at 2020** | | | | |
| | | | | |
| **STAGE1** | | | | |
| **Sub-Market Area** | Locally Targeted Demand at 2020 | Effective Stock at 2020 | Local Shortfall | Local Surplus |
| | | | | |
| Greater Glasgow North & West | 101,150 | 104,643 | 0 | 3,493 |
| Strathkelvin & Springburn | 33,296 | 36,191 | 0 | 2,895 |
| Glasgow East | 40,966 | 45,772 | 0 | 4,806 |
| Cumbernauld | 32,071 | 33,291 | 0 | 1,220 |
| Greater Glasgow South | 127,717 | 129,418 | 0 | 1,701 |
| Renfrewshire | 72,047 | 79,816 | 0 | 7,769 |
| East Kilbride | 35,363 | 36,565 | 0 | 1,202 |
| **Central Conurbation** | 442,610 | 465,696 | 0 | 23,086 |
| | | | | |
| Airdrie & Coatbridge | 34,121 | 35,998 | 0 | 1,877 |
| Motherwell | 47,137 | 50,334 | 0 | 3,197 |
| Hamilton | 39,138 | 40,654 | 0 | 1,516 |
| Clydesdale | 22,772 | 24,393 | 0 | 1,621 |
| **Eastern Conurbation** | 143,168 | 151,379 | 0 | 8,211 |
| | | | | |
| **STAGE 2** | | | | |
| **2nd Tier Market Area** | Mobile Demand at 2020 | Local Surpluses at 2020 (from Stage 1) | Mobile Shortfall | Mobile Surplus |
| | | | | |
| Central Conurbation | 22,329 | 23,086 | 0 | 757 |
| Eastern Conurbation | 5,709 | 8,211 | 0 | 2,502 |
| | 28,038 | 31,297 | 0 | 3,259 |
| | | | | |
| **STAGE 3** | | | | |
| **1st Tier Market Area** | Mobile Demand at 2020 | Mobile Surplus at 2020 (from Stage 2) | Mobile Shortfall | Mobile Surplus |
| | | | | |
| Conurbation | 3,353 | 3,259 | 94 | 0 |
| | | | | |
| **Individual HMA** | Demand at 2020 | Effective Stock at 2020 | Shortfall | Surplus |
| | | | | |
| Dumbarton & Vale of Leven | 16,391 | 17,433 | 0 | 1,042 |
| Inverclyde | 26,500 | 28,320 | 0 | 1,820 |
| | | | | |
| **GCV-wide position** | | | | |
| Projected completions (09-20) included in above projected stock figures | 76,477 | | | |
| Sum of above surpluses/shortfalls | 2,768 | | | |
| Required completions (09-20) | 73,709 | | | |
| Required completions - annual | 6,701 | | | |

**Tribal applied an affordability test to those in Backlog Need to identify what proportion could meet their needs in the private market. The Lower Estimate of Backlog Need refers to the lower level of those who could meet their need in the private market, the remainder are the upper level assumed to require affordable housing.*

*More detail can be found in TA06 Section 8. Corresponding table for C2 Low affordability can be found in Annex B. Results for Scenario A1 are available in Annex C.*

*(Figure also in TA06 Table 8.5)*

*Source: GCVSDPA, 2011. This table uses inputs derived from Tribal/Optimal Economics and GCVSDPA.*
*- Demand: Tribal/Optimal Economics Affordability Study, 2011, TA04 (Page 30, Table 7.1 Owners+PRS) plus lower estimate of Backlog Need TA06 Table 4.2*
*- Mobile and Local Demand: TA06 Table 8.3*
*- Stock: GCVSDPA Estimates of Stock and Households at base date TA06 Table 3.2 and Stock Projections TA06 Table 7.1*

| FIGURE 5.8 PROJECTION C2 HIGH AFFORDABILITY | | | | |
|---|---|---|---|---|
| **Comparison of private supply and demand (including Lower Estimate Backlog Need*) at 2025** | | | | |
| **STAGE1** | | | | |
| **Sub-Market Area** | Locally Targeted Demand at 2025 | Effective Stock at 2025 | Local Shortfall | Local Surplus |
| | | | | |
| Greater Glasgow North & West | 105,814 | 111,264 | 0 | 5,450 |
| Strathkelvin & Springburn | 34,207 | 38,557 | 0 | 4,350 |
| Glasgow East | 43,391 | 51,191 | 0 | 7,800 |
| Cumbernauld | 33,665 | 34,907 | 0 | 1,242 |
| Greater Glasgow South | 134,154 | 135,590 | 0 | 1,436 |
| Renfrewshire | 73,829 | 83,184 | 0 | 9,355 |
| East Kilbride | 37,279 | 37,552 | 0 | 273 |
| **Central Conurbation** | 462,340 | 492,245 | 0 | 29,905 |
| | | | | |
| Airdrie & Coatbridge | 36,016 | 38,189 | 0 | 2,173 |
| Motherwell | 49,715 | 54,994 | 0 | 5,279 |
| Hamilton | 41,260 | 42,101 | 0 | 841 |
| Clydesdale | 24,009 | 24,627 | 0 | 618 |
| **Eastern Conurbation** | 151,000 | 159,911 | 0 | 8,911 |
| | | | | |
| **STAGE 2** | | | | |
| **2nd Tier Market Area** | Mobile Demand at 2025 | Local Surpluses at 2025 (from Stage 1) | Mobile Shortfall | Mobile Surplus |
| | | | | |
| Central Conurbation | 23,371 | 29,905 | 0 | 6,534 |
| Eastern Conurbation | 6,027 | 8,911 | 0 | 2,884 |
| | 29,397 | 38,815 | 0 | 9,418 |
| | | | | |
| **STAGE 3** | | | | |
| **1st Tier Market Area** | Mobile Demand at 2025 | Mobile Surplus at 2025 (from Stage 2) | Mobile Shortfall | Mobile Surplus |
| | | | | |
| Conurbation | 3,539 | 9,418 | 0 | 5,879 |
| | | | | |
| **Individual HMA** | Demand at 2025 | Effective Stock at 2025 | Shortfall | Surplus |
| | | | | |
| Dumbarton & Vale of Leven | 16,892 | 18,429 | 0 | 1,537 |
| Inverclyde | 26,677 | 29,865 | 0 | 3,188 |
| | | | | |
| **GCV-wide position** | | | | |
| Projected completions (09-25) included in above projected stock figures | 107,981 | | | |
| Sum of above surpluses/shortfalls | 10,604 | | | |
| Required completions (09-25) | 97,377 | | | |
| Required completions - annual | 6,086 | | | |

**Tribal applied an affordability test to those in Backlog Need to identify what proportion could meet their needs in the private market. The Lower Estimate of Backlog Need refers to the lower level of those who could meet their need in the private market, the remainder are the upper level assumed to require affordable housing.*

*More detail can be found in TA06 Section 8. Corresponding table for C2 Low affordability can be found in Annex B. Results for Scenario A1 are available in Annex C.*

*(Figure also in TA06 Table 8.6)*
*Source: GCVSDPA, 2011. This table uses inputs derived from Tribal/Optimal Economics and GCVSDPA.*
*- Demand: Tribal/Optimal Economics Affordability Study, 2011, TA04 (Page 30, Table 7.1 Owners+PRS) plus lower estimate of Backlog Need TA06 Table 4.2*
*- Mobile and Local Demand: TA06 Table 8.4*
*- Stock: GCVSDPA Estimates of Stock and Households at base date TA06 Table 3.2 and Stock Projections TA06 Table 7.1*

5.25 The appropriate geography to consider private sector requirements is within the HMA framework (results presented in Figures 5.7 and 5.8). However, SPP requires results also to be set out at a local authority level, and these results are presented in Figure 5.9 for C2 high affordability. The appropriate time period to consider the private sector is 2009-25, however, to allow presentation of summary results for all tenures in Figure 13 results are shown for the period 2008-20 and 25 (ref TA06 Table 8.8B). These have been calculated by adding the 2008/09 completions (TA06 Table 7.2) to the 2009-25 figures shown here.

**Figure 5.9 Private Sector New Build Requirements 2009-25 LA Summary C2 High Affordability (including Lower Estimate of Backlog Need)**

| **LA** | Required New Build to meet Projected Demand in all HMAs (approximated to LAs)[1] 2009-20 | Required New Build to meet Projected Demand in all HMAs (approximated to LAs)[1] 2020-25 | Required New Build to meet Projected Demand in all HMAs (approximated to LAs)[1] 2009-25 |
|---|---|---|---|
| East Dunbartonshire | 2,723 | 404 | 3,127 |
| East Renfrewshire | 2,205 | 274 | 2,479 |
| Glasgow City | 25,360 | 9,993 | 35,353 |
| Inverclyde | 1,371 | 83 | 1,454 |
| North Lanarkshire | 15,165 | 6,407 | 21,572 |
| Renfrewshire | 8,249 | 2,734 | 10,983 |
| South Lanarkshire | 15,809 | 2,523 | 18,332 |
| West Dunbartonshire | 2,828 | 1,249 | 4,077 |
| **GCV Total** | **73,710** | **23,667** | **97,377** |

*The appropriate timeperiod to consider the private sector is 2009-25, however, to allow presentation of results for all tenures in Figure 5.13 results are shown for the period 2008-20 and 25 (ref TA06 Table 8.8B). These have been calculated by adding the 2008/09 completions (TA06 Table 7.2) to the 2009-25 figures shown here.*

*[1] Private sector figures are assessed in the Housing Market Area system. The results are then approximated to LA. The appropriate geography to consider private sector requirements is HSMA ref Section 8 Tables 8.5 & 8.6.*

*Backlog Need is included for the years 2009-19. Tribal applied an affordability test to those in Backlog Need to identify what proportion could meet their needs in the private market. The Lower Estimate of Backlog Need refers to the lower level of those who could meet their need in the private market, the remainder are the upper level assumed to require affordable housing.*

*Source: GCVSDPA, 2011. See also TA06 Table 8.8A*

### Comparison of Affordable Sector Supply and Need at 2016, 2020 and 2025

5.26 The HNDA Guidance outlines an approach to assess the requirement for social rented housing which is similar to the established 'Housing Needs Assessment' method. The basic framework of this model has been used in recent years by local authorities to assess local housing needs, and inform Local Housing Strategy (LHS) development. The appropriate geography is the local authority area, together with 31 local authority sub-areas, as movement between local authorities in the social rented sector is much less pronounced than the mobility in the private sector.

5.27 This method has three separate components: current (backlog) need, projected future housing need, and affordable housing supply. Net annual housing need is estimated by summing the annual quota of current housing need to the annual newly arising need, then subtracting the future annual supply of affordable housing from this total. A negative figure implies a net surplus of affordable housing.

5.28 The summary results are set out in Figure 5.10 by GCV area and local authority for 2016, 2020 and 2025. For the city region the results show a net housing need for nearly 50,000 affordable households by 2016, an additional 24,000 by 2020 and an additional 13,000 by 2025 – in total there is an estimated 85,000 households with a net housing need over the period 2008-25. Backlog Need is included for the first ten years, 2009-19, and potential 'intermediate'' supply extracted from the Housing Land Audit and Urban Capacity Study is also included. It may be noted that this assessment sets out results for the entire projection period and not simply the LHS time period.

Local authority affordable need figures contained in the Figures in this Chapter, and within the HNDA, may contain shortfalls/surpluses within individual LA sub areas. These shortfalls/surpluses are shown at Annex E of this document.

**CORE OUTPUT 6**

***Estimate of future households that will require affordable housing.***

**Figure 5.10 Summary of GCV Areas Housing Need Requirement in Accordance with Housing Needs Assessment Supply/Need Comparison Model 2008-25 - C2 Low Affordability (25/33%) inc Upper Estimate of Backlog Need* and Intermediate Supply**

| C2 Low Affordability | Surplus/ Shortfall | Shortfall** | Surplus/ Shortfall | Shortfall** | Surplus/ Shortfall | Shortfall** | Surplus/ Shortfall | Shortfall** |
|---|---|---|---|---|---|---|---|---|
| | 2008-16 | 2008-16 | 2016-20 | 2016-20 | 2020-25 | 2020-25 | 2008-25 | 2008-25 |
| East Dunbartonshire | 4,374 | 4,374 | 2,038 | 2,038 | 1,221 | 1,221 | 7,634 | 7,634 |
| East Renfrewshire | 2,076 | 2,076 | 954 | 954 | 204 | 204 | 3,234 | 3,234 |
| Glasgow City | 30,757 | 30,757 | 15,349 | 15,349 | 9,891 | 9,891 | 55,997 | 55,997 |
| Inverclyde | 2,648 | 2,648 | 1,145 | 1,145 | 125 | 125 | 3,919 | 3,919 |
| North Lanarkshire | -1,537 | 0 | -152 | 0 | -1,879 | 0 | -3,568 | 0 |
| Renfrewshire | 670 | 670 | 139 | 139 | -1,838 | 0 | -1,029 | 0 |
| South Lanarkshire | 9,000 | 9,000 | 4,302 | 4,302 | 1,279 | 1,279 | 14,582 | 14,582 |
| West Dunbartonshire | -453 | 0 | -539 | 0 | -1,907 | 0 | -2,898 | 0 |
| **GCV area** | | **49,526** | | **23,928** | | **12,720** | | **85,365** |

*This table includes Intermediate supply*

*NB. Positive figures are shortfalls. Backlog Need is included for the years 2009-19*

** Some LA results differ from the published HNDA Working Draft figures due to minor changes*

*** Where there is an overall surplus in an LA this column is set to zero. The 2008-25 shortfall totals may be less than the sum of the shortfalls of the three periods (2008-16, 2016-20, 2020-25), as any surplus in one of the three periods may reduce the 2008-25 shortfall.*

*Please note these tables show the surplus/shortfall within a local authority and also display a shortfall total (excluding surpluses) to allow calculation of a GCV total. This assumes that shortfalls/surpluses are contained within an LA boundary.*

*Corresponding results for C2 High Affordability can be found in TA06 Annex B. Results for Scenario A1 are available in Annex C.*

*Source: GCVSDPA, 2011. See also TA06 Table 9.3A.*
*This table uses inputs derived from Tribal/Optimal Economics and GCVSDPA. Detailed Housing Needs Assessments and their inputs by LA are available in TA06 Tables 9.5 - 9.12.*

5.29 A net housing need does not directly translate into a new build housing requirement for affordable housing. As indicated in the HNDA Guidance, information about net need and the resulting housing requirement should be presented with evidence from the other stages of the needs assessment to inform decisions about appropriate policy interventions. This process will occur through each LA's Local Housing Strategy and Local Development Plan. Chapter 7 provides an overview of the implications of the HNDA results for each of the GCV local authorities. It is also worth recalling that some double counting may arise from the use of different affordability scenarios for the private and affordable sectors, and in relation to backlog need.

5.30 A residual affordable sector figure may be derived from the private sector methodology (All Stock/All Households) and, for the sake of completeness, this is outlined in TA06 Annex F.

## Intermediate Sector

5.31 For the purposes of the HNDA, the HMPCG defined the Intermediate Sector as subsidised low cost home ownership (LCHO), such as shared equity or shared ownership. However, it is recognised that other intermediate products may be available, such as unsubsidised low cost market housing and mid-market or intermediate rent.

5.32 The Affordability Study undertaken by consultants Tribal/Optimal Economics sought to answer the question, “of those households unable to meet their housing need in the open market, how many could afford to meet their need using intermediate housing products”. The modelling therefore considers only the potential intermediate sector from new households that could not afford market housing (private renting or owner occupation). The Scottish Government’s Low Cost Initiative for First Time Buyers (LIFT) scheme was identified as the most appropriate way to explore ‘intermediate housing’ as it would be most applicable to new households i.e. first time buyers. LIFT provides a range of assistance to first time buyers including new supply shared equity, open market shared equity and shared ownership. The price thresholds set by the Scottish Government for open market shared equity for two apartment properties for each local authority area were used in the modelling.

5.33 The intermediate sector is expressed as a *potential* sector. The maximum potential intermediate sector assumes that (1) all of those households which could potentially meet their needs in low cost home ownership products do so because there is no supply constraint, (2) they have a desire to do so, and (3) the household has unrestricted access to mortgage finance. The social rented sector is correspondingly reduced. The minimum potential intermediate sector figure is zero, which assumes that there is restricted access to LCHO; all households which cannot meet their own needs in the market therefore require to be housed in the social rented sector.

5.34 A pragmatic approach was adopted to incorporate the modelling work for the potential intermediate sector into the assessment of affordable housing requirements, the Housing Needs Assessment. The percentage intermediate share for new households (i.e. those households in the affordable sector who could potentially afford LCHO products expressed as a share of the total affordable sector) was applied to the affordable housing need requirements. Under Planning scenario C2 (low affordability) at 2025 the intermediate sector could range from zero to 22,000 households, potentially contributing up to 26% of the affordable housing need requirements.

5.35 Figure 5.11 shows the maximum potential LCHO contribution to meeting affordable requirements in the city region, under the Planning scenario C2 low affordability assumption. This includes Intermediate supply identified through the HLA and UCS, corresponding results excluding Intermediate supply can be found in TA06 Table 9.14A. The minimum potential LCHO contribution to 2025 is zero if no intermediate products are available and the corresponding 85,000 affordable sector need would have to be met in the social rented sector. There is the potential for a maximum intermediate contribution of 13,500 to meet affordable needs by 2016, an additional 6,000 by 2020, and an additional 2,500 by 2025. In total there is an estimated maximum potential intermediate LCHO contribution of 22,000 households in the period 2008-25, representing 26% of the affordable housing need requirements identified. If this need was met in full there would be a requirement for 63,000 households in the social rented sector.

**Figure 5.11 Summary of GCV Area Maximum Potential Assessed Requirements for the Intemediate Sector 2008-25**
**- C2 Low Affordability (Maximum Potential Intermediate (LCHO) - Including Intermediate Supply)**

| | POTENTIAL INTERMEDIATE SECTOR (SUBSET OF AFFORDABLE SECTOR) Maximum Potential Assessed Requirements C2 Low Affordability inc Upper Estimate of Backlog Need[2] Potential Contribution of LCHO to Meeting Affordable Requirements[1] | | | |
|---|---|---|---|---|
| | 2008-16 | 2016-20 | 2020-25 | 2008-25 |
| East Dunbartonshire | 1,500 | 700 | 400 | 2,600 |
| East Renfrewshire | 800 | 400 | 100 | 1,300 |
| Glasgow City | 3,400 | 1,700 | 1,100 | 6,200 |
| Inverclyde | 1,800 | 700 | 100 | 2,600 |
| North Lanarkshire | 0 | 0 | 0 | 0 |
| Renfrewshire | 400 | 100 | 0 | 0 |
| South Lanarkshire | 5,600 | 2,700 | 800 | 9,100 |
| West Dunbartonshire | 0 | 0 | 0 | 0 |
| GCV Total[3] | 13,500 | 6,000 | 2,500 | 22,000 |

*[1] The Potential Intermedaite sector represents a potential if intermediate products were available and households had the means and the desire to access intermediate products, otherwise it is assumed these households will remain in the social rented sector. LCHO share is based on Tribal's assessment of the tenure of newly forming households which was applied to all housholds in need.*

*[2] Backlog Need is included for the years 2009-19. Tribal applied an affordability test to those in Backlog Need to identify what proportion could meet their needs in the private market. The Lower Estimate of Backlog Need refers to the lower level of those who could meet their need in the private market, the remainder are the upper level assumed to require affordable housing.*

*[3] GCV Total rounded to nearest 500.*

*- The affordable sector requirement includes Intermediate supply which was taken from the 2009 HLA and UCS. Corresponding results excluding Intermediate supply can be found in TA06 Table 9.14A.*

*- Caution should be to be applied to the Potential Intermediate Sector due to the difficulties of obtaining information for this sector ref TA06 Section 9B.*

*- Local authorities with a surplus i.e. zero affordable housing requirement, may still have a requirement for intermediate housing.*

*- A maximum potential for intermediate housing does not directly translate to a requirement for new build housing.*

*Source: GCVSDPA, 2011. See also TA06 Table 9.15A*

5.36 The following qualifications should be borne in mind in relation to the modelling and analysis of the potential intermediate sector:

- Tribal/Optimal Economics used Open Market Shared Equity price thresholds for two apartment properties issued by the Scottish Government as part of the LIFT scheme
- two apartment properties represent the most affordable option for LIFT therefore a large proportion of households are able to afford this option compared to being able to afford larger sized properties
- Open Market (second hand) shared equity values and new build shared equity vary greatly across the local authorities; it is important to note that the potential identified is for all LCHO products identified in LIFT and not just new supply shared equity
- there are other intermediate housing products available which have not been considered in this analysis such as mid market rent and non-subsided LCHO

- the initial modelling focused only on new households that could not afford market housing. Intermediate sector housing may be attractive also to some existing households who may or may not be considered to be in housing need. Uptake from existing households could free up currently occupied social rented or private rented houses
- constrained access to mortgage finance may hinder households wishing to purchase intermediate products
- access to wealth (e.g. for initial deposit) has not been taken into account in the analysis
- planned supply is subject to market conditions and is dependant on a degree of Scottish Government subsidy
- there is a lack of real understanding of the choices people will make; thus, even if intermediate products are available, and finance is accessible, households may choose not to take up the product
- the intermediate sector is a relatively new and small sector, so statistical information on the sector is limited.

5.37 The Scottish Government has recently published an evaluation of the LIFT scheme[18], based on a desk review and telephone interviews with 115 LIFT purchasers from across Scotland, which provides information on supply by local authority area for the five year period 2005-06 to 2009-10 (Figure 5.12). The GCV area accounts for around 27% of the total Scottish supply. The largest single component of LIFT in the GCV area is through New Supply Shared Equity, but the total LIFT supply through all components is a relatively small part of total supply.

**Figure 5.12 LIFT supply by local authority area, 2005-06 to 2009-10**

| LA | Shared Ownership | New Supply Shared Equity | Open Market Shared Equity pilot | GRO [Grants for owner occupation] | Total |
|---|---|---|---|---|---|
| East Dunbartonshire | 0 | 0 | 27 | 0 | 27 |
| East Renfrewshire | 0 | 30 | 17 | 0 | 47 |
| Glasgow City | 356 | 351 | 176 | 275 | 1158 |
| Inverclyde | 53 | 57 | 21 | 0 | 131 |
| North Lanarkshire | 39 | 66 | 45 | 112 | 262 |
| Renfrewshire | 0 | 17 | 18 | 0 | 35 |
| South Lanarkshire | 0 | 145 | 44 | 70 | 259 |
| West Dunbartonshire | 21 | 46 | 24 | 85 | 176 |
| **GCV Total** | **469** | **712** | **372** | **542** | **2,095** |
| *Scotland* | *1,104* | *2,570* | *3,185* | *867* | *7,726* |

*Source:* TRS Total Revenue Support, the Scottish Government's resource system (Table A3.2 in *The Evaluation of Low Cost Initiative for First Time Buyers [LIFT]*, 2011, Scottish Government Social Research)

Note. Although the TRS data shows that more than 1,000 shared ownership units have been provided in the period across Scotland, there may be some double counting on the system and the Scottish Government believe that 794 units have in fact been provided in Scotland. In recognising this concern the data can only be used as a guide.

5.38 The study gathered quantitative data across Scotland which suggested that around 50% of NSSE and 25% of OMSEP purchasers could have bought without support at the lower end of the market, but this contradicted qualitative interviews where only

[18] Scott, John, MacMillan, Katy and Reid, Steven, 2011, *The Evaluation of Low Cost Initiative for First Time Buyers (LIFT).* Edinburgh: Scottish Government Social Research.

around 10% of purchasers stated that they could have purchased on the open market. The need for a deposit could be a significant factor, as could local variations in ability to purchase and particular housing needs. A higher proportion of Shared Ownership and GRO purchasers indicated that they could have purchased without support.

5.39 Over the five year period, across Scotland, approximately 21% of LIFT purchasers were either living in social rented accommodation or likely to be offered it (i.e. on a social landlord's housing list with a realistic chance of being housed by the landlord).

5.40 The study concluded that LIFT has largely been successful at targeting the households identified as priorities for assistance through the schemes. OMSEP and NSSE have been most successful at targeting first time buyers, and provided the most cost effective mechanisms for supporting low and moderate income households into home ownership. GRO is also meeting people's housing needs, with some concerns around build quality and sustainable communities. Shared ownership does not appear to be meeting household needs to the same extent, due to significant concerns over value for money.

5.41 NSSE, GRO and shared ownership all contributed to creating mixed communities, though there was evidence of some tensions arising from tenure mix and integration.

**Summary of Housing Requirements 2008-25**

5.42 The assessment of housing requirements in the GCV area has identified a surplus of 10,000 units in the private sector 2008-25 (11,000 in the period 2009-25).

5.43 For the affordable sector, the Housing Needs Assessment Model identifies a need of 85,000 over the period 2008-25.

5.44 The potential contribution which the 'Intermediate' sector could make to meeting affordable housing need requirements ranges from zero (0%) to 22,000 (26%) 2008-25. This would consequently reduce the social rented sector to a minimum of 63,000 by 2025 if the potential intermediate sector contribution was made in full. The maximum potential intermediate sector contribution would assume no supply constraint and unfettered demand from those households considered financially able to enter the sector.

5.45 When considering the all tenure results of the GCV HNDA it is important to note that the methodologies used for the two sectors are inconsistent:

- private sector is based on the planning scenario (C2) High affordability PRS
- affordable sector is based on the planning scenario (C2) Low affordability PRS
- when totalled by tenure using Tribal/Optimal Economics' figures, the total of private sector demand and social rented sector need exceeds the overall number of households from the household projections by 26,000. This is because there is an overlap of households in high and low affordability scenarios.
- Backlog Need, on advice from the CHMA, has been added in addition to the household projections i.e. there are 72,000 households accounted for in addition to the GCV household projections. Of these 6,000 are estimated to be able to meet their needs in the private market and have been added to the private sector supply/demand comparison. There is potential for double counting between elements of backlog need and the household projections, but this cannot be readily quantified.

5.46 The consequence of these inconsistencies is that the all tenure summary has to be approached with caution and cannot be considered without understanding the inconsistencies in the models used for the private and affordable sectors. Furthermore, it would be inappropriate to directly translate affordable housing requirements into new build housing requirements. LAs, through their LHSs, will derive housing supply targets for the affordable sector taking into account new housing supply, replacement housing, empty properties to be brought back into use and conversions.

5.47 Figure 5.13 outlines the GCV Summary of Housing Requirements based on Planning Scenario C2.

## CORE OUTPUT 8

***Estimate of total future households requiring either affordable or market housing.***

**Figure 5.13 GCV Summary of Housing Requirements 2008-25 by Tenure and Local Authority**

| LA | PRIVATE SECTOR | | | AFFORDABLE SECTOR | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | AFFORDABLE SECTOR | | | | POTENTIAL INTERMEDIATE | | | |
| | New Build Requirements | | | Maximum Assessed Requirements | | | | Maximum Potential Assessed Requirements | | | |
| | C2 High Affordability inc Lower Estimate of Backlog Need[4] | | | C2 Low Affordability inc Upper Estimate of Backlog Need[4] | | | | C2 Low Affordability inc Upper Estimate of Backlog Need[4] | | | |
| | Required New Build to meet Projected Demand in all HMAs (approximated to LAs)[1] | | | Housing Needs Assessment Maximum Shortfalls by LA[2] | | | | Potential Contribution of LCHO to Meeting Affordable Requirements[3] | | | |
| | 2008-20 | 2020-25 | 2008-25 | 2008-16 | 2016-20 | 2020-25 | 2008-25 | 2008-16 | 2016-20 | 2020-25 | 2008-25 |
| East Dunbartonshire | 2,900 | 400 | 3,300 | 4,400 | 2,000 | 1,200 | 7,600 | 1,500 | 700 | 400 | 2,600 |
| East Renfrewshire | 2,300 | 300 | 2,600 | 2,000 | 1,000 | 200 | 3,200 | 800 | 400 | 100 | 1,300 |
| Glasgow City | 27,100 | 9,900 | 37,000 | 30,800 | 15,300 | 9,900 | 56,000 | 3,400 | 1,700 | 1,100 | 6,200 |
| Inverclyde | 1,500 | 100 | 1,600 | 2,600 | 1,200 | 100 | 3,900 | 1,800 | 700 | 100 | 2,600 |
| North Lanarkshire | 16,300 | 6,400 | 22,700 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Renfrewshire | 8,900 | 2,700 | 11,600 | 700 | 100 | 0 | 0 | 400 | 100 | 0 | 0 |
| South Lanarkshire | 17,000 | 2,500 | 19,500 | 9,000 | 4,300 | 1,300 | 14,600 | 5,600 | 2,700 | 800 | 9,100 |
| West Dunbartonshire | 3,000 | 1,200 | 4,200 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| GCV Total[5] | 79,000 | 23,500 | 102,500 | 49,000 | 24,000 | 12,000 | 85,000 | 13,500 | 6,000 | 2,500 | 22,000 |

*The appropriate timeperiod to consider the private sector is 2009-25, however, to allow presentation of results for all tenures in this summary results are shown for the period 2008-20 and 25 (ref TA06 Table 8.8B). These have been calculated by adding the 2008/09 HLA (TA06 Table 7.2) to the 2009-25 figures shown in Figure 5.9.*

*[1] Private sector figures are assessed in the Housing Market Area system. The results are then approximated to LA. The appropriate geography to consider private sector requirements is HSMA ref Figures 5.7 and 5.8.*

*[2] Where there is an overall surplus in an LA this column is set to zero. The 2008-25 shortfall totals may be less than the sum of the shortfalls of the three periods (2008-16, 2016-20, 2020-25), as any surplus in one of the three periods may reduce the 2008-25 shortfall.*

*[3] The Potential Intermedaite sector represents a potential if intermediate products were available and households had the means and the desire to access intermediate products, otherwise it is assumed these households will remain in the social rented sector. LCHO share is based on Tribal's assessment of the tenure of newly forming households which was applied to all housholds in need.*

*[4] Backlog Need is included for the years 2009-19. Tribal applied an affordability test to those in Backlog Need to identify what proportion could meet their needs in the private market. The Lower Estimate of Backlog Need refers to the lower level of those who could meet their need in the private market, the remainder are the upper level assumed to require affordable housing.*

*[5] GCV Total rounded to nearest 500*

*- The affordable sector requirement includes Intermediate supply which was taken from the 2009 HLA and UCS.*

*- The appropriate time period for comparing supply and demand in the Private sector are 2020 and 2025. For the affordable sector the first period is 2016.*

*- Private sector uses Planning Scenario C2 High Affordability, the Affordable Sector uses C2 Low affordability ref TA06 Section 6 (para 6.6).*

*- For the Affordable Sector only shortfalls are shown. These represent the maximum requirement. For more detailed figures please see TA06 Section 9A (Tables 9.1A and 9.3A)*

*- Intermediate supply identified for SE/SO has been subtracted from Affordable sector need see TA06 Section 9B (Table 9.15A).*

*- Caution should be to be applied to the Potential Intermediate Sector due to the difficulties of obtaining information for this sector ref TA06 Section 9B.*

*- Local authorities with a surplus i.e. zero affordable housing requirement, may still have a requirement for intermediate housing.*

*- A maximum potential for intermediate housing does not directly translate to a requirement for new build housing.*

*- There is less certainty projecting housing requirements in the longer term compared to assessing housing requirements in the shorter term.*

*Source: GCVSDPA, 2011. See also TA06 Table 10.1*
*This table uses inputs derived from Tribal/Optimal Economics and GCVSDPA.*

# 6

# Household Groups with Specific Housing Requirements

**CORE OUTPUT 4**

***Estimate of household groups who have specific housing requirements e.g. families, older people, minority ethnic groups, disabled people, young people, etc.***

- The Equality Act 2010 updates, streamlines and strengthens previous equalities legislation. It places duties on local authorities and others to eliminate unlawful conduct, advance equality of opportunity, foster good relations, and take into account the needs of people relating to age, disability, sex, race, religion and belief, sexual orientation and transgender.

- Over the projection period 2008-2025 there will be a sizeable increase in the number of older people households. This will have significant implications for support services and the development of assistive technologies, to enable people to continue to live at home for as long as possible. There will also be implications for specialist residential provision across tenures, including extra care housing and care homes.

- Many people with physical disabilities or sensory impairments will be able to live in mainstream housing with appropriate adaptations, assistive technology and support services. However, there is a shortfall across the GCV area in the number of houses designed or adapted for wheelchair use.

- Many people with mental health problems live in supported mainstream accommodation. Appropriate support arrangements are required for move-on accommodation when residents leave acute psychiatric wards.

- The voluntary sector plays an important role in providing some 65% of registered care home places for adults with learning disabilities.

- There are different needs between the traditional minority ethnic communities in the GCV area and more recent migrants from Eastern Europe and Africa. More good quality affordable housing is required of suitable size for larger minority ethnic households in areas where they feel safe from harassment and have community support. There is growing demand for suitable housing for older minority ethnic households, including sheltered housing.

- Three GCV authorities provide Council sites for Gypsies/Travellers (63 pitches), and one has a significant amount of private provision (71 pitches). There is an estimated shortfall of some 31 pitches across the GCV area for Gypsies/ Travellers, with an additional 17 private pitches having received planning consent. Cross-boundary cooperation between authorities will be important for delivery.

- Although four of the GCV authorities have sites for travelling showpeople, providing some 812 pitches, the vast majority (over 90%) are located in Glasgow City. A small number of these are likely to be re-located as a result of major regeneration programmes. There is substantial variation in site size, density and conditions.

- The GCV area is host to many students attending universities and colleges. While many live at home or in privately rented accommodation, almost 10,000 live in specialist halls of residence, mainly in Glasgow City.

- Local authorities and other housing providers are likely to come under increasing pressure as they strive to meet statutory obligations and to meet the 2012 target – offering settled accommodation to all applicants assessed as unintentionally homeless.

## 6.1 Context

6.1.1 The HNDA provides an overview of the main issues to be considered in addressing the housing requirements of various household groups with specific needs, using published national data where appropriate to ensure consistency. It provides the basis on which each of the GCV authorities can refine their individual assessments and develop appropriate housing and planning policies, through the LHS and LDP, to address these specific requirements.

6.1.2 Although progress has been made over the years, through a variety of measures, inequalities persist in Scotland and the UK. For those people affected, discrimination may result in social exclusion, restricted employment opportunities, and restrictions in access to goods and services, including housing, health, education, and social services. Some people may experience discrimination on several grounds (multiple discrimination). The HMP, through its eight constituent local authorities, operates within a complex legal and policy framework which commits it to prevent discrimination and promote equal opportunities.

6.1.3 The HNDA Guidance (The Scottish Government, 2008a) requires HMPs to assess the *housing requirements of specific household groups.* Local Authorities also have statutory duties, principally through the Equality Act 2010, to eliminate unlawful conduct, advance equality of opportunity, foster good relations, and to take into account the needs of people relating to age, disability, sex, race, religion and belief, sexual orientation and transgender. The Equality Act, enacted in April 2010, updates, streamlines and strengthens previous equalities legislation.

6.1.4 The Scottish Human Rights Commission promotes and protects the human rights guaranteed by the European Convention on Human Rights, which form part of the law of Scotland through the Human Rights Act 1998 and the Scotland Act 1998, together with other human rights guaranteed by a wide range of other international conventions and treaties ratified by the UK. For the most part, as a result of the Equality Act, the UK will already comply with a proposed future EU Article 13 Equal Treatment Directive.

6.1.5 The Concordat (The Scottish Government, 2007b) agreed between the Scottish Government and the Convention of Scottish Local Authorities (CoSLA) sets out their new relationship and confirms that although the Scottish Government will set policy direction, it will stand back from micro-managing service delivery. Based on the

Government's National Outcomes and, under a common framework, Local Outcomes take account of local priorities. This approach is intended to free up local authorities and their partners to meet varying local needs. Local authorities are expected to set out their contribution to the National Outcomes; National Outcome 6 states that "we have tackled the significant inequalities in Scottish society".

6.1.6 The planning system in Scotland contains policies and advice in SPP and PANs to address equalities issues. Relevant documents are listed in References at the end of the Chapter.

6.1.7 Some local authorities have complementary planning policies. For example, Glasgow's City Plan 2, adopted in 2009 expects all housing developers, in projects of 20 dwellings or more, (both houses and flats), to provide 10% to wheelchair standard, or housing that is readily adaptable to meet the standard.

6.1.8 All local authorities have in place a Single Equality Scheme in which they set out their priorities relating to equalities.

## 6.2 Families

6.2.1 The needs of families are central to the work of local authorities in determining the housing needs and demands within their area. The composition of family households are wide ranging and diverse, ranging from single parent households to multi-generational families, couples with no children and single people. An emerging issue is that of the growth of new households following relationship breakdown where parents have custody or overnight access to children from the relationship and require accommodation which is larger than the typical size normally associated with a single person household.

6.2.2 The findings of the HNDA largely cover the housing needs of families and recognise the need to ensure a wide range of housing types and sizes are available in areas which are affordable to households across the income spectrum.

## 6.3 Young People

6.3.1 As shown by the Tribal Affordability Study (Technical Appendix TA04), young people's choices are constrained by their income and ability to access the private sector because of the need to provide large deposits for mortgages or private renting. The most significant issue for young households is being able to afford to access the 'property ladder' without parental or other supports. Some younger households find difficulty in gaining access to social rented housing as they lack priority need points when assessed against other priorities.

6.3.2 Similarly, younger households are more likely to require housing of an appropriate size near to locations where they work or study.

6.3.3 The Housing Affordability Study prepared by Tribal (TA04) presents in-depth analysis of the income and behaviours of households by age cohorts.

## 6.4 Older People

6.4.1 The debate about how best to address the needs of older people and ensure services are fit for purpose in the future, is set out in various consultation papers (The Scottish Government 2010b; 2010c). National and local policy is firmly based on the principle of enabling older people to continue to live independently at home or in their community, with appropriate levels of support where required.

6.4.2 As discussed in Chapter 4, the population and household projections for the GCV area reflect the wider national pattern of an ageing population. Over the projection period 2008-2025 there will be a sizeable increase in the number of older people households.

6.4.3 In relation to the private sector, each local authority has published its Scheme of Assistance in accordance with the Housing (Scotland) Act, 2006. These Schemes provide a range of services and support to help older people remain in their home, principally through the provision of grant assisted home adaptations and information, advice and practical support to help maintain or repair their homes.

6.4.4 As set out in Figure 6.4.1, 33% of very sheltered housing units and 28% of sheltered units in Scotland are in the GCV area. Between 2001 and 2009, across the GCV area, the number of very sheltered units increased by 124%. During the same period, the number of sheltered housing units slightly reduced reflecting the slow national decline as older complexes were closed or converted to very sheltered/extra care.

**Figure: 6.4.1: Housing for Older People, March 2009**

| Local Authority | | Very Sheltered | Sheltered | (of which) Wheelchair Adapted | Medium Dependency | Dwellings with Community Alarm |
|---|---|---|---|---|---|---|
| **ED** | LA | 0 | 156 | 40 | na | 530 |
| | RSL | 0 | 260 | na | 0 | na |
| | Private | - | 155 | - | - | - |
| | **Total** | **0** | **571** | **40** | **0** | **530** |
| **ER** | LA | 0 | 230 | 9 | 343 | 360 |
| | RSL | 102 | 152 | na | 44 | na |
| | Private | - | 745 | - | - | - |
| | **Total** | **102** | **1,127** | **9** | **387** | **360** |
| **GC** | LA | * | * | * | * | * |
| | RSL | 537 | 3,042 | na | 523 | na |
| | Private | - | 212 | - | - | - |
| | **Total** | **537** | **3,254** | **na** | **523** | **na** |
| **IC** | LA | * | * | * | * | * |
| | RSL | 61 | 440 | na | 365 | na |
| | Private | - | - | - | - | - |
| | **Total** | **61** | **440** | **na** | **365** | **na** |
| **NL** | LA | 0 | 1,224 | 64 | 0 | 5,147 |
| | RSL | 89 | 615 | na | 187 | na |
| | Private | - | - | - | - | - |
| | **Total** | **89** | **1,839** | **64** | **187** | **5147** |
| **RC** | LA | 0 | 331 | 15 | 107 | 297 |
| | RSL | 109 | 509 | na | 486 | na |
| | Private | - | 108 | - | - | - |
| | **Total** | **109** | **948** | **15** | **593** | **297** |
| **SL** | LA | 0 | 1,268 | 114 | 290 | 1,783 |
| | RSL | 139 | 316 | na | 268 | na |
| | Private | - | 262 | - | - | - |
| | **Total** | **139** | **1,846** | **114** | **558** | **1,783** |
| **WD** | LA | 0 | 269 | 0 | 230 | 1,532 |
| | RSL | 128 | 189 | na | 123 | na |
| | Private | - | - | - | - | - |
| | **Total** | **128** | **458** | **0** | **353** | **1,532** |
| **GCV** | LA | **0** | **3,478** | **242** | **970** | **9,649** |
| | RSL | **1,165** | **5,523** | **na** | **1,996** | **na** |
| | Private | **-** | **1,482** | **-** | **-** | **-** |
| | **Total** | **1,165** | **10,483** | **242** | **2,966** | **9,649** |
| **Scotland** | LA | **498** | **15,632** | **1,934** | **6,519** | **32,623** |
| | RSL | **3,032** | **16,935** | **0** | **7,272** | **0** |
| | Private | **-** | **3,680** | **-** | **-** | **-** |
| | **Total** | **3,530** | **36,247** | **1,934** | **13,791** | **32,623** |

*Sources:* Housing Statistics, Scottish Government; S1B returns by local authorities to the Scottish Government, Communities Analytical Services (augmented by LA own data). RSL data provided by the Scottish Housing Regulator from the Annual Performance and Statistical Return. Private sector figures at 2006 from *Review of Sheltered Housing in Scotland* (Scottish Government, 2008) based on Elderly Accommodation Counsel (EAC) database.

* Local authority stock transferred in the main to Glasgow Housing Association and to River Clyde Homes (in the case of Inverclyde Council).

6.4.5 Figure 6.4.1 includes estimates of private sector sheltered housing, based on 2006 figures from the EAC database, but these will underestimate provision as registration on the database is voluntary. No alternative consistent source was available for all authorities. Private supply continues to grow, and about a further 150, one and two bedroom apartments have recently been completed in East Renfrewshire, Renfrewshire and South Lanarkshire. A number of development proposals in East Renfrewshire and South Lanarkshire are currently being considered. These developments include some 'assisted living' apartments, which aim to bridge the gap between conventional retirement flats and care or nursing homes.

6.4.6 Telecare is the remote or enhanced delivery of health and social care to people in their own homes by means of telecommunications and computerised systems. (Newhaven, 2010). The national Telecare Strategy (The Scottish Government, 2008d) provided initial funding to promote this advanced technology. Recent studies (University of Leeds, 2009; University of York, 2009) suggest there is considerable potential to deliver better care to people, across a spectrum of needs, in their own home, using technology to integrate services more cost-effectively and efficiently. There is scope to offer services, both for preventative care and acute care, for older people, and for those with sensory impairments, physical disabilities, mental health problems and learning disabilities.

6.4.7 The Scottish Government's (2010d) National Dementia Strategy estimates there are approximately 71,000 people with dementia in Scotland, around 2,300 of whom are under the age of 65. This is expected to double over the next 25 years. On a pro rata basis to population, this would equate to approximately 23,700 people with dementia, 750 of whom under the age of 65, in the GCV area.

6.4.8 Figure 6.4.2 details the number of care homes and registered places for older people, as registered with the Care Commission, in the GCV authorities at March 2009. In all authority areas the majority of places are in the private sector. The highest provision is in Glasgow and South Lanarkshire. The total number of places available has increased in six of the eight authority areas, between March 2000 and March 2009, most notably so in Inverclyde and North Lanarkshire. East Renfrewshire and Glasgow City have each experienced a decline in the number of places over the period, of 8% and 7% respectively.

**Figure 6.4.2: Care Homes and Places for Older People by Local Authority, March 2009**

| | Care Homes | Registered places by sector for adults 65+ | | | | |
|---|---|---|---|---|---|---|
| | | LA/NHS | Private | Voluntary | Total | % change in places March 2000 to March 2009 |
| **ED** | 11 | 0 | 548 | 2 | 550 | +7% |
| **ER** | 11 | 34 | 310 | 152 | 496 | -8% |
| **GC** | 84 | 672 | 3,305 | 424 | 4,401 | -7% |
| **IC** | 21 | 3 | 653 | 257 | 913 | +38% |
| **NL** | 40 | 265 | 1,932 | 0 | 2,197 | +31% |
| **RC** | 23 | 182 | 926 | 250 | 1,358 | +13% |
| **SL** | 55 | 324 | 2,092 | 333 | 2,749 | +10% |
| **WD** | 14 | 190 | 405 | 10 | 605 | +7% |
| **GCV** | **259** | **1,670** | **10,171** | **1,428** | **13,269** | **+7%** |
| **Scotland** | **963** | **5,336** | **29,211** | **4,296** | **38,843** | **-1%** |

*Source:* Care Homes, Scotland, 2009. Scottish Government National Statistics published 27 April 2010 based on SCHC1 (Scottish Care Home Census) Return March 2009: Annex Tables 1, 2 and 3.

6.4.9 Most older people prefer to remain in their own home with appropriate levels of support and care. This may be facilitated by future developments in telecare and assistive technologies and a requirement for mainstream housing in all tenures which can be adapted to meet changing needs. This may also lead to an increase in demand for very sheltered or extra care housing in all tenures.

## 6.5 People with a Disability or Limiting Long Term Illness

6.5.1 Disabled people[19] make up approximately one fifth of Scotland's population (1 million or 19%), up from 14% in 1991, yet often experience high levels of inequality compared to non-disabled people. Households containing at least one person with a disability are also more than twice as likely to live in social rented accommodation (28% compared to 11% of households with no disabled people). Fifty four percent of households with a disabled person live in owner occupation compared to 74% of households who do not have anyone with a disability or long-term illness. People who have ever experienced homelessness are more likely to have a disability or long-term illness. Households with disabled members are also more likely to experience relative low income, lower standard of living[20], and to require state benefits.

6.5.2 Figure 6.5.1 estimates the number of households with one or more persons with a limiting long-term illness (LLTI) or disability, based on the Scottish Household Survey (SHS) 2007-08. This uses a wider definition, including limiting long-term illness as well as disability (physical or mental impairment). The proportion of households containing a person with a LLTI or disability ranges from 26% to 42% (Scottish average 33%), and in the case of six authorities is lower than the proportion recorded at the 2001 Census. This variation could be due to demographic changes, variation in self-assessed circumstances, or sample size in the SHS. While this provides an idea of the high number of households directly affected by LLTI or disability, it should not be taken as being the number of homes requiring adaptation. Older people households are considerably more likely to contain someone with a LLTI or disability.

**Figure 6.5.1: Limiting Long-Term Illness or Disability by Local Authority Areas, 2007 - 2008**

| | All households (2008) | Households with one or more persons with a LLTI | | |
|---|---|---|---|---|
| | | No. | % | % at 2001 Census |
| **ED** | 43,227 | 11,239 | 26% | 33% |
| **ER** | 35,988 | 10,077 | 28% | 32% |
| **GC** | 284,533 | 105,277 | 37% | 43% |
| **IC** | 37,156 | 15,606 | 42% | 40% |
| **NL** | 143,715 | 56,049 | 39% | 43% |
| **RC** | 79,037 | 30,824 | 39% | 38% |
| **SL** | 138,354 | 48,424 | 35% | 40% |
| **WD** | 42,699 | 15,372 | 36% | 42% |
| **GCV** | **804,709** | **292,868** | **36%** | **41%** |

*Source:* Scottish Household Survey 2007 and 2008

[19] *High Level Summary of Equality Statistics: Key Trends for Scotland* (2006) Scottish Executive National Statistics Publication. Also: www.scotland.gov.uk/Topics/People/Equality/disability (updated September 2009).
[20] As above. Also: Chanfrrau, Jenny and Burchardt, Tania (2008) *Equivalence scales: rationales, uses and assumptions.* Scottish Government.

**Physical Disability and Sensory Impairment**

6.5.3 In 2005 it was estimated that 96,000 people in Scotland were registered wheelchair users, (NHS, 2006). This does not include wheelchair users who obtain services from private or voluntary sector providers rather than the NHS.

6.5.4 In 2009, 35,588 people were registered as blind or partially sighted,[21] 33% of whom had additional disabilities. The Royal National Institute of Blind People (RNIB) considers that the true figure for those who are blind or partially sighted in Scotland is much higher at around 180,000. The majority of people who are blind or partially sighted may be able to live in mainstream housing with appropriate adaptations and assistive technology.

6.5.5 The Royal National Institute for Deaf People (RNID) estimates that there are some 758,000 people who are deaf or hard of hearing in Scotland. Many will have undiagnosed hearing loss. Assistive technology is developing rapidly to meet the daily needs of hearing impaired people, such as telecommunications, alerting devices (such as door bells and smoke alarms) and broadcast media.

6.5.6 Local Authorities' Schemes of Assistance detail the support, including financial support, to help people with disabilities adapt their private sector home to meet their needs. Assistance, including mandatory grant provision, is set out in the Housing (Scotland) Act, 2006. Households in the social rented sector receive support from their landlords to provide equipment or adapt their home to meet the needs of disabled people in their household.

6.5.7 It is possible to estimate the mismatch at the Scottish level between the number of wheelchair users and adapted housing provision in the social rented sector, as shown in Figure 6.5.2. There is a lack of data available on the number of wheelchair users at the local authority level. One third of the Scottish population resides in the GCV area. Using a simple pro-rata approach, this suggests that approximately 7,000 – 12,600 social rented houses need to be adapted to wheelchair standard. This is similar to the findings of a survey by Inclusion Scotland in 2009. Five GCV authorities (East Renfrewshire, Inverclyde, North Lanarkshire, South Lanarkshire and West Dunbartonshire) provided an estimate of unmet need of 6,835, based on the number of disabled people on the housing register for designed or adapted housing.

**Figure 6.5.2: Estimate of wheelchair users compared to adapted housing, Scotland**

| | | **Shortfall** |
|---|---|---|
| Social rented supply adapted for wheelchair use | 6,000 | |
| Scottish estimate of registered wheelchair users, 2005 | 96,000 | |
| if 46% in social rented accommodation [SHS 2005, 2006] | 44,000 | 38,000 |
| if 28% in social rented accommodation [see 6.5.1 above] | 27,000 | 21,000 |

*Sources:* NHS (2006); SHS 2005, 2006 (quoted in www.inclusionscotland.org); Housing Statistics for Scotland (2009). This assumes each wheelchair user requires an adapted home; some, however, may be in care homes.

6.5.8 Figure 6.5.3 provides data on current social rented housing in the GCV area for people with physical disabilities. The majority of housing for people with physical disabilities is suitable for ambulant disabled people, with fewer properties adapted for wheelchair use, possibly because of the unsuitability of properties for conversion or higher costs involved.

[21] *Registered Blind and Partially Sighted Persons, Scotland 2009*. Scottish Government National Statistics Publication

**Figure 6.5.3: Housing for People with Physical Disabilities by Local Authority, March 2009/2010**

| | Adapted for wheelchair use | | | Ambulant disabled | | | Other adapted | | |
|---|---|---|---|---|---|---|---|---|---|
| | **LA (2010)** | **HA (2009)** | **Total** | **LA (2010)** | **HA (2009)** | **Total** | **LA (2010)** | **HA (2009)** | **Total** |
| **ED** | 10 | 4 | 14 | 388 | 3 | 391 | na | 7 | 7 |
| **ER** | 0 | 40 | 40 | 9 | 0 | 9 | 0 | 57 | 57 |
| **GC** | * | 661 | 661 | * | 889 | 889 | * | 566 | 566 |
| **IC** | * | 60 | 60 | * | 44 | 44 | * | 0 | 0 |
| **NL** | 15 | 118 | 133 | na | 134 | 134 | na | 11 | 11 |
| **RC** | 22 | 207 | 229 | 546 | 103 | 649 | 0 | 461 | 461 |
| **SL** | 963 | 114 | 1,077 | 7,320 | 129 | 7,449 | 3 | 30 | 33 |
| **WD** | 94 | 92 | 186 | 151 | 179 | 330 | 0 | 47 | 47 |
| **GCV** | **1,104** | **1,296** | **2,400** | **8,414** | **1,481** | **9,895** | **3** | **1,179** | **1,182** |
| **Scotland** | **2,492** | **3,322** | **5,814** | **16,422** | **5,119** | **21,541** | **6,398** | **1,737** | **8,135** |

*Sources:* Housing Statistics for Scotland: S1B returns; The Scottish Housing Regulator. There may be differences in the interpretation of the criteria for housing adapted for people with physical disabilities.
* LA stock transferred to RSLs, mainly Glasgow Housing Association and River Clyde Homes (Inverclyde)
*Housing adapted for wheelchair use*: dwellings built or adapted to give extra floor area, whole house heating, and special bathroom, kitchen and other features. *Ambulant disabled housing*: dwellings for non wheel chair users built or adapted to general needs housing standards with a level/ramped approach, WC or bathroom at entrance level and other special features. *Other specially adapted housing*: dwellings with other adaptations, such as those with renal dialysis equipment.

6.5.9 Across the GCV area, within three local authorities, there are 13 care homes offering 239 places catering for a variety of disabilities. This is shown in Figure 6.5.4.

6.5.10 It is recognised that there is currently a shortfall in the GCV area in the availability of suitable housing, whether purpose designed or adapted, to meet the requirements of physically disabled people. It is likely that demand will increase in future.

**Figure 6.5.4: Care Homes for Adults with Physical Disabilities: Homes and Places by Local Authority, March 2009**

| Authority | Care Home Provision | |
|---|---|---|
| | **Care Homes** | **Registered Places** |
| **Glasgow City** | 5 | 111 |
| **Inverclyde** | 7 | 106 |
| **Renfrewshire** | 1 | 22 |
| **GCV** | **13** | **239** |
| **Scotland** | **40** | **547** |

*Source:* Care Homes, Scotland, 2009. National Statistics published 27 April 2010 based on SCHC1 (Scottish Care Home Census) Return March 2009, Annex Table 1.
Note: The number of care homes, and places in care homes, as registered with the Care Commission.

### Mental Health

6.5.11 'Towards a Mentally Flourishing Scotland' (The Scottish Government, 2009a) aims to improve mental health in Scotland. It recognises that mental state is shaped by our social, economic, physical and cultural environment, including people's personal strengths and vulnerabilities, their lifestyles and health-related behaviours, as well as various external socio-economic factors.

6.5.12 Following the closure of long-stay psychiatric hospitals, there has been a move to more diverse housing. The vast majority of people with mild mental health problems and over 80% of people with severe and enduring mental health problems live in mainstream housing, with the rest living in supported housing or other specialist accommodation (ODPM, 2004). Housing is provided across all sectors, including the voluntary sector.

6.5.13 Many residents in acute psychiatric wards require suitable move-on accommodation, with appropriate arrangements for support. Many people with mental health problems live in supported, mainstream accommodation but may be vulnerable to homelessness.

6.5.14 Across the GCV area there are 30 registered care homes providing 419 places for adults with mental health problems. Over 70% of these places are in Glasgow. There is no provision in East Renfrewshire, North Lanarkshire or West Dunbartonshire. This is shown in Figure 6.5.5. These care homes must meet 19 national care standards.

**Figure 6.5.5: Care Homes for Adults with Mental Health Problems: Homes and Places by Local Authority, March 2009**

| | Care Home Provision | |
|---|---|---|
| | **Care Homes** | **Registered Places** |
| **East Dunbartonshire** | 1 | 5 |
| **Glasgow City** | 25 | 299 |
| **Inverclyde** | 1 | 9 |
| **Renfrewshire** | 1 | 60 |
| **South Lanarkshire** | 2 | 46 |
| **GCV** | **30** | **419** |
| **Scotland** | **81** | **1,052** |

*Source:* Care Homes, Scotland, 2009. National Statistics published 27 April 2010 based on SCHC1 (Scottish Care Home Census) Return March 2009, Annex Table 1.
Note: The number of care homes, and places in care homes, as registered with the Care Commission

### Learning Disabilities

6.5.15 The term learning disabilities covers a broad spectrum of individual circumstances, and people's needs can change during their lifetime. The HNDA has adopted the definition, in 'The Same as You?' (Scottish Executive, 2000a: Mental Health Foundation, 1993). This includes people with autistic spectrum disorders.

6.5.16 The housing needs of people with mild to moderate learning disabilities can be met, with appropriate support in mainstream or group housing. People with more complex or multiple needs may require constant and highly intensive support and the facilities of a registered care home. Support for most people with learning disabilities is provided at home by relatives. This is often a lifelong commitment and responsibility.

6.5.17 'The Same as You?' attempted to quantify how many people in Scotland had a learning disability, recognising there may be some variation across the country. It estimated that:

- 20 people for every 1,000 have a mild or moderate learning disability, and
- 3 to 4 people for every 1,000 have a profound or multiple disabilities.

6.5.18 Its findings indicate the number of people with learning disabilities has increased by around 1.2% per year and more of them will live longer, meaning needs may also change. The study also estimated that only around 25% of people with learning disabilities are in regular contact with local authorities or the health service in Scotland, the remainder are supported by their families at home with no request for specialist support.

6.5.19 Figure 6.5.6 details adults with learning disabilities known to the GCV local authorities, and those living in their own tenancies or owner occupiers, at 2007. A further examination of the source data between 2003 and 2007 indicates a gradual increase from 24% of those known to local authorities in 2003 to 33% at Scotland level. The figures for those living in their own tenancy or owner occupiers show variation between authorities.

**Figure 6.5.6: Adults with Learning Disabilities, 2007**

| | Adults with Learning Disabilities known to Local Authorities | | | | Living in their own Tenancy or Owner Occupiers | |
|---|---|---|---|---|---|---|
| | Males | Females | Total | Per 1,000 population | Total | Estimate of adults as % those known to LA |
| **ED** | 218 | 172 | 390 | 4.6 | 180 | 46% |
| **ER** | 223 | 197 | 420 | 5.9 | 148 | 35% |
| **GC** | 1,508 | 1,155 | 2,663 | 5.5 | 1,247 | 47% |
| **IC** | 244 | 210 | 454 | 6.8 | 143 | 31% |
| **NL** | 738 | 629 | 1,367 | 5.3 | 433 | 32% |
| **RC** | 550 | 305 | 855 | 6.2 | 174 | 20% |
| **SL** | 521 | 422 | 943 | 3.8 | 250 | 27% |
| **WD** | 264 | 196 | 460 | 6.2 | 163 | 35% |
| **GCV** | **4,266** | **3,286** | **7,552** | **4.3** | **2,738** | **36%** |
| **Scotland** | **13,049** | **9,826** | **22,875** | **5.5** | **7,497** | **33%** |

*Source:* 'The Same as You?' Annual Survey 2007, The Scottish Government. (Annex A and Annex I.)
Note: The numbers of adults as a percentage of all adults known to a local authority are estimates as the figures may not have come from the same base of individuals.

6.5.20 The voluntary sector plays an important role in the provision of care homes for adults with learning disabilities. Data[22] at March 2006 indicates that, across the GCV area, 65% of registered places were in the voluntary sector, 18% in the private sector, and 17% in LA/NHS sector. Between 2006 and 2009 there was a slight increase of an additional care home and 20 registered places in the GCV area, contrasting with a reduction in both care homes and places across Scotland over the same period (Figure 6.5.7). All such care homes must meet the 20 national care standards. Most of the care homes provided are relatively small, ranging from 1 to 13 places. This reflects the shift to providing support in the community, in small group housing or core and cluster models.

**Figure 6.5.7: Care Homes for Adults with Learning Difficulties, March 2009**

| | Care Home Provision | |
|---|---|---|
| | Care Homes | Registered Places |
| **ED** | 4 | 24 |
| **ER** | 3 | 31 |
| **GC** | 13 | 125 |
| **IC** | 4 | 53 |
| **NL** | 13 | 149 |
| **RC** | 7 | 75 |
| **SL** | 11 | 117 |
| **WD** | 1 | 4 |
| **GCV** | **56** | **578** |
| **Scotland** | **311** | **2,857** |

*Source*: Care Homes, Scotland, 2009. Scottish Government National Statistics, 27 April 2010 based on SCHC1 [Scottish Care Home Census] Return March 2009 – Annex Table 1. Note: As registered with the Care Commission

[22] SEHD Community Care Statistics Return March 2006

## 6.6 Minority Ethnic Households

6.6.1 The HNDA provides an overview of the accommodation needs of minority ethnic (ME) households at local authority level. Each local authority provided information on ME households in their area, using the 2001 Census as a key data source, augmented where available with data from local housing registers, and local research studies.

6.6.2 Between 1991 and 2001 the total population of Scotland increased by 1.3%, but the ME population increased much more rapidly, by 62.3%[23]. In 2001 it represented 2% of the total population of Scotland, 2.8% of the GCV population.

6.6.3 The pattern of growth appears to have been uneven between different groups. A more recent study in Lanarkshire (ODS, 2006), reflecting on both natural change and migration, found very substantial change over the censal period between 1991 and 2001, together with variability between ME groups and between North and South Lanarkshire areas. These findings are set out in Figure 6.6.1.

**Figure 6.6.1: Inter-censal Change in Lanarkshire, 1991 - 2001**

| Minority Ethnic Group | North Lanarkshire % change 1991 – 2001 | South Lanarkshire % change 1991 – 2001 |
|---|---|---|
| **White Irish** | + 20% | + 44% |
| **Indian** | + 45% | + 77% |
| **Pakistani** | + 76% | + 45% |
| **Bangladeshi** | -- | -- 24% |
| **Chinese** | + 37% | + 61% |
| **Other Asian** | + 40% | -- 11% |
| **Black Caribbean** | + 71% | + 40% |
| **Black African** | + 52% | + 24% |
| **Black Other** | -- 25% | -- 40% |
| **Other** | + 5% | -- 15% |
| **Total** | **+ 32%** | **+39%** |

*Source:* ODS Consulting (2006)

6.6.4 Glasgow City Council (2010) assessed the change in the city's ME population between 2001 and 2008. The report concluded that it grew from 5.4% in 2001 to 8.1% in 2008, the largest percentage increase being in the African group (up 215%).

6.6.5 Various factors may have contributed to growth in the ME population since 2001, including the significant numbers of asylum seekers granted refugee status and the accession of the 10 new member states to the European Union, leading to new patterns of migration across the EU's internal borders.

6.6.6 Figure 6.6.2 details the distribution of the ME population across the GCV authorities in 2001. The ME population accounts for 2.8% of the total population. By far the largest group is Pakistani and Other South Asian. The proportion of the overall population who are from ME origin is not evenly distributed across the constituent local authorities, ranging from under 1% in Inverclyde and West Dunbartonshire to 5.5% in Glasgow. According to the 2001 Census, Glasgow has the largest minority ethnic population in Scotland, with almost a third (31%) of the total Scottish minority ethnic population living in the city; this is followed by Edinburgh (18**%**).

[23] Analysis of Ethnicity in the 2001 Census: Summary Report (2004). Edinburgh: Scottish Executive, Office of the Chief Statistician.

**Figure 6.6.2: Ethnic Population, 2001**

| | White | | Indian | | Pakistani/ Other South Asian | | Chinese | | Other ME Background | | Total Population |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | No | % | No | % | No | % | No | % | No | % | |
| **ED** | 104,893 | 96.9 | 1,533 | 1.4 | 734 | 0.7 | 512 | 0.5 | 571 | 0.5 | 108.243 |
| **ER** | 85,875 | 96.1 | 686 | 0.8 | 1,935 | 2.2 | 341 | 0.4 | 474 | 0.5 | 89,311 |
| **GC** | 546,359 | 94.5 | 4,173 | 0.7 | 17,587 | 3.0 | 3,876 | 0.7 | 5,874 | 1.0 | 577,869 |
| **IC** | 83,453 | 99.1 | 172 | 0.2 | 113 | 0.1 | 151 | 0.2 | 314 | 0.4 | 84,203 |
| **NL** | 317,026 | 98.7 | 527 | 0.2 | 1,988 | 0.6 | 607 | 0.2 | 919 | 0.3 | 321,067 |
| **RC** | 170,728 | 98.8 | 461 | 0.3 | 608 | 0.4 | 440 | 0.3 | 630 | 0.4 | 172,867 |
| **SL** | 298,812 | 98.9 | 536 | 0.2 | 1,162 | 0.4 | 718 | 0.2 | 988 | 0.3 | 302,216 |
| **WD** | 92,712 | 99.3 | 103 | 0.1 | 224 | 0.2 | 143 | 0.2 | 196 | 0.2 | 93,378 |
| **GCV** | **1,699,858** | **97.2** | **8,191** | **0.5** | **24,351** | **1.4** | **6,788** | **0.4** | **9,966** | **0.6** | **1,749,154** |
| **Scot** | **4,960,334** | **98.0** | **15,037** | **0.3** | **39,970** | **0.8** | **16,310** | **0.3** | **30,360** | **0.6** | **5,062,011** |

*Source:* 2001 Census. Table CAST07: Ethnic Group – People
Note: Percentages may not total 100 due to rounding.

6.6.7 The distribution of ME households across the GCV authorities, shown by the Census 2001, shows similarities to population. However, there are proportionately fewer ME households, implying larger household sizes.

6.6.8 Minority ethnic groups tend to settle in areas where there are existing family and community networks, or other services which are culturally sensitive, for example, community facilities and places of worship. The availability of appropriate and affordable housing is another important factor in the choices made by ME households, as most favour owner occupation or private renting.

6.6.9 Figure 6.6.3 details households in the GCV area, by ethnic group, with a person with a LLTI. The White group generally has a higher rate of LLTI than ME groups (though in four authority areas the Pakistani/Other South Asian group has the highest LLTI rate). This pattern is likely to reflect the generally older age profiles of White groups.

**Figure 6.6.3: Households including a Person with a LLTI by ME Group (%), 2001**

| | White | | Indian | | Pakistani/ Other South Asian | | Chinese | | Other ME Background | | Total House-holds | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | LLTI | No LLTI | LLTI | No LLTI | LLTI | No LLTI | LLTI | No LLTI | LLTI | No LLTI | LLTI | No LLTI |
| **ED** | 33 | 67 | 36 | 64 | 38 | 62 | 24 | 76 | 18 | 82 | 33 | 67 |
| **ER** | 32 | 68 | 32 | 68 | 43 | 57 | 25 | 75 | 20 | 80 | 32 | 68 |
| **GC** | 44 | 56 | 36 | 64 | 42 | 58 | 23 | 77 | 25 | 75 | 43 | 57 |
| **IC** | 40 | 60 | 13 | 87 | 38 | 62 | 11 | 89 | 28 | 72 | 40 | 60 |
| **NL** | 43 | 57 | 31 | 69 | 42 | 58 | 22 | 78 | 39 | 61 | 43 | 57 |
| **RC** | 38 | 62 | 34 | 66 | 37 | 63 | 18 | 82 | 31 | 69 | 38 | 62 |
| **SL** | 40 | 60 | 35 | 65 | 45 | 55 | 20 | 80 | 29 | 71 | 40 | 60 |
| **WD** | 42 | 58 | 35 | 65 | 43 | 57 | 42 | 58 | 23 | 77 | 42 | 58 |
| **GCV** | **41** | **59** | **34** | **66** | **42** | **58** | **23** | **77** | **26** | **74** | **41** | **59** |

*Source:* 2001 Census, Table CAST08

6.6.10 Figure 6.6.4 shows the tenure patterns of ME groups at 2001. The highest percentage of all households live in owner occupation, except Glasgow. In Inverclyde, 29% of the Pakistani and Other South Asian community lived in council owned stock, which is considerably higher than the proportion of White households and for the GCV area as a whole. It is worth noting that six of the eight local authorities had low levels of owner occupation in the Other category compared to other ME groups.

6.6.11 As part of our consultation process, we engaged with a number of organisations who advocate on behalf of minority ethnic people. During this process, a number of issues were highlighted:

- Several respondents drew a distinction between the needs of the long established, settled ME communities, mainly of South Asian origin, which increasingly are no different from the rest of the housing market, and those of more recent migrants from Eastern Europe and Africa, with different economic and housing circumstances.
- Similar to the White Scottish population, there are affordability issues for many ME households. Some in older tenemental property may be unable to afford the high costs of necessary repairs and refurbishment without assistance.
- More good quality affordable housing is required of suitable size for larger minority ethnic households.
- There is an increasing demand for accommodation for older people in the traditional ME groups, particularly sheltered housing. There may be difficulties for some communities (particularly Pakistani and south Asian) in moving to sheltered accommodation because of the move away from the traditional multi generational family support network. However, this does not appear to be as problematic for the Chinese community.

### Figure 6.6.4: Tenure of ME Households (%), 2001

| Ethnic Group | Tenure | Local Authority | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | EDC | ERC | GCC | IC | NLC | RC | SLC | WDC | GCV |
| White | Owned | 81% | 83% | 48% | 60% | 58% | 65% | 67% | 54% | 59% |
| | Council | 14% | 10% | 26% | 25% | 32% | 22% | 24% | 29% | 25% |
| | Other RSL | 2% | 2% | 14% | 7% | 4% | 6% | 3% | 11% | 8% |
| | PRS | 4% | 4% | 12% | 7% | 6% | 7% | 6% | 6% | 8% |
| | | | | | | | | | | |
| Indian | Owned | 93% | 90% | 60% | 74% | 71% | 82% | 89% | 74% | 72% |
| | Council | 2% | 3% | 8% | 2% | 9% | 3% | 4% | 19% | 6% |
| | Other RSL | 1% | - | 7% | - | 4% | 1% | - | - | 4% |
| | PRS | 4% | 7% | 25% | 24% | 16% | 14% | 7% | 6% | 17% |
| | | | | | | | | | | |
| Pakistani / Other South Asian | Owned | 89% | 90% | 59% | 38% | 75% | 76% | 77% | 73% | 64% |
| | Council | 5% | 1% | 8% | 29% | 11% | 4% | 9% | 14% | 8% |
| | Other RSL | - | - | 9% | 8% | 2% | 4% | 2% | 6% | 7% |
| | PRS | 6% | 9% | 24% | 25% | 12% | 16% | 12% | 8% | 21% |
| | | | | | | | | | | |
| Chinese | Owned | 92% | 90% | 58% | 68% | 81% | 75% | 87% | 73% | 67% |
| | Council | 1% | - | 14% | 9% | 10% | - | 6% | 10% | 11% |
| | Other RSL | 1% | 1% | 6% | 6% | 1% | 2% | 1% | 8% | 4% |
| | PRS | 6% | 9% | 22% | 17% | 9% | 24% | 7% | 8% | 18% |
| | | | | | | | | | | |
| Other | Owned | 76% | 81% | 29% | 44% | 47% | 49% | 58% | 38% | 38% |
| | Council | 7% | 4% | 24% | 19% | 29% | 22% | 18% | 35% | 22% |
| | Other RSL | 1% | 1% | 11% | 8% | 5% | 8% | 2% | 8% | 9% |
| | PRS | 16% | 14% | 37% | 30% | 19% | 20% | 21% | 18% | 31% |
| | | | | | | | | | | |
| All H/holds | Owned | 81% | 83% | 49% | 60% | 58% | 65% | 67% | 54% | 59% |
| | Council | 13% | 10% | 26% | 25% | 32% | 21% | 24% | 29% | 25% |
| | Other RSL | 2% | 2% | 13% | 7% | 4% | 6% | 3% | 11% | 8% |
| | PRS | 4% | 4% | 12% | 7% | 6% | 7% | 6% | 6% | 8% |

*Source:* 2001 Census, Table CAST08
Percentages rounded to nearest integer; totals may not sum due to rounding. For some ME groups the numbers are very small and the % figure may be misleading and should be treated with caution. The figures relate to the 2001 Census, prior to large scale transfer of Council housing stock in Glasgow City and Inverclyde to RSLs.

6.6.12 Although the majority of ME households live in the private sector, and are likely to continue to do so, there is some evidence from social housing providers of increasing need for access to social rented housing. There is an increase in demand for good quality, affordable housing in areas where people from ME communities feel safe, whether this is in the private or social sector.

6.6.13 Some ME households in the private rented sector experience problems relating to overcrowding and condition of property. There is also need for support services for older ME households, including sheltered housing which meets cultural requirements.

## 6.7 Asylum Seekers and Refugees

6.7.1 Glasgow City is currently the only local authority in Scotland contracted by the UK Borders Agency to provide accommodation for asylum seekers. However this contract will terminate in April 2011. Housing provision for asylum seekers in the city will then be provided by YPeople and the Angel Group, through a mix of leased RSL properties and properties in the private sector. Other asylum seekers live with friends or relatives within the other GCV authority areas. At August 2006[24] there were over 5,000 asylum seekers in Scotland, the vast majority in Glasgow City; only 82 were living with friends or relatives, dispersed across ten other authority areas. On being granted 'leave to remain', an asylum seeker has the same housing and social security entitlements as a UK citizen.

6.7.2 Research by the University of Strathclyde (2005) noted that asylum seekers tended to be relatively young and well educated, and that 88% aspired to remain in Scotland. Lewis (2006) found a greater tolerance in Scotland than in England, at least to the principle of asylum, but also identified considerable hostility and prejudice. This tended to centre around a perceived threat to jobs and the impact on public services, particularly housing.

6.7.3 According to the Home Office[25], at the end of June 2010, there were 2,205 Asylum Seekers supported in accommodation in Glasgow, excluding unaccompanied asylum seeking children and those in initial accommodation. This is less than the Council estimate of around 5,000 asylum seekers living in the city, possibly due to an increase in those living with friends and relatives. In the initial years of the active dispersal programme, Glasgow mainly received families. This was appropriate to the accommodation facilities and support services available, such as local schools, and also helped to support communities. More asylum seekers are now choosing to move to Glasgow to be near family and communities. Fewer families and more single people are now seeking asylum in Glasgow bringing a different profile of needs. There are around 100 unaccompanied asylum seekers (under 18) coming to Glasgow each year.

6.7.4 On average, around 70% of families stay in Glasgow, where they will have built up social networks when they have gained refugee status. For single people, the movement patterns are quite different with around a third moving away, a third remaining in Glasgow and a third losing contact with services.

6.7.5 A study by Heriot-Watt University (2009) highlighted difficulties experienced by newly recognised refugees in gaining access to appropriate housing in Glasgow. These are similar to other ME groups who identify a shortage of permanent accommodation in areas perceived by them to be safe, a lack of appropriately sized accommodation for

[24] CoSLA Strategic Migration Partnership. www.asylumscotland.org.uk/asylumstatistics
[25] Control of Immigration: Quarterly Statistical Summary, 26 August 2010: The Home Office.

larger families and a fear and actual experience of racial harassment. There is an ongoing need for impartial specialist services to help refugees navigate the housing system, particularly in the transition from asylum seeker to refugee status. More clarity is required in the roles and responsibilities of the various statutory and voluntary sector agencies involved in supporting refugees.

6.7.6 The report recognised policy and process changes which will impact on refugees. It also noted that many issues raised, including debt, rent charges, satisfaction with landlords and the location of housing, are experienced by many people in Glasgow but are compounded by the specific circumstances of refugees and their increased potential vulnerability to homelessness.

6.7.7 About two-thirds of those interviewed for the research were 'very likely' to continue to remain in Glasgow, offering many positive reasons and an appreciation of the city and its people, despite difficulties experienced in relation to their housing.

6.7.8 The UK Border Agency Immigration Removal Centre for Scotland is located in South Lanarkshire at Dungavel. It opened in 2001 and has 190 bed spaces and a range of other services. As at 30 June 2010 there were 200 adults in detention at Dungavel solely under Immigration Act powers; 115 of these had sought asylum at some stage[26].

6.7.9 Various voluntary sector agencies are involved in offering information, advice and support to asylum seekers and refugees. At January 2010, Positive Action in Housing (PAiH) were working on behalf of 444 households, including:

- 168 cases (38%) waiting for two apartment housing
- 230 families (52%) waiting for 3 or 4 apartment housing
- 46 families (10%) waiting for 5, 6 or 7 apartment housing.

6.7.10 These households were waiting for suitable, permanent social rented housing in Glasgow and surrounding areas. PAiH highlighted a shortage of affordable, large family houses.

### 6.8 Migrant Workers from the European Union

6.8.1 EU nationals can come to the UK to work without having to apply for a visa, with a reciprocal arrangement in place for UK citizens to work in Europe. In 2004, ten countries joined the EU[27]. While A8 nationals have the right to live and work in the UK, access to the labour market (the Worker Registration Scheme, or WRS) was regulated and access to benefits restricted. Between May 2004 and March 2007, around 45,000 migrants from the A8 countries registered to work in Scotland, the majority from Poland[28]. No restrictions were placed on workers from Cyprus and Malta. In 2007 Bulgaria and Romania also acceded to the EU (A2 accession states). Tighter regulations apply to nationals of these countries who wish to work in the UK.

6.8.2 The number and changing pattern of migrant workers can be estimated using data published by the UK Department for Work and Pensions (DWP) on National Insurance Number (NINo) Registrations to adult overseas nationals entering the UK. Five GCV authorities commissioned research which provides more detailed

[26] Control of Immigration: Quarterly Statistical Summary, 26 August 2010: The Home Office.
[27] Cyprus and Malta together with eight Eastern European states (the A8 accession states): Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Slovakia and Slovenia.
[28] www.careers-scotland.org.uk

information (Blake Stevenson (2007a: 2007b: 2007c) and (University of Stirling, 2007).

6.8.3 As shown in Figure 6.8.1, there was an increase of 76% in the number of NINo registrations across the GCV between 2004/05 and 2005/06 and an increase of 69% between 2005/06 and 2006/07. This high level of registrations was maintained for a few years before the numbers registering reduce from 2008/09. However, despite this reduction, the numbers registering are still double in 2009/2010 compared to 2002/03. This pattern is repeated across all the GCV authorities, with the exception of Inverclyde.

**Figure 6.8.1: NINo Registrations to Adult Overseas Nationals Entering the UK, 2002/03 – 2009/10**

| | 2002/03 | 2003/04 | 2004/05 | 2005/06 | 2006/07 | 2007/08 | 2008/09 | 2009/10 |
|---|---|---|---|---|---|---|---|---|
| **ED** | 100 | 110 | 130 | 170 | 310 | 200 | 160 | 130 |
| **ER** | 90 | 80 | 100 | 120 | 280 | 140 | 110 | 100 |
| **GC** | 3060 | 2890 | 3930 | 6670 | 9200 | 10400 | 8560 | 6770 |
| **IC** | 190 | 160 | 250 | 310 | 250 | 280 | 220 | 140 |
| **NL** | 280 | 250 | 340 | 810 | 1530 | 1450 | 990 | 530 |
| **RC** | 240 | 240 | 290 | 710 | 1120 | 1050 | 690 | 500 |
| **SL** | 320 | 310 | 400 | 770 | 1090 | 860 | 680 | 400 |
| **WD** | 90 | 90 | 90 | 160 | 280 | 220 | 150 | 140 |
| **GCV** | **4370** | **4130** | **5530** | **9720** | **14060** | **14600** | **11560** | **8710** |

*Source:* DWP NINo Registrations database.
Note: Numbers rounded to the nearest 10. Totals may not sum due to rounding method used.

6.8.4 Figure 6.8.2 shows the breakdown of NINo Registrations by World Area of Origin in 2009/10. There are significant numbers of immigrants from Africa, Asia and the Middle East. Twenty eight percent of NINo Registrations were made by nationals from the EU Accession States.

6.8.5 The GCV area accounted for around 24% of the Scottish total of NINo registrations to adult overseas nationals (36,330) in 2009-10.

**Figure 6.8.2: NINo Registrations to Adult Overseas Nationals by World Area of Origin, 2009/10**

| LA | Total | World Area of Origin | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | | EU | EU A12 States | Other Europe | Africa | Asia/ Middle East | The Americas | Australasia / Oceania | Not Known |
| **ED** | 130 | 30 | 30 | - | 10 | 30 | 10 | 10 | - |
| **ER** | 100 | 10 | 30 | - | - | 40 | 10 | 10 | - |
| **GC** | 6770 | 820 | 1570 | 110 | 1050 | 2860 | 240 | 110 | 20 |
| **IC** | 140 | 80 | 20 | 10 | - | 20 | - | - | - |
| **NL** | 530 | 30 | 320 | 10 | 30 | 100 | 20 | 10 | - |
| **RC** | 500 | 50 | 200 | 10 | 60 | 150 | 10 | 20 | - |
| **SL** | 400 | 50 | 180 | 10 | 20 | 100 | 20 | 20 | - |
| **WD** | 140 | 20 | 50 | - | 20 | 40 | - | - | - |
| **GCV** | **8710** | **1090** | **2400** | **150** | **1190** | **3340** | **310** | **180** | **20** |
| **Scotl'd** | **36,330** | **6,160** | **15,550** | **650** | **2,990** | **8,100** | **1,610** | **1,240** | **20** |

*Source:* DWP NINo Registrations database.
Note: '-' = nil or negligible. Numbers rounded to the nearest 10. Totals may not sum due to rounding method used.

6.8.6 Figure 6.8.3 portrays the cumulative total of EU nationals registered with the DWP in the GCV area from the twelve EU Accession States from January 2002 to March 2010. Sixty four percent of the GCV total were in Glasgow City, 15% in North Lanarkshire and 8% in both Renfrewshire and South Lanarkshire. The majority of registrations across all eight GCV authorities were from Polish people. All eight authorities had more registrations from Poland than from all the other states combined.

6.8.7 Research at UK level by Joseph Rowntree Foundation (2006) found that some migrants lived in overcrowded and poor quality housing yet most expressed satisfaction with their accommodation.

6.8.8 The majority of EU migrant workers live in the private rented sector. New migrants stay initially with friends or relatives before moving into their own accommodation. This may be easier for single person or couple households but many migrant households with children rely on the social rented sector, often through the homelessness route.

**Figure 6.8.3: NINo Registrations to Nationals of EU Accession States, Cumulative Total, 2002 – 2010**

| EU Accession State | Local Authority | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | EDC | ERC | GCC | IC | NLC | RC | SLC | WDC | GCV |
| Estonia | - | - | 80 | 10 | 30 | 20 | 220 | - | **360** |
| Czech Republic | 10 | 10 | 1110 | 20 | 120 | 50 | 80 | 20 | **1420** |
| Slovak | 20 | 10 | 2230 | 70 | 140 | 70 | 220 | 60 | **2820** |
| Hungary | 10 | 10 | 280 | 10 | 210 | 40 | 160 | 10 | **730** |
| Latvia | 10 | - | 480 | 10 | 50 | 50 | 150 | 20 | **770** |
| Lithuania | 10 | 10 | 640 | 10 | 100 | 40 | 60 | 10 | **880** |
| Poland | 240 | 190 | 11680 | 170 | 3250 | 1920 | 1310 | 330 | **19090** |
| Slovenia | - | - | 40 | - | - | - | - | - | **40** |
| Malta | 10 | - | 60 | - | 10 | 10 | 10 | 10 | **110** |
| Cyprus | - | - | 30 | - | - | - | - | - | **30** |
| Bulgaria | - | 10 | 110 | - | 20 | 10 | 30 | - | **180** |
| Romania | 10 | 10 | 370 | 10 | 40 | 30 | 30 | 20 | **520** |
| Total | **320** | **260** | **17100** | **300** | **3950** | **2240** | **2270** | **470** | **26950** |

*Source:* DWP NINo Registrations database.
Note: '-' = nil or negligible. Numbers rounded to the nearest 10. Totals may not sum due to rounding method used. Grand total 26,950 is sum of vertical column of GCV totals for each EU Accession State.

6.8.9 Agencies working on behalf of migrant workers highlighted that many prefer to be housed in social rented accommodation but there is limited availability. Some expressed interest in accessing low cost home ownership if mechanisms, such as shared equity, were available to them. Some migrant workers have experienced unlawful eviction and destitution.

6.8.10 The transitional arrangements for A8 and A2 nationals are due to end in 2011 and 2014, respectively. The implications are not clear but may include an increase in demand for social housing, homelessness services and welfare benefits.

## 6.9 Gypsies/ Travellers

6.9.1 Gypsies/Travellers are a small but distinct ethnic and cultural minority and include Scottish Gypsies/Travellers, Irish Travellers, and European Roma. Other groups include New Age Travellers, who choose to live an alternative travelling lifestyle for ideological reasons and Travelling Showpeople and Circus families who are occupational travellers.

6.9.2 The Scottish Government's key data source is 'Gypsies/Travellers in Scotland: The Twice Yearly Count'. The most recent results published were the summer count (July 2008) and the winter count (January 2009). These findings were supplemented by the research, 'Accommodation Needs of Gypsy Travellers in West Central Scotland' (Craigforth, 2007) (jointly commissioned by seven of the constituent local authorities), and North Lanarkshire Council's own study (2010). The local authorities also provided updated information.

6.9.3 The 'Count' is based on an estimate of households living on official Council/RSL sites, private sites and unauthorised encampments. It does not include Gypsy/Traveller households living in 'bricks and mortar' homes. At July 2007 (the highest recent Count), 848 households were recorded on official Council and RSL sites, private sites and unauthorised encampments across Scotland. When an average household size of 3.4 is applied, the (mobile) population in Scotland may be estimated to be about 2,883 (at July 2007 Count).

6.9.4 Owners of private sites are under no obligation to participate in the Count, and owners of holiday/touring sites may be reluctant to disclose that they accept Gypsies/Travellers.

6.9.5 Figures 6.9.1 and 6.9.2 highlight that three of the GCV authorities have public site provision. These are in East Dunbartonshire, South Lanarkshire and West Dunbartonshire. The only private site provision in the GCV area is in South Lanarkshire. There are no authorised short-stay sites or 'stopping places' in the GCV area.

6.9.6 Using the 8 year mean, 60% of Gypsy/Traveller households in the GCV area live in South Lanarkshire, 15% in West Dunbartonshire and 12% in North Lanarkshire. There were no recorded unauthorised encampments in East Dunbartonshire and East Renfrewshire, and limited occurrences in Glasgow, Inverclyde South Lanarkshire and West Dunbartonshire. Most encampments were in North Lanarkshire and Renfrewshire. The majority of Gypsy/Traveller households (82%) live on public or private sites.

**Figure 6.9.1: Gypsy/Traveller Households by Local Authority and Type of Site (2008 - 2009)**

| | Summer (July 2008) | | | | Winter (January 2009) | | | |
|---|---|---|---|---|---|---|---|---|
| | LA/RSL | Private | Unauth Encamp | Total | LA/RSL | Private | Unauth Encamp | Total |
| ED | 5 | 0 | 0 | 5 | 5 | 0 | 0 | 5 |
| ER | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| GC | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| IC | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| NL | 0 | 0 | 38 | 38 | 0 | 0 | 0 | 0 |
| RC | 0 | 0 | 7 | 7 | 0 | 0 | 6 | 6 |
| SL | 30 | 69 | 0 | 99 | 28 | 26 | 0 | 54 |
| WD | 23 | 0 | 0 | 23 | 21 | 0 | 0 | 21 |
| GCV | | | | | | | | |
| Total | 58 | 69 | 45 | 172 | 54 | 26 | 6 | 86 |
| % | 34% | 40% | 26% | 100% | 63% | 30% | 7% | 100% |
| Popn | 197 | 235 | 153 | 585 | 184 | 88 | 20 | 292 |
| Scot H/H | 42% | 22% | 36% | 100% | 56% | 22% | 22% | 100% |

*Source:* 'Gypsies/Travellers in Scotland – The Twice Yearly Count': Nos. 14 and 15
Note: Population estimate: multiply households by assumed average household size of 3.4 persons

**Figure 6.9.2: Gypsy/Traveller households by Local Authority and Type of Site: 5 Year and 8 Year Mean**

| | 5 Year Mean (2004 – 2008) | | | | 8 Year mean (2001 – 2008) | | | |
|---|---|---|---|---|---|---|---|---|
| | LA/RSL | Private | Unauth Encamp | Total | LA/RSL | Private | Unauth Encamp | Total |
| ED | 5 | 0 | 0 | 5 | 4 | 0 | 0 | 4 |
| ER | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| GC | 1 | 0 | 0 | 1 | 2 | 0 | 2 | 4 |
| IC | 0 | 0 | 2 | 2 | 0 | 0 | 3 | 3 |
| NL | 1 | 0 | 13 | 14 | 2 | 6 | 8 | 16 |
| RC | 0 | 0 | 11 | 11 | 0 | 0 | 8 | 8 |
| SL | 25 | 58 | 3 | 86 | 24 | 55 | 2 | 81 |
| WD | 19 | 0 | 1 | 20 | 18 | 0 | 2 | 20 |
| GCV | | | | | | | | |
| Total | 51 | 58 | 30 | 139 | 50 | 61 | 25 | 136 |
| % | 37% | 42% | 22% | 100% | 37% | 45% | 18% | 100% |
| Popn | 173 | 197 | 102 | 472 | 170 | 207 | 85 | 462 |
| Scot H/H | 39% | 20% | 41% | 100% | 42% | 22% | 37% | 100% |

*Source:* 'Gypsies/Travellers in Scotland – The Twice Yearly Count':No.14, July 2008 (Table 10)
Notes: Figures quoted in the Twice Yearly Count for private site provision in ERC were counted erroneously, as these relate to a site for travelling showpeople in Barrhead (Craigforth, 2007, page 122). For accuracy the figure has been adjusted here to zero. Percentages rounded to nearest integer.
Population estimate: multiply households by assumed average household size of 3.4 persons

6.9.7 Figure 6.9.3 indicates that Gypsies/Travellers travel more in the summer than in winter. The extent of travelling, however, can vary significantly from year to year.

**Figure 6.9.3: Gypsy/Traveller Households on Encampments at Time of Count**

| | No. of locations known to be used as encampments* | Summer | | | | Winter | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | **2005** | **2006** | **2007** | **2008** | **2005** | **2006** | **2007** | **2008** | **2009** |
| **ED** | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **ER** | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **GC** | 1 | 0 | 0 | 2 | 0 | 0 | 0 | 0 | 0 | 0 |
| **IC** | 5 | 0 | 5 | 3 | 0 | 0 | 3 | 0 | 0 | 0 |
| **NL** | 6 | 3 | 5 | 17 | 38 | 5 | 5 | 19 | 0 | 0 |
| **RC** | 12 | 4 | 22 | 6 | 7 | 0 | 0 | 0 | 0 | 6 |
| **SL** | 2 | 6 | 7 | 0 | 0 | 5 | 2 | 2 | 0 | 0 |
| **WD** | 4 | 0 | 0 | 5 | 0 | 0 | 0 | 0 | 5 | 0 |
| **GCV** | **30** | **13** | **39** | **33** | **45** | **10** | **10** | **21** | **5** | **6** |

*Source:* 'Gypsies/Travellers in Scotland – The Twice Yearly Count' Nos.14 and 15
Note: Where discrepancies occur in figures between Counts 14 and 15, the higher figure has been used.

**Council/ RSL Site Provision**

6.9.8 All the Council sites in the GCV area offer year-round accommodation. Tenancies of year-round sites are unrestricted in length and tenants are permitted leave of absence, generally of up to 12 weeks per year (for work, travelling, visiting relatives or holidaying), while retaining their tenancy.

6.9.9 There are five Gypsy/Traveller sites in the GCV area, offering 63 pitches, provided by three local authorities (Figure 6.9.4). There is no site provision in East Renfrewshire, Glasgow, Inverclyde, North Lanarkshire and Renfrewshire. At 2009, the site at East Dunbartonshire was only one third occupied. However, this site has recently become unoccupied and was extensively fire damaged in December 2010.

6.9.10 The sites in both South Lanarkshire and West Dunbartonshire are popular and settled, with many households living on the site for eight years or more. Both authorities have a waiting list for their sites.

**Figure 6.9.4: Council Site Provision for Gypsies/Travellers, 2009**

| | Pitches | | | Tenancy Profile | | | Tenancy Change | Waiting List | Turned Away |
|---|---|---|---|---|---|---|---|---|---|
| | **Total Pitches** | **Avail. To Let** | **Let** | **< 1 year** | **1 – 5 Years** | **5 years and over** | | | |
| **ED** | 15 | 15 | 5 | 1 | 3 | 1 | 2 | 0 | 0 |
| **SL** | 28 | 27 | 26 | 2 | 13 | 11 | 0 | 20 | 3 |
| **WD** | 20 | 20 | 20 | 4 | 3 | 13 | 1 | 6 | 1 |
| **GCV** | **63** | **62** | **51** | **7** | **19** | **25** | **3** | **26** | **4** |

*Source:* 'The Twice Yearly Count' No.15, (amended to reflect that sites in Glasgow and North Lanarkshire are closed)

### Private Sites

6.9.11 Year round and seasonal private sites are often established by Gypsies/ Travellers themselves to cater for specific or extended families. This tends to mean they accommodate groups of people from largely the same ethnicity.[29]

6.9.12 At the 2009 Count there were five 'official' private sites in the GCV area, all in South Lanarkshire, providing 71 pitches. The Count categorises one of the sites as all-year-round, designed to operate both for holidaymakers and for Gypsies/Travellers. Craigforth (2007) indicated that this site was also used as a short stay 'stopping place'. South Lanarkshire Council has subsequently granted planning consent for two additional private sites, with a total capacity of 8 pitches. North Lanarkshire Council has recently granted planning consent for one private site for 9 pitches.

6.9.13 Craigforth (2007) highlighted the extent to which households are becoming more settled on sites. Only 40% of people interviewed travelled for significant periods of time (over 4 weeks per year), with 30% travelling for 2 to 4 weeks, usually on holiday and/or to visit family. Around 30% do not travel at all, mainly for health reasons or due to disability. This shift in lifestyle may allow better access to education, health services and employment opportunities and this trend is expected to continue but may not suit some Gypsies/ Travellers in the long term. It is important to continue to provide appropriate and suitably located sites so that people can exercise more choice about where to live.

6.9.14 In their 2007 study, Craigforth developed an accommodation needs model to assess future pitch requirements. The model was also informed by data from the Twice Yearly Count and interviews with a sample of Gypsy/Traveller households. An allowance was made for future household formation of 35 households over 5 years. Craigforth concluded there was a shortfall of approximately 53 pitches across the study area which included Argyll and Bute and the three Ayrshire Councils but excluded North Lanarkshire.

6.9.15 Using the same modelling approach (Figure 6.9.5) with data for the eight GCV authorities, a revised assessment identifies a shortfall of 31 pitches.

[29] 'Gypsies/Travellers in Scotland – The Twice Yearly Count' No.15: January 2009.

**Figure 6.9.5 Estimate of Need for Year Round Pitch Provision in GCV Area, 2010 – 2015: Need and Supply Comparison**

| **Need** | |
|---|---|
| Seeking pitch – current Waiting List (26 Council; assume 0 private) | 26 |
| Wanting to move from house to pitch (use Craigforth figure as default) | 7 |
| On encampments but wanting official site living (use Craigforth figure as default) | 9 |
| Future household formation over next 5 years (pro rata from Craigforth figure) | 25 |
| **TOTAL** | **67** |
| **Supply** | |
| Total pitch provision (63 Council and 71 private) | 134 |
| Baseline position – pitch occupancy (8 year mean for Council (50) and private (61)) | - 111 |
| = Pitch provision which is unoccupied and available for use | = 23 |
| Wanting to move from sites to housing (assume 25% of Council site-based population) | +13 |
| **Total** | **36** |
| **Shortfall/Need for new pitches** | **31** |

*Source:* Model and some data extracted from Craigforth (2007) and from previous tables.
Notes:
1. The 8 year mean occupancy figures for Council and private sites have been used to average out anomalies
2. In the absence of alternative evidence, the Craigforth figures for households 'wanting to move from a house to a pitch' and households 'on encampments but wanting official site living' have been used as a default. The five year average 2005-2009 of households on encampments in the GCV area at the Winter Count is 10.4 households, so the default of 9 is equivalent to assuming 87% of encampment households want official site living
3. The estimate of 'future household formation' has been derived as a proportion of the 111 occupied pitches – pro rata the Craigforth figure of 35 new households from 153 occupied pitches
4. The assumption that 25% of households living on Council sites expressed an interest in moving to a house has been applied to the Council 8 year mean occupancy figure of 50; this assumes no households on private sites wish to move to a house
5. No allowance has been made for pitch turnover
6. No allowance has been made for the recently approved private sites in North and South Lanarkshire (17 pitches).

### Housed Gypsies/Travellers

6.9.16 In the recent review of the Twice Yearly Counts in Scotland, Craigforth (2010) discussed housed travellers who are not included in the current Count arrangements. From stakeholder consultation and Gypsy/Traveller interviews, it concluded that in some areas permanent housing may account for more than half of the Gypsy/Traveller population. The Review identified Glasgow and North and South Lanarkshire as areas where there may be a significant housed Gypsy/Traveller population.

6.9.17 Craigforth (2007) also found that the majority of housed Gypsies/Travellers were in owner occupied housing, with a known major concentration in and around a specific area in South Lanarkshire. The study noted that one in four of those interviewed living on sites/ encampments expressed an interest in moving to bricks and mortar housing.

6.9.18 As a result of the recent enlargement of the EU by accession of a number of Eastern European states, a Roma community has grown up, mostly located in Glasgow City.

## 6.10 Travelling Showpeople

6.10.1 Travelling showpeople are self-employed people who travel the country, often within extended family groups. The community has a strong and distinctive culture, traditions and identity.

6.10.2 They need a permanent base or depot (traditionally known as a 'yard') where they can store, maintain and repair their equipment and store their caravans and other vehicles, when they are not travelling. This is traditionally known as 'winter quarters' as historically it was only through the winter months that a permanent base was required.

6.10.3 Traditionally showpeople travelled between March and October and then returned to their winter quarters in October. These are usually temporary sites. Significant changes, however, have occurred in this traditional travelling pattern and the community has generally become more settled in more permanent bases. This is because of a reduction in the number of traditional fairs which have resulted in changes to their business practice.

6.10.4 Travelling showpeople now live mainly in permanently sited chalets or static mobile homes which provide higher standards of accommodation and amenities than caravans. Whereas traditional winter quarters were simply for a caravan there is now a need for more space to accommodate their home, vehicles and equipment. Space for storage is also required, including when equipment has to be parked while in transit between major events.

6.10.5 Although showpeople may aspire to own their own yard they are usually only granted 'temporary' planning consent. This is partly because many sites are identified for future regeneration and because chalets are not considered to be permanent structures.

6.10.6 Overall the number of sites for travelling showpeople across Scotland has decreased mainly as a result of redevelopment. Consequently, some existing sites have become overcrowded.

6.10.7 Four of the eight GCV authorities have sites for travelling showpeople, over 90% of which are located in Glasgow. Seventy nine (10%) of the pitches are traditional winter quarters. Site densities can vary from 9 pitches per hectare to over 100 pitches per hectare. This is summarised in Figure 6.10.1.

**Figure 6.10.1: Provision for Travelling Showpeople, 2010**

| | No. of Sites | No. of Pitches | Area (ha) | Average Density |
|---|---|---|---|---|
| **ER** | 1 | 25 | Unknown | Unknown |
| **GC** | 50 | 713 | 19.78 ha* | 36/ha |
| **NL** | 1 | 12 | 0.75 ha | 16/ha |
| **SL** | 2 | 62 | 2.5 ha | 25/ha |
| **GCV** | **54** | **812** | **-** | **-** |

*Source:* Local authority data, 2010. *No area given for 2 sites in Glasgow, accommodating 20 pitches. Excluding these sites would result in average density for Glasgow City of 35/ha

6.10.8 Many of the sites are located on vacant and derelict land which is not suitable for residential accommodation. There is a significant variation in the standard of facilities and amenities provided across the sites. A number of established sites may have to be relocated because of major regeneration projects in Glasgow and South

Lanarkshire, including, the M74 extension, facilities for the 2014 Commonwealth Games and various Clyde Gateway projects.

6.10.9 During consultation, the Showmen's Guild advised that the current numbers of travelling showpeople and their families is expected to increase slightly. While there is no strategic requirement for additional future accommodation provision for travelling showpeople, each local authority will consider any local needs within the LDP and LHS.

6.10.10 The HMP did not identify any circus businesses in the GCV area and, therefore, there is no need to make provision for this specific group of showpeople.

**6.11 Students**

6.11.1 The GCV area is served by a wide range of further and higher education institutions, mainly concentrated within Glasgow City. The sector has enjoyed substantial growth as Scottish Government policy has sought both to increase participation rates, underpinning the knowledge economy, and to attract growing numbers of EU and other overseas students. The six higher education level institutions[30] alone had a combined total of 84,585 undergraduate and postgraduate students in 2009-10, of whom 59,835 were studying full time[31]. To this may be added some 51,233 full time equivalent students[32] at FE colleges throughout the GCV area.

6.11.2 Many new undergraduate students secure accommodation in a hall of residence, whilst returning students may choose to share privately rented accommodation, creating a strong market segment, particularly in parts of Glasgow City. For example, the student accommodation service at Glasgow University estimates that 16% live in University owned or managed accommodation, 27% live in the parental home, and 56% live in privately rented accommodation or own their own home.

6.11.3 The private rented sector has traditionally offered choice and a flexible response to demand. Changes in legislation, including the mandatory licensing of Houses in Multiple Occupancy (HMO[33]) by local authorities and compulsory Landlord Registration[34] have improved standards in the private rented sector and given tenants improved safeguards. More recently, in response to demand for convenient, affordable and safe accommodation, specialist student housing companies have entered the market and have absorbed some of the growth in student numbers.

6.11.4 Figure 6.11.1 details student residences (purpose designed and converted) in the GCV area by local authority, based on 2008 data provided by GROS. Glasgow City accounts for 90% of this provision, concentrated across the city's west end and the city centre/ inner east end, serving the city's three universities and specialist higher education institutions. Specialist private companies provide around 25% of the city's student residences. Provision is also located in Inverclyde, Renfrewshire, North Lanarkshire and South Lanarkshire to serve the local university and further education campuses.

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[30] Glasgow Caledonian University, Glasgow School of Art, University of Glasgow, Royal Scottish Academy of Music and Drama, University of Strathclyde and University of the West of Scotland.
[31] Higher Education Statistics Agency, 'All students by HE institution, level of study, mode of study, 2009-10'.
[32] Scottish Funding Council, 'Analysis of FE awards, 2009-10.
[33] Civic Government (Scotland) Act 1982 (Licensing of Houses in Multiple Occupation) Order 2000, as amended
[34] Under Part 8 of the Antisocial Behaviour etc. (Scotland) Act 2004 (an HMO is defined as a house or flat where three or more people, not part of the same family, live as their only or main home and share cooking, washing or toilet facilities)

**Figure 6.11.1: Student Residences by Authority area, 2009**

| Authority/ Provider | No. Residences | No. Student places |
|---|---|---|
| ***GLASGOW CITY*** | | |
| University of Glasgow | 9 | 3,455 |
| University of Strathclyde | 7 | 1,971 |
| Glasgow Caledonian University | 1 | 660 |
| Glasgow School of Art | 1 | 116 |
| Langside College | 1 | 35 |
| Glasgow College of Nautical Studies | 2 | 383 |
| Private providers | 7 | 2,192 |
| ***INVERCLYDE*** | | |
| James Watt College | 2 | 164 |
| ***NORTH LANARKSHIRE*** | | |
| Motherwell College | 1 | 47 |
| ***RENFREWSHIRE*** | | |
| University of the West of Scotland | 3 | 629 |
| ***SOUTH LANARKSHIRE*** | | |
| University of the West of Scotland | 1 | 156 |
| **GCV Total** | **35** | **9,808** |

*Source:* GROS 2008, updated by GCV 2009.

### 6.12 Gender

6.12.1 Independent research commissioned in 2007 (The Scottish Government, 2008e) provides a review of statistics on gender differences and inequalities in Scotland across a range of key areas of social and economic life, including housing:

- a substantial proportion of households are couple households with men and women in such households having access to the same type and quality of housing. However, households where men are the highest income earners are likely to have access to better quality housing than households where women are the highest income earners, with men being more likely to be home owners and less likely to rent from a social landlord
- households headed by women, such as lone parent and lone pensioner households, tend to be more disadvantaged in the quality of their housing
- in general, there is little difference between women and men in their ratings and perceptions of their neighbourhoods, though lone parent households seem to experience greater problems
- the most vulnerable to homelessness are single men, followed by lone parents and single women. For lone parents, a high proportion of the disputes which led to their homelessness involved violence
- the differences between women in higher socio-economic groups and women in lower socio-economic groups is likely to be much greater than the differences between men and women within these groups respectively.

6.12.2 The research also noted both the persistence of gender inequality and the complex and inter-related nature of many aspects – for instance, caring responsibilities may lead to part-time work, reduced income, and restricted access to the housing market.

6.12.3 The HMP Core Group was satisfied that the HNDA took account of key issues: gendered demographic projections, concern for the provision of sufficient affordable housing, assessment of provision for those threatened with or experiencing homelessness, including those who are victims of domestic abuse (predominantly women). Other relevant matters such as the location of new housing provision and design policies for houses and housing estates should be considered through LHSs and LDPs.

## 6.13 Lesbian, Gay, Bisexual and Transgender Households [LGBT]

6.13.1 Communities Scotland (2005a; 2005b; 2005c) found that the majority of people interviewed in their study[35] were content with their current housing circumstances. However, some had experienced harassment in their home or neighbourhood, causing them to move house. Almost half the participants felt they may experience barriers in the future in accessing quality services, particularly residential care, due to age (linked to a lack of respect), financial constraints, gender identity or sexual orientation.

6.13.2 Guidance has been published by The Scottish Housing Regulator with Stonewall Scotland (2009) to assist in understanding issues facing LGBT people and households in Scotland, and the impact of homophobic and transphobic harassment.

6.13.3 The HMP Core Group concluded that sexual orientation and gender identity issues were predominantly equality issues relating to service delivery rather than to provision of particular types of property. Such issues require management solutions rather than bricks and mortar solutions, and should be considered through the LHS process.

## 6.14 Homeless People

6.14.1 Across Scotland, there has been a steady rise in homeless applications in the years to 2005/ 2006[36], with a levelling off or gradual decline since then. The GCV authorities mirror this pattern, with the exception of South Lanarkshire where there has been an increase in homeless applications since 2005/ 2006.

6.14.2 As shown in Figure 6.14.1 there were 21,561 homelessness applications across the GCV area in 2009-10. Of these, 49% were made in Glasgow, followed by South Lanarkshire (14.2%) and North Lanarkshire (13.8%). Of these applications, 74% were assessed as being statutorily homeless or threatened with homelessness.

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[35] The research was conducted in June 2004 and involved discussions with 64 older LGBT people throughout Scotland.

[36] *Operation of the Homeless Persons Legislation in Scotland: 2009-10*. A National Statistics Publication for Scotland

**Figure 6.14.1: Homelessness Assessments, 2009 - 2010**

| | All homeless applications | | Assessed as homeless | | Assessed as homeless and in Priority Need | | Repeat applications | |
|---|---|---|---|---|---|---|---|---|
| | No. | % * | No. | % ** | No. | % *** | No. | % *** |
| **ED** | 666 | 2 | 434 | 65 | 343 | 79 | 6 | 1 |
| **ER** | 353 | 1 | 263 | 75 | 217 | 83 | 18 | 7 |
| **GC** | 10,640 | 4 | 8,077 | 76 | 7,282 | 90 | 456 | 6 |
| **IC** | 576 | 2 | 376 | 65 | 354 | 94 | 40 | 11 |
| **NL** | 2,975 | 2 | 2,264 | 76 | 1,841 | 81 | 124 | 6 |
| **RC** | 1,236 | 2 | 1,008 | 82 | 963 | 96 | 84 | 8 |
| **SL** | 3,054 | 2 | 2,398 | 79 | 2,059 | 86 | 155 | 7 |
| **WD** | 2,061 | 5 | 1,236 | 60 | 1,207 | 98 | 84 | 7 |
| **GCV** | **21,561** | **3** | **16,056** | **74** | **14,266** | **89** | **967** | **6** |

*Source:* The Scottish Government, August 2010, Homelessness Statistics: Annual Reference Tables: 2009-10.
Note: Assessment date within the financial year 2009/10. Repeat Applications refers to applications reassessed as homeless within a year of closure of a previous application. Percentages rounded to nearest integer.
* of all households (2008): ** of all homeless applications: *** of all assessed as homeless

6.14.3 Across the GCV area, 62% of all homeless applicants are single people, of which 41% are single males and 21% single females. Single parent households account for 26% of applications, of these almost three quarters (73%) are headed by a single female. The 'other' category comprises couples with or without children (12%). (Figure 6.14.2).

**Figure 6.14.2: Homeless Applications by Household Type, 2009 - 2010**

| | Household Type | | | | | | | | | | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | Single Person | | | | Single Parent | | | | Other | | |
| | Male | | Female | | Male | | Female | | | | |
| | No. | % | No. | % | No. | % | No. | % | No. | % | No. |
| **ED** | 231 | 35 | 160 | 24 | 38 | 6 | 140 | 21 | 97 | 15 | **666** |
| **ER** | 151 | 43 | 75 | 21 | 5 | 1 | 80 | 23 | 42 | 12 | **353** |
| **GC** | 4,932 | 46 | 2,124 | 20 | 421 | 4 | 1,859 | 17 | 1,304 | 13 | **10,640** |
| **IC** | 306 | 53 | 138 | 24 | 9 | 2 | 82 | 14 | 41 | 7 | **576** |
| **NL** | 983 | 33 | 557 | 19 | 369 | 12 | 636 | 21 | 430 | 14 | **2,975** |
| **RC** | 653 | 53 | 286 | 23 | 76 | 6 | 147 | 12 | 74 | 5 | **1,236** |
| **SL** | 937 | 31 | 628 | 21 | 376 | 12 | 666 | 22 | 447 | 15 | **3,054** |
| **WD** | 741 | 36 | 524 | 25 | 208 | 10 | 399 | 19 | 189 | 8 | **2,061** |
| **GCV** | **8,934** | **41** | **4,492** | **21** | **1,502** | **7** | **4,009** | **19** | **2,624** | **12** | **21,561** |

*Source:* The Scottish Government, August 2010, Homelessness Statistics: Annual Reference Tables: 2009-10.
Percentages rounded to nearest integer.

6.14.4 Clearly relationship breakdown of one form or another is mainly responsible for homelessness applications as set out in Figure 6.14.3. By contrast, rent arrears or mortgage default accounted for only 5% of homelessness applications in 2009-10 (average across the GCV area)[37].

[37] The Scottish Government, August 2010, Homelessness Statistics: Annual Reference Tables: 2009-10.

**Figure 6.14.3: Main Reason for Applying for Assistance (%), 2009 – 2010**

| | Asked to leave | Relationship breakdown/ dispute within the household | Termination of tenancy/ mortgage due to arrears; action by landlord; loss of tied accommodation; applicant terminating secure accommodation | Discharge from prison/ hospital/ care/ other institution | Other (incl. emergency, harassment, overcrowding, fleeing non-domestic violence, and all other reasons) |
|---|---|---|---|---|---|
| **ED** | 34 | 33 | 16 | 1 | 16 |
| **ER** | 30 | 20 | 21 | 5 | 24 |
| **GC** | 27 | 19 | 12 | 8 | 35 |
| **IC** | 40 | 21 | 12 | 6 | 23 |
| **NL** | 28 | 28 | 12 | 3 | 28 |
| **RC** | 28 | 34 | 14 | 8 | 16 |
| **SL** | 39 | 26 | 16 | 4 | 17 |
| **WD** | 38 | 27 | 9 | 5 | 20 |
| **GCV** | **33** | **26** | **14** | **5** | **22** |

*Source:* The Scottish Government, August 2010, Homelessness Statistics: Annual Reference Tables: 2009-10.
Percentages rounded to nearest integer.

6.14.5 There may be a small group of former, current and potential rough sleepers who are difficult to reach due to complex multiple needs and challenging behaviour. The number of people sleeping rough is difficult to quantify and is relatively small. Of the 21,561 homelessness applications made in the GCV area in 2009/10, only 0.3% of those applying as homeless had slept rough the night before applying.

6.14.6 Local authorities and other housing providers will come under increasing pressure to meet their statutory obligations under the terms of the 2003 Homelessness Act in terms of the removal of priority need.

6.14.7 As shown in Figure 6.14.4, 12% of all homelessness applications in the GCV area were as a result of domestic abuse. This is slightly higher than the national average of 10%.

**Figure 6.14.4: Households presenting as Homeless as a result of Domestic Abuse, 2009 - 2010**

| | No. of Applications | % of all applications |
|---|---|---|
| **ED** | 105 | 16 |
| **ER** | 29 | 8 |
| **GC** | 791 | 7 |
| **IC** | 61 | 11 |
| **NL** | 370 | 12 |
| **RC** | 166 | 13 |
| **SL** | 357 | 12 |
| **WD** | 339 | 16 |
| **GCV** | **2,218** | **12** |
| **Scotland** | | **10% (average)** |

*Source:* The Scottish Government, 31 August 2010. Homelessness Statistics: Annual Reference Tables: 2009-10. Table 22 (a and b) Main reason for applying for assistance by local authority 2009-10

6.14.8 The majority of households presenting as homeless as a result of domestic abuse are provided with temporary accommodation by local authorities, with Women's Aid organisations providing specialist refuge accommodation.

6.14.9 All eight GCV authorities have some specialist refuge accommodation, as indicated in Figure 6.14.5 (at Q4 2007). Although there is some variation between authorities, across the GCV area, 41% of this was shared accommodation. Based on research into the experiences and preferences of women, children and young people in relation to refuge provision (Fitzpatrick et al, 2003), it has been recommended that traditional shared refuges should be phased out and replaced by cluster refuges containing single occupancy (household) flats, together with communal areas and appropriate support services.

**Figure 6.14.5 ACCOMMODATION PROVIDED TO WOMEN'S AID GROUPS**

| Authority | Accommodation provided (households) (Q4 2007) | | |
|---|---|---|---|
| | ***Shared*** | ***Self Contained*** | ***Total*** |
| East Dunbartonshire | - | 10 | 10 |
| East Renfrewshire | - | 6 | 6 |
| Glasgow City | 23 | 34 | 57 |
| Inverclyde | 8 | - | 8 |
| North Lanarkshire | 24 | 14 | 38 |
| Renfrewshire | - | 19 | 19 |
| South Lanarkshire | 16 | 17 | 33 |
| West Dunbartonshire | 6 | 10 | 16 |
| ***GCV*** | ***77*** | ***110*** | ***187*** |

*Source:* Accommodation Profile, Feb 2008, Scottish Women's Aid

6.14.10 One group, Hemat Gryffe Women's Aid, provides refuge accommodation primarily for minority ethnic women and their children, together with culturally-sensitive support, information and counselling services.

## 6.15 Religion and Belief

6.15.1 For many people their religious faith and beliefs may significantly influence their lives and their sense of identity and community; some may wish to live within easy reach of a place of worship or school, or to live close to others sharing their beliefs. Faith communities and their members may also make a positive contribution to urban regeneration and related work (Farnell, 2003).

6.15.2 Figure 6.15.1 illustrates the pattern of religious belief across the GCV authorities, based on the religion, religious denomination or body that people belonged to at the time of the 2001 Census.

## FIGURE 6.15.1 CURRENT RELIGION OF PEOPLE [%], 2001

| Current Religion | Authority | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | EDC | ERC | GCC | IC | NLC | RC | SLC | WDC |
| **Church of Scotland** | 43.05 | 41.5 | 31.52 | 38.22 | 37.55 | 41.54 | 43.68 | 35.74 |
| **Roman Catholic** | 22.55 | 20.7 | 29.2 | 35.79 | 34.52 | 23.15 | 22.12 | 33.41 |
| **Other Christian** | 5.57 | 5.27 | 4.06 | 5.32 | 4.09 | 4.73 | 4.64 | 4.28 |
| **Buddhist** | 0.08 | 0.14 | 0.21 | 0.07 | 0.06 | 0.08 | 0.07 | 0.05 |
| **Hindu** | 0.5 | 0.23 | 0.21 | 0.06 | 0.06 | 0.07 | 0.07 | 0.03 |
| **Jewish** | 0.04 | 3.5 | 0.19 | 0.01 | 0.02 | 0.02 | 0.06 | 0.02 |
| **Muslim** | 0.71 | 2.15 | 3.08 | 0.18 | 0.6 | 0.36 | 0.37 | 0.23 |
| **Sikh** | 0.78 | 0.47 | 0.41 | 0.1 | 0.06 | 0.17 | 0.06 | 0.07 |
| **Another religion** | 0.34 | 0.37 | 0.66 | 0.3 | 0.23 | 0.34 | 0.29 | 0.22 |
| **None** | 22.04 | 21 | 22.7 | 13.47 | 16.72 | 23.82 | 22.51 | 19.39 |
| **Not answered** | 4.33 | 4.68 | 7.76 | 6.5 | 6.1 | 5.71 | 6.12 | 6.56 |
| **All People** | 108,243 100% | 89,311 100% | 577,869 100% | 84,203 100% | 321,067 100% | 172,867 100% | 302,216 100% | 93,378 100% |

*Source:* Census 2001, Table KS07: Current Religion.

6.15.3 In the main, over two-thirds of the population identify themselves as belonging to one denomination or another of the Christian religion, while around one in five belongs to none. Among the minority religions, there is a relatively high incidence of people of Jewish faith in East Renfrewshire; this represents some 49% of people from Jewish backgrounds in Scotland, the majority of the rest living in Glasgow and Edinburgh. The Muslim and Sikh faith groups are concentrated in Glasgow City and the neighbouring authorities of East Dunbartonshire and East Renfrewshire; some 42% of the Muslim population of Scotland and 36% of the Sikh population live in Glasgow City[38].

6.15.4 The HMP Core Group considered Religion/Belief as essentially an equalities issue relating to service delivery, and requiring management rather than bricks and mortar solutions.

[38] *Analysis of Religion in the 2001 Census: Summary Report* (2005). Edinburgh: Office of the Chief Statistician. Scottish Executive National Statistics Publication.

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# 7

# Key Messages and Conclusions

7.1 Various complex technical analyses have been undertaken as part of the HNDA to derive the Core Outputs required as evidence for development plans and local housing strategies. As far as possible, the approach adopted at each stage has followed the Scottish Government's HNDA Guidance. This final Chapter has two purposes:

- to briefly draw out 'key messages' which arise from the evidence as a whole, particularly relating to any projected changes to established trends and other aspects of the housing system which will have strategic significance for the GCV area; and
- to identify critical results for individual local authorities which will have implications for their LHSs and LDPs.

7.2 The discussion complements Chapter 4 Market Commentary, and the 'Market Analysis' section of the study by consultants Tribal contained in Technical Appendix TA04 *Affordability Study*.

**Key messages for the city-region**

**Demographic change**

7.3 The GCV area experienced steady population decline from at least 1981 up to 2003, when there was a return to growth due to a combination of a reduced natural change population loss and net inmigration. Population growth is projected to continue up to 2025, under both scenarios considered, mainly due to natural change. Some uncertainty remains in the level of migration, which will be influenced by the prevailing economic circumstances of the city region.

7.4 Annual household growth is projected to be significantly higher than in recent years. Again there are uncertainties relating to (1) a possible slowdown in household formation rates and (2) lower migration, largely as a result of slower than anticipated economic growth.

7.5 A considerable increase is projected in the number of older people households as a result of an ageing population. This will have implications for all tenures, though the projections suggest it may be more of an issue for some authorities than for others. By contrast, almost no change is projected in the number of young adult households.

**Equalities issues**

7.6 The HNDA assessed in Chapter 6 the requirements of a wide range of household groups with specific housing requirements. While the 2012 homelessness target is perhaps the most urgent priority, a major focus will be on the housing and support needs of increasing numbers of older people households. It is also important, however, that the particular requirements of a range of other household groups are not overlooked; for example, there is a shortfall across the GCV area in the number of houses currently designed or adapted for wheelchair use. There is also a requirement for more good quality affordable housing of suitable size for larger minority ethnic households in areas where they feel safe from harassment and have community support.

7.7 Appropriate adaptations to existing mainstream housing, coupled with assistive technology and support services, will allow many people with a range of disabilities to remain in their own home or local community with dignity and independence.

**Tenure**

7.8 The overall trend projection, in terms of tenure share, for the period 2008- 25, is for a stabilising tenure pattern: a slowing rate of growth in the private sector, and a levelling off in decline in the social rented sector.

**Housing Requirements**

7.9 The projections 2008-25 indicate continued growth in the private sector, requiring some 102,500 new houses to be built to meet demand – around 6,000 completions per year. This would include properties for both owner occupation and private rental.

7.10 The HNDA assessment incorporates private rented within the private sector, though further detail is provided in the affordability study by Tribal/Optimal Economics. This suggests a requirement of about 15,000 private rented houses over the period 2008-25. However, there is considerable uncertainty relating to the private rented sector, which could grow more rapidly if, for example, there is a slowing in the rate at which households move into owner occupation due to difficulty in accessing mortgage finance.

7.11 With regard to the social rented sector, the assessment indicates a stabilisation after many years of decline in the sector. The Housing Needs Assessment suggests a maximum shortfall to 2025 of 85,000 across the GCV area, though caution should be exercised in translating this into a figure for new build housing[39]. The projections for the social rented sector surprised some authorities, suggesting significant changes in pattern and even reversal of previous trends, with implications for the appropriate policy response. In these instances, additional detailed information at the local level will be required to provide further insight and understanding of the dynamics of the sector.

7.12 The HNDA analysis identified potential for an ‘intermediate’ sector (shared equity/shared ownership)[40], but recognised that this would be dependent on various factors, including demand and confidence in a new market sector, access to mortgage finance, and subsidised supply. If all these criteria could be met, the model suggests that the sector could contribute a maximum of 22,000 towards affordable requirements, reducing social rented needs accordingly. However, intermediate housing may be thought of as a hybrid tenure, and various products may be attractive to those in private rented accommodation as well as first time buyers. Currently the intermediate sector comprises only a very small component of the GCV housing system; its contribution to overall future requirements may remain relatively modest at least in the short to medium term.

[39] *Wagging the Dog: Assessing Housing Need*, 2011, Newhaven Research for the Chartered Institute of Housing.

[40] The HNDA defined ‘intermediate housing’ as subsidised Low Cost Home Ownership, while recognising that there are other intermediate products available.

**Stock**

7.13 An estimated 10,000 dwellings in the GCV area (6,500 of which are in Glasgow City) continue to fail the Tolerable Standard. Although representing only a small proportion of the stock, their improvement must remain a priority.

7.14 At 2008, similar proportions of stock in the private and social sectors failed the SHQS, although stock in the social sector outperformed the private sector in terms of energy efficiency. It is estimated that the majority of social housing stock will comply with the mandatory 2015 SHQS target; increasingly the challenge will be to improve the quality of the private sector housing stock, where the SHQS is only aspirational.

7.15 An ageing population and an increase in older people households may have an impact on the housing market, as older people look for particular types of properties suitable to their changing needs; for some, however, these needs may be met by adaptation of existing homes and development of assistive technology.

**Geographical variation**

7.16 The HNDA analysis frequently draws attention to the variation which exists between LAs, and within sub areas, for instance, in relation to tenure, house type, and deprivation; there is also variation in terms of the mismatch between suitable supply and demand to meet differing needs including those of Minority Ethnic households, older people and people with disabilities. In preparing policies in development plans and LHSs, it will be important for authorities to recognise this geographical variation, try to understand why it occurs, and tailor priorities accordingly.

7.17 Particularly noticeable is the position of Glasgow City in the GCV housing system, in relation to a number of issues, not least due to its sheer size and its unique role in the local economy.

**Delivery challenge**

7.18 The focus of the HNDA is on assessing the need and demand for housing, and identifying any arising shortfall or surplus by tenure. However, there are a number of challenges, as a result of the economic downturn, which have a significant impact on supply. These include constraints on availability of mortgage credit, reappraisal of development risk and development viability, reductions in public spending, and difficulties in funding infrastructure.

7.19 In turn, the reduction in house completions (new supply) may constrain rates of household formation, and impact on migration and economic activity.

7.20 A range of innovative financial models and new ways of working, including partnership structures and joint ventures, may be required for both the private and social sectors to respond to these delivery challenges.

**Recession and recovery**

7.21 The depth and duration of the recent recession has had a significant impact on the housing system, severely reducing new supply and developer capacity, affecting household demand and need, and constraining market activity. The rate of recovery is proving to be slow and protracted.

7.22 The UK government has responded with a variety of measures including significant cuts in public spending, tax increases, changes to financial regulation, and welfare reform. These are likely to impact on employment, disposable income, consumer confidence, mortgage credit, funding for social housing, and (indirectly) may affect household formation, demand and need. Although housing is a devolved responsibility, fiscal constraint has fed through into reduced funding for the Scottish Government and, in turn, for local government.

7.23 The response by the Scottish Government, in respect of housing policy, includes the effective replacement of the Affordable Housing Investment Programme and the introduction of challenge funding, curtailing the Right-to-Buy through legislation, promoting the National Housing Trust initiative, and encouraging local authorities to resume new-build Council housing.

**Implications for the local authorities in the GCV area**

7.24 In this section, the eight GCV authorities identify the results of the HNDA analyses which will have the most significant implications for their particular area.

**East Dunbartonshire**

7.25 East Dunbartonshire's housing system is dominated by owner occupation and characterised by high value housing stimulated by the quality of the local environment, the affluence of households who migrate into the area, and the profile of housing product on offer.

7.26 Within the local authority area there is limited supply of affordable housing while there is high need for such housing. East Dunbartonshire is recognised as having one of the most acute affordable housing shortfalls in Scotland.

7.27 Population patterns highlight that the overall population of East Dunbartonshire has decreased, due to out migration. This is particularly prevalent in young people (aged 15-29). However there has been a gain in the number of families migrating to East Dunbartonshire.

7.28 The HNDA projects a significant shortfall of social rented housing in East Dunbartonshire under all scenarios, until 2025. This shortfall comes from:

- high level of gross backlog need
- high house prices ensuring that many households are unable to afford market housing
- limited land supply for affordable housing development
- increased pressure to meet the 2012 homelessness target.

7.29 Although owner occupation is by far the most dominant sector, there are limited prospects for more growth in the sector – partly because in-migration is limited by housing supply.

7.30 There does, however, appear to be a very strong potential for Low Cost Home Ownership in the area with 33% to 50% of households in need of social housing identified as potentially able to afford LCHO.

**East Renfrewshire**

7.31 Population and household growth within East Renfrewshire are projected to be relatively modest over the planning period to 2025. From 2008-16 the area will see a rise in the working age population, some of which can be attributed to the rise in pensionable age. The profile of households in East Renfrewshire, in keeping with the rest of the GCV area (except Glasgow), will be characterised by an increasing ageing population, of pre-retirement and elderly households. This has significant implications for the Council and partners, given the particular housing and related support needs which will have to be met over time.

7.32 The affordable housing requirements identified reinforce East Renfrewshire as an area of ongoing significant pressure for affordable housing. A shortfall of affordable housing is projected for East Renfrewshire at 2016, 2020 and 2025 under both affordability assumptions for the planning scenario. Requirements to meet the 2012 homelessness targets and the impact of forthcoming welfare reforms will increase existing pressure to deliver housing of the right size and type which is affordable to local households.

7.33 Known differences between the distinct sub areas of Eastwood and Levern Valley continue to be highlighted. Eastwood is an affluent area, with a significant shortfall of affordable housing particularly for social rent; Levern Valley is much less affluent, with a much higher proportion of the population on low income or benefits. The majority of affordable housing stock is located here, but there remains an identified need for affordable housing to meet particular needs and the requirements of smaller households. Given the profiles of these areas, the potential for households to meet their requirement for affordable housing through the intermediate market, for example LCHO, is in reality expected to differ between the two areas to a greater extent than projected within the HNDA.

7.34 A significant issue in meeting projected affordable housing need is the small social rented sector, where stock has increased over the last few years but not at a rate sufficient to meet identified needs. Significant steps have been taken locally to address this issue: the introduction of Supplementary Planning Guidance (SPG) on Affordable Housing (25% contribution), SPG on Unallocated Housing Proposals and proactive work with developers and RSLs to secure delivery of affordable units. This work will continue, exploring new and innovative solutions for delivery, and identifying policy options for optimising use of current supply. However, significant challenges remain for the future in terms of land supply, the economy and funding constraints, and in turn the ability of the Council and partners to deliver sufficient affordable housing supply to meet the needs identified by the HNDA.

7.35 The HNDA concludes, under the more optimistic growth scenario, that there is sufficient supply of land identified across the GCV area to meet current and future demand within the private sector.

7.36 The continuing challenges within East Renfrewshire will be to seek to improve delivery of existing sites identified for housing but which are not being developed, and to continue to address housing needs, particularly the scale of affordable housing needs. An integrated approach with the development industry will be vital in achieving the Council's objective to improve delivery of both market and affordable housing.

### Glasgow City

7.37 The data and information collated for the HNDA about the households and housing in the City help to identify housing needs and issues. The tenure and stock profile of Glasgow significantly differs from the Scottish average with, in 2008, a considerable socially rented sector (38%), a large and important private rented sector (12%), and with only half of the stock being owner occupied. The City's neighbourhoods are diverse in terms of tenure and household composition, with the HNDA results highlighting the areas of pressure on affordable housing supply in the West and South of the City.

7.38 The City's population will experience significant change in the future, which planning for housing need and demand must take into account. Both HNDA projection scenarios show growth in the City's population, with natural change as the main contributor to this growth. Despite this growth, the projections for Glasgow assume that the City will continue to lose children (families) and elderly through outward migration.

7.39 Under both scenarios, Glasgow's working age population is projected to grow, but at a lower annual rate than in 2001-08. Glasgow's population age 75+ is projected to reduce in the first decade (from 39,400 in 2008 to 38,600 in 2018), with a subsequent rise thereafter (to over 41,500 in 2025).

7.40 The HNDA projections show, for Glasgow, a household growth of around 2,400 per year in 2008-25, which is considerably above recent change (1,250 per year in 2001-08). The HNDA report comments that there is uncertainty about these projected changes, due to the recent slowdown in the rate of household formation in Glasgow and the effect of the economic downturn on housing supply.

7.41 Meeting the housing needs and demands of current and future households in the City is reliant on achieving a sustainable mix of good quality houses of different size and types in both the existing and new build housing stock. Glasgow City is going through a process of major regeneration to tackle the significant levels of deprivation and to improve or replace poor quality housing stock in the City, to better meet the demands of the City's population. The renewal of these areas will create attractive, sustainable residential environments which will also make a contribution towards meeting wider aims such as improving health. The development of private housing, and possibly intermediate tenures, will play a major role in contributing to the regeneration of these areas.

7.42 In terms of the private sector land supply, the HNDA indicates that there is no requirement to identify additional land within Glasgow before 2025. In order to meet projected demand, there is a need to deliver around 2,200 new build private sector houses per annum in the 2008-25 period, which is an annual level of output previously achieved in the City. Not only is the scale of the land supply sufficient, but it is also varied, including urban re-development sites and greenfield locations within the Community Growth Areas on the edge of the urban area. The supply will therefore contribute to providing a range and choice of private housing within the City.

7.43 The backlog need element of the HNDA quantifies the very large role that homelessness plays in the affordable housing system in the City, as well as the significant level of support needs of some of Glasgow's households. The HNDA also highlights the distinctive pre-1919 tenemental stock in Glasgow, which brings with it challenges of disrepair, and which contributes to investment requirements in the City.

7.44 The results from the HNDA for the affordable housing sector in Glasgow are considerably different from previous studies undertaken, albeit utilising different methodology. Those studies, namely the Glasgow Social Housing Demand Reviews (GSHDR) carried out in 2004 and 2007, found Glasgow to be in a position of surplus social rented housing. What is clear is that the change in direction of travel from surplus is reasonable, particularly in the current economic climate. However, understanding the scale of that change is more difficult.

7.45 The HNDA Guidance states: -

"Housing markets are dynamic and complex. Because of this, housing need and demand assessments will not provide definitive estimates of housing need, demand and market conditions. However, they can provide valuable insights into how housing markets operate both now and in the future."

(HNDA Guidance p.7)

Whilst the methodology as prescribed by the Government has been followed in a robust and credible manner, the output figure for social rented need for Glasgow gives cause for serious concern in that it suggests a requirement not justifiable when compared against more Glasgow focussed evidence. However, in certain respects this particular outcome is not necessarily unexpected in that:

- it would appear that other HNDAs have also thrown up anomalous high and low outputs
- Glasgow, with by far the largest and most complex housing/population characteristics in Scotland, is obviously more likely to be both less adaptable to generic assumptions, and importantly, more likely to be impacted on by small changes in the assumptions used in strategic modelling
- the inherent complexities/difficulties with the model recommended in the Scottish Government's HNDA Guidance are now well documented and individual authorities/organisations (such as HMPs) are pressing for change in their next iteration – perhaps to a core model with modules added to reflect area circumstances.

7.46 Given the unexpected output for Glasgow in respect of the social rented sector, there is a requirement for further testing against more detailed information at the LHS/LDP level in order to reflect more clearly on the individual complexities of the Glasgow housing market and household characteristics, and taking forward the realities associated with actual funding and deliverability of affordable housing. This approach would also appear to be in line with suggestions currently being made in any case for a more modular approach to the HNDA process.

**Inverclyde**

7.47 In terms of forward planning for housing and the regeneration agenda in Inverclyde, the projected changing structure of households presents just as fundamental an issue as the modest projected increases. Depopulation coupled with limited household growth will result in an increase in the number and proportion of single person households, accounting for just under half of all projected households at 2025. The majority of these households are likely to be older persons, creating provision and service delivery issues for the Council and its partners.

7.48 Projected out migration of the young will be a major contributor to depopulation, although the rate of population decline compared to the recent past (2001-08) under both migration assumptions is projected to slow in terms of natural change and net migration between 2008 -2016 and 2016 -2025. A decline in younger age groups and a lower than average household formation rate would combine to create modest household growth. This will reduce the number of family-sized households and have implications both for the local economy in terms of lower tax contributions, and for a range of services.

7.49 A shortfall is projected in social rented housing in Inverclyde at 2016, 2020 and 2025 under both planning scenarios. This shortfall arises from:

- a high level of gross backlog need (the second highest in the GCV region, with 11% of households)
- new households unable to afford market housing (new households with the propensity to purchase is one of the lowest in the GCV region at 43%, with the remainder of new households entering renting, either social or private depending on private renting affordability)
- social rented stock projected to decrease, primarily due to the ongoing and planned demolition programme.

7.50 Declining affordable supply in terms of stock and lets available play a major part in the projected shortfall of affordable housing in Inverclyde. This finding suggests there are likely to be more households requiring social rented housing at 2016 and beyond, than the Council and its housing partners are currently planning for. However, there is confidence that the scale of need projected can be accommodated within the current settlement boundaries and that no justification can be made for additional urban expansion on a strategic scale. Issues of a more local kind involving access to affordable housing, the means of provision, preferred or required tenure, availability of sites, and issues such as the range and distribution of sites, will be examined in more detail through the Local Housing Strategy and for the LDP Proposed Plan.

7.51 The outlook for the owner occupied market at 2020 and 2025 under both scenarios and affordability assumptions is one of modest or no growth. The lowest rate of household formation in the GCV Region, coupled with a low percentage of new households able to purchase, creates this situation. Out-migrant households from this sector are also higher than in-migrants. Growth is likely to remain weak due to circumstances in the local economy and the area’s underlying social-economic characteristics, including high levels of worklessness. There is a more than sufficient supply in a wide range of localities throughout the urban areas to satisfy private sector requirements.

7.52 Growth in private renting is dependent on the affordability assumption used. It is expected to be fuelled by demand from new households that allocate a larger proportion of their income to paying rent. This growth correlates with a lower number of households in social renting. Uncertainty remains over the role private renting plays in the Inverclyde housing market. What is clear is that the affordability/ unaffordability of this sector correlates strongly with households entering social rented housing. Further work is needed to establish the reasons why households enter the sector and whether private renting is being used as an alternative for those requiring social rented or owner occupied housing, or whether private renting is considered a long term solution for many households.

**North Lanarkshire**

7.53 The projected change in household growth in North Lanarkshire over the period of the plan is significant with an 18% increase from just under 144,000 households to just over 169,000 households. This is equivalent to nearly 1,500 new households every year. In addition, the household structure is projected to continue to change.

7.54 The main components of demographic change in North Lanarkshire are significant growth in the elderly population, single person and lone parent households. All these demographic groups are characterised by lower than average incomes, potentially impacting on the need for more affordable homes across all tenures. Single person households are projected to account for around 42% of all households at 2025. The increase in older persons will place significant pressure on housing and associated health and social care.

7.55 In terms of housing in North Lanarkshire, the biggest challenge is finding the right mix of new housing in relation to housing need and aspiration. This must take into account affordability, property size, type and choice in terms of location. The housing system has to accommodate not only new households but also a wide range of needs and aspirations among current households.

7.56 As well as accommodating demand in the market, the need for social rented housing in North Lanarkshire is evident over the period of the plan. The identified need is now being considered through the Council's emerging new housing strategy with the aim of addressing shortfalls over the period 2011-16. Key issues from the HNDA include:

- a high number of households currently in need (9,041 or just over 6% of all households)
- a total projected annual need to be met for around 3,000 households every year
- social rented stock projected to decrease more slowly when compared to recent years, given the reduction in Right to Buy Sales, although there will be a relatively small number of selective strategic demolitions over the period.

7.57 The outlook for the private sector in the housing market at 2020 and 2025 under both scenarios remains one of significant growth. However, uncertainty remains over the short to medium term, and growth is dependent on wider economic performance and projected household changes. Wider welfare and housing policy impacts may also conspire to stifle growth and accessibility within the private rented sector.

7.58 In North Lanarkshire the HNDA results show a pattern of increasing need for social rented homes over the period up to 2020. However the spatial pattern of this need differs with the greatest pressure in the Cumbernauld Housing Sub-Market Area (HSMA)[41]. Even over the period 2011-16 a shortfall of 977 affordable homes has been identified in this area. The Airdrie and Coatbridge HSMA exhibits more modest net need with the Motherwell HSMA showing a surplus of social rented homes. Both these HSMAs do however have significant regeneration priorities at both a strategic and local level that require investment in new affordable homes.

### Renfrewshire

7.59 Renfrewshire's population is projected to experience further decline by 2025, albeit by a small percentage of between 1% and 3%. This contrasts to the Glasgow and Clyde Valley area as a whole, which is projected to show an increase in population of 1%-4%. Population change due to natural change shows an increase – a reversal of recent trends. However, this increase is outweighed by continuing higher levels of out-migration, leading to an overall population decline. The proportion of Renfrewshire's population who are children and of working age will decline, while the proportion of older people will experience a large increase.

7.60 Despite population decline, the number of households is expected to grow between 4% and 8%. This is a reasonable rate of household growth, but still remains around half the level across GCV area as a whole. The growth in households is driven by an increasing number of single adult households, projected to account for just under half

[41] Includes Cumbernauld, Moodiesburn & Kilsyth

of all households by 2025. The largest growth in households will be those headed by an adult aged 75 and over.

7.61 A growing ageing population, coupled with a decline in the working age population, has significant implications for service provision.

7.62 A shortfall of social rented housing is projected at 2016. The shortfall arises from the total number of those requiring affordable housing exceeding available supply of social rented lets. The number requiring affordable housing is made up of:

- those in current (backlog) housing need unable to meet their needs in the market
- new households unable to afford to buy market housing (only 50% are estimated to be able to afford private market housing) or unable to afford to rent a private sector property
- existing households moving from other sectors into the social rented sector.

7.63 It is assumed that backlog needs are met over a ten-year period i.e. by 2019. Post 2019 a small surplus of affordable housing is predicted, largely due to the effect of removing backlog need.

7.64 The future requirement for housing is also influenced by the ability of existing stock to meet current demand (something not considered in this HNDA but which will be examined through the LHS). Over the past ten years, Renfrewshire has had a demolition and regeneration programme to replace unpopular/poor quality social rented stock with good quality affordable housing. Completion of local regeneration programmes in Renfrewshire remains a challenge.

7.65 The owner occupied sector is expected to grow steadily, by about 9% to 2025 (under the planning, high affordability scenario), rather less than the GCV average of 16% growth.

7.66 The private rented sector in Renfrewshire has experienced significant growth since 2001 and remains relatively affordable compared to surrounding areas. This factor influences the strong growth of this sector which is predicted to 2025.

7.67 Recent market trends indicate a stabilisation of growth in the owner occupied sector, together with growth in the private rented sector. Further work is needed to establish the reasons why households enter the private rented sector, and whether private renting is being used as an alternative for those unable to access owner occupation in the short term, or whether private renting will become a long-term solution for many households.

**South Lanarkshire**

7.68 Under both scenarios, there will be significant increases in population and households in South Lanarkshire up to 2025. There is a pressing challenge regarding the projected increase in older people, aged 75 years or older, in terms of assisting them to sustain occupancy of their current home with housing support and other services. In fact, South Lanarkshire has the highest projected annual change in this demographic group of all the GCV authorities. This is likely to be a particular issue in East Kilbride Housing Market Area (HMA), which has grown as a new town from the 1940s, and which has a peculiar demographic, with a number of people ageing at the same rate. South Lanarkshire has long been associated with high levels of in-migration, both from surrounding local authorities and from further afield due to previous high economic growth and associated house building activity. This is projected to continue, based on the HNDA findings across both the planning and lower migration scenarios used in the analyses.

7.69 The projected demographic change will require a significant provision of new housing across all tenures to meet high levels of both need and demand across South Lanarkshire. The demand for owner occupied housing will be met through the planned Community Growth Areas and through sites already identified in the adopted South Lanarkshire Local Plan. The HNDA also highlights the requirement for consideration of a mix of house sizes and types, in all locations, which are affordable to meet the requirements of a diverse and wide-ranging population.

7.70 In recent years, growth in private rented housing has occurred as a consequence of constraints in accessing owner occupation due to the economic downturn, coupled with an inability to meet needs in the social rented sector arising from the mismatch of supply and need. As a result, homes initially built for owner occupation have been absorbed by the private rented sector, including the buy to let market.

7.71 In terms of affordable housing, the HNDA findings are comparable to the findings of earlier affordable housing needs assessments carried out by Newhaven in 2004 and 2007. The level of current (backlog) need in South Lanarkshire is significantly high across all HMAs. However, as identified in the previous studies, East Kilbride HMA has chronic need, where supply does not meet newly arising need never mind impact on current (backlog) need.

7.72 In Rutherglen and Cambuslang HMA, the main housing stress is related to area regeneration of large local authority housing estates, where the poor quality of housing and neighbourhood is exacerbated by the mismatch of supply and demand regarding property type and size. Hamilton HMA is the largest in South Lanarkshire and also has the highest level of assessed need, although this is not as chronic as in East Kilbride. However, within Hamilton HMA there are affluent areas with housing stock of correspondingly high quality and value, but also areas of multiple deprivation and regeneration requirements.

7.73 In Clydesdale HMA, the need for new affordable housing supply is not as evident as in the other three HMAs. However, given the distinctiveness of Clydesdale as a rural area, there are a variety of housing issues. These range from high pressure areas (in terms of both the demand for private housing and the need for affordable housing), to communities showing signs of stress and oversupply of housing. This is associated with the mismatch of current provision and demand, and also the need for area regeneration and the replacement of obsolete and unpopular housing.

7.74 Despite good progress with the current LHS and Local Plan, including the significant new supply of market and affordable housing over the last five years and the adoption of the Affordable Housing and Housing Choice Policies, there remain challenges from the increase in housing need and demand relating to the current economic situation and other housing and fiscal pressures.

**West Dunbartonshire**

7.75 The HNDA shows the population in West Dunbartonshire declining from 90,940 in 2008 to 89,849 in 2025. Despite this fall in the population, a rise in the number of households is projected for the same period, from 42,699 to 47,245 with much of this increase driven by an increase in single person households.

7.76 With regard solely to physical capacity, there is sufficient land available at both 2020 and 2025 to meet the demand projections for private sector housing. This is the case in both Housing Market Areas: the self-contained Dumbarton and Vale of Leven Housing Market Area, and the Greater Glasgow North and West Housing Market Area, which includes Clydebank. However, with regard to both Housing Market Areas, this depends on development of some difficult sites, for example Queens Quay in Clydebank.

7.77 The position for social rented housing is more complicated, with two different methodologies producing significantly different results. The preferred Housing Needs Assessment methodology, which follows HNDA Guidance, identifies that in addition to already projected changes to social rented stock (for example, as a result of demolitions) and a new build element averaging 120 units per year, there is a shortfall of social rented homes in West Dunbartonshire that would be addressed by the development of an additional 25 houses per year over the next Local Housing Strategy period of 2011-2016. This makes allowance for dealing with identified backlog need, which at 11% of households is higher than the regional average of 9%. The HNDA indicates that any shortfall of affordable housing is concentrated in Clydebank. Addressing this issue needs to be coupled with housing management measures to tackle concerns such as overcrowding and housing not currently meeting specific needs. The alternative ‘all stock/all households’ methodology, shows a significantly higher social rented need across the authority.

7.78 The outcomes of the HNDA show a continued growth in the number of households in the Council area. The comparison of supply and demand in the private sector indicates that there is sufficient land in terms of quantity to meet private sector demand into the foreseeable future, although there is a continuing requirement to assess this land in terms of its effectiveness, quality and contribution to choice. In terms of social rented need, the HNDA indicates a small shortfall over the next Local Housing Strategy period that could also be met by the existing housing land supply.

**Next Steps**

7.79 During the preparation of the HNDA, a number of specific topics were identified by the HMP as requiring further investigation, and a provisional Future Work Programme (Figure 7.1) has been identified. The initial priorities relate to translation of HNDA results into the SDP Proposed Plan, and use of the HNDA evidence in LHSs and LDPs. The HMP has also identified a requirement for further research on the intermediate sector, private rented housing and other aspects of the housing market. This list may be added to as circumstances dictate and as resources permit. The HMP will also review its programme of work in relation to other joint strategic planning processes in housing, such as the GCV Local Housing Strategy Group.

7.80 The results from this programme of work will inform ongoing monitoring, and will feed into preparation of the next HNDA. The GCV Housing Market Partnership will continue to meet quarterly to oversee and progress this work.

**Figure 7.1 GCV Housing Market Partnership – Provisional Future Work Programme**

| Topic/Issue | Description | Indicative Timescale |
|---|---|---|
| SDP Proposed Plan | • Support work to translate outputs of HNDA into policy context of the SDP<br>• Liaison with stakeholders<br>• Review SDP Proposed Plan representations relevant to Housing<br>• Preparation of Schedule 4s for SDP Examination | April 2011<br>July 2011<br>August 2011<br>August – October 2011 |
| Support LAs in preparation of LHSs | • Provision of information<br>• Discussion of Housing Supply Targets | April 2011 – March 2012 |
| Intermediate housing | • Further research relating to demand for intermediate housing | 2012 |
| Housing market analysis | • House prices<br>• Migration flows<br>• Study of private rented sector | 2012<br>2012<br>2012 |
| Gypsies/Travellers | • Cross-boundary issue. Liaison with constituent authorities re HNDA findings | May/June 2011 |
| Understanding the GCV housing system | • Cooperation with Glasgow University on approaches to housing system modelling | From summer 2011 |
| Monitoring and Review | • Economic recovery and housing market impact<br>• Further consideration of cross-boundary movement within social rented sector<br>• Review our detailed understanding of housing stock<br>• Housing Land Audit<br>• Census 2011 results<br>• Implications of national policy changes<br>• New housing delivery models | Ongoing<br>2012<br><br>Annual<br>From 2013<br>Keep under review<br>Keep under review |

## Conclusions

7.81 Preparation of this Housing Need and Demand Assessment has been a challenging and time-consuming process, given both the diversity of circumstances in the eight local authority areas and the complexity of the GCV housing system, including its various geographies. However, it has also been an important learning process for all concerned, as the different insights of housing and planning colleagues have been shared, and collective expertise has been applied to develop the complex modelling involved and interrogate and interpret a wealth of data.

7.82 All such analysis is constrained by the chosen methodology, adherence to Guidance, and quality of available data. In addition, there is an inevitable degree of uncertainty arising from the current volatility in the wider economy as the country recovers from recession, and this has been recognised in the report.

7.83 The GCV HMP has approached the HNDA with a desire to understand the current GCV housing market and to project its likely development to 2025. We are confident it provides a sound evidence base for development plans and local housing strategies. Where appropriate, it may be augmented with more detailed area-specific analysis in LHSs to better understand the local situation. The GCV housing system will be kept under review as circumstances change and new data (for example, from the 2011 Census) becomes available.

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