Glasgow and the Clyde Valley Housing Market Partnership

Housing Need and Demand Assessment
Technical Appendix 02
Current Housing Supply / Stock Profile

Final

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HNDA

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Core Output 1

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CORE OUTPUT 1

Estimates of current dwellings in terms of size, type, condition, tenure, occupancy and location.

- In the GCV area, there are nearly 805,000 households living in approximately 830,000 dwellings, of which 23,000 are vacant.
- Owner occupation is the dominant tenure in all authorities. This is particularly the case in East Dunbartonshire and East Renfrewshire (85%), but less so in Glasgow (50%). The trend over the last decade has been towards owner occupation and away from social rented, with a relatively small private rented sector, although this has increased notably in Glasgow where it now accounts for around 12% of stock.
- In terms of vacancies, the average rate is around 3% but this masks wide variation by area and tenure, ranging from under 1% to over 12%.
- Type and size of accommodation varies, with more houses in East Dunbartonshire, East Renfrewshire and South Lanarkshire, but more flats in Glasgow City.
- Stock age and condition varies by area and tenure. The rate of disrepair, in terms of stock failing the Scottish Housing Quality Standard (SHQS), was similar in 2008 in the private and social sectors (66% and 67% respectively). However, homes in the social sector are generally more energy efficient than those in the private sector. More people in the private sector express satisfaction with their housing compared to those in the social rented sector.
- Over the five year period 2005-06 to 2009-10, there has been a significant net increase in the housing stock, with 37,241 completions, 77% of which were in the private sector. In the same period, over 13,500 dwellings were demolished or otherwise taken out of housing use, mainly as part of regeneration programmes.
- In terms of communal establishments, care homes provide places for 14,755 adults across Glasgow and the Clyde Valley, including older people, and those with physical disabilities, mental health problems and learning disabilities. There are over 10,000 sheltered housing and more than 1,100 extra care units, mainly provided through RSLs. There are nearly 10,000 places for students in halls of residence.

1 Introduction

1.1 This Stock Profile examines the number and type of housing available within the GCV area, and identifies similarities and differences between local authority areas. It considers certain indicators of how the housing stock is being used, assisting the Housing Market Partnership by:

- having a better understanding of the dynamics and operation of the GCV housing system
- providing useful information to assess the overall adequacy of the stock, both in terms of quantity and quality, and
- identifying key issues that need to be considered.

The projection of future need, demand and supply is examined in detail in Technical Appendix TA06 *Review of Supply and Demand/Need for Housing*.

1.2 To ensure consistency, statistics published by the Scottish Government have been used in most instances. Where relevant, reference is made to other parts of the HNDA for a more detailed explanation of specific matters.

A key data source is the Scottish House Condition Survey (SHCS), which examines the physical condition of homes together with the experience of householders. To achieve sample sizes big enough to create robust statistical estimates at the LA level, the combined results of the 2007, 2008 and 2009 surveys have been used in the SHCS 2007-09 Local Authority Analyses (published 2010). However, the sample size may remain an issue, particularly for smaller authorities. The SHCS rounds numbers to the nearest thousand. It tends to underestimate stock compared to GCV estimates.

Reference has also been made to Scottish Neighbourhood Statistics (SNS), at 2009, which appear to provide a closer fit with GCV estimates. Stock totals for each local authority may therefore vary slightly depending on the year, data source, sampling and rounding.

2 The GCV Housing Stock

2.1 A summary of households and stock by local authority is below at Figure 1. The largest areas are Glasgow City, North Lanarkshire and South Lanarkshire, which account for 36%, 18% and 17% of stock respectively. Together these three local authorities account for 71% of the GCV housing stock. The local authorities with the smallest proportion of stock are East Renfrewshire (4%), Inverclyde (5%), East Dunbartonshire (5%) and West Dunbartonshire (5%). Renfrewshire has 10% of the GCV stock.

Figure 1 Households and Stock Summary

Local Authority	*Households*		*Total Stock*	
	No.	*%*	*No.*	*%*
East Dunbartonshire	43,227	*5*	44,034	*5*
East Renfrewshire	35,988	*4*	36,747	*4*
Glasgow City	284,533	*35*	295,950	*36*
Inverclyde	37,156	*5*	39,334	*5*
North Lanarkshire	143,715	*18*	146,463	*18*
Renfrewshire	79,037	*10*	82,267	*10*
South Lanarkshire	138,354	*17*	141,618	*17*
West Dunbartonshire	42,699	*5*	44,114	*5*
GCV TOTAL	**804,709**	*100*	**830,527**	*100*

Source: HNDA Technical Appendix TA06, Table 3.2 for 2008 base date.
Note: Planning Scenario (C). Percentages rounded to nearest integer.

3 Tenure

3.1 Stock is shown by local authority in terms of tenure in Figure 2 below. Owner occupation is the dominant tenure in GCV overall (63%), ranging from East Dunbartonshire (85%), East Renfrewshire (85%) and South Lanarkshire (74%), to lower proportions in Glasgow (50%) and West Dunbartonshire (58%). The social rental sector proportion is highest in Glasgow (38%) and West Dunbartonshire (39%), and lowest in East Dunbartonshire (13%) and East Renfrewshire (11%). Both Glasgow City and Inverclyde have undertaken whole stock transfers to Registered Social Landlords. Glasgow City had the highest proportion of private rented stock at 12%, partly due to the high incidence of students and demand for short term renting within the city; according to Glasgow City, this share increased to 15% in 2010.

Figure 2 Tenure of Stock by Local Authority, 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.

3.2 Between 2001 and 2008 a significant change occurred in the household tenure pattern, as shown in Figure 3. Across the GCV area, the private sector has increased by an average of 7% as a proportion of total households, with a corresponding decline in the social rented sector. While the extent of this shift varies from 3% in East Renfrewshire to 9% in North Lanarkshire, the general pattern of change is the same. Right to Buy sales account for much of the reduction in the social rented sector. In Glasgow City, Inverclyde and Renfrewshire the reduction in the number of households in the social sector is substantially greater than can be explained by Right to Buy (RTB) alone, implying further losses due to other factors. In North Lanarkshire (and to a lesser extent South Lanarkshire and West Dunbartonshire), the reduction in the number of households in the social sector is less than the number of RTB sales, implying a small compensatory increase in households in the social sector, possibly due to additional social housing supply. Note that RTB sales have a neutral effect on the total number of households, simply shifting from the social to private sector. The increase in the number of private sector households is much greater than can be explained by RTB alone, and is accounted for by new private supply to meet demand.

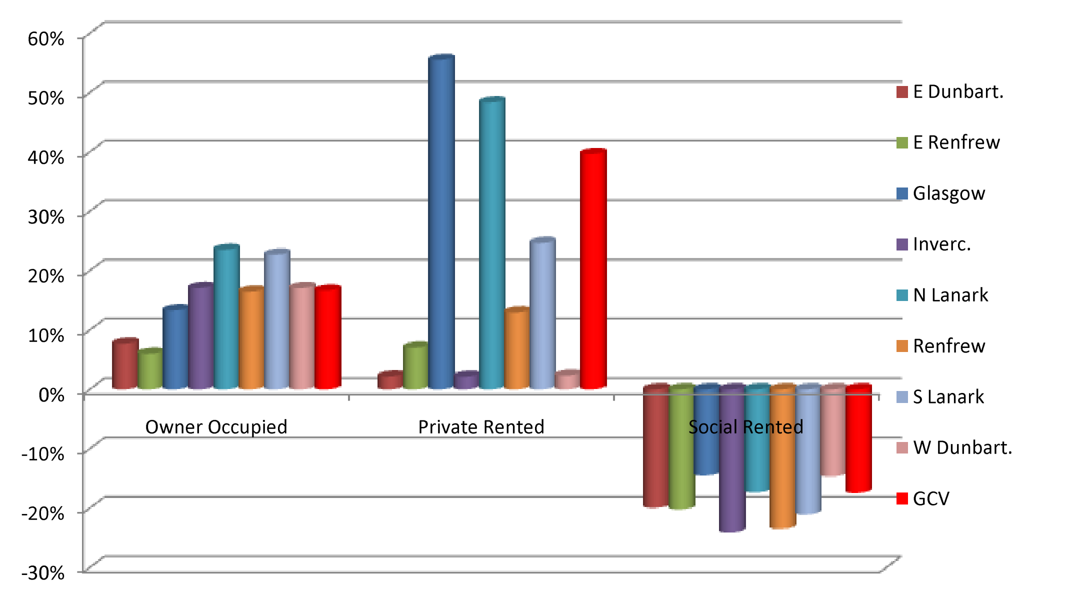
Figure 3 Household Tenure Change: 2001 – 2008

LA		**Household Tenure Change incl. RTB**						**2001-08 RTB Sales**
		All Households		**Social Rented Sector**		**Private Sector**		
		No.	*%*	*No.*	*%*	*No.*	*%*	*No.*
ED	2001	42,415	100	6,723	16	35,692	84	
	2008	43,227	100	5,295	12	37,932	88	
	Change	812		-1,428	-4	2,240	4	1,419
ER	2001	35,236	100	4,857	14	30,379	86	
	2008	35,988	100	4,045	11	31,943	89	
	Change	752		-812	-3	1,564	3	801
GC	2001	275,761	100	122,432	44	153,329	56	
	2008	284,533	100	106,426	37	178,107	63	
	Change	8,772		-16,006	-7	24,778	7	9,227
IC	2001	37,061	100	13,140	35	23,921	65	
	2008	37,156	100	10,050	27	27,106	73	
	Change	95		-3,090	-8	3,185	8	1,760
NL	2001	134,316	100	53,283	40	81,033	60	
	2008	143,715	100	45,269	31	98,446	69	
	Change	9,399		-8,014	-9	17,413	9	8,869
RC	2001	76,807	100	24,925	32	51,882	68	
	2008	79,037	100	19,730	25	59,307	75	
	Change	2,230		-5,195	-7	7,425	7	4,049
SL	2001	127,244	100	37,747	30	89,497	70	
	2008	138,354	100	30,754	22	107,600	78	
	Change	11,110		-6,993	-8	18,103	8	7,304
WD	2001	41,556	100	18,473	44	23,083	56	
	2008	42,699	100	16,377	38	26,322	62	
	Change	1,143		-2,096	-6	3,239	6	2,227
GCV	**2001**	**770,396**	**100**	**281,580**	**37**	**488,816**	**63**	
	2008	**804,709**	**100**	**237,946**	**30**	**566,763**	**70**	
	Change	**34,313**		**-43,634**	**-7**	**77,947**	**7**	**35,656**

Sources: 2001 data from Census. 2008 data from GCV HNDA Technical Appendix TA06 'Review of Supply and Demand/Need for Housing' Table 3.2 – see also Figure 1 above.
Note: % change is given as change in proportion of total households. Percentages rounded to nearest integer.

3.3 Figure 4 provides a graphic illustration of the change in household tenure between 2001 and 2008, using NRS estimates which subdivide the private sector into owner occupied and private rented. The private rented sector has increased significantly in Glasgow City and North Lanarkshire, and to a lesser extent in South Lanarkshire and Renfrewshire.

Figure 4 Household Tenure Change [%], 2001 – 2008



Source: NRS for 2008

3.4 Figure 5 provides information on the number of Houses in Multiple Occupation (HMO) (Licenses in Force) by local authority area at 31 March 2010. This is largely an issue in Glasgow City, with 2,515 HMOs (representing some 7% of the city's private rented stock). This may be explained in part by the city's large student population.

Figure 5 Houses in Multiple Occupation: Licenses in force

Local Authority	HMOs (31 March 2010)
ED	21
ER	18
GC	2,515
IC	71
NL	25
RC	123
SL	17
WD	18
GCV	**2,808**

Source: HMO returns by local authorities to the Scottish Government Communities Analytical Services (Housing Statistics).

4 Vacancy Rates

4.1 Vacancy rates are shown in Figure 6, by local authority and tenure. There is considerable variation by tenure and by local authority, and there may be further variation at more local geographies. Council vacancies range from 1.6% in North Lanarkshire to 9.1% in Renfrewshire.

Figure 6 Vacancy Rates by LA and Tenure, June 2008

LA	Vacancy Rate				
	Tenure				Vacancy Rate (all tenures)
	Council	RSL	Private Rent	Owner Occ.	
ED	1.7%	4.9%	5.0%	1.1%	1.4%
ER	3.0%	0.8%	5.0%	1.5%	1.8%
GC	n.a.	5.8%	5.0%	1.4%	3.6%
IN	n.a.	12.4%	5.0%	1.7%	5.0%
NL	1.6%	1.2%	5.0%	1.5%	1.7%
RE	9.1%	2.0%	5.0%	2.3%	3.6%
SL	2.3%	1.4%	5.0%	1.8%	2.0%
WD	5.5%	3.4%	5.0%	1.4%	2.9%
GCV	**5.5%**	**3.4%**	**5.0%**	**1.6%**	**2.8%**

Source: GCV estimates in Table 3.2, Technical Appendix TA06 *Review of Supply and Demand/ Need for Housing.* 30 June 2008 is taken as the base date for analysis in the HNDA.
Notes: Following transfer, former Council stock in Glasgow City and Inverclyde now managed by RSLs.
HNDA has assumed a 5% vacancy rate across private rented sector.

4.2 RSL vacancies range from 0.8% in East Renfrewshire to 12.4% in Inverclyde, which includes the former Council stock transferred to River Clyde Homes. Similarly the RSL figure of 5.8% in Glasgow City includes former Council stock transferred to Glasgow Housing Association (GHA); the figure for GHA alone is 8.4% compared with the average for other RSLs in the city of 1.9%[1]. The high vacancy rates for some social rented stock can be explained as a consequence of major improvement and regeneration programmes.

4.3 The vacancy rate in the private rented sector is estimated at 5% for all authorities; this has been cross-checked against the SHCS 2007-09. The vacancy rate in the owner occupied sector ranges from 1.1% in East Dunbartonshite to 2.3% in Renfrewshire. The overall average vacancy rate for the whole GCV area is 2.8%.

5 Type and Size

5.1 The variation in distribution of dwelling types across the GCV area is shown in Figure 7. Almost half of the properties in the GCV area are flats (49%). Flats are the main property type in all local authority areas except East Dunbartonshire and East Renfrewshire. Glasgow City (74%), followed by Inverclyde (53%) and West Dunbartonshire (52%), have the highest proportions, while East Dunbartonshire (20%) and East Renfrewshire (25%) have the lowest proportions of flats. Glasgow City has the lowest levels of detached (3%) and semi-detached (11%) properties. East Dunbartonshire has the highest proportion of detached (30%) and semi-detached (34%) properties, followed by East Renfrewshire with 27% and 30% respectively. North Lanarkshire (33%) and South Lanarkshire (31%) have proportionately less flatted dwellings than the GCV average (49%), and greater proportions of terraced dwellings (31% and 29% respectively). Renfrewshire's break-down by property type is the closest to the GCV average.

[1] Estimates in Table 3.2, Technical Appendix TA06 *Review of Supply and Demand/ Need for Housing.*

Figure 7 Dwelling Type, 2009

LA	Total no. of dwellings [100%]	Dwelling Type							
		Flats		Terraced		Semi-detached		Detached	
		No.	*%*	*No.*	*%*	*No.*	*%*	*No.*	*%*
ED	44093	8983	20	6877	16	14854	34	13252	30
ER	36991	9175	25	6407	17	11138	30	10163	27
GC	298972	220300	74	34475	12	32692	11	10100	3
IC	39380	20734	53	7521	19	6775	17	4246	11
NL	147852	49434	33	46176	31	30013	20	22091	15
RC	82859	36689	44	18405	22	15795	19	11703	14
SL	143119	44448	31	40784	29	29180	20	28191	20
WD	44376	23270	52	8917	20	8343	19	3703	8
GCV	**837642**	**413033**	**49**	**169562**	**20**	**148790**	**18**	**103449**	**12**

Source: SNS 2009.
Note: Percentages rounded to nearest integer. The Total No. of Dwellings includes a small number of dwellings in each authority where attachment is unknown, and this will account for the discrepancy between sum of dwelling types and Total. This amounts to 2808 dwellings [0.3%] across the GCV area.

5.2 The relationship of dwelling type to tenure is shown in Figure 8. Across the GCV area as a whole, and across tenures, there are marginally more houses (52%) than flats (48%). There is considerable variation between authorities and between tenures. In terms of the private sector, houses are the predominant dwelling type in all authority areas except Glasgow City; this predominance of private houses is particularly marked in East Dunbartonshire (76%), East Renfrewshire (71%) and South Lanarkshire (62%). In Glasgow City, in the private sector, there are almost twice as many flats (39%) as houses (20%).

Figure 8 Dwelling Type by Tenure

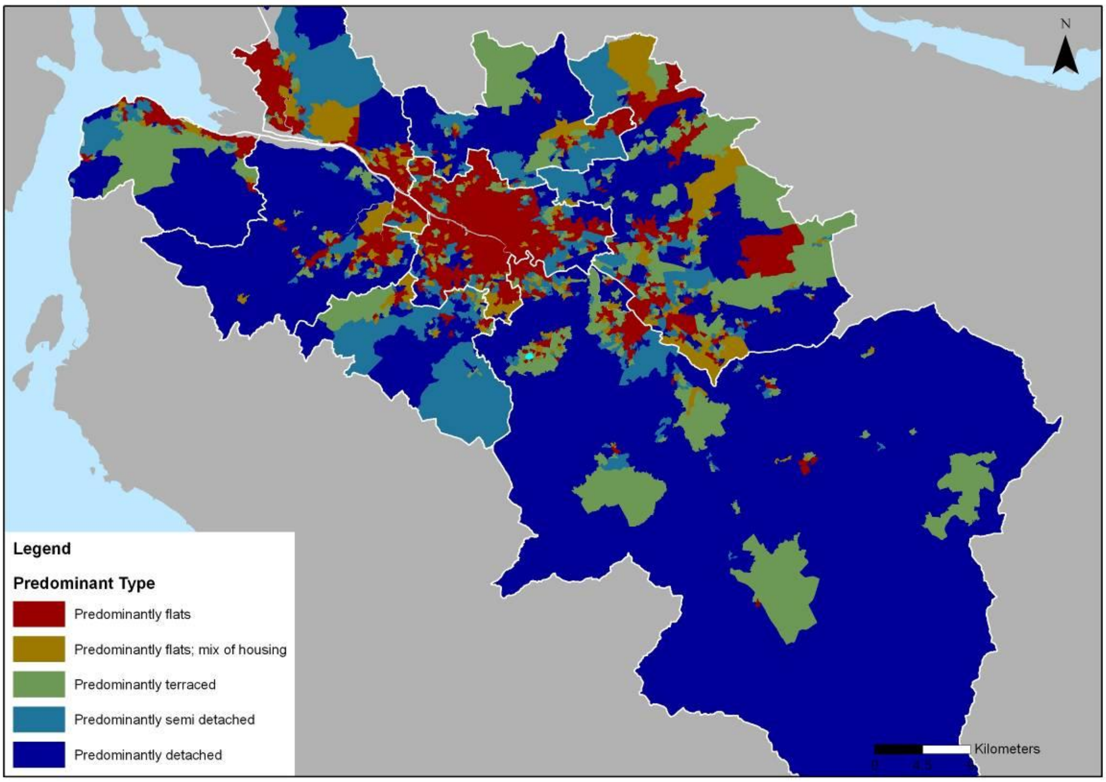
LA	Tenure								Total dwellings [100%]
	Private Sector				Social Sector				
	Type of Dwelling				Type of Dwelling				
	House		Flat		House		Flat		
	000s	Row%	000s	Row%	000s	Row%	000s	Row%	
ED	33	76	6	13	2	6	2	5	43000
ER	25	71	6	18	1	3	3	8	35000
GC	57	20	111	39	19	7	95	34	282000
IC	15	41	11	30	2	6	9	24	37000
NL	68	48	19	14	26	18	30	21	143000
RC	39	50	20	25	3	4	17	22	79000
SL	85	62	19	14	18	13	13	10	135000
WD	17	40	8	20	5	13	11	27	41000
GCV	**339**	**43%**	**200**	**25%**	**76**	**10%**	**180**	**23%**	**795000**

Source: SHCS 2007-2009 'Tenure (banded) by type of dwelling (banded)' [mid point: 2008].
Note: SHCS underestimates HNDA stock estimates as shown in Figure 1. Private sector includes both owner occupation and private rental. 'House' includes terraced, semi-detached and detached. 'Flat' includes tenement flat, 4-in-a-block, high rise tower/slab, and flat arising from a conversion. Numbers rounded to nearest thousand, and percentages to nearest integer. Totals may not sum due to rounding.

5.3 By contrast, in the social sector, flats are the predominant house type in all authorities except South Lanarkshire, where houses predominate in the social sector, and East Dunbartonshire where the split is more or less equal. The predominance of flats in the social sector is particularly clear in Glasgow City, Renfrewshire and Inverclyde, followed by East Renfrewshire, West Dunbartonshire and North Lanarkshire.

5.4 The distribution of dwelling types is also mapped in Figure 9, illustrating clearly the predominance of flats in denser urban areas, and terraced, detached and semi-detached houses in suburban and rural areas.

Figure 9 Mapping by Predominant Dwelling Type



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Source: SNS 2008.

5.5 Figure 10 shows the overall housing stock by size across all local authority areas. East Dunbartonshire (8%) and East Renfrewshire (9%) have the highest proportion of large dwellings (7 or more habitable rooms), followed by South Lanarkshire (6%), while Glasgow City (3%) has the lowest proportion. East Dunbartonshire (27%) and East Renfrewshire (29%) have the lowest proportion of smaller dwellings (1 – 3 habitable rooms), followed by South Lanarkshire (36%) and North Lanarkshire (39%). In Glasgow City and West Dunbartonshire over half the stock is in the smaller category of 1 to 3 habitable rooms. In six of the GCV local authority areas, the median house size is 4 habitable rooms, the exceptions being Glasgow City and West Dunbartonshire where the median number of rooms is 3.

Figure 10 Dwelling Size (Number of Habitable Rooms), 2009

LA	Total No. dwellings	Number of habitable rooms %					Median No. of habitable rooms
		1-3 rooms	4-6 rooms	7-9 rooms	10 + rooms	No. rooms unknown	
ED	44093	27.09	63.89	7.12	0.48	1.42	4
ER	36991	28.97	62.26	8.22	0.45	0.09	4
GC	298972	56.45	38.16	2.13	0.39	2.87	3
IC	39380	43.35	52.06	4.00	0.50	0.08	4
NL	147852	39.23	56.73	3.70	0.15	0.20	4
RC	82859	45.48	50.82	3.24	0.25	0.21	4
SL	143119	36.47	57.12	5.71	0.32	0.38	4
WD	44376	51.57	44.17	1.37	0.15	2.74	3

Source: SNS 2009.
Note: Number of rooms is defined as the number of habitable rooms (usually bedrooms and living rooms). Some variation may occur in recording, e.g. open plan areas, dining rooms, kitchens and kitchenettes. Note that there are significant differences between SNS data on size of dwellings/number of rooms, and SHCS, possibly due to differences in definition and small SHCS sample sizes.

6 Council Tax Band

6.1 Council Tax banding can be useful in considering relative house valuations, although it should be emphasised that domestic property valuations have not been revised for some time. The percentages of dwellings in various Council Tax bands for the GCV area at 2009 are summarised in Figure 11 and mapped in Figure 12.

Figure 11 Council Tax Bandings by Local Authority, 2009

LA	Total No. of dwellings	Dwellings in Council Tax Bands [%]		
		A – C %	D – E %	F – H %
ED	44093	29.65	40.75	29.60
ER	36991	28.33	38.32	33.35
GC	298972	71.20	22.42	6.38
IC	39380	74.91	16.59	8.51
NL	147852	73.88	19.91	6.21
RC	82859	64.08	25.03	10.89
SL	143119	63.65	25.41	10.94
WD	44376	73.58	21.61	4.80
GCV	**837642**	**66%**	**24%**	**10%**

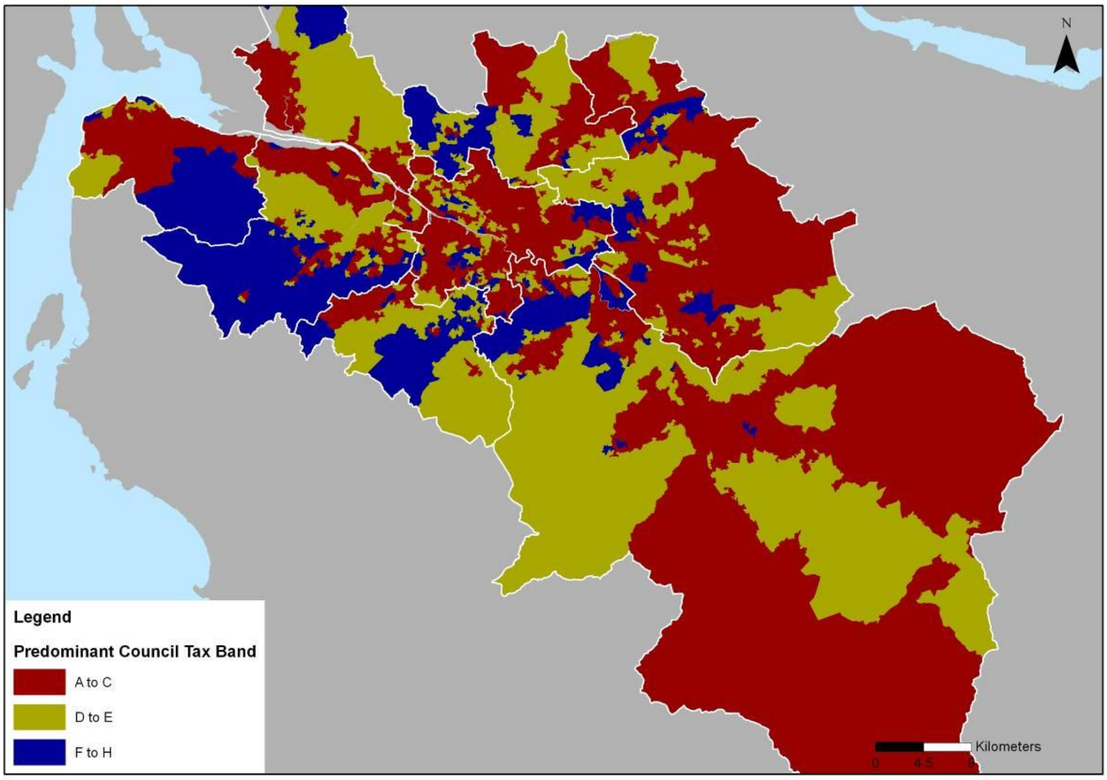
Source: SNS 2009
Note: Band A is lowest valuation and Band H the highest.

6.2 East Dunbartonshire and East Renfrewshire have the smallest proportion of lowest-band (A-C) properties, whilst Glasgow City, Inverclyde, North Lanarkshire and West Dunbartonshire have the highest proportion of such properties. East Dunbartonshire and East Renfrewshire also have the highest proportions of highest-banded (F-H) properties. Across the whole GCV area, 66% of dwellings are in bands A – C, 24% in bands D – E, and 10% in the top bands F – H.

6.3 However, the pattern is not uniform within Council areas, as illustrated by the map in Figure 12. Even in those Council areas where over 70% of dwellings are in low Council Tax bands A-C (Glasgow City, Inverclyde, North Lanarkshire and West Dunbartonshire) there are distinct localities with accommodation in the top bands F-

H. Social rented and former social rented/Right to Buy properties tend to fall within lower Council Tax bands.

Figure 12 Council Taxes – Predominant Band by Datazone



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Source: SNS 2009.

7 Age of GCV Dwelling Stock

7.1 The age of the housing stock is shown in Figure 13. Across the GCV area around 80% of dwellings are at least 30 years old – built prior to 1982.

There are varying levels of older pre-1919 stock reflecting the historical development of the urban fabric of the area. Glasgow City (25%) and Inverclyde (24%) in particular have significant proportions of pre-1919 stock.

Figure 13 Age Profile of GCV Dwelling Stock

LA	Age of Dwelling										Total Stock
	Pre-1919		1919-1944		1945-1964		1965-1982		Post-1982		
	000s	Row%	000s	Row%	000s	Row%	000s	Row%	000s	Row%	[100%]
ED	3	7	6	14	14	32	14	32	6	14	43000
ER	3	8	11	29	8	23	7	19	7	21	36000
GC	70	25	50	18	68	24	34	12	58	21	280000
IC	9	24	5	13	9	26	8	22	5	15	36000
NL	4	3	30	21	43	30	38	27	28	20	143000
RC	11	13	14	18	18	23	21	26	15	19	79000
SL	17	13	16	12	39	29	29	22	34	25	135000
WD	5	12	7	17	12	30	8	20	9	22	41000
GCV	**122**	**15%**	**139**	**18%**	**211**	**27%**	**159**	**20%**	**162**	**20%**	**793000**

Source: SHCS 2007-2009 'Age Profile of Stock' [mid point: 2008].
Note: SHCS underestimates HNDA stock estimates in Figure 1. Numbers rounded to nearest thousand, and percentages to nearest integer. Totals may not sum due to rounding.

7.2 In terms of general dwelling type and age, shown in Figure 14, it is evident that there is variation across the GCV area. In East Renfrewshire, East Dunbartonshire and South Lanarkshire the majority of surviving pre-1945 stock is in the form of houses, whereas in Glasgow City and Inverclyde (and to a lesser extent Renfrewshire and West Dunbartonshire) this older stock is mainly as flats. In all authority areas except Glasgow City, post-1945 development is mainly in the form of houses, reflecting suburban expansion in the metropolitan area. In East Dunbartonshire, North Lanarkshire and South Lanarkshire this post-1945 development in the form of houses exceeds 50% of the total dwelling stock, perhaps reflecting for North and South Lanarkshire the extent of the New Town developments in Cumbernauld and East Kilbride respectively. In Glasgow City the majority of post-1945 accommodation is in the form of flats.

Figure 14 Ages of GCV Dwellings by Type

LA	Age of Dwelling by Dwelling type								Total Stock
	Houses				Flats				
	Pre-war		Post-war		Pre-war		Post-war		
	000s	Row%	000s	Row%	000s	Row%	000s	Row%	[100%]
ED	7	17	28	64	2	4	6	14	43000
ER	11	31	15	43	2	7	7	19	35000
GC	25	9	50	18	95	34	111	39	281000
IC	4	10	13	36	10	27	10	27	37000
NL	16	11	78	54	18	12	31	22	143000
RC	9	12	33	42	16	20	21	26	79000
SL	23	17	80	59	11	8	22	16	136000
WD	5	11	17	41	7	17	12	30	41000
GCV	**100**	**13%**	**314**	**39%**	**161**	**20%**	**220**	**28%**	**795000**

Source: SHCS 2007-2009 'Age of dwelling (banded) by type' [mid point: 2008].
Note: Pre-war includes dwellings built prior to 1945. Post-war includes dwellings built 1945 and after. SHCS underestimates HNDA stock estimates in Figure 1. Numbers rounded to nearest thousand, and percentages to nearest integer. Totals may not sum due to rounding.

7.3 The age of the GCV dwelling stock by tenure is shown in Figure 15. For seven of the eight GCV authorities, the majority of stock in both social and private sectors is post-1945. The exception is Glasgow City where the proportion of private pre-1945 stock slightly exceeds private post-1945 stock.

Figure 15 Ages of Dwellings by Tenure

LA	Tenure (banded)								Total Stock
	Private Sector				Social Sector				
	Pre-war		Post-war		Pre-war		Post-war		
	000s	Row%	000s	Row%	000s	Row%	000s	Row%	[100%]
ED	8	20	30	69	1	1	4	9	43000
ER	13	36	19	52	-	1	4	10	36000
GC	86	31	81	29	35	12	79	28	281000
IC	11	29	15	41	3	8	8	22	37000
NL	21	15	67	47	13	9	42	29	143000
RC	19	24	39	50	6	7	14	18	78000
SL	27	20	77	57	7	5	25	18	136000
WD	8	20	17	41	4	9	13	31	42000
GCV	**193**	**24%**	**345**	**43%**	**69**	**9%**	**189**	**24%**	**796000**

Source: SHCS 2007-2009 'Tenure (banded) by age of dwelling (banded)' [mid point: 2008].
Note: Pre-war includes dwellings built prior to 1945. Post-war includes dwellings built 1945 and after. SHCS underestimates HNDA stock estimates in Figure 1. Numbers rounded to nearest thousand, and percentages to nearest integer. '-' number <500. Totals may not sum due to rounding.

8 Stock Condition

8.1 The Scottish House Condition Survey examines dwellings with 'any disrepair', defined as covering ALL disrepair, irrespective of extent or seriousness, and can therefore mean anything from a leaking bathroom tap to a missing roof. The extent of any disrepair is markedly greater in the private sector than in the social rented sector, but this largely reflects the greater proportion of all stock which is in the private sector. In fact, in seven of the eight GCV authorities, the proportion of stock with any disrepair *within* each tenure is higher in the public sector (SHCS 2007-09, Table 4.3). However, the breadth of definition makes 'any disrepair' a relatively meaningless measure from a strategic point of view.

8.2 'Urgent disrepair' is potentially more useful, relating to any disrepair which if not rectified would cause the fabric of the building to deteriorate further and/or place the health and safety of the occupier at risk. However caution is also required here because urgency of disrepair is only assessed for external and common elements. This could therefore omit serious internal problems, such as extensive dry rot. Any Urgent Disrepair is also a very broad definition, including everything from relatively easily rectified matters such as missing roof tiles to more serious issues such as subsidence. There is a lack of consistent and accurate information on stock condition, especially in the private sector.

8.3 Figure 16 shows Dwellings with Any Urgent Disrepair, by tenure. Across the GCV area, just over one third of both the private stock and the social stock has some urgent disrepair, the scale of the issue reflecting in part the breadth of definition. This ranges in the private sector from East Dunbartonshire (29%) to West Dunbartonshire (46%), and in the public/social sector from East Dunbartonshire (29%) to Renfrewshire (53%). In all the GCV authority areas, a higher proportion of flats have an urgent disrepair than is the case with houses[2]. Perhaps unsurprisingly, in all GCV authority areas a higher proportion of older (pre-1945) dwellings have an urgent disrepair than post-1945 properties[3].

Figure 16 Dwellings with Any Urgent Disrepair by Tenure

LA	Tenure					
	Private			Public		
	000s	% of all stock	% of all Private	000s	% of all stock	% of all Public
ED	11	26	29	2	4	29
ER	14	38	43	2	5	41
GC	59	21	35	36	13	32
IC	11	31	44	5	14	48
NL	24	17	26	22	15	43
RC	23	29	40	11	14	53
SL	40	30	39	15	11	48
WD	12	29	46	7	18	47
GCV	**194**	**24%**	**36%**	**100**	**13%**	**39%**

Source: SHCS 2007-2009 'Dwellings with any urgent disrepair by tenure' Table 4.8 [mid point: 2008].
Note: Percentages in this table are based on the total number of dwellings with any (urgent) disrepair SHCS underestimates HNDA stock estimates in Figure 1. Numbers rounded to nearest thousand, and percentages to nearest integer.

[2] SHCS, 2007-2009, Table 4.9
[3] SHCS, 2001-2009, Table 4.10

8.4 One of the categories examined by authorities in assessing Backlog Need in 2009 was ‘Poor Quality’ of housing, using as far as possible the rigorous criteria of the Tolerable Standard as defined in the Housing Act 1987 and updated in the Housing (Scotland) Act 2001 (see Technical Appendix TA03 *Current/Backlog Need*). The standard relates to structural stability; satisfactory lighting, ventilation and heating; and hygiene and cooking facilities. The assessment revealed that, across the GCV area, an average of 1.2% of the housing stock fails the Tolerable Standard, ranging from 0.0% in West Dunbartonshire (just 9 properties) to 2.2% in Glasgow and 2.4% in Inverclyde (Figure 17).

Figure 17 ‘Poor Quality’ Dwellings from Backlog Need Assessment

Local Authority Area	‘Poor Quality’ Dwellings, 2009	% of total stock
East Dunbartonshire	577	1.3%
East Renfrewshire	310	0.8%
Glasgow City	6,494	2.2%
Inverclyde	925	2.4%
North Lanarkshire	540	0.4%
Renfrewshire	644	0.8%
South Lanarkshire	493	0.3%
West Dunbartonshire	9	0.02%
GCV	**9,992**	**1.2%**

Source: HNDA Technical Appendix TA03 *NRSs Current/Backlog Need* Annex 3.

8.5 As the majority of dwellings now meet ‘tolerable standards’, the Scottish Housing Quality Standard (SHQS) was introduced in 2004 as a more meaningful measure of dwelling quality. To meet the standard the house must be:

- compliant with the statutory tolerable standard
- free from serious disrepair
- energy efficient
- provided with modern kitchen/bathroom facilities and services
- healthy, safe and secure.

8.6 Local Authorities and RSLs, must ensure their housing stock meets the SHQS by 2015. The SHQS is not mandatory in the private sector.

8.7 Dwellings failing the SHQS, by tenure, are shown in Figure 18. Across the GCV area as a whole, similar proportions of dwellings in the private sector (66%) and social sector (67%) fail the SHQS. There is some variation between authorities. In terms of the private sector, East Renfrewshire and Renfrewshire have the highest proportion of dwellings which fail SHQS (74% each). North Lanarkshire (59%) has the lowest proportion failing SHQS. In terms of the social sector, East Renfrewshire and Renfrewshire again have the highest proportion of dwellings in the sector failing SHQS (78% and 77% respectively), while East Dunbartonshire has the lowest proportion (57%). It may be noted that the base date for this data is 2008 and considerable progress has been made since that time. While there are various reasons for social rented property failing the SHQS, common reasons relate to energy efficiency issues, particularly in non-traditional property types, and to the lack of mains gas supply, especially in rural areas.

Figure 18 Dwellings failing SHQS by tenure

LA	Tenure of dwellings *failing* the SHQS						Total Stock
	Private			Public			
	000s	% of all stock	% of all private stock	000s	% of all stock	% of all public stock	
ED	25	57	64	3	6	57	43000
ER	24	66	74	3	9	78	36000
GC	110	39	65	72	25	61	281000
IC	18	49	69	7	20	68	37000
NL	52	36	59	41	28	73	143000
RC	44	55	74	16	20	77	78000
SL	66	49	63	20	15	62	136000
WD	16	39	65	11	27	66	42000
GCV	**355**	**45%**	**66%**	**173**	**22%**	**67%**	**796000**

Source: SHCS 2007-2009 'SHQS fails by tenure' Table 4.13 [mid point: 2008].
Note: Percentages in this table are based on the total number of dwellings failing the SHQS. Total stock taken from Figure 14 above – the SHCS underestimates HNDA stock estimates in Figure 1. Numbers rounded to nearest thousand, and percentages to nearest integer.

8.8 An increasingly important focus of attention relates to the energy efficiency of dwellings. The way a building is constructed, insulated, heated and ventilated and the type of fuel used, all contribute to its energy consumption and carbon emissions. The **National Home Energy Rating** (NHER) assessment procedure is based on a model of the 'Total Energy costs', per square metre of floor area, of maintaining a standard heating regime for a standard level of occupancy. Total energy costs include space and water heating, lighting, standard domestic appliances (e.g. washing machine) and standing charges. The model also contains a factor for local climate variations which take into account differences across the UK, thus providing a comprehensive assessment of a dwelling's energy efficiency[4].

8.9 Figure 19 shows NHER ratings for dwellings by tenure, using a scale of 0 (poor) to 10 (excellent). Across all GCV authorities, a significantly higher proportion of public/social stock falls within the higher NHER rating (6-10) than is the case in the private sector, probably reflecting the onus on the social sector to achieve SHQS for all its stock by 2015. In both the social and private tenures in the GCV area, the proportion of dwellings in the higher NHER band exceeds the average for Scotland.

8.10 More detailed national analysis[5] suggests the following across Scotland:

- private rented dwellings are about 3 times more likely to have a 'poor' NHER rating (0-2 on the scale) than owner occupied dwellings – 9% of private rented dwellings rated 'poor' nationally;
- houses have lower energy efficiency than other types of dwellings because more of their walls are exposed resulting in increased heat loss;
- newer dwellings (post 1982) are more likely to have a 'good' rating (7-10 on the scale) than older dwellings; and
- urban dwellings are much less likely to be rated 'poor' than rural dwellings.

[4] For further information see the SHCS 2002 National Report Technical Annex 9.
[5] *Scottish House Condition Survey: Key Findings for 2009* (2010) Scottish Government. Chapter 2 'Energy Efficiency'.

Figure 19 Energy Efficiency of Dwellings: NHER by Tenure

LA	Tenure (banded)												Stock Total
	Private						Public						
	NHER (banded)						NHER (banded)						
	0 – 5		6 – 10		Total		0 – 5		6 – 10		Total		
	000s	Row%	000s	Row%	000s	Row%	000s	Row%	000s	Row%	000s	Row%	000s
ED	14	37	24	63	38	100	-	10	4	90	4	100	42
ER	13	42	18	58	31	100	-	11	4	89	4	100	35
GC	39	23	129	77	168	100	13	12	100	88	113	100	281
IC	6	24	20	76	26	100	1	10	10	90	11	100	37
NL	17	19	71	81	88	100	5	9	51	91	56	100	144
RC	15	26	43	74	58	100	2	10	18	90	20	100	78
SL	31	30	72	70	103	100	6	20	25	80	31	100	134
WD	6	26	19	74	25	100	2	11	15	89	17	100	42
GCV	**141**	**26%**	**396**	**74%**	**537**	**100**	**29**	**11%**	**227**	**89%**	**256**	**100**	793
Scot'd	*618*	*37%*	*1071*	*63%*	*1689*	*100*	*113*	*18%*	*528*	*82%*	*641*	*100*	*2330*

Source: SHCS 2007-2009 'NHER by tenure' [mid point: 2008].
Note: (-) = small number <500. The SHCS underestimates HNDA stock estimates in Figure 1. Numbers rounded to nearest thousand, and percentages to nearest integer.

8.11 The SHCS measures the satisfaction of residents with their home for both private and social sectors. Figure 20 shows the results for the GCV area. Generally speaking, satisfaction is higher in the private sector than in the social sector. While there is some variation between authority areas, the GCV average closely reflects the picture nationally. However, the measure should be treated with some caution because it is subjective and provides no indication of the source of any dissatisfaction. Nor is any distinction drawn between owner occupation and rented in the private sector, or between different social rented providers.

Figure 20 Satisfaction with home by tenure

LA	Satisfaction with home %					
	Private sector [100%]			Social sector [100%]		
	Very	Fairly	Neutral/ dissatisfied/ no opinion	Very	Fairly	Neutral/ dissatisfied/ no opinion
ED	66	27	7	40	36	24
ER	66	31	3	44	43	13
GC	51	43	6	35	50	15
IC	65	31	4	29	53	17
NL	59	37	3	37	45	18
RC	62	33	5	36	49	14
SL	60	34	6	40	40	20
WD	65	34	2	31	43	26
GCV	59%	36%	5%	36%	47%	17%
Scotland	*60%*	*35%*	*5%*	*38%*	*47%*	*15%*

Source: SHCS 2007-2009 'Satisfaction with home by tenure (banded)' Table 3.12 [mid point: 2008].
Note: Percentages rounded to nearest integer.

9 Stock Reduction: Dwellings Demolished, Closed or otherwise taken out of housing use

9.1 Figure 21 shows the number of 'houses demolished, closed or taken out of housing use' over the period 2005-06 to 2009-10, for local authority owned and for non local authority owned (including RSLs and private sector) property[6]. Generally speaking, the social sector comprises the majority of activity. In some cases the number of houses physically demolished in a particular year may be a small proportion of the number shown, the majority being otherwise declared surplus, for instance, taken out of housing use pending refurbishment or subsequent demolition. Across the GCV area, approximately 13,788 residential properties have been demolished or otherwise taken out of housing use during the past five years.

Figure 21 Dwellings Demolished, Closed or taken out of housing use: 2005-06 to 2009-10

LA		2005-06	2006-07	2007-08	2008-09	2009-10	Cumulative Total	
							No.	As % of total stock in LA area
ED	LA	0	0	72	88	30	190	
	Non-LA	10	5	0	41	133	189	
	Total	10	5	72	129	163	379	1%
ER	LA	71	178	0	0	0	249	
	Non-LA	6	2	14	21	5	48	
	Total	77	180	14	21	5	297	1%
GC	LA	0	0	0	0	1	1	
	Non-LA	2183	1434	2087	1794	1533	9031	
	Total	2183	1434	2087	1794	1534	9032	3%
IC	LA	0	0	0	0	0	0	
	Non-LA	0	1	1	0	253	255	
	Total	0	1	1	0	253	255	1%
NL	LA	20	33	308	220	32	613	
	Non-LA	11	16	8	2	108	145	
	Total	31	49	316	222	140	758	1%
RC	LA	208	185	180	394	191	1158	
	Non-LA	0	0	0	0	80	80	
	Total	208	185	180	394	271	1238	2%
SL	LA	345	2	96	80	169	692	
	Non-LA	6	5	47	145	15	188	
	Total	351	7	143	225	184	910	1%
WD	LA	96	44	187	200	364	891	
	Non-LA	0	14	14	0	0	28	
	Total	96	58	201	200	364	919	2%
GCV	**LA**	**740**	**442**	**843**	**982**	**787**	**3794**	
	Non-LA	**2216**	**1477**	**2171**	**2003**	**2127**	**9964**	
	Total	**2956**	**1919**	**3014**	**2985**	**2914**	**13788**	**2%**

Source: Stock4 *Summary Return of Changes to Housing Stock* submitted annually by local authorities to Scottish Government Communities Analytical Services (Housing Statistics).

Note: Annual figures from The Scottish Housing Regulator on demolitions of RSL dwellings have been used as an estimate of the total number of demolitions in Glasgow City each year, and are likely to be a slight under-estimate as they exclude demolitions of private dwellings.

6 This data is derived from the Scottish Government's Stock4 'Summary Return of Changes to Housing Stock', and should be treated with some caution. Figures for local authority owned stock are accurate. However, authorities vary in their ability to provide information on other tenures – the data may not be comprehensive and may exclude many private demolitions.

9.2 Glasgow City has seen a significant number of demolitions and closures, averaging about 1800 per annum over the five year period. This has been the result of planned programmes of work to remove obsolete stock, tackle comprehensive regeneration in targeted areas, improve the remaining stock to meet tenants' requirements, and meet the requirements of the SHQS.

9.3 All other GCV authorities have seen some similar activity over the period – particularly Renfrewshire, West Dunbartonshire, South Lanarkshire and North Lanarkshire – linked to regeneration projects and achieving 100% SHQS by the 2015 target date. There has been a gradual increase in activity in East Dunbartonshire, and a decline in East Renfrewshire. A very sharp increase in activity occurred in Inverclyde in 2009-10.

10 Completions by Tenure

10.1 New build completions by tenure are shown in Figure 22 for the period from 2005-06 to 2009-10. In that five year period a total of 37,241 new homes were built, of which 28,690 (77%) were in the private sector, and 8,551 (23%) in the social sector. Of the latter sector, all except 20 were completed by RSLs.

10.2 Across the GCV area, private sector completions increased to 7,549 in 2007-08, then declined sharply to 2,872 in 2009-10. This may have been a result of the recession and the associated difficulty in securing mortgage finance. Over the five year period, between 2005-06 and 2009-10, there has been an average of 7,448 new houses, in all sectors, constructed across the city region. The pattern of high completions followed by sharp decline is reflected to some degree in all local authority areas.

10.3 There appears to be more variability from year to year in the level of completions in the social sector, some authorities experiencing years during the period with low or even nil social completions. However, a number of authorities experienced growth in RSL completions in 2009-10 as a result of government policy to advance the Affordable Housing Investment Programme. The most noticeable impact was in East Renfrewshire and Inverclyde, where such social completions accounted for the majority of all new build completions that year, and were by far the highest level during the five year period.

Figure 22 New Build Completions by Tenure: 2005-06 to 2009-10

LA	New Build Completions									
	2005-06		2006-07		2007-08		2008-09		2009-10	
	No.	*%*	*No.*	*%*	*No.*	*%*	*No.*	*%*	*No.*	*%*
ED										
Private	162	53	195	100	273	91	160	79	25	49
LA	0	0	0	0	0	0	0	0	0	0
RSL	142	47	0	0	26	9	42	21	26	51
All NB	304	100	195	100	299	100	202	100	51	100
ER										
Private	30	39	58	61	77	100	186	90	76	39
LA	0	0	0	0	0	0	0	0	0	0
RSL	46	61	37	39	0	0	20	10	119	61
All NB	76	100	95	100	77	100	206	100	195	100
GC										
Private	2169	70	2686	77	3403	81	1409	65	919	50
LA *	-	-	-	-	-	-	-	-	-	-
RSL	951	30	821	23	773	19	756	35	922	50
All NB	3120	100	3507	100	4176	100	2165	100	1841	100
IC										
Private	322	73	168	95	340	85	171	67	100	23
LA *	0	0	0	0	-	-	-	-	-	-
RSL	117	27	8	5	58	15	85	33	336	77
All NB	439	100	176	100	398	100	256	100	436	100
NL										
Private	1421	76	1404	94	1298	95	918	80	583	70
LA	0	0	0	0	0	0	0	0	20	2
RSL	442	24	82	6	65	5	232	20	224	27
All NB	1863	100	1486	100	1363	100	1150	100	827	100
RC										
Private	465	63	646	87	769	87	501	86	385	78
LA	0	0	0	0	0	0	0	0	0	0
RSL	278	37	98	13	115	13	80	14	109	22
All NB	743	100	744	100	884	100	581	100	494	100
SL										
Private	1475	92	1818	92	1197	90	1488	84	672	67
LA	0	0	0	0	0	0	0	0	0	0
RSL	136	8	154	8	134	10	278	16	330	33
All NB	1611	100	1972	100	1331	100	1766	100	1002	100
WD										
Private	116	32	108	60	192	80	193	79	112	59
LA	0	0	0	0	0	0	0	0	0	0
RSL	241	68	71	40	48	20	51	21	78	41
All NB	357	100	179	100	240	100	244	100	190	100
GCV										
Private	**6160**	**72%**	**7083**	**85%**	**7549**	**86%**	**5026**	**76%**	**2872**	**57%**
LA	**0**	**0%**	**0**	**0%**	**0**	**0%**	**0**	**0%**	**20**	**0%**
RSL	**2353**	**28%**	**1271**	**15%**	**1219**	**14%**	**1544**	**24%**	**2144**	**43%**
All NB	**8513**	**100%**	**8354**	**100%**	**8768**	**100%**	**6570**	**100%**	**5036**	**100%**

Source: Scottish Neighbourhood Statistics report (Scottish Government). Based on NB1 and NB2 returns by local authorities to Scottish Government Communities Analytical Services (Housing Statistics); RSL data from Scottish Government Housing Investment Division: Affordable Housing Investment Programme.
Note: * Glasgow City Council no longer has any housing stock, following voluntary transfer to RSLs in 2003. Inverclyde Council transferred its stock to RSLs in 2007 – any social sector completions in 2007-08 are therefore attributed to RSLs. Percentages rounded to nearest integer; may not sum due to rounding.

11 Communal Establishments

11.1 Chapter 6 *Household Groups with Specific Housing Requirements,* provides a full discussion of specialist and communal forms of accommodation. Key groups are identified here in summary only, to ensure that a more complete and rounded profile of the GCV stock is provided.

11.2 Communal establishments, defined as managed residential accommodation, are provided for older people, and for adults with specific care or support requirements relating to, for example, physical disabilities, mental health problems, and learning disabilities. There are 379 care homes, registered with the Care Commission, providing 14,755 places in the GCV area, as summarised in Figure 23.

Figure 23 Care Homes and Registered Places for Adults, by Local Authority

LA	Care Homes for Adults [March 2009]						
	Older People	Physical Disabilities	Mental Health Problems	Learning Disabilities	Other	All Client Groups	
	Registered Places	*Registered Places*	*Registered Places*	*Registered Places*	*Registered Places*	*Care Homes*	*Places*
ED	550	0	5	24	0	16	579
ER	496	0	0	31	0	14	527
GC	4,401	111	299	125	206	143	5,142
IN	913	106	9	53	0	33	1,081
NL	2,197	0	0	149	0	53	2,346
RE	1,358	22	60	75	0	32	1,515
SL	2,749	0	46	117	44	73	2,956
WD	605	0	0	4	0	15	609
GCV	**13,269**	**239**	**419**	**578**	**250**	**379**	**14,755**
Scotland	**38,843**	**547**	**1,052**	**2,857**	**595**	**1,442**	**43,894**

Source: The number of care homes and places as registered with the Care Commission: *Care Homes, Scotland, 2009* Annex Table 1 [Scottish Government statistics, 2010].

11.3 In terms of supported accommodation, there are 10,483 sheltered housing and 1,165 extra care units in the GCV area (Scottish Government Housing Statistics, 2009). Of these, 5,523 are provided by RSLs, 3,478 by local authorities, and 1,482 by the private sector.

11.4 The GCV area has a considerable number, and wide range, of further and higher education institutions, mostly located in Glasgow City. Although many students live at home or in shared privately rented accommodation, a significant number live in halls of residence. Glasgow City has around 90% of the GCV total of 9,808 places[7]. Approximately 29% of accommodation in halls of residence is now provided by specialist private sector providers.

[7] HNDA, Chapter 6 *Household Groups with Specific Housing Requirements*, Table 6.11.1 'Student Residences by authority area, 2009' [source NRS updated by GCVSDPA].

GLASGOW and
the CLYDE VALLEY
strategic development
planning authority

Glasgow and the Clyde Valley Strategic Development Planning Authority
Lower ground floor, 125 West Regent Street, Glasgow G2 2SA
t 0141 229 7730 | **e** info@gcvsdpa.gov.uk | **w** www.gcvsdpa.gov.uk