South Ayrshire Housing Need and Demand Assessment 2021-2026

October 2021

Prepared by Corporate and Housing Policy

on behalf of the South Ayrshire Housing Market Partnership

lhs@south-ayrshire.gov.uk

Riverside House, Ayr, KA8 0AU

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South Ayrshire Council
Customer Contact Centre
0300 123 0900

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Housing Need and Demand Assessment Signatories

The following named senior housing and planning managers from South Ayrshire Council have signed this document confirming that they have jointly produced this Housing Need and Demand Assessment and agreed the Core Outputs.

This statement is in fulfilment of the requirements of Core Process 6 as detailed in the HNDA Managers Guide (2018)

Kevin Anderson

Service Lead, Policy, Performance and Community Planning

K. Anderson.

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Craig Iles

Service Lead, Planning and Building Standards

Craig Iles

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Methods, Quality Control and Limitations

Data Type	Source	Quality Control	Limitations
Primary Data	• South Ayrshire Council Information Systems • Ayrshire Housing Information System • West of Scotland Information System • Hanover (Scotland) Housing Association Information System • Trust Group Ltd Information System	These information systems are updated daily by Housing Staff within the organisations. Data extraction was undertaken by trained, experienced officers within all organisations. Microsoft Excel was used for analysis by the lead HNDA officer, and this was verified by members of the Housing Policy and Strategy Team with oversight by the Housing Market Partnership.	The information within these systems is primarily collected as a means of allocating housing and managing existing stock. The potential to use this information as an indication of housing need is limited. It must be considered in context with other data sources.
Secondary Data	• National Records of Scotland • Registers of Scotland • Scottish Government • Centre for Housing Market Analysis • Office for National Statistics • Scottish Housing Regulator • Scotland's Census • Scottish Household Survey • Office of National Statistics • City Lets Datahub • SIMD Data • Skills Development Scotland • NOMIS • Scottish Commission for Learning Disability • Scotland's Housing Network	Sourcing and compiling this data was undertaken by experienced officers. Microsoft Excel was used for analysis by the lead HNDA Officer and verified by members of the Housing Policy and Strategy Team with oversight by the Housing Market Partnership.	*Restricted updates:* In some areas up-to-date information was not available at the time of writing and as such data from previous years has been presented to complete the picture. Totals from different sources do not always agree but have been used to give as full and accurate a picture as possible. *Scale of data:* Data is collected at a variety of scales and can mostly be disaggregated to data zone level. Some data is unavailable at a South Ayrshire local authority level and sample data is included in chapters that does not necessarily provide an exact picture.

			Triangulation has been used to enhance analysis where possible. Similar results support the validity of the data.
Literature Review and Existing Reports	• South Ayrshire Council, *Rapid Rehousing Transition Plan* • Horizon Housing, *Still Minding the Step?* • Public Health Scotland, *Needs Assessment South Ayrshire HSCP September 2020* • The Ayrshire Mental Health Conversation, Priorities and Outcomes 2019-2027	Existing research and information referred to within this HNDA are taken from reputable sources.	Documents always reflect the time in which they are written. Events continue and may not be covered or explained.
HNDA Tool	The HNDA Tool was designed by the Scottish Government (Centre for Housing Market Analysis) specifically to aid local authorities in calculating new build requirements. Several iterations have improved and upgraded the model.	Officers within the Council's Housing Policy and Strategy Team have received training on the use of the Tool and liaised with the CHMA to validate inputs and outputs. The CHMA also provide guidance of the use of the Tool. Results have been discussed with the Housing Market Partnership.	As the HNDA Tool is based on nationally produced data sets, the same limitations exist as outlined for secondary data.

Chapter 1: Introduction and Executive Summary

1. Introduction

1.1 The Housing Need and Demand Assessment (HNDA) is an important document produced every five years to inform the decisions the Council and our partners will make about housing, homelessness, meeting particular needs, and planning for the future housing requirements of South Ayrshire.

1.2 The HNDA tries to gather as much evidence as possible about different topics related to housing, and, working with local people, other organisations and the Health and Social Care Partnership, uses this information to come to a number of conclusions.

1.3 The topics being considered in the HNDA include:

- Information about our population just now, and how this might change in the future
- The costs involved with purchasing or renting a home in South Ayrshire, and how affordable this is for people
- South Ayrshire's economy, how this has changed in recent years and how it might change in the future
- The types of housing in South Ayrshire, its condition, and whether it is owned, rented or empty
- The extent to which people in South Ayrshire have to share with others to meet their housing needs, sometimes resulting in homes being overcrowded
- Information about social housing (properties provided by South Ayrshire Council or a Housing Associations), demand for this stock and the number of properties becoming available in a year
- The need for special types of accommodation to meet the needs of particular groups, for example, people with disabilities, young people leaving care, and people who require additional support.

1.4 An important element of the HNDA involves using the information gathered to produce a range of 'housing estimates' – that is, estimates of the number of new build houses we will need in the future.

1.5 In writing this document, we have tried to work with partners and local people to make sure our data, estimates and conclusions are as accurate as possible. In the context of the Coronavirus pandemic, it has not been possible to engage with the wider population as early or as fully as we would have liked, however we have received a good response to our online consultation as detailed in Appendix 2 and have used these responses to inform the HNDA.

1.6 South Ayrshire is defined as a self-contained Housing Market Area (HMA). Previous HNDAs have included 2 sub-HMAs, Girvan and South Carrick and Ayr Urban. South Ayrshire Council's HMA Refresh concludes that the Girvan and South Carrick sub-HMA has a strong market relationship with the Ayr Urban sub-HMA and therefore should not be considered a distinct housing market area in and of itself. The refresh exercise is available to read at Appendix 5.

1.7 Comments that referenced future directions of travel in housing and planning will also be taken forward and considered in the development of future strategic documents, including the Local Housing Strategy.

2. Estimating future need and demand (Summary)

Table 1 – Key Findings Template: Estimate of Additional (New) Future Housing Units

HOUSING NEED AND DEMAND ASSESSMENT

Key Findings Template: Estimate of Additional (New) Future Housing Units

		Number of years to clear existing need
Total households with **existing need (net)**	1,328	10

	Household Projection Period		
	2021-2040		
	Principal Projection	Low Migration Projection	High Migration Projection
Total number of new **households over the projection period**	309	0	434

	HNDA Projection Period
	2021-2040

	ANNUAL NEED - YEARS 1 TO 5[1]			
Total households over the projection period who *may* afford:	Scenario 1	Scenario 2	Scenario 3	Scenario 4
OWNER OCCUPATION	74	79	74	79
PRIVATE RENT	63	68	64	69
BELOW MARKET RENT	7	7	6	7
SOCIAL RENT	51	55	51	55
Total additional future housing units	**195**	**210**	**195**	**210**

[1] Please note, the use of rounding when displaying the Housing Estimate figures results in small discrepancies between the individual units required and totals, as well as totals compared to the Cumulative Total At End of Projection Period figures.

ANNUAL NEED - YEARS 5 TO 10[2]

Total households over the projection period who *may* afford:	Scenario 1	Scenario 2	Scenario 3	Scenario 4
OWNER OCCUPATION	53	57	53	57
PRIVATE RENT	44	47	46	49
BELOW MARKET RENT	4	5	4	5
SOCIAL RENT	31	33	29	31
Total additional future housing units	**133**	**143**	**133**	**143**

ANNUAL NEED - YEARS 10 TO 15

Total households over the projection period who *may* afford:	Scenario 1	Scenario 2	Scenario 3	Scenario 4
OWNER OCCUPATION	0	0	0	0
PRIVATE RENT	0	0	0	0
BELOW MARKET RENT	0	0	0	0
SOCIAL RENT	0	0	0	0
Total additional future housing units	**0**	**0**	**0**	**0**

ANNUAL NEED - YEARS 15 TO 20

Total households over the projection period who *may* afford:	Scenario 1	Scenario 2	Scenario 3	Scenario 4
OWNER OCCUPATION	0	0	0	0
PRIVATE RENT	0	0	0	0
BELOW MARKET RENT	0	0	0	0
SOCIAL RENT	0	0	0	0
Total additional future housing units	**0**	**0**	**0**	**0**

[2] Data beyond Year 10 produced negative figures, and as such these have been zeroed.

Total households over the projection period who *may* afford:	CUMULATIVE TOTAL AT END OF PROJECTION PERIOD[3]			
	Scenario 1	Scenario 2	Scenario 3	Scenario 4
OWNER OCCUPATION	635	683	635	683
PRIVATE RENT	536	577	551	593
BELOW MARKET RENT	54	58	52	56
SOCIAL RENT	412	444	399	430
Total additional future housing units	1,637	1,762	1,637	1,762

3. Executive Summary

Background

3.1 South Ayrshire has an estimated population of 112,610[4], representing approximately 2% of the population of Scotland.

3.2 The area includes the towns of Ayr, Prestwick, Troon, Maybole and Girvan. A large rural area of 422 square miles (1,222 square km) extends from Troon and Symington in the north to Ballantrae and Loch Ryan in the south. Approximately 27% of the South Ayrshire population live in areas classified as rural.

Population

Slight reduction in total population

3.3 In terms of total numbers, South Ayrshire's population has stayed relatively stable over the last twenty years compared to other local authorities in Scotland, decreasing only marginally between 1998 and 2019[5].

[3] Please note, the use of rounding when displaying the Housing Estimate figures results in small discrepancies between the individual units required and totals, as well as totals compared to the Cumulative Total At End of Projection Period figures.

[4] NRS *Mid-2019 population estimates by Council area in Scotland, South Ayrshire Council area profile* https://www.nrscotland.gov.uk/files/statistics/council-area-data-sheets/south-ayrshire-council-profile.html

[5] As above

3.4 It is expected that South Ayrshire's population will decrease by 2040, a reduction of 5.1% from 2021[6]. This compares to an overall increase in Scotland's population of about 1.8%. Projections show 18 local authorities in Scotland are likely to experience a decrease in population.

3.5 This change is made up of a decrease in population through natural change of 13.3% (meaning more deaths than births), an increase in population as a result of net migration of 8.6% (meaning more people migrating to South Ayrshire than those leaving) and other changes which account for a decrease of 0.4%.

3.6 The majority of this net migration is from other areas in Scotland, while migration to and from the rest of the UK also contributes significantly to this. Migration from overseas produces a negative figure of net migration, meaning that more people leave South Ayrshire to go overseas than those who come from overseas to South Ayrshire[7].

An ageing population

3.7 South Ayrshire currently has an older population than the rest of Scotland, with the difference being particularly noticeable in reductions to the 45-59 age group and increases to the 75 and over age group[8].

3.8 Recent years have seen a trend towards an ageing population in South Ayrshire[9], with the 65-74 and 75+ age groups seeing the largest increases between 2021 and 2040.

3.9 While this is in-keeping with demographic changes nationally, these changes were more pronounced in South Ayrshire than for Scotland during this period[10].

Smaller households

3.10 South Ayrshire has an estimated 52,588 households[11].

3.11 While the total overall population of South Ayrshire has been decreasing over the last twenty years, the total number of households has been increasing[12]. This tells us that people are tending to live in smaller households.

3.12 As would be expected given the information above, South Ayrshire has a significantly higher proportion of 'older smaller' households than the Scottish average, and a lower proportion of 'single adult' and 'small family' households[13].

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[6] *NRS* Mid-2018 Population Projections for Scottish Areas (2018- based) Data Tables https://www.nrscotland.gov.uk/statistics-and-data/statistics/statistics-by-theme/population/population-projections/sub-national-population-projections/2018-based

[7] *NRS Population Projections for Scottish Areas (2018-based).* https://www.nrscotland.gov.uk/statistics-and-data/statistics/statistics-by-theme/population/population-projections/sub-national-population-projections/2018-based

[8] *NRS* 2018-based Population Projections, summary table for South Ayrshire (S12000028), Males, Females https://www.nrscotland.gov.uk/statistics-and-data/statistics/statistics-by-theme/population/population-projections/sub-national-population-projections/2018-based/summary-datasets

[9] NRS *Mid-2019 Population Estimates by Council Area in Scotland, South Ayrshire Council Area profile* – https://www.nrscotland.gov.uk/files/statistics/council-area-data-sheets/south-ayrshire-council-profile.html

[10] As above – Tables derived from population estimate time series data

[11] NRS *Estimates of Households and Dwellings in Scotland, 2019. https://www.nrscotland.gov.uk/statistics-and-data/statistics/statistics-by-theme/households/household-estimates/2019*

[12] As above

[13] Scottish Household Survey *Scotland's People Local Authority Tables*, 2018.

3.13 The number of households in South Ayrshire is projected to increase from 2021 to 2031 by 0.4% and then decrease by 0.6% between 2031 and 2040. This equates to a 0.2% decrease between 2021 and 2040[14].

Housing in South Ayrshire

Larger properties

3.14 There are an estimated 55,668[15] dwellings in South Ayrshire[16]. Most dwellings are houses (72%), with detached and semi-detached properties being most common[17].

3.15 Recent estimates suggested that almost 65% of dwellings in South Ayrshire had four or more rooms, while there were only a small number of properties with one or two rooms (about 11%)[18].

3.16 Given the downward trends in average household size seen in recent years and projected to continue in the years to come, this could be interpreted as something of a mismatch in terms of provision.

Owner occupation is the predominant tenure

3.17 The majority (67%) of dwellings in South Ayrshire are in owner-occupation.

3.18 The next most common housing tenure is the social rented sector, representing 19% of dwellings (made up of Council housing at 15% of all dwellings and RSL housing at 4%), while the Private Rented Sector (PRS) makes a small but valuable contribution to meeting housing needs in South Ayrshire, accounting for more than 11% of all dwellings.

3.19 Almost 2,000 privately-owned properties were estimated to be vacant or used as Second Homes[19].

Under-occupancy is common, particularly amongst older households

3.20 About 72% of South Ayrshire's households were defined as under-occupying, meaning their dwelling has 1 or more rooms in addition to the rooms they would require to meet their basic needs. Almost half of South Ayrshire's households were estimated to be under-occupying by two or more rooms[20].

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[14] *NRS Household Projections for Scotland (2018-based) Detailed Scottish Area Tables - Principal Projection, South Ayrshire* https://www.nrscotland.gov.uk/statistics-and-data/statistics/statistics-by-theme/households/household-projections/2018-based-household-projections/list-of-data-tables

[15] *NRS Household Estimates, Scotland, 2019 is the most recent and preferred dataset for the estimated dwellings in South Ayrshire. Estimates have also been used from NRS 2018 and Scottish Government 2018 to allow for sub-level analysis.*

[16] NRS *Household Estimates, Scotland, 2019.* https://www.nrscotland.gov.uk/statistics-and-data/statistics/stats-at-a-glance/infographics-and-visualisations#hh-estimates

[17] NRS *Dwelling Estimates and Characteristics of Dwellings by 2011 Datazones, 2017.* https://www.nrscotland.gov.uk/statlolistics-and-data/statistics/statistics-by-theme/households/household-estimates/small-area-statistics-on-households-and-dwellings

[18] NRS *Dwelling Estimates and Characteristics of Dwellings by 2011 Datazones, 2017.* Based on data from the Scottish Assessors' Association's Assessors' Portal. https://www.nrscotland.gov.uk/statistics-and-data/statistics/statistics-by-theme/households/household-estimates/small-area-statistics-on-households-and-dwellings

[19] Scottish Government, *Housing Statistics for Scotland, Stock by tenure 2018,* https://www2.gov.scot/Topics/Statistics/Browse/Housing-Regeneration/HSfS/KeyInfoTables

[20] Scotland's Census 2011, Occupancy rating per room

3.21 Under-occupancy is most common in owner-occupation, with the issue being far less prevalent in the social rented sector. In addition, older households were more likely to be under-occupying than families[21].

3.22 Under-occupancy is not necessarily a negative influence on the housing market, as many households will choose to live in a home that is bigger than their basic needs. Under-occupancy becomes an issue where demand for larger properties greatly exceeds supply.

Overcrowding an issue, but affects a relatively small number of households

3.23 Overcrowding is the opposite of under-occupancy and refers to occasions where households are living in accommodation that has too few rooms to meet their basic requirements.

3.24 It is estimated that 6% of households in South Ayrshire are overcrowded[22], affecting all tenures, but most common in the social rented sector[23].

Small number of concealed households

3.25 A related issue to overcrowding is that of 'concealed households', where two or more households are living together in a single dwelling. This can often result in overcrowding.

3.26 384 households in South Ayrshire were estimated to be concealed. While this can affect families of all ages, the majority of these in South Ayrshire (61%) had a Family Reference Person (FRP) under the age of 35[24], as such this issue has a disproportionate impact on younger households.

The Housing Market

House prices steady but still affordability issues

3.27 South Ayrshire's average residential property price was £156,394[25]. This compares to a Scottish average of £182,357.

3.28 Prior to the housing market crash of 2007/08, South Ayrshire's average house prices were higher than for Scotland as a whole. Since 2009/10, however, the opposite has been true, and the years since 2016/17 have seen increasing divergence between the South Ayrshire and the Scottish average.

3.29 Growth in the value of house sales in South Ayrshire during the period 2010/11 to 2019/20 was around 0.2% per annum. The new build sector has seen greater growth during this time, again increasing by around 5% per year since 2010/11, although this has slowed to some extent in recent years[26].

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[21] SHCS Local Authority Analysis Tables 2016-2018 Under-occupied

[22] Scotland's Census 2011 occupancy rating per room

[23] SHCS Local Authority Analysis Tables - % of dwellings which are overcrowded

[24] Scotland's Census DC1110SC

[25] Registers of Scotland *Property Market Report 2019/20.* Table 3: Average residential property price by local authority, Scotland, 2003-04 to 2019-20, financial year data. https://www.ros.gov.uk/data-and-statistics/house-price-statistics. Excludes sales under £20,000 and over £1m.

[26] Registers of Scotland *Property Market Report 2019/20.* Table 3: Average residential property price by local authority, Scotland, 2003-04 to 2019-20, financial year data and Table 15: Average residential property price for new builds by local authority, Scotland, 2003-04 to 2019-20, financial year data

3.30 Affordability can be an issue in accessing owner-occupation and given the prevalence of this tenure in South Ayrshire this can make it difficult for some households to find suitable housing.

3.31 More than a third of households (36%) would not be able to afford a property at the lower quartile sale price (£86,000), while 57% of households would not be able to afford a property at the median sale price (£135,000)[27].

3.32 In addition, recent months have seen a reduction in the number of high loan-to-value mortgage products being offered by banks[28], resulting in additional barriers for low income households in accessing this important tenure.

Private Rented Sector plays an important role, but still barriers to entry

3.33 The Private Rented Sector (PRS) makes a valued contribution to South Ayrshire's housing market, making up an estimated 11-12% of dwellings locally. The sector offers several benefits to tenants, and new national regulations have further improved its security and the quality of services offered.

3.34 The last ten years have seen relatively limited change in average rents in Ayrshire – a 1% increase for two-bedroom properties compared to the Scottish average of 24%[29].

3.35 Nonetheless, some households still find it more difficult to access housing in the PRS than others. Barriers to entry exist in the sector, including credit checks and the need to put down a deposit, while affordability can also be an issue for some.

3.36 About a third of households would not be able to affordably access a two-bedroom PRS property at the lower quartile rent level (£425 per month), while almost half of all households (47%) would not be able to afford a three bedroom PRS property at the median rent (£550 per month)[30].

3.37 Furthermore, for households claiming benefits, other barriers to entry can exist, including landlord preferences, as well as restrictions on the amount of rental costs paid to single people under the age of 35.

Social renting meets many needs, but demand exceeds supply

3.38 There are more than 10,500 properties provided as social housing in South Ayrshire. The majority of these are provided by South Ayrshire Council (more than 8,000 units), while the remainder are provided by several local and national housing associations, sometimes referred to as Registered Social Landlords (RSLs) [31].

3.39 Demand for social housing is high, with recent figures showing more than 3,000 people on the Council's housing list[32].

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[27] Centre for Housing Market Analysis *HNDA Datapack 2020*.

[28] Scottish Government *Scottish Housing Market Review, October – December 2020*

[29] *Scottish Government* Private Renting Statistics, 2010 to 2020

[30] Scottish Government *Private Renting Statistics, 2010 to 2020,* Centre for Housing Market Analysis *HNDA Datapack 2020.*

[31] Scottish Housing Regulator, *Stock by Provision Type and LA Area, 2019*. Data provided as at 31 March 2019. Issued by Scotland's Housing Network, 6/11/19.

[32] South Ayrshire Council, Number of current applications Northgate Report, as at 11 August 2020.

3.40 At the same time, supply is relatively limited with an average of 770 Council properties becoming available in the five years to 2019/20[33] and between 140 and 200 lets per year from the two largest RSLs[34].

3.41 In terms of South Ayrshire Council's housing stock, there were estimated to be 4 applicants for every let in 2019/20. Most demand is for one and two bedroom properties, and this also represents the majority of the Council's stock.

3.42 3-bedroom properties accounted for around a quarter of the Council's housing stock, yet only 10% of all applicants were looking for this size of accommodation[35]. This suggests something of a mismatch between demand and supply and supports the trends towards smaller household sizes shown earlier.

Rural housing needs

3.43 An estimated 4% of our population live in an area which meets the Scottish Government's definition of "remote rural"[36], while a further 15% of our population live in an area which meets the Scottish Government's definition of "accessible rural"[37]

3.44 A recent study of Rural Housing Needs[38] was carried out to inform the HNDA and planning for the Strategic Housing Investment Plan (SHIP).

3.45 The study found that housing challenges often varied from those in urban areas, and particularly the prevalence of hidden demand for housing.

3.46 A high proportion of those who responded to our survey, for instance, noted a need for additional social housing in rural areas (89%), yet a similarly high proportion were not themselves on a social housing waiting list (83%).

3.47 High proportions of respondents favoured a house or a bungalow (82%), while more than half of all Council stock is made up of flatted dwellings.

3.48 Qualitative responses to consultation on social media highlighted the need for more 'family homes', which, given the trend towards more but smaller households, suggests that there may be a number of larger properties being under occupied. Consequently, developing smaller, amenity style accommodation aimed at older people may free up family accommodation and encourage younger families to choose to settle in (or remain) rural areas.

3.49 As South Ayrshire is a single Housing Market Area (HMA), our Housing Supply Target (HST) will ensure adequate land supply for South Ayrshire as a whole.

3.50 A number of rural developments are currently planned in our Strategic Housing Investment Plan (SHIP), and the Council will ensure rural housing needs are met by working

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[33] Northgate housing system reports used to inform South Ayrshire Council Annual Return on the Charter (Indicator C7), 2015/16 to 2019/20.

[34] Data provided by Ayrshire Housing and West of Scotland for re-lets annually between 2015/16 – 2019/20

[35] South Ayrshire Council, Number of current applications Northgate Report, as at 11 August 2020, compared to average lets 2015/16 to 2019/20. (*) denotes average of less than 1 let per year, (-) denotes no relets during this time period.

[36] Defined as "Settlements of less than 3,000 and with a drive time of over 30 minutes to a settlement of 10,000 people or more"

[37] Defined as "Settlements of less than 3,000 and with a drive time of 30 minutes to a settlement of 10,000 people or more"

[38] Report on Rural Housing Needs Study, Members Bulletin, May 2019.

with our RSL and private sector partners to identify further opportunities to develop appropriate accommodation to meet rural housing needs in the years to come.

Meeting particular needs

Housing for people with physical disabilities

3.51 7.2% of South Ayrshire's population has a physical disability, compared with 6.7% of the population of Scotland[39]. The same source estimates that the physical activities of 11,870 people in South Ayrshire are limited 'a lot' by their disability, while a further 12,671 people are estimated to have their physical activities limited 'a little'[40].

3.52 There are an estimated 1,810 wheelchair user households in South Ayrshire[41]. In the context of an ageing population, it is anticipated that the proportion of our population requiring accessible or adapted housing will increase over the lifetime of the HNDA.

3.53 To address these needs, new build social housing properties are designed to meet the Lifetime Homes standard, making them adaptable by design, with the aim of creating and encouraging better living environments for everyone.

3.54 Despite this, anybody at some stage in their life may need additional support to maintain their independence, particularly as they become older or where particular needs develop or become more pronounced. In these instances, we would seek to work with other agencies to consider the options open to the person, including delivering adaptations to support independent living or finding alternative accommodation where appropriate.

3.55 Demand for Council-owned ground level accommodation is high, with around 140 lets per year and 4 applicants to every let. Demand is particularly pronounced for two bedroom properties[42].

3.56 RSLs also contribute to meeting this demand by providing specialist housing options and developing new housing to meet Lifetime Homes/Housing for Varying Needs standards[43].

3.57 In terms of net existing need, we have estimated that there are currently about 101 households who require ground level accommodation and 179 households requiring wheelchair accessible accommodation giving an estimated total of 280 households whose needs will not be met by in situ solutions[44].

3.58 We estimate that this figure would rise to about 332 households by 2028 if no new properties were developed to meet this need.

Non-permanent and interim accommodation

3.59 While South Ayrshire Council's focus is on providing settled accommodation in the community with appropriate support where required, there are instances where it is more

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[39] Scottish Census 2011 https://www.scotlandscensus.gov.uk/ods-analyser/jsf/tableView/tableView.xhtml

[40] Scottish Census 2011 https://www.scotlandscensus.gov.uk/ods-web/area.html

[41] Adapted from Horizon Housing *Still Minding the Step? A new estimation of the housing needs of wheelchair users in Scotland.* https://www.horizonhousing.org/media/1522/still-minding-the-step-full-report.pdf

[42] Northgate housing system reports used to inform South Ayrshire Council Annual Return on the Charter (Indicator C7), 2015/16 to 2019/20.

[43] Annual Return on the Charter information provided by Ayrshire Housing, West of Scotland, Hanover and Link. Information sought from Trust, Blackwood, ANCHO.

[44] See Appendix 1 for calculation.

appropriate to provide temporary or interim accommodation until a suitable long-term option is found.

Temporary accommodation for homeless households

3.60 One such example is temporary accommodation for people experiencing homelessness. South Ayrshire Council received 845 applications for assistance under homelessness legislation in 2019/20[45].

3.61 The Council is required to provide temporary accommodation where we believe the person to be homeless. To achieve this, we utilise accommodation from a variety of sources, including from the Council's own stock, from RSLs, and through arrangements with private landlords. At 31 March 2020, 232 units of stock from these sources were provided as temporary accommodation.

3.62 It is difficult to predict future trends in homelessness, however our approach over the years has been to ensure a flexible supply of temporary accommodation is available to meet needs.

3.63 In implementing its Rapid Rehousing Transition Plan, the Council is seeking to reduce the length of time people spend in temporary accommodation. In order to achieve this, a number of steps are being taken including the continued roll-out of Housing First to 50 clients by 2024, developing a Social Lettings Agency to support 80 households to access the PRS and exploring options to meet the needs of the 1% of homeless households who would be better served by residential supported accommodation.

3.64 If successful it is hoped that these measures would result in a reduction in need for temporary accommodation.

Young people leaving care

3.65 Between 1 August 2019 and 31 July 2020, 29 young people over the age of 16 left care in South Ayrshire[46].

3.66 The Council's focus is on providing this group of young people with a range of good quality housing options backed by appropriate support to best meet their individual needs.

3.67 While the needs of many care leavers can be met by the provision of good quality accommodation with minimal support, other young people have more significant support requirements, needing a greater degree of support in their transition to interdependence.

3.68 South Ayrshire Council currently provides several interim options focussed on supporting this group, including 8 units of supported accommodation, Starter Flats with support in the community, and independent flats within our Children's houses[47].

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[45] Scottish Government *Annual Report for South Ayrshire (HL1), 2019/20*

[46] Scottish Government *Children's Social Work Statistics, 2019/20* - Table 3.4: Percentage of care leavers over 16 years old with a pathway plan and a pathway co-ordinator, by local authority, 2019-20. https://www.gov.scot/publications/childrens-social-work-statistics-2019-20/pages/9/

[47] A 'Children's house' is a safe and homely environment, staffed by trained residential workers providing residential care for children and young people. South Ayrshire Council has 2 Children's houses. Sundrum in Coylton – accommodating a maximum of 5 children and young people up to the age of 18 years, and Cunningham Place in Ayr – accommodating a maximum of 6 young people between 12 years to 18 years.

3.69 Going forward, there is a recognised need to continue to develop good quality options for young people leaving care, learning from local and national best practice and listening to what young people themselves want. While it is very difficult to accurately say how many young people will leave care over the age of 16 in the future, we believe this level of need is likely to be sustained in the years to come.

3.70 It is estimated that an additional 12 units of specialist accommodation with support would be required to meet the anticipated short-term needs of young people leaving care[48], while other needs can be met through mainstream housing with appropriate support.

3.71 Engagement with young people with experience of care has indicated a need to provide more permanent and non-permanent housing options that support graduated transition towards independence. Young people highlighted a number of possible options, including 'satellite flats', the Foyer model, shared housing and a Housing First for Youth project.

Women fleeing violence

3.72 In 2018/19, South Ayrshire saw 95 reported domestic abuse incidents per 10,000 population[49]. A relatively high proportion of households applying as homeless cite domestic abuse as the technical reason for homelessness on their application – 133 households in 2019/20, representing about 16% of cases[50].

3.73 South Ayrshire Women's Aid is the primary resource for women and children fleeing domestic abuse in South Ayrshire. This organisation offers help in securing safe, alternative accommodation, and additionally offers 8 temporary accommodation spaces in a refuge setting. Temporary accommodation is also provided as part of South Ayrshire Council's homelessness duty.

3.74 In terms of permanent accommodation, people fleeing domestic abuse receive a priority in accessing social housing as part of the local authority and RSLs' allocations policies.

People fleeing conflict

3.75 South Ayrshire Council has over the last ten years provided permanent accommodation to people fleeing conflict. The Council has settled a total of 21 households through the Afghan Relocation Scheme and to date, as well as 41 households through the Syrian Vulnerable Persons Relocation (VPR) Scheme.

3.76 Housing Support is in place to help individuals settle, including skills projects to improve access to employment, and efforts to ensure cultural and religious needs of this group can be met.

3.77 It is anticipated that in the coming years the Council will support the Global Resettlement Programme following a commitment made in September 2020. It is anticipated

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[48] Discussion as part of Improving Housing Outcomes for Young Care Leavers group, December 2020 – informed by the report South Ayrshire Health and Social Care Partnership *Improving Outcomes for Young People Leaving Care 2019-2024.*

[49] Scottish Government, Domestic Abuse Statistics, Table 5: Rate of incidents of domestic abuse recorded by the police per 10,000 population3, by local authority, 2009-10 to 2018-19

[50] Scottish Government *Annual Report for South Ayrshire (HL1), 2019/20*

that this contribution will be like that under the Syrian VPR scheme – around 42 individuals. This need will be met from within the existing housing stock.

Supported housing provision

Care homes

3.78 Care home provision in South Ayrshire is delivered by private sector providers, voluntary organisations and the local authority. Provision meets a range of needs and care home residents are either Long Stay, Short Stay, or Respite.

3.79 The total number of care homes has reduced slightly in South Ayrshire in the last ten years, from 32 care homes in 2007 to 30 care homes in 2017. During the same period, the number of care home places in South Ayrshire has increased, from 980 in 2007 to 1,197 places in 2017[51].

3.80 South Ayrshire differs from Scotland as a whole in that the general national trend has been for fewer adults to reside in care homes, with a reduction of about 5% in the ten years to 2017. In South Ayrshire, this same period saw a general upward trend – an 11% increase from 948 residents in 2007 to 1,056 residents in 2017[52]. This is a result of the particular demographic trends within South Ayrshire rather than the Health and Social Care Partnership's (HSCP) approach to commissioning and designing services.

3.81 As at 2018, there were approximately 95 care home places per 1,000 people over the age of 75. For this level of provision to be maintained in the context of an increasing population in this age group and without significant service transformation, an additional 328 care home places would theoretically be required by 2028.

3.82 The Health and Social Care Partnership's LIST team took an alternative approach to reviewing this issue, and used figures of actual residence in Care Homes to estimate what need for care home places will look like in 2029/30.

3.83 This research estimated that at least 1,248 spaces would be required by 2028/29. As care homes in South Ayrshire were not at capacity in 2018, this would mean an increase of 37 spaces from the 1,211 spaces recorded in the 2018 care home census.

3.84 Consideration should be given to whether increasing the volume of care home spaces is the most appropriate response in the broad national context (e.g. 'shifting the balance of care') set out in various recent policy documents[53], as well as evidence of reducing occupancy rates locally[54].

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[51] NHS Information Services Division (2018) *Care Home Census for Adults in Scotland, 2007-2017 Data Tables* https://www.isdscotland.org/Health-Topics/Health-and-Social-Community-Care/Publications/2018-09-11/2018-09-11-CHCensus-Report.pdf

[52] As above

[53] See for instance Scottish Government (2018) *Age, Home and Community – The Next Phase* https://www.gov.scot/publications/age-home-community-next-phase/pages/1/

[54] NHS Information Services Division (2018) *Care Home Census for Adults in Scotland, 2007-2017 Data Tables* https://www.isdscotland.org/Health-Topics/Health-and-Social-Community-Care/Publications/2018-09-11/2018-09-11-CHCensus-Report.pdf

3.85 The Council and our partners should work together to set out appropriate strategies to meet this need going forward, while supporting the principles of 'right advice, right home, right support'[55].

Sheltered housing

3.86 There are 743 units of sheltered and very sheltered accommodation in South Ayrshire, provided by the local authority and RSL partners[56].

3.87 There are approximately 6 applicants for every let in South Ayrshire, however about 98 Sheltered Housing properties within South Ayrshire Council's stock have been classified as being in 'low demand', as at 31 March 2020. A further 10 properties are considered to have 'no demand', meaning that there is no-one currently on the waiting list for these properties.

3.88 This suggests a mismatch between need and demand for this type of accommodation.

3.89 The longer-term role of sheltered housing should be explored further with our partners during the development of the LHS to ensure current supply is continuing to meet the changing needs of our population.

Housing with care

3.90 In addition to 31 existing units of 'very sheltered' provision by housing association partners, a number of developments have been taken forward by the Housing service and our RSL partners in recent years to meet the specific identified needs of HSCP clients.

3.91 We intend to continue to work in partnership through regular meetings and joint planning sessions in order to identify similar opportunities to progress new build and buyback opportunities to meet specific housing and support needs in our community, as well as planning for the future in this area of work.

Long-term supported accommodation

3.92 South Ayrshire Council's Rapid Rehousing Transition Plan estimated that about 1% of households applying for assistance under homelessness legislation would be best served by a longer-term supported accommodation model offering 'highly specialist provision within small, shared, supported and trauma informed environments if mainstream housing, including Housing First, is not possible or preferable'[57].

3.93 Over the next five years, the Council intends to work with HSCP partners to consider options to provide long-term supported accommodation models for the 7-8 homeless households per year who would benefit from this type of accommodation.

Care and support for independent living at home

3.94 In addition to the accommodation models described above, many households and individuals require some form of support delivered in their own home, for example, a key worker or warden, with additional support from a community psychiatric nurse, or general nurse, social worker, physiotherapist, care assistant, or housing support officer among others.

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[55] Scottish Government (2018) *Age, Home and Community – The Next Phase*

[56] Scottish Housing Regulator (2019) *All stock landlords dataset by provision type and local authority area, as at 31 March 2019*

[57] Scottish Government *Rapid Rehousing Transition Plans: Guidance for local authorities and partners*.

3.95 There are a wide range of relevant care and support services available across South Ayrshire, to enable residents to live independently in their own, primarily mainstream, home.

3.96 This can include general housing support, telehealth and telecare, and home care.

3.97 The most recent information available notes that 2,650 households in South Ayrshire had Community Alarms and/or Telecare systems fitted in their home[58], while 1,330 people aged 65+ were receiving care at home and free personal care[59].

3.98 With regard to people with learning disabilities, 470 adults with learning disabilities were known to South Ayrshire Council in 2019[60], the majority of whom live in mainstream housing with support[61].

3.99 South Ayrshire IJB's Strategic Plan 2021-2031 sets out a commitment to self-directed support as a mechanism for people to have more choice and control in their lives as well as highlighting our intention to work together to identify housing need and to develop Social Housing specifically for people with Learning Disabilities. 27 properties are currently being developed by an RSL partner to meet the identified specific needs of this population.

3.100 SAC and the HSCP have also set out a commitment in the IJB Strategic Plan and Housing Contribution Statement to work in partnership in the years to come to identify opportunities to meet similar specific needs as these arise.

Locational and land needs

Gypsy/Travellers

3.101 Following on from the publication of the CoSLA report "Improving the Lives of Gypsy/Travellers 2019-2021", a motion was passed at a special Council meeting to work towards the implementation of this report's recommendations. A Member Officer Working Group has since been established, and the focus so far has been on the first of the report's recommendations, to "Provide More and Better Accommodation".

3.102 Scotland's Census 2011 indicated there were 98 households where the household reference person indicated that they were 'White: Gypsy/Traveller' in South Ayrshire[62].

3.103 Evidence shows that the majority of households where a member identifies as belonging to the Gypsy/Traveller community are living in mainstream settled accommodation.

3.104 As such, we believe most needs of the Gypsy/Traveller community can be met from within existing projections of need for housing in the area.

3.105 In terms of specialist provision, 7 properties were built in 2019, with the Council working closely in partnership with the community. One property is currently vacant. This unit was built to amenity space standards to meet a specific housing need that has

58 Scottish Government *Social Care Services Scotland, 2017* https://www2.gov.scot/Topics/Statistics/Browse/Health/Data/HomeCare/SocialCareDataSets2017

59 Scottish Government *Social Care Services Scotland, 2017* https://www2.gov.scot/Topics/Statistics/Browse/Health/Data/HomeCare/SocialCareDataSets2017

60 Scottish Commission for Learning Disability *Learning Disability Statistics Scotland 2019.* https://www.scld.org.uk/wp-content/uploads/2019/12/Learning-Disability-Statistics-Scotland-2019.pdf

61 Scottish Commission for Learning Disability, *Learning Disability Statistics Scotland 2019*

62 2011 Census Table KS201SC - Ethnic group http://scotlandscensus.gov.uk/census-results

subsequently been met elsewhere, and it is our intention to convert this property into two accommodation units, giving a total of 8 units to meet the needs of this community.

3.106 At the present time we believe there to be no additional housing need for permanent accommodation for Gypsy/Travellers at this time, given that our specialist accommodation for this group both has the capacity to meet current and future needs, and is not currently at capacity. This will be kept under review during the lifetime of the HNDA.

3.107 Thinking about the need for transit sites or 'negotiated stopping', this can be evidenced by the continuing number of unauthorised encampments in South Ayrshire. While this has traditionally been less common in South Ayrshire than in other parts of Scotland[63], it still suggests unmet need and the last year has seen a substantial increase in the volume of unauthorised encampments in South Ayrshire[64].

3.108 Evidence coupled with officer knowledge suggests a need for up to 6 pitches to meet the needs of this population. A Member/Officer Working Group is currently reviewing options in terms of meeting this need.

Travelling Show People

3.109 Travelling Show People are a distinct community from Gypsy/Travellers, are not a minority ethnic group and do not seek this status.

3.110 Relatively recent contact between members of the Showman's Guild and the Council suggests that this group are not currently seeking sites to live on in South Ayrshire, but contact will be made with the Showman's Guild – Scottish Section as part of this consultation process to ensure this is accurate.

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[63] Scottish Government *Gypsy Traveller sites in Scotland, 2018* https://www.gov.scot/publications/gypsy-traveller-sites-scotland. *Data not available for LA ** Data on individual encampment locations not available

[64] Year-to-date data presented at Member Officer Working Group, 23 April 2021. 34 unauthorised encampments compared to average of 9 per year to 2019.

Chapter 2: Key Housing Market Drivers

4. Demographic Trends

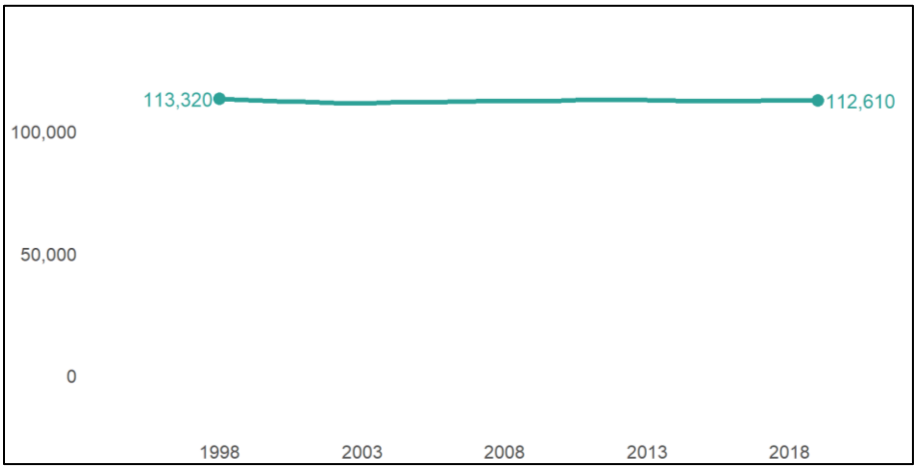
4(a) Household Composition

Population estimates

4.1 South Ayrshire has an estimated population of 112,610[65].

4.2 As can be seen in Figure 1, this population has stayed relatively stable over the last twenty years, decreasing only marginally between 1998 and 2019 (-0.6%).

Figure 1 – Population estimate, South Ayrshire, 1998-2019[66]

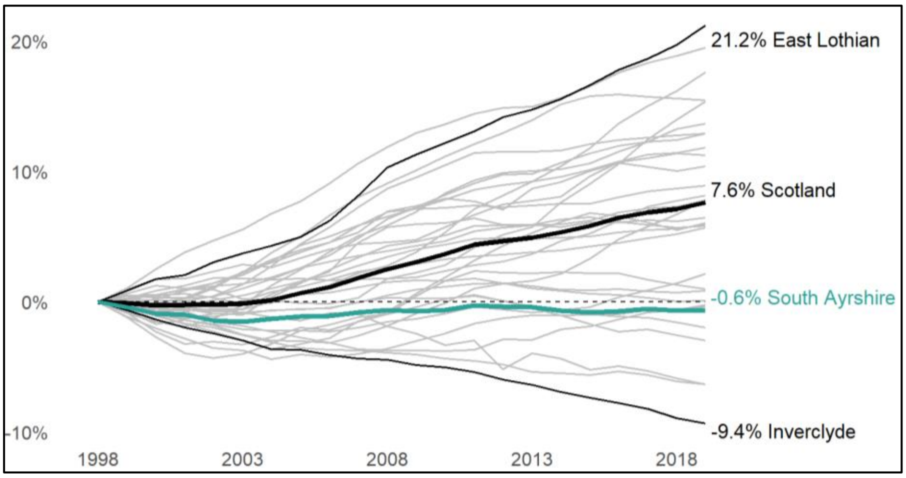


4.3 This limited population change stands in contrast to that seen for other local authorities and for Scotland as a whole during this same period, as can be seen in Figure 2 While Scotland's population increased by 7.6% between 1998 and 2019, South Ayrshire's population stayed broadly similar throughout, decreasing only modestly during this time. By way of contrast, only five authorities in Scotland saw less change in their total population during this period.

[65] NRS *Mid-2019 population estimates by Council area in Scotland, South Ayrshire Council area profile* https://www.nrscotland.gov.uk/files/statistics/council-area-data-sheets/south-ayrshire-council-profile.html

[66] As above.

Figure 2 – Overall percentage change in population by Council area, 1998-2019[67]



4.4 South Ayrshire has an older demographic profile than is the case for Scotland as a whole, as can be seen in Table 2. The most recent mid-year population estimates indicate that 45% of our population is under the age of 45 compared to more than 53% of the Scottish population, while 25% of South Ayrshire's population are over the age of 65 compared to just over 19% of the Scottish population.

Table 2 – Estimated population by age in South Ayrshire and Scotland, 2019[68]

	Age 0-15	Age 16-24	Age 25-44	Age 45-64	Age 65-74	Age75+	Total
South Ayrshire	17,608	10,302	22,684	33,272	15,565	13,179	112,610
	15.6%	9.1%	20.1%	29.5%	13.8%	11.7%	100%
Scotland	16.9%	10.5%	26.1%	27.5%	10.6%	8.5%	100%

4.5 A similar estimate is provided by the Scottish Household Survey (SHS). While this survey used different age groupings to summarise of the NRS data, triangulation was possible by working with mid-2019 population estimates for the area by single year of age and grouping these to match the SHS.

4.6 The relative similarity between these results, demonstrated in Table 3, support the validity of the data on age distribution presented above.

[67] As above.

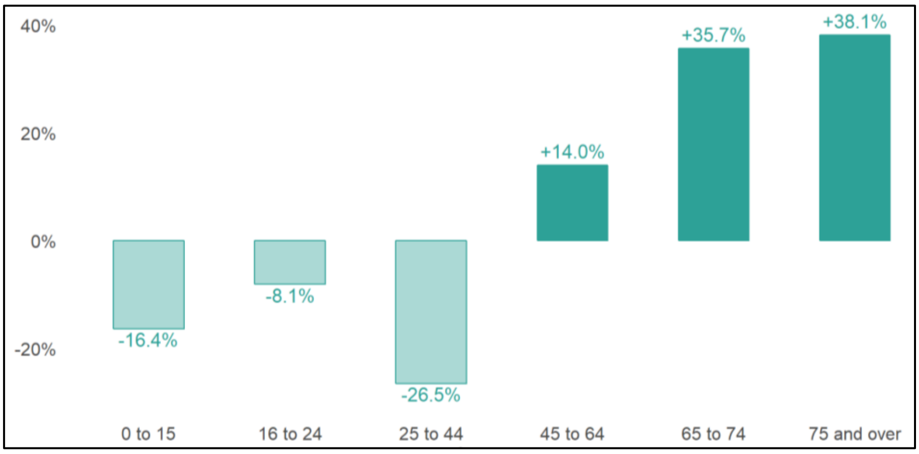
[68] NRS *Mid-2019 Population Estimates Scotland,* Table 2: Estimated population by sex, single year of age and administrative area, mid-2019 https://www.nrscotland.gov.uk/statistics-and-data/statistics/statistics-by-theme/population/population-estimates/mid-year-population-estimates/mid-2019

Table 3 – Population estimates by age in South Ayrshire in Scotland, 2018[69]

Age group	South Ayrshire SHS 2018 estimate	Scotland SHS 2018 estimate	Comparison to NRS mid-2019 estimates for SAC
0-15	16%	17%	15.6%
16-24	9%	11%	9.1%
25-34	10%	14%	10%
35-44	11%	12%	10.1%
45-59	21%	22%	22.1%
60-74	24%	17%	21.3%
75+	9%	8%	11.7%
All	**100%**	**100%**	**100%**

4.7 South Ayrshire has seen a general trend towards an ageing population in recent years. Figure 3 demonstrates the changes in population age distribution between 1998 and 2019. As can be seen below, the largest percentage decrease in population was in the 25 to 44 age group (-26.5%), while the 75 and over age group saw the largest percentage increase (+38.1%).

Figure 3 – Percentage change in population by age group in South Ayrshire, 1998 and 2019[70]



4.8 While this pattern is broadly consistent with the national trend towards an ageing population, it is important to recognise that some of the issues identified nationally appear more pronounced in South Ayrshire than for Scotland as a whole.

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69 Scottish Household Survey *Scotland's People: Local Authority Tables*, 2018. https://www2.gov.scot/Topics/Statistics/16002/LAtables2018

70 NRS *Mid-2019 Population Estimates by Council Area in Scotland, South Ayrshire Council Area profile* – https://www.nrscotland.gov.uk/files/statistics/council-area-data-sheets/south-ayrshire-council-profile.html

Table 4 - Percentage change in population by age group in South Ayrshire and Scotland, 1998 and 2019[71]

Age group	1998	2019	% change	Scotland % change
0 to 15	21,056	17,608	-16.4	-8.1
16 to 24	11,211	10,302	-8.1	1.4
25 to 44	30,865	22,684	-26.5	-6.0
45 to 64	29,176	33,272	14.0	24.9
65 to 74	11,472	15,565	35.7	29.8
75 and over	9,540	13,179	38.1	34.2
All people	**113,320**	**112,610**	**-0.6**	**7.6**

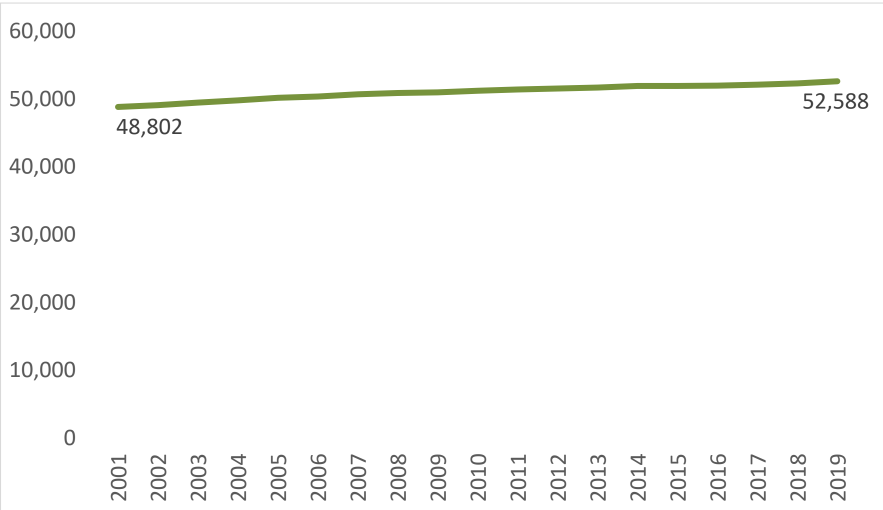
4.9 Table 4 above compares the proportion of change seen in South Ayrshire with that seen for Scotland. Here we can see that the reductions in the number of under-25s, reductions in the number of people aged between 25 and 44 and increases in the number of people aged over-65 are all higher in South Ayrshire.

Household estimates

4.10 South Ayrshire has an estimated 52,588 households[72].

4.11 Figure 4 demonstrates the general upward trend in the number of households between 2001 and 2019.

Figure 4 – Number of households in South Ayrshire, 2001-2019[73]



4.12 While this upward trend is again one seen across Scotland during this period, it is important to recognise that this increase in the number of households is less pronounced in South Ayrshire than for Scotland as a whole.

4.13 Figure 5 demonstrates the percentage change in the number of households for local authorities across Scotland as well as the Scottish Average. While South Ayrshire saw an

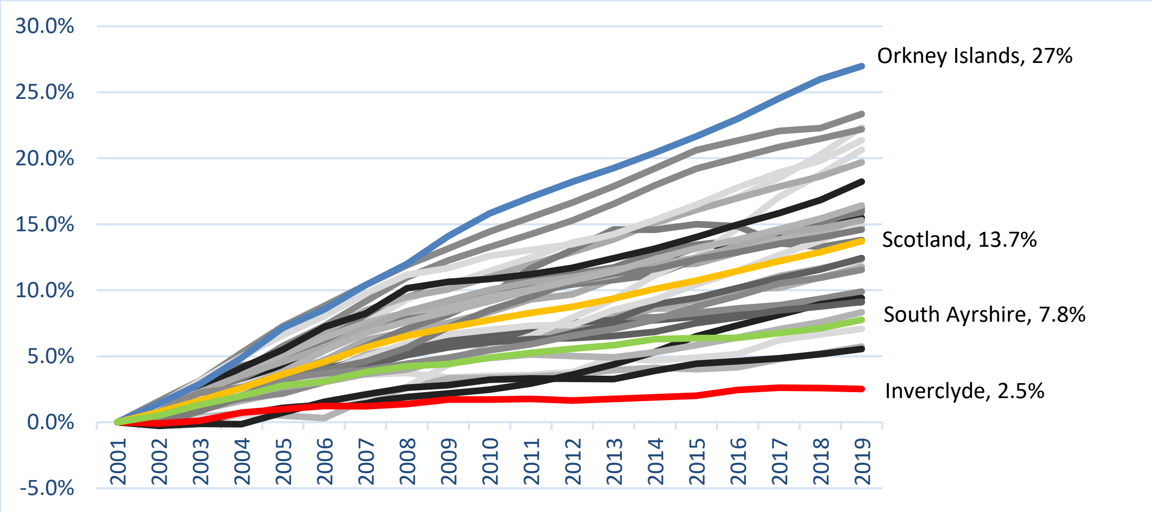
[71] As above – Tables derived from population estimate time series data

[72] NRS *Estimates of Households and Dwellings in Scotland, 2019*. https://www.nrscotland.gov.uk/statistics-and-data/statistics/statistics-by-theme/households/household-estimates/2019

[73] As above

increase in the estimated number of households of 7.8%, the percentage change for Scotland as a whole was almost 14%, while 27 of the other 31 local authorities saw a greater increase in the total number of households during this time than South Ayrshire.

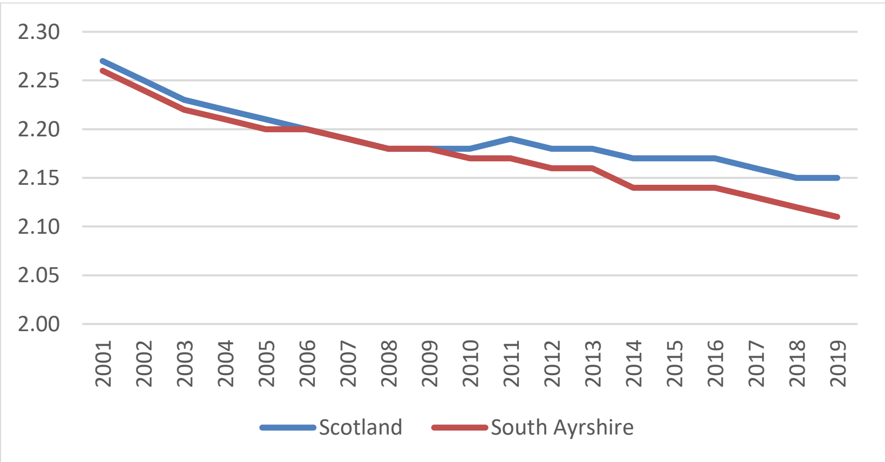
Figure 5 – Percentage change in the number of households, 2001-2019[74]



4.14 Despite this, the average household size has seen a greater degree of change in South Ayrshire than in Scotland as a whole.

4.15 Figure 6 below demonstrates a reduction in household size in South Ayrshire from 2.26 people per household in 2001 to 2.11 in 2019 – a reduction of 6.6%. This compares with a national average reduction of 5.3% from an average household size of 2.27 people in 2001 to 2.15 in 2019.

Figure 6 – Average household size for Scotland by council area, South Ayrshire and Scotland, June 2001 to 2019[75]



4.16 Based on the information presented so far, we have seen that South Ayrshire's population is staying broadly stable over time, and that the number of households is

[74] NRS *Estimates of Households and Dwellings in Scotland, 2019.* Table 1 https://www.nrscotland.gov.uk/statistics-and-data/statistics/statistics-by-theme/households/household-estimates/2019

[75] As above. Table 3.

increasing, albeit at a slower rate than elsewhere in Scotland. At the same time, the average household size is reducing at a faster rate than for Scotland as a whole.

4.17 In order to better understand these trends, we will now look to the Scottish Household Survey to consider how South Ayrshire's household profile compares to the national picture for different household types using the definitions below:

- ***Single adult*** household – contains one adult of working age and no children.
- ***Small adult*** household – contains two adults of working age and no children.
- ***Single parent*** household – contains one adult of any age and one or more children.
- ***Small family*** household – contains two adults of any age and one or two children.
- ***Large family*** household – contains two adults of any age and three or more children, or three or more adults of any age and one or more children.
- ***Large adult*** household – contains three or more adults and no children.
- ***Older smaller*** household – contains one adult of working age and one of pensionable age and no children, or two adults of pensionable age and no children.
- ***Single older*** household - contains one adult of pensionable age and no children. Pensionable age is 65 for both women and men.

Table 5 – Characteristics of household types in South Ayrshire and Scotland, 2018[76]

	South Ayrshire	Scotland
Single adult	19%	22%
Small adult	20%	20%
Single parent	5%	5%
Small family	9%	12%
Large family	5%	5%
Large adult	8%	9%
Older smaller	23%	14%
Single older	13%	14%
All	**100%**	**100%**

4.18 As can be seen in Table 1.d above, Scottish Household Survey estimates suggest South Ayrshire has a 'significantly higher' proportion of 'older smaller' households than the Scottish average, and a lower proportion of 'single adult' and 'small family' households.

4.19 These findings would perhaps be anticipated in the context of a population that is ageing to a greater extent than the Scottish average, with a lower proportion of working age people than for Scotland as a whole, but nevertheless this provides additional context and detail to this picture.

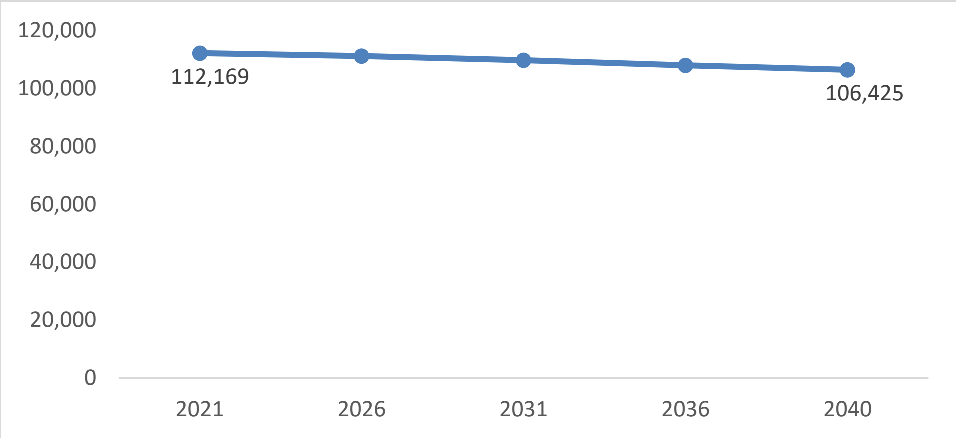
[76] Scottish Household Survey *Scotland's People Local Authority Tables*, 2018.

4(b) Household Projections

Population projections

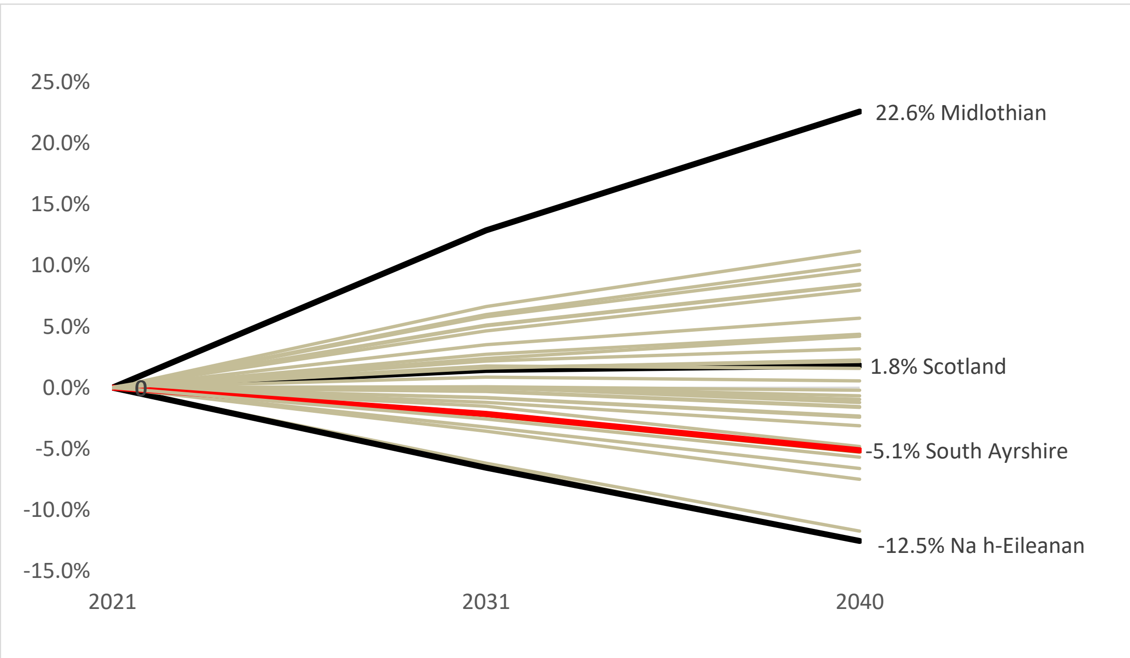
4.20 As can be seen in Figure 7, South Ayrshire's population is projected to decrease by 5.1% between 2021 and 2040.

Figure 7 - 2018-based Population Projections by Council Area in Scotland, South Ayrshire, 2021-2040[77]



4.21 This compares to a projected increase in the Scottish population of 1.8%. As can be seen in Figure 8, South Ayrshire is one of 18 authorities anticipated to see a decrease in total population, while 14 authorities will see a greater degree of change (increase or decrease) than South Ayrshire during this time.

Figure 8 – Percentage change in projected population by Council area, 2021-2040[78]

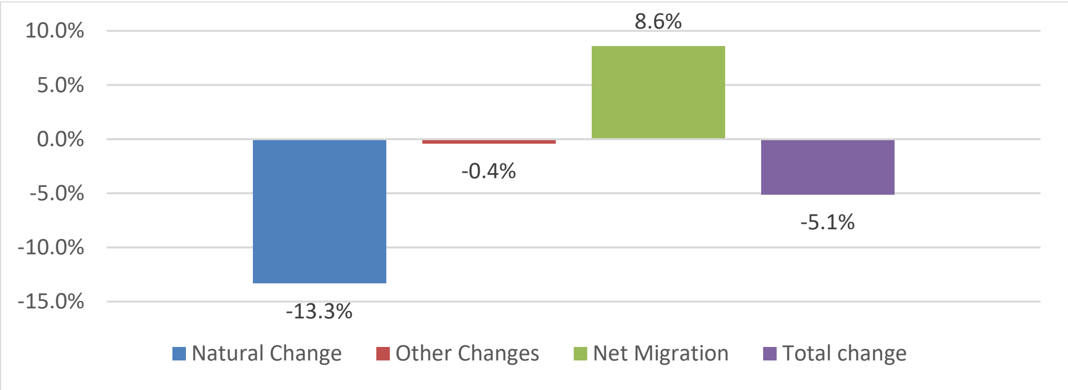


[77] *NRS* Mid-2018 Population Projections for Scottish Areas (2018- based) Data Tables https://www.nrscotland.gov.uk/statistics-and-data/statistics/statistics-by-theme/population/population-projections/sub-national-population-projections/2018-based

[78] As above

4.22 For South Ayrshire, this change comprises a decrease in population through natural change of -13.3% (meaning more deaths than births), coupled with an increase in population as a result of net migration of 8.6% (meaning more people migrating to South Ayrshire than those leaving). Other changes account for a -0.4% decrease in population. These broad trends are presented at Figure 9.

Figure 9 – Components of projected population change in South Ayrshire, 2021-2040[79]

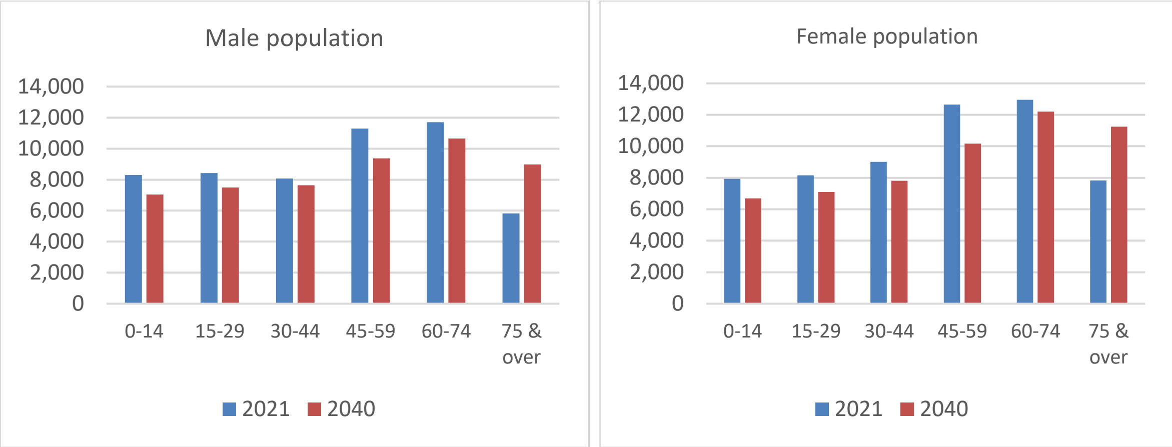


4.23 The projected decrease in population is a trend for 18 authorities across Scotland and is likely to occur unless there is policy intervention. This is a risk that South Ayrshire Council should take into account when considering wider policy issues to identify opportunities to mitigate population decline.

4.24 'In terms of population demographics, estimates again suggest that South Ayrshire's population distribution is continuing to age. Figure 10 demonstrates the anticipated male and female average age brackets of South Ayrshire's population in 2021 and in 2040. The largest age bracket is 60-74 years in 2021 and in 2040 but the greatest change over the 20-year period will be seen in the 75 years and over category as the 'baby boomer' generation ages and more people are expected to live longer. Projections estimate that by 2040 there will be 25% more females than males in this age bracket.

[79] *NRS* 2018-based Population Projections, summary table for South Ayrshire (S12000028), Persons https://www.nrscotland.gov.uk/statistics-and-data/statistics/statistics-by-theme/population/population-projections/sub-national-population-projections/2018-based/summary-datasets

Figure 10 – Projected population at last birthday, profile for South Ayrshire, males and females 2021 and 2040[80]

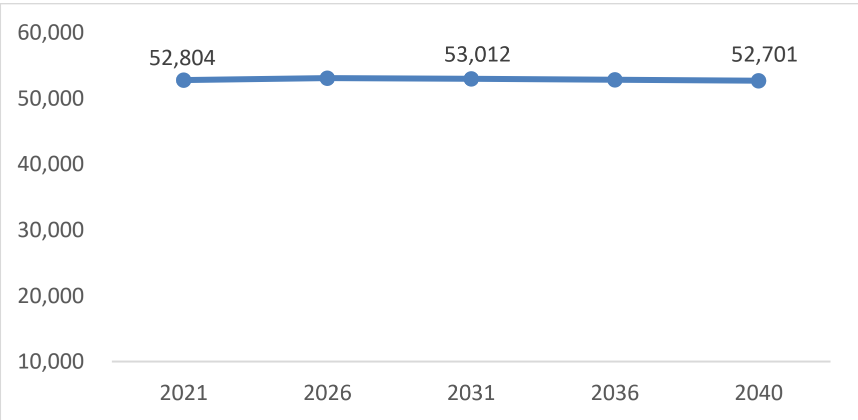


Household projections

Principal projections

4.25 As can be seen in Figure 11 below, the number of households in South Ayrshire is anticipated to increase by 0.4% between 2021 and 2031, based on the NRS principal projections and then decrease by 0.6% between 2031 and 2040. This equates to a 0.2% decrease from 2021 to 2040.

Figure 41 – Projected number of households in South Ayrshire, 2021-2040[81]

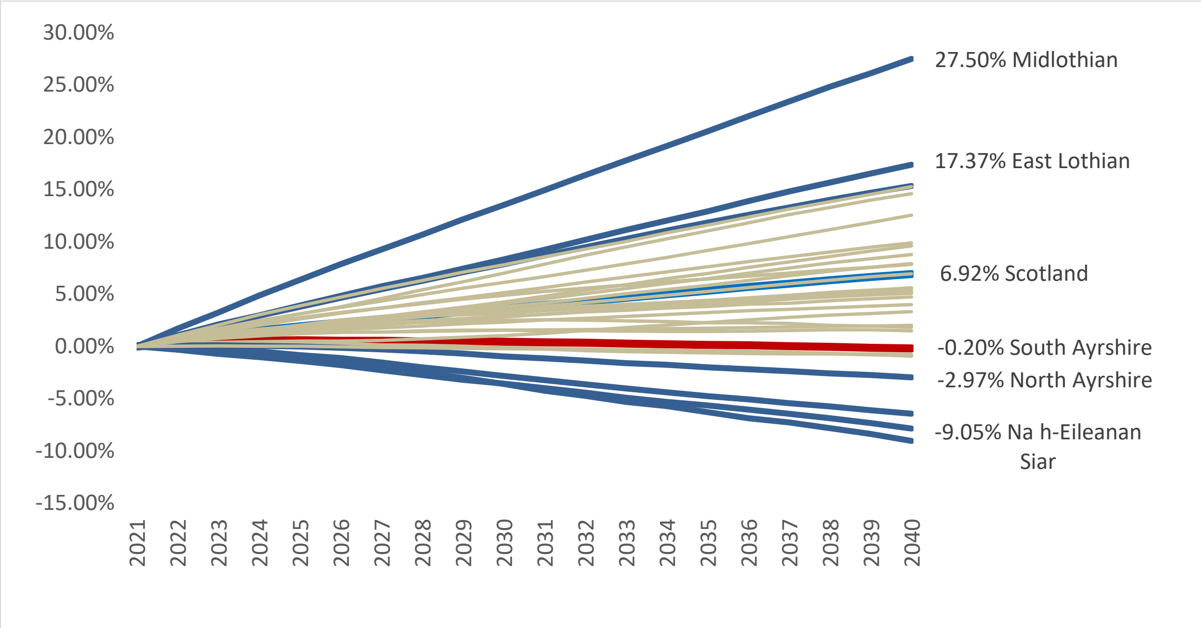


4.26 Figure 12 shows the expected change in the number of households for all local authorities and Scotland as a whole. 24 local authorities are expected to see an increase in the number of households and 8 are expected to see a decrease. 7 local authorities will have a greater degree of decrease in the number of households than South Ayrshire (0.20%). Scotland will see a 6.92% increase in the number of households with outliers including Midlothian and East Lothian impacting significantly on this projection.

[80] *NRS* 2018-based Population Projections, summary table for South Ayrshire (S12000028), Males, Females https://www.nrscotland.gov.uk/statistics-and-data/statistics/statistics-by-theme/population/population-projections/sub-national-population-projections/2018-based/summary-datasets

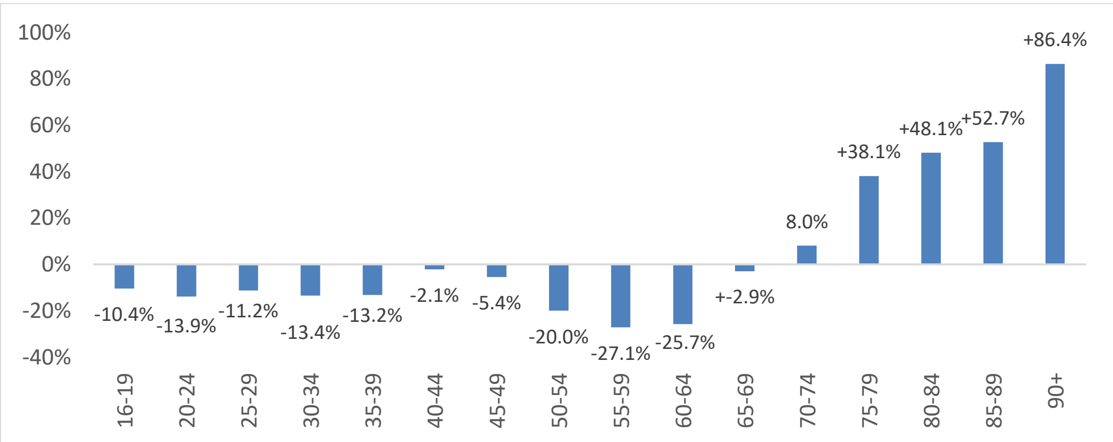
[81] *NRS* Household Projections for Scotland (2018-based) Detailed Scottish Area Tables - Principal Projection, South Ayrshire

Figure 42 – Projected change in the number of households by Council area, 2021-2040[82]



4.27 Figure 13 below demonstrates the change in Household Reference Person (HRP) age distribution principal projection figures from 2021 to 2040. This shows that the largest reductions are in the 55 to 59 and 60 to 64 age groups, while the largest increases are in households where the HRP is over the age of 75.

Figure 13 – Percentage change in projected number of households by age group of Household Reference Person, South Ayrshire, 2021-2040[83]



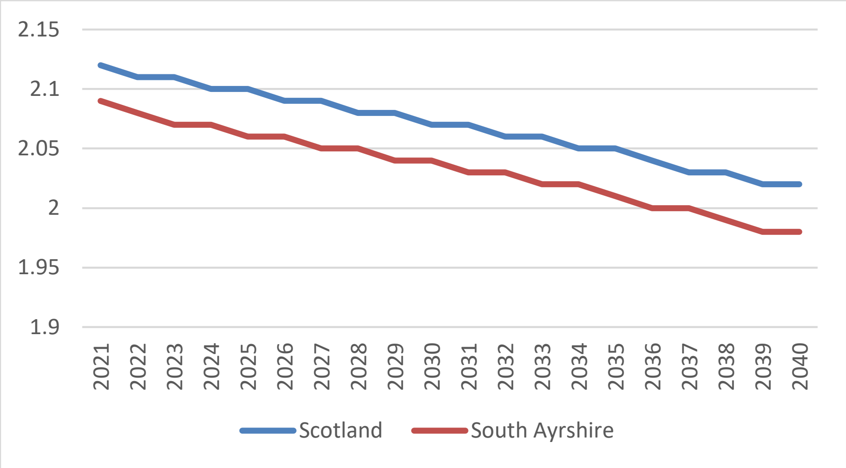
4.28 NRS's principal projection for South Ayrshire also shows that the average household size is expected to reduce at a faster rate than the Scottish average. In 2021, the average household size was 2.09 people, compared to a Scottish average of 2.12 for Scotland as a

[82] *NRS* Household Projections for Scotland (2018-based) Detailed Scottish Area Tables - Principal Projection, South Ayrshire https://www.nrscotland.gov.uk/statistics-and-data/statistics/statistics-by-theme/households/household-projections/2018-based-household-projections/list-of-data-tables

[83] *NRS* Household Projections for Scotland (2018-based) Detailed Scottish Area Tables - Principal Projection, South Ayrshire https://www.nrscotland.gov.uk/statistics-and-data/statistics/statistics-by-theme/households/household-projections/2018-based-household-projections/list-of-data-tables

whole. By 2040, this is anticipated to fall in South Ayrshire by 5.3% to 1.98 people, compared to a Scottish average of 2.02, a reduction again of around 4.72%.

Figure 44 – Average household size (Principal Projection), South Ayrshire and Scotland, 2021-2040[84]



Variant projections

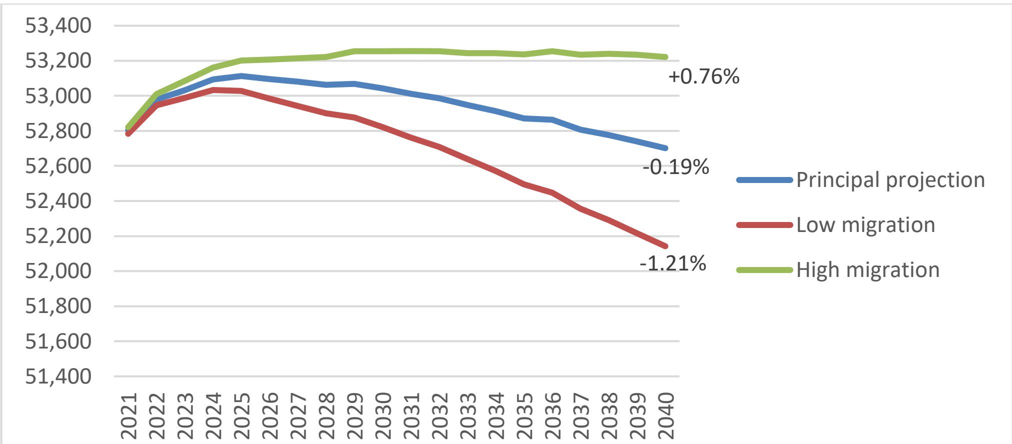
4.29 Alternative projections have been provided by National Records for Scotland, estimating South Ayrshire's households on the basis of higher than expected and less than expected migration.

4.30 The high migration variant projects a 0.76% increase in the number of households, from 52,821 in 2021 to 53,222 in 2040.

4.31 The low migration variant projects a decrease in the number of households at a lower level of -1.21% from 52,783 in 2021 to 52,142 in 2040.

4.32 Figure 15 provides an illustrative comparison of these three estimated trends in the number of households.

Figure 45 – Principal and Variant Projections in the number of households in South Ayrshire, 2021-2040[85]



[84] *NRS* Household Projections for Scotland, 2018-based. https://www.nrscotland.gov.uk/files//statistics/household-projections/18/2018-house-proj-fullprinc-alltabs.xlsx

[85] *NRS* Household Projections for Scotland, 2018-based. https://www.nrscotland.gov.uk/statistics-and-data/statistics/stats-at-a-glance/infographics-and-visualisations#hh-projections

Comparison of principal and variant projections

4.33 Comparison between principal and variant projections shows little difference in terms of household types under the three scenarios. Variation in household types between the Principal Projection and High/Low migration scenarios is no greater than 1.1% in either direction for most household types, with only “1 adult, 1+ children” and “2 adults, 1+ children” categories showing a greater degree of variance.

4.34 For the “1 adult, 1+ children” category, high migration projections would result in a variance of +3.1% from the principal projection, while low migration projections result in a variance of -1.8%

4.35 For the “2 adults, 1+ children” category, high migration results in a difference of +2.2% in comparison to principal projections while low migration estimates return a difference of -2.3%[86].

Table 6 – Household Reference Person by age groups in South Ayrshire, Principal and Variant projections 2040[87]. [

	2021	Principal - 2040	High Migration - 2040	Low migration - 2040	% diff - High Migration	% diff - Low Migration
16-19	147	131	133	130	1.5%	-0.8%
20-24	1,407	1,211	1,221	1,194	0.8%	-1.4%
25-29	2,083	1,849	1,884	1,812	1.9%	-2.0%
30-34	2,992	2,591	2,675	2,522	3.2%	-2.7%
35-39	3,263	2832	2,940	2,735	3.8%	-3.4%
40-44	3,476	3,399	3,487	3,316	2.6%	-2.4%
45+	39,441	40,682	40,883	40,432	0.5%	-0.6%

4.36 Table 6, shows the variance in terms of the age of Household Reference Person (HRP) when comparing principal and variant projections.

4.37 The largest differences in HRP demographics between principal and variant projections are in the 30-34, 35-39 and 40-44 age groups. In a scenario of high migration, projections predict a higher number of people to be in these age groups – a difference of +3.2% for 30-34 year olds, and +3.8% for 35-39 year olds on the principal projection. In a scenario of low migration, projections estimate a difference of -2.7% between low migration and principal projection for 30-34 year olds, -3.4% for 35-39 year olds and -2.4% for 40-44 year olds. The NRS report on this data notes that these differences are caused by different age distributions in the variant population projections, as migrants tend to be younger[88].

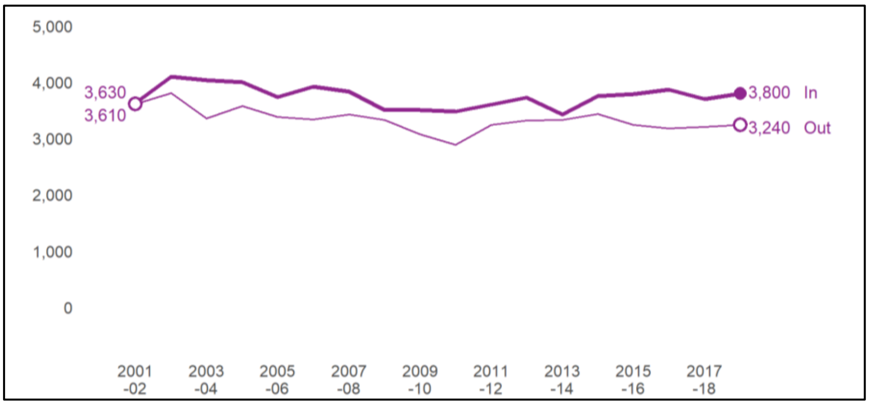
4(c) Net migration

4.38 As can be seen in Figure 16, 2018/19 saw an up-tick in the level of in-migration to South Ayrshire from the previous year, from 3,700 in 2017/18 to 3,800 - a 2.7% increase. This is still short of the level of in-migration of 3,870 people seen in 2016/17.

[86] Analysis of Principal and Variant projections using 2018-based NRS data.
[87] Analysis of Principal and Variant projections using 2018-based NRS data.
[88] Analysis of Principal and Variant projections using 2018-based NRS data.

4.39 During the same period, out-migration in South Ayrshire was 3,240, up slightly from the 2017/18 figure of 3,210 – continuing a trend of marginal change (increases of less than 1% by this measure were seen in both 2016/17 and 2017/18).

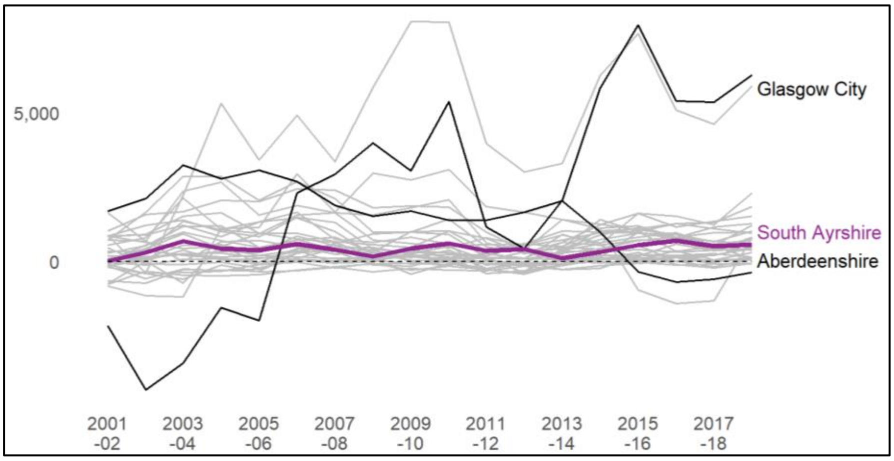
Figure 16 – Total in and out migration, South Ayrshire, 2001-02 to 2018-19[89]



4.40 Figure 17 presents net migration trends for the local authority areas of Scotland. In comparison to other Council areas in Scotland, net migration has been relatively stable in recent years.

4.41 In 2017-18, South Ayrshire had the 17th highest net migration of the 32 local authorities – 560 more people migrated to South Ayrshire in this period than the total number of people who left. This was an increase of 60 people from the total net migration reported in 2016-17[90].

Figure 17 – Total net migration by Council area, 2001-02 to 2018-19[91]



[89] *NRS* Mid-2019 Migration by Council Area in Scotland. https://www.nrscotland.gov.uk/files//statistics/council-area-data-sheets/south-ayrshire-council-profile.html#migration

[90] As above. *Note: Totals have been rounded to the nearest 10, explaining the minor discrepancies between the figures presented above.*

[91] *NRS* Mid-2019 Migration by Council Area in Scotland. https://www.nrscotland.gov.uk/files//statistics/council-area-data-sheets/south-ayrshire-council-profile.html#migration

4.42 Looking at the principal population projections in Figure 17 above, net migration will increase by 8.6% by 2040. As can be seen in Table 7 below, this means 9,626 more people migrating to South Ayrshire than those leaving during the period 2021-2040.

Table 7 - Components of projected population change for South Ayrshire, 2021 to 2040[92]

2021-2040										
		Natural change			Net Migration			Other changes		
Pop. mid-2021	Natural change	Births	Deaths	Net migration	Overseas	Rest of UK	Within Scotland		**Pop. mid-2040**	% change
112,169	-14,930	16,007	30937	9,626	-1,424	4,744	6,306	-440	106,425	-5.1

4.43 The majority of this net migration is accounted for by migration from other areas in Scotland, while migration to and from the rest of the UK also contributes significantly to this. Migration from overseas produces a negative figure of net migration, meaning that more people leave South Ayrshire to go overseas than those who come from overseas to South Ayrshire.

4.44 While Brexit will have an impact on migration to and from overseas, this is likely to have less of an impact on internal migration within Scotland and from the rest of the UK.

4d Housing Market Partnership (HMP) – Demographic Assumptions

4.45 The three variant NRS projections (Principal, High Migration and Low Migration) were considered by the HMP to determine the 2 demographic scenarios it felt were most likely to occur based on the data and any other factors that might impact. Data presented showed that South Ayrshire's population had stayed relatively constant over the years from 1998-2019 declining by only 0.6% during this period. The years 2001-2019 had seen an upward trend in the number of households, but this again was seen as a relatively limited change compared to most other areas in Scotland. Available projections showed that South Ayrshire's population was projected to decrease by 5.1% between 2021 and 2040, while the number of households was projected to decrease by 0.2% between 2021 and 2040. Projected changes in South Ayrshire's population comprised a decrease in population through natural change of -13.3% (meaning more deaths than births), an increase in population as a result of net migration of 8.6% (meaning more people migrating to South Ayrshire than those leaving) and -0.4% other changes. The HMP noted this was broadly driven by considerable net migration from other areas in Scotland (+6,306) and the Rest of the UK (+4,744), while migration to/from overseas resulted in a net decrease (-1,424).

Taking this data into account, the HMP discussed the factors which could potentially result in more or less migration to the area. Britain's exit from the EU was considered to be likely to have less of an impact on migration, since the biggest contributors to net migration in South

[92] *NRS* Population Projections for Scottish Areas (2018-based). https://www.nrscotland.gov.uk/statistics-and-data/statistics/statistics-by-theme/population/population-projections/sub-national-population-projections/2018-based/summary-datasets

Ayrshire was shown to predominantly be from other areas within the UK. While the most recent Skills Development Scotland report showed that employment levels for Ayrshire as a whole had been seen to decrease by 2.9% between 2009 and 2019 and that predictions suggested that employment in South Ayrshire would reduce by around 0.1% per year, it was felt that the investment provided by the Ayrshire Growth Deal in key industries would support inward migration. Furthermore, the HMP felt the increased flexibility to provide sites for development offered by the new Local Development Plan (LDP2) would further support regeneration of the area and inward migration. The HMP noted the potential impact that the coronavirus pandemic may have on employment, given that some workplaces are moving towards a greater reliance on 'working from home'. As such, this may result in less need for households to migrate out of the area in order to work for companies based in Scotland's main conurbations.

Based on all of the above the HMP agreed that:

- The Principal Projection and High Migration variant should be utilised.

5. House sales

5(a) House Prices

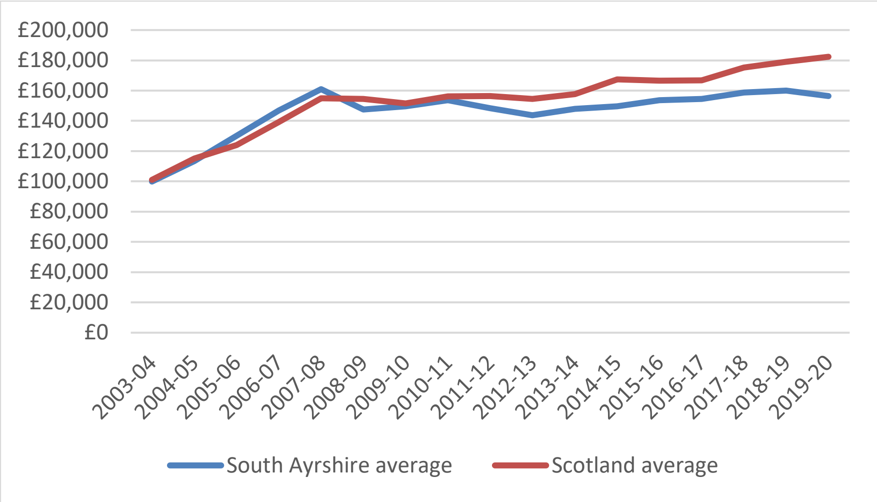
5.1 In 2019/20, South Ayrshire's average residential property price was £156,394[93]. This compares to a Scottish average of £182,357.

5.2 House price data produced by Registers of Scotland is calculated using arithmetic mean and median. Averages, as detailed in this section, are calculated using the arithmetic mean.

5.3 As can be seen in Figure 18 below, in the years preceding the housing market crash of 2007/08, South Ayrshire's average house prices were higher than for Scotland as a whole. Since 2009/10, however, the converse has been true, and the years since 2016/17 have seen increasing divergence between the South Ayrshire and the Scottish average. South Ayrshire's average house price was around 92% of the Scottish average in 2016/17 and had reduced to 85% of the Scottish average in 2019/20.

[93] Registers of Scotland *Property Market Report 2019/20.* Table 3: Average residential property price by local authority, Scotland, 2003-04 to 2019-20, financial year data. https://www.ros.gov.uk/data-and-statistics/house-price-statistics. Excludes sales under £20,000 and over £1m.

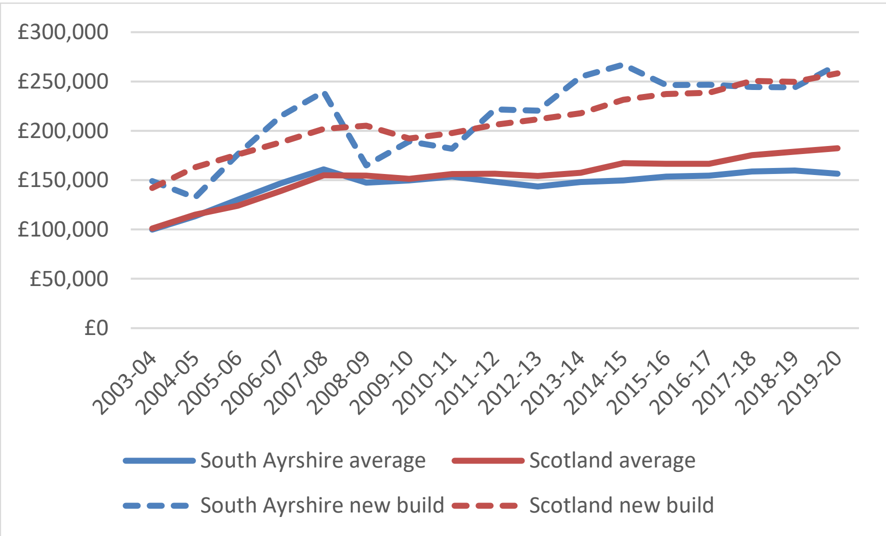
Figure 18 - Average residential property price, South Ayrshire and Scotland, 2003/04 to 2019/20[94]



5.4 In terms of new build purchases, the average new build sale in South Ayrshire in 2019/20 was £258,272, considerably higher than the average for all sales during that year.

5.5 As can be seen in Figure 19 below, this is in-keeping with the Scottish average, and unsurprisingly new build prices – to some extent – follow trends in the rest of the market, albeit with more volatility given the smaller numbers being used to calculate the averages at a local level.

Figure 19 – Average residential property price and average new build property price, South Ayrshire and Scotland, 2003/04 to 2019/20[95]



5.6 Table 8 below provides information on average house prices in South Ayrshire and provides an indication of average annual growth.

[94] As above

[95] Registers of Scotland *Property Market Report 2019/20.* Table 3: Average residential property price by local authority, Scotland, 2003-04 to 2019-20, financial year data and Table 15: Average residential property price for new builds by local authority, Scotland, 2003-04 to 2019-20, financial year data

5.7 Over the period 2003/04 to 2019/20, it can be seen that the average annual growth for average house sales in South Ayrshire was 3%, while growth in prices for new build sales was around 5%.

5.8 The years since the financial crash, however, have seen limited growth in South Ayrshire purchase prices – an average of only 0.2% per year between 2010/11 and 2019/20. The new build sector has seen greater growth during this time, again increasing by around 5% per year since 2010/11, although this has slowed to some extent in recent years.

Table 8 - Average residential property price and average new build property price, South Ayrshire and Scotland, 2003/04 to 2019/20[96]

					Average annual growth		
	2003/04	2010/11	2015/16	2019/20	2003/04 to 2019/20	2010/11 to 2019/20	2015/16 to 2019/20
Average house sales	£99,871	£153,693	£153,659	£156,394	3.0%	0.2%	0.5%
Average new build	£149,067	£181,991	£246,258	£266,930	4.8%	4.7%	2.1%

5.9 Table 9 below compares new build average prices with all residential sales averages (with the usual exclusions of transactions below £20,000 and over £1,000,000) for South Ayrshire, neighbouring authorities and Scotland as a whole for the three financial years to 2019/20.

5.10 While South Ayrshire has a higher average sale price for new build properties than in East Ayrshire, North Ayrshire and Glasgow, South Ayrshire's 'all sales' average is also higher than East Ayrshire and North Ayrshire.

5.11 As can be seen in Table 8, the average new build sale in South Ayrshire is about 1.5 times the value of the average residential sale over all in 2017/18 and 2018/19. This compares with more pronounced divergence in North Ayrshire (suggesting that new build prices are more expensive than the market generally) and less difference in Glasgow City (suggesting less divergence between new build prices and the wider market). In 2019/20, the average new build transaction in South Ayrshire was 1.7 times the average transaction, considerably higher than the Scottish factor of 1.4 times.

[96] Registers of Scotland *Property Market Report 2019/20.* Table 3: Average residential property price by local authority, Scotland, 2003-04 to 2019-20, financial year data and Table 15: Average residential property price for new builds by local authority, Scotland, 2003-04 to 2019-20, financial year data

Table 9 – Comparison of average new build and all residential sales for South Ayrshire, Scotland and neighbouring authorities, 2017/18 to 2019/20[97]

	2017-18			2018-19			2019-20		
	New build ave.	All sales ave.	X[98]	New build ave.	All sales ave.	X	New build ave.	All sales ave.	X
South Ayrshire	£244,380	£158,662	1.54	£244,199	£159,932	1.53	£266,930	£156,394	1.71
East Ayrshire	£206,580	£125,403	1.65	£191,262	£122,811	1.56	£196,347	£121,175	1.62
North Ayrshire	£202,196	£121,688	1.66	£239,408	£123,179	1.94	£228,749	£127,926	1.79
Glasgow City	£234,477	£155,299	1.51	£224,270	£159,600	1.41	£226,326	£162,529	1.39
Scotland	**£250,716**	**£175,198**	**1.43**	**£249,656**	**£179,012**	**1.39**	**£258,272**	**£182,357**	**1.42**

5.12 The median is also a useful measure of house price trends. This measure tells us the mid-point where half of all sales were more expensive and half were less expensive within a given timeframe, giving a picture of the overall market.

5.13 In addition, in order to better understand how these trends, affect different sectors of the purchasing market, trends are presented below for the lower and upper quartiles of South Ayrshire's housing market.

5.14 Lower quartile means the value below which one quarter of the cases fall. In relation to house prices, it means the price of the house that is one-quarter of the way up the ranking from the cheapest to the most expensive. By contrast, the upper quartile means the value above which one quarter of cases fall, and the price of the house that is three-quarters of the way up the ranking from cheapest to most expensive.

5.15 Lower quartile house price increases can be an indicator of affordability problems for first time buyers. In South Ayrshire, lower quartile house prices increased by 121% between 2000 and 2018, but as can be seen in Figure 20 below this has not been a straight trajectory.

5.16 In the period to 2007, lower quartile house prices increased by 132%, before reducing by 5% between 2007 and 2009. Prices continued to decline before sharply dropping by 10% between 2011 and 2012 as a result of the recession during that period.

5.17 Since 2012 lower quartile house prices have begun to creep back up, increasing by around 14% but in practice this only brings 2018 house prices marginally above where they were in 2009.

5.18 By contrast, median and upper quartile house prices in South Ayrshire saw a greater degree of increase between 2000 and 2007 (142% and 145% respectively), and were more affected by the housing market crash, seeing reductions of around 8% between 2007 and 2009.

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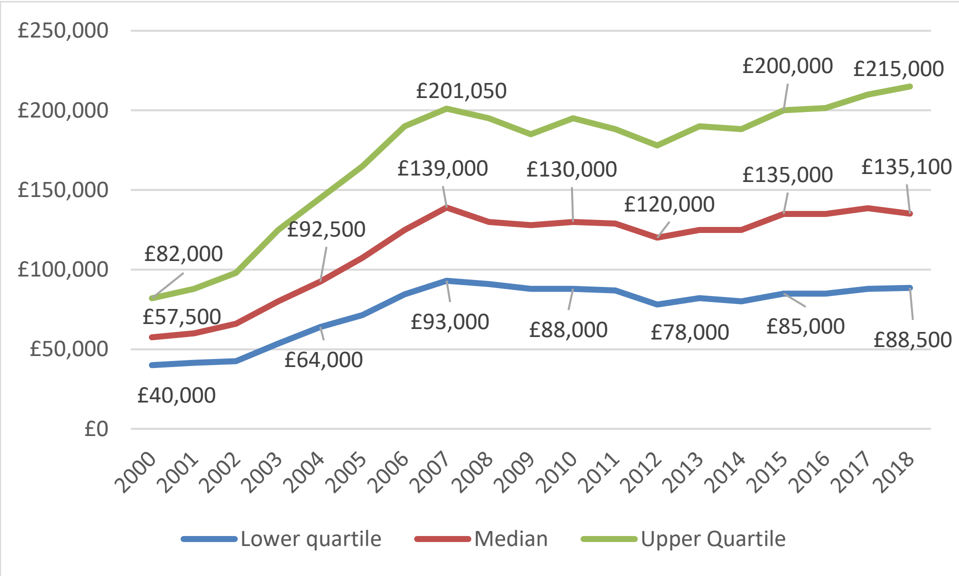
[97] Registers of Scotland *Property Market Report 2019/20.* Table 3: Average residential property price by local authority, Scotland, 2003-04 to 2019-20, financial year data and Table 15: Average residential property price for new builds by local authority, Scotland, 2003-04 to 2019-20, financial year data

[98] Average new-build cost as a multiple of 'all sales' average.

5.19 While the recession can be seen to have had an impact across house prices in South Ayrshire, median and upper house prices were less affected, seeing reductions of 7% and 5.4% respectively.

5.20 Upper quartile prices have also seen more recovery between 2012 and 2018, increasing by around 21% during this period and exceeding 2009 levels by 16% compared to 0.6% and 5.5% lower quartile and median house prices.

Figure 20 – House price trends, South Ayrshire, 2000 to 2018[99]



5.21 The Centre for Housing Market Analysis has made available data on house prices that removes certain 'outliers' in order to maximise accuracy for local authorities completing HNDAs. At the time of writing, only data for the period 2011 to 2017 was available from this source, and summary information on this is presented below. The same trends seen in Figure 20 are present, with only marginal variation. Nevertheless, in the interests of accuracy calculations on affordability will utilise this data.

Table 10 – House price trends >£20k and <£1m, South Ayrshire, 2011 to 2017[100]

	2011	2012	2013	2014	2015	2016	2017	% Change 2011 to 2017
Lower quartile	£88,000	£78,000	£83,000	£80,000	£85,000	£85,000	£89,000	1.1%
Median	£130,000	£120,500	£125,000	£125,000	£135,000	£135,000	£139,000	6.9%
Upper quartile	£188,500	£178,000	£190,000	£188,500	£200,000	£203,000	£210,000	11.4%

[99] Scottish Government *House prices dataset – Value of residential property transactions*. https://statistics.gov.scot/data/house-sales-prices

[100] Centre for Housing Market Analysis *HNDA Datapack 2018*.

5.22 As can be seen above, lower quartile house prices have changed very little during the period 2011 to 2017, increasing by only 1.1% during this period. This compares to overall increases in the median house price of nearly 7% and increases in the upper quartile house price of more than 11%.

5.23 In terms of variation in average house prices by property type, this data is available by local authority area on a quarterly basis.

5.24 As can be seen in Table 11 below, house prices in South Ayrshire are less than the Scottish average across all property types. This difference is most pronounced in the purchase prices achieved for flats, with the South Ayrshire average being about 70% of the Scottish average in 2019/20. 2017/18 to 2018/19 saw a general reduction in average property sales values in both Scotland and in South Ayrshire, but this was again more pronounced in South Ayrshire. Equally, improvements seen in 2018/19 to 2019/20 were more pronounced in South Ayrshire than in Scotland as a whole.

5.25 It is important to reiterate that a small number of property sales could potentially skew these averages at a local authority level. In 2019/20 Q4, for instance, the average house price for terraced properties in South Ayrshire is based on just 66 sales, while detached properties is based on 77 sales. This information nevertheless provides a snapshot of the market's character to be considered alongside other measures.

Table 11 – Average house price by house type, South Ayrshire and Scotland, 2017/18 Q4 to 2019/20 Q4[101]

House type	Area	2017/18 Q4	2018/19 Q4	2019/20 Q4	Change 2017/18 to 2018/19	Change 2018/19 to 2019/20
Detached	**South Ayrshire**	**246,248**	**232,674**	**236,321**	**-5.5%**	**1.6%**
	Scotland	263,163	262,000	267,536	-0.4%	2.1%
Semi-detached	**South Ayrshire**	**153,576**	**151,442**	**166,383**	**-1.4%**	**9.9%**
	Scotland	167,433	169,926	172,659	1.5%	1.6%
Terraced	**South Ayrshire**	**134,762**	**113,363**	**126,114**	**-15.9%**	**11.2%**
	Scotland	146,892	143,720	145,913	-2.2%	1.5%
Flat	**South Ayrshire**	**109,471**	**86,460**	**93,426**	**-21.0%**	**8.1%**
	Scotland	139,028	136,862	135,141	-1.6%	-1.3%
All house types	**South Ayrshire**	**162,619**	**140,457**	**154,592**	**-13.6%**	**10.1%**
	Scotland	174,934	174,285	179,541	-0.4%	3.0%

5(b) Volume of House Sales

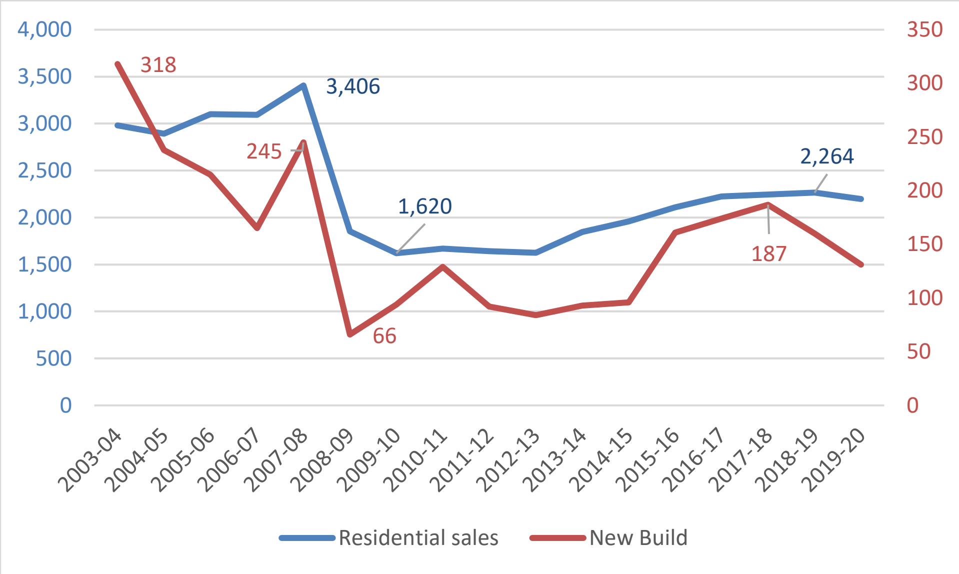
5.26 Looking now to the volume of house sales taking place in South Ayrshire, akin to the peak in house prices, there was also a spike in the volume of house sales taking place in 2007/08 prior to the housing market crash, with more than 3,406 sales taking place during that financial year.

[101] Registers of Scotland *Quarterly House Price Statistics, 2019-20 Q4.* Table 5: Average residential property price by local authority and house type: Scotland, since 2003-04 Q1

5.27 As can be seen in Figure 21 below, 2008/09 and 2009/10 saw successive dramatic reductions in the number of sales in South Ayrshire – a 52% reduction between 2007/08 and 2009/10.

5.28 Sales volumes stayed relatively constant between 2009/10 and 2012/13, partly explained by the recession experienced during this period, before beginning to rally from 2013/14 onwards. The volume of house sales increased to a recent peak of 2,264 in 2018/19, before reducing slightly to 2,199 in 2019/20.

Figure 51 – Volume of residential property sales (primary axis), new build sales (secondary axis) South Ayrshire[102]



5.29 The secondary axis of Figure 21 demonstrates how trends in the volume of new build sales have to some extent followed wider market trends. As can be seen above, new build sales in South Ayrshire were at a peak for this period in 2003/04, with 318 new build sales taking place that year, accounting for more than 10% of all sales that year.

5.30 Following a period of decline in the number of new build sales, a further peak was reached in 2007/08 with 245 new build sales taking place during that year. As with the wider market, 2008/09 saw considerable decline in the number of sales, but this was more marked for new build purchases, reducing by 72% from the previous year to just 66 sales.

5.31 The last five years have seen some improvement in the number of new build sales, reaching 187 sales in 2017/18, before reducing again in 2018/19 and 2019/20.

5.32 Table 12 below provides a summary of all residential sales and new build sales over the five years to 2019/20 in order to demonstrate the proportion of all sales that are new build. As can be seen, new build sales account for a small but important section of the market, although this role has contracted to some extent since 2018/19.

[102] Registers of Scotland *Property Market Report 2019/20.* Table 2: Volume of residential property sales by local authority, Scotland, 2003-04 to 2019-20, financial year data and Table 14: Volume of new build residential property sales by local authority, Scotland, 2003-04 to 2019-20, financial year data.

Table 12 – Volume of new build sales and proportion of residential sales, South Ayrshire, 2015/16 to 2019/20[103]

	2015/16	2016/17	2017/18	2018/19	2019/20
All residential sales	2,110	2,226	2,244	2,264	2,199
New build sales	161	174	187	160	131
Volume of new build as a proportion of all sales	*7.6%*	*7.8%*	*8.3%*	*7.1%*	*6.0%*

5(C) Housing Market Partnership (HMP) - House Sales Assumptions

5.33 Data was presented on trends in house prices over the years from 2003/04 to 2019/20 in South Ayrshire. This data showed that prior to the housing market crash of 2007/08, South Ayrshire's average house prices were higher than for Scotland as a whole. Since 2009/10, however, the converse has been true and the years since 2016/17 have seen divergence between the Scottish average and house prices in South Ayrshire, with average prices locally showing only limited growth compared to upward trends for Scotland as a whole. New build purchase prices had seen more growth locally, but this only represents a proportion of the whole market. Furthermore, upper quartile house prices were shown to have increased to a far greater extent over the last ten years than lower quartile and median house prices locally.

The HMP considered possible factors likely to impact on house prices in South Ayrshire in the coming years, including predicted unemployment in some sectors making it more difficult for households to access a mortgage (balanced by predicted increases in employment in other sectors as a consequence of the Ayrshire Growth Deal), some banks moving away from High Loan-to-Value mortgage products in recent months (in the context of general increases in LTV rates over recent years) and previous years' house price trends showing limited growth locally.

Taking these factors into account, the HMP agreed that:

- Weak growth (+2% per annum) was the most likely scenario in terms of house prices in South Ayrshire.
- The HNDA Tool's default setting with regard to house price affordability should be used.

6. Renting

6(a) Private Rents

6.1 The Private Rented Sector (PRS) constitutes an estimated 11-12% of dwellings in South Ayrshire, and as such can be seen to be an important component of the local housing market.

[103] As above

6.2 The PRS offers a number of benefits to households seeking accommodation, including choice, availability in desirable locations and good quality of accommodation.

6.3 Nevertheless, barriers exist that can prevent some households from accessing this type of accommodation, or restrict the level of choice available to them. The principal amongst these is affordability.

6.4 One key determinant of affordability for low-income households accessing the PRS is Local Housing Allowance (LHA). LHA rates are used to calculate the value of the Housing Component of Universal Credit or housing benefit for tenants renting from private landlords.

6.5 South Ayrshire's Local Housing Allowance is calculated on the basis of a Broad Rental Market Area (BRMA) with North Ayrshire and East Ayrshire Councils.

Table 13 – Local Housing Allowance rates, 2020/21 – Ayrshires Broad Rental Market Area[104]

	1 Bed Shared	1 Bedroom	2 Bedrooms	3 Bedrooms	4 Bedrooms
Weekly	£76.99[105]	£80.55	£97.81	£115.07	£159.95
Monthly	£333.62	£349.05	£423.84	£498.64	£693.12

6.6 The calculation to determine LHA is informed by data provided by the Rent Service Scotland Market Evidence Database. This data is gathered from a range of sources, including private landlord and letting agent returns, mailshot initiatives, as well as advertised rental information. In 2020, an estimated 99% of records were based on advertised rents, with the remainder being based on actual rents from landlord returns.

6.7 Table 14 below presents findings from the Market Evidence Database for the period January to September 2019.

Table 14 - Private Rents (£ Monthly), Ayrshires Broad Rental Market Area, 2020 (year to end Sep)[106]

	Number of records	Lower Quartile	Median	Mean	Upper Quartile
1 bedroom (Shared)	79	£273	£360	£358	£421
1 bedroom	367	£350	£375	£376	£400
2 bedroom	667	£425	£450	£469	£500
3 bedroom	438	£500	£550	£597	£650
4 bedroom	99	£625	£850	£906	£1,000

6.8 The last ten years have seen relatively limited change in the average monthly rent in the Ayrshires BRMA. Between 2010 and 2020, for instance, the Scotland average rent for a two bedroom property saw an increase of almost 24%. By contrast, average rents in the Ayrshire BRMA rose by just 1%. As can be seen in Figure 22, 2 bedroom rents have been lower

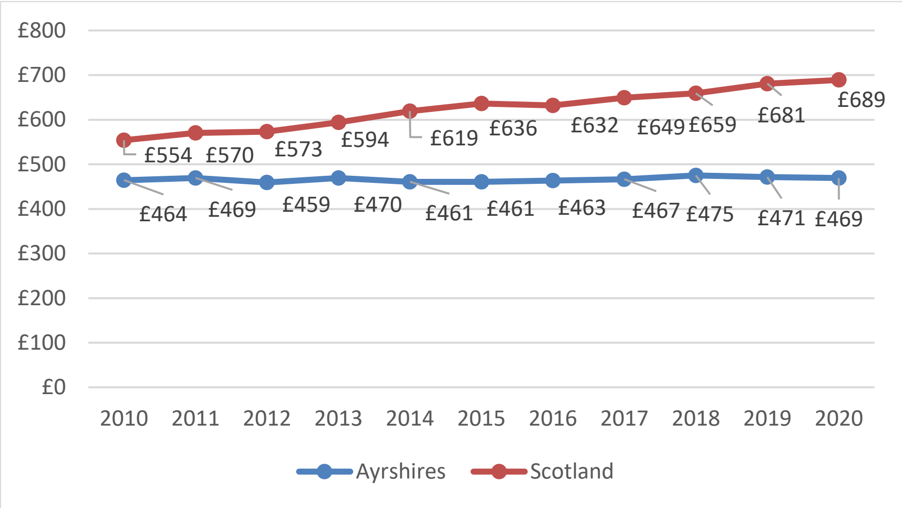
[104] *Scottish Government* Local Housing Allowance Rates 2020/21 https://www.gov.scot/publications/local-housing-allowance-rates-2020-2021/

[105] The 1 bedroom Shared Room Rate has been subject to a temporary uplift in response to the Coronavirus pandemic. In previous years, this rate was considerably less than the 1 bedroom rate and in 2019/20 stood at £62.69. *Scottish Government* Local Housing Allowance Rates 2019-2020 https://www.gov.scot/publications/local-housing-allowance-rates-2019-2020/

[106] *Scottish Government* Private Renting Statistics, 2010 to 2020

than the Scotland average in each year since 2010, and the gap has grown over the years, with the average rent in 2020 being £469 per month, compared to the Scotland average of £689.

Figure 22 – 2 bedroom average monthly PRS rents (£), Ayrshires BRMA, 2010 to 2020[107]



6.9 This disparity between the rents in the Ayrshires BRMA and the Scotland average can be seen across all property types in Table 15 below. Rental prices are lower throughout the period across all property sizes, while Ayrshires BRMA rents have also seen significantly less change than the Scottish average during this period.

6.10 Furthermore, while average rents have increased for Scotland as a whole between 2019 and 2020, some average rents in the Ayrshires have in fact reduced during this period.

Table 15 – Average private rent by property size, Scotland and Ayrshires BRMA, 2010 to 2019[108]

		2010	2019	2020	2010 to 2020 change	2019 to 2020 change
1 bedroom	Scotland	£442	£532	£542	22.7%	1.8%
	Ayrshires	£375	£370	£376	0.1%	1.5%
2 bedroom	Scotland	£554	£681	£689	24.4%	1.1%
	Ayrshires	£464	£471	£469	0.9%	-0.6%
3 bedroom	Scotland	£674	£826	£844	25.3%	2.2%
	Ayrshires	£556	£583	£597	7.3%	2.3%
4 bedroom	Scotland	£939	£1,316	£1,342	43.0%	2.0%
	Ayrshires	£758	£848	£906	19.5%	6.9%
1 bedroom (shared)	Scotland	£305	£390	£400	31.0%	2.5%
	Ayrshires	£302	£369	£358	18.5%	-3.1%

[107] *Scottish Government* Private Renting Statistics, 2010 to 2020
[108] As above

6.11 While this information is useful for providing a picture of the Ayrshire-wide rental market based on the most robust national data available, it unfortunately does not give information at a South Ayrshire local authority level.

6.12 There has been an assumption based on anecdotal evidence and informal observation of the market that rents in South Ayrshire are higher than in North and East Ayrshire. Unfortunately, information at this level is not routinely collected nationally or locally, but some secondary data has been gathered to present a more local picture.

6.13 The residential lettings site CityLets routinely compiles data on the residential rental market from the letting agents it works with. The statistics are based on rental properties advertised on Citylets, and are only recorded when a property is removed from the site as let. The data is cleansed to remove multiple entries and other anomalies.

6.14 Information is available on rental activity within two towns in South Ayrshire, Ayr and Troon. This is presented at Table 17 below.

Table 16 – Average PRS rents for Ayr and Troon, 2018 and 2019[109]

	Ayr			Troon		
	1 bedroom	2 bedroom	3 bedroom	1 bedroom	2 bedroom	3 bedroom
Q1 2018	£369	£529	£623	n/a	£523	n/a
Q2 2018	n/a	£534	£666	n/a	n/a	n/a
Q3 2018	£416	£517	n/a	n/a	£551	n/a
Q4 2018	£402	£481	£647	n/a	£558	n/a
Q1 2019	£433	£505	£625	n/a	£575	n/a
Q2 2019	£395	£535	n/a	n/a	£498	n/a

6.15 In order to understand the South Ayrshire context further, comparison with rental levels in other 'Ayrshires' authorities would be helpful. Unfortunately, only data from Kilmarnock in East Ayrshire is available from the CityLets database.

Table 17 – Average PRS rents for Kilmarnock, 2018 and 2019[110]

	Kilmarnock		
	1 bedroom	2 bedroom	3 bedroom
Q1 2018	£354	£460	£535
Q2 2018	£333	£439	n/a
Q3 2018	£360	£453	£580
Q4 2018	£354	£449	£561
Q1 2019	£355	£467	£556
Q2 2019	£362	£460	n/a

6.16 This data should be considered with caveats, given that the data is collated from a portion rather than the whole of the market. In addition, at the present time we have been unable to ascertain how many properties this information is based upon.

[109] Source - CityLets https://www.citylets.co.uk/research/reports/
[110] As above

6.17 The data nevertheless supports the view that the South Ayrshire PRS is subject to higher rental charges than elsewhere within the BRMA. As LHA rates are based on rental levels across the BRMA, lower rental levels in North Ayrshire and East Ayrshire would have an impact on affordability in South Ayrshire.

6(b) Social Rents

6.18 Social housing in South Ayrshire is provided by both the local authority and several Registered Social Landlords (RSLs). More information on stock numbers is provided in chapter 3 of this HNDA, entitled "Housing Stock Profile, Pressures (and existing need) and Management Issues".

6.19 Some of the data within this section covers different timeframes. This is due to the availability of the data.

6.20 Table 18 provides the average weekly rent for local authority housing as reported in South Ayrshire Council's Annual Return on the Charter for 2019/20.

Table 18 – Average weekly and monthly rents for self-contained local authority accommodation by property size, South Ayrshire, 2019/20[111]

		1 apt	2 apt	3 apt	4 apt	5 apt +	Total SC
SAC	Weekly	£68.00	£73.06	£74.93	£79.09	£83.57	£75.55
	Monthly	£294.67	£316.59	£324.70	£342.72	£362.14	£327.38

6.21 RSL rents are typically higher than those charged by local authorities. The two providers with the most housing stock in South Ayrshire are Ayrshire Housing and West of Scotland Housing Association.

6.22 Table 19 provides information on average weekly rents as reported in the Annual Return on the Charter for both Ayrshire Housing and West of Scotland Housing Association. While the Charter presents average rents across RSLs' whole housing stock, the data below was provided by RSLs from their own records and relates only to units in South Ayrshire.

Table 19 - Average weekly and monthly rents for self-contained RSL accommodation by property size, Ayrshire Housing and West of Scotland, 2018/19[112]

		1 apt	2 apt	3 apt	4 apt	5 apt +	Total SC
Ayrshire Housing	Weekly	n/a	£75.42	£84.85	£92.82	£104.15	£85.49
	Monthly	n/a	£326.82	£367.68	£402.22	£451.32	£370.46
West of Scotland	Weekly	£83.91	£76.98	£84.88	£91.97	£97.32	£83.79
	Monthly	£363.59	£333.59	£367.79	£398.54	£421.72	£363.10

6.23 Table 20 below demonstrates the trends in local authority rent levels in South Ayrshire between 2013/14 and 2018/19. As can be seen, average rental charges have shown an overall

[111] South Ayrshire Council *Annual Return on the Charter, 2019/20*

[112] Ayrshire Housing and West of Scotland 2018/19 data provided September 2019 for South Ayrshire only.

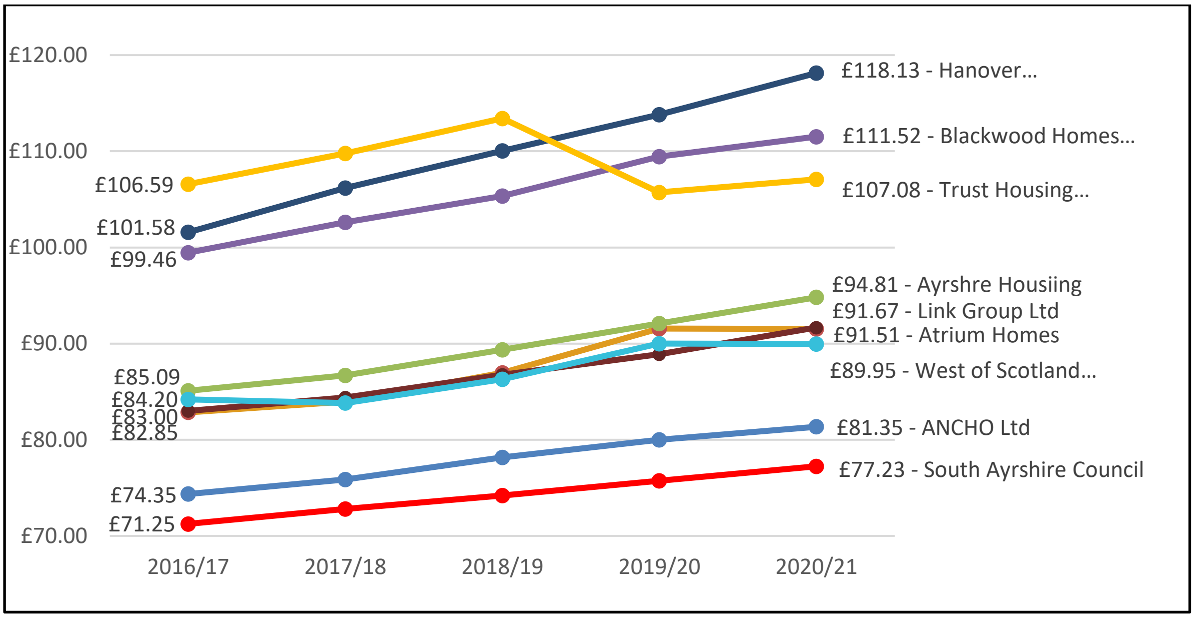
increase of around 14%. This compares to generally more modest increases in the PRS locally, as highlighted above.

Table 20 – Average weekly rents for self-contained local authority accommodation by property size, South Ayrshire, 2013/14 to 2019/20[113]

	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	% change 13/14 to 19/20
1 apt	£59.43	£65.54	£62.94	£63.99	£65.61	£66.68	£68.00	14.4%
2 apt	£63.01	£65.74	£68.36	£68.65	£70.61	£71.57	£73.06	15.9%
3 apt	£64.54	£67.59	£70.30	£70.53	£72.26	£73.39	£74.93	16.1%
4 apt	£67.83	£71.38	£74.30	£74.54	£76.25	£77.48	£79.09	16.6%
5 apt +	£71.44	£77.85	£78.16	£78.54	£80.58	£81.80	£83.57	17.0%
Total	£65.07	£68.21	£70.85	£71.10	£72.88	£73.99	£75.55	16.1%

6.24 Figure 23 below demonstrates the trend in average RSL self-contained weekly rent levels compared with local authority average weekly rent levels in South Ayrshire and shows how they have changed from 2016/17 to 2020/21. Within this timeframe Trust Housing Associations have the smallest average increase over the time series of 0.5%. Hanover (Scotland) Housing Association Ltd rent levels saw the greatest increase over the time series of 16.3%, equal to a weekly increase of £16.55. As can be seen South Ayrshire Council's social rents are continuously the lowest in South Ayrshire.

Figure 23 – Time series of average weekly self-contained RSL rents within South Ayrshire compared with local authority average weekly rents 2016/17 to 2020/21[114]



6.25 Table 21 shows average weekly rents for Scotland as a whole across all social housing providers. In order to offer a point of comparison, the data presented in figure 24 has been used to provide the average for South Ayrshire during the same period.

[113] South Ayrshire Council *Annual Return on the Charter 2013/14 to 2018/19*
[114] Scottish Housing Regulator, Comparison Tool https://www.housingregulator.gov.scot/comparison-tool

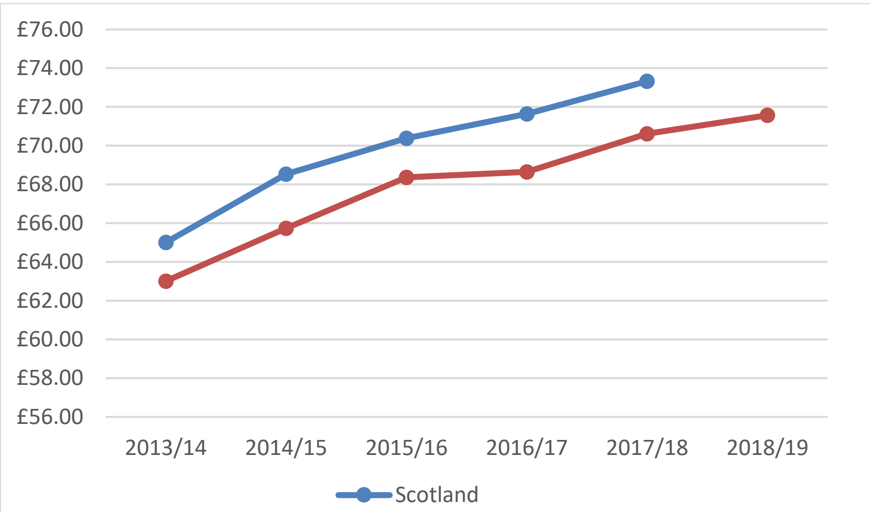
6.26 As can be seen below, percentage change has been less pronounced in South Ayrshire than for the Scottish social sector average with regard to 1 apartment, 2 apartment and 3 apartment properties, however 4 and 5 apartment properties have seen a greater degree of change in South Ayrshire. Nevertheless, local authority rents are still cheaper than the Scottish social sector average.

Table 21 – Average weekly rents for Social housing (LAs and RSLs) by property size, Scotland, 2013/14 to 2017/18[115]

	2013/14	2014/15	2015/16	2016/17	2017/18	Scot. (LA/RSLs) Change 2013/14 to 2017/18	SAC (LA only) Change 2013/14 to 2017/18
1 apt	£59.45	£64.06	£65.97	£66.48	£67.44	13.4%	10.4%
2 apt	£65.01	£68.53	£70.38	£71.64	£73.33	12.8%	12.1%
3 apt	£66.88	£69.59	£71.54	£73.11	£74.94	12.1%	12.0%
4 apt	£72.71	£75.68	£77.60	£79.40	£81.37	11.9%	12.4%
5 apt	£81.38	£84.05	£85.98	£88.39	£90.39	11.1%	12.8%
All sizes	£67.96	£70.99	£72.90	£74.43	£76.23	12.2%	12.0%

6.27 Figure 24 demonstrates this trend for two bedroom properties, showing a widening gap between rents for SAC-owned stock and the Scottish average.

Figure 24 – 2 bedroom rents, Scottish average (RSLs and LAs) compared to South Ayrshire Council owned average rents, 2013/14 to 2018/19[116]



6 (C) Housing Market Partnership – Rental Price Assumptions

Trends in private rented sector rents were not available at a local authority level, and this information was instead produced for the Ayrshire Broad Rental Market Area (BRMA). This data therefore describes trends in rental costs across all three Ayrshires. While SAC can

[115] Scottish Government *Social Tenants in Scotland, 2017* and South Ayrshire Council *Annual Return on the Charter 2013/14 to 2018/19*
[116] Scottish Government *Social Tenants in Scotland, 2017* and South Ayrshire Council *Annual Return on the Charter 2013/14 to 2018/19*

produce a 'snapshot' of current rents by carrying out a survey of landlords, it is not possible to show these trends over time in a robust way. As such, assumptions made in relation to this will be based on the Ayrshire BRMA data. The last ten years have seen relatively limited change in the average monthly rent in the Ayrshires BRMA – increases of about 1.5% for a 2 bedroom property over the last ten years compared to an increase of 25% for Scotland as a whole. A similar disparity can be seen across almost all property sizes.

The group discussed the HNDA Tool's default affordability thresholds, particularly around the relevance of the 'below market rent' estimate produced for households spending between 25% and 35% of their income on a Private Rent. It was noted that while there was likely to be limited demand for this type of provision in South Ayrshire it was worth retaining this information source in order to consider alternative models of housing provision during production of the Local Housing Strategy (LHS), including Shared Equity properties.

The HMP agreed that:

- Weak growth (+2% per annum) or flat growth (+0% per annum) were the most likely scenarios.
- The HNDA Tool should utilise the default setting that 60% of households who can afford to buy do buy.
- The HNDA Tool's default affordability thresholds (25% and 35%) should be used in order to determine need for solutions like Below Market Rent and Shared Equity.

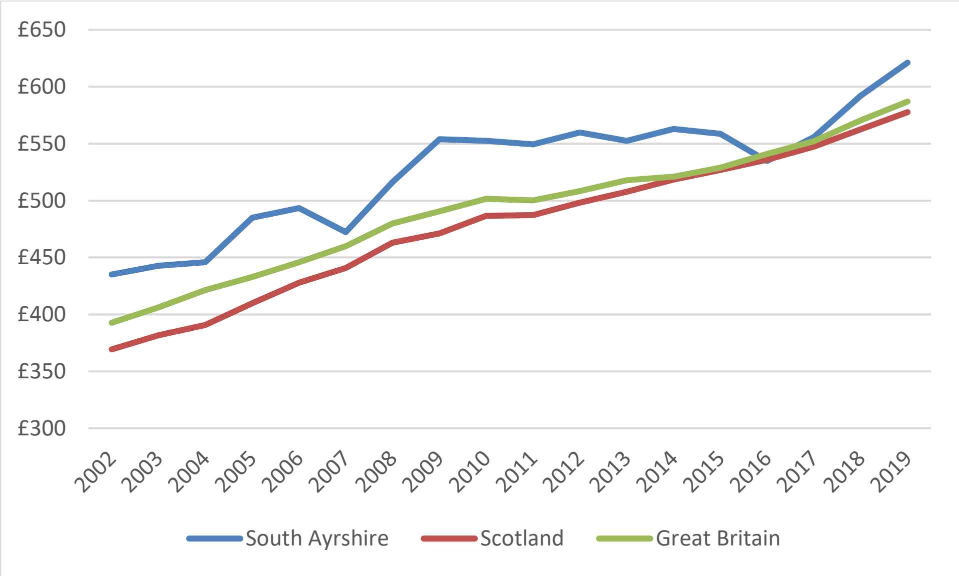
7. Income

7.1 Figure 25 below demonstrates earnings trends for South Ayrshire, Scotland and Great Britain since 2002.

7.2 While median earnings have seen a broadly consistent gradual upward trend in Scotland and Great Britain as a whole (with slowing in 2010 and 2011 being the only exception), median incomes in South Ayrshire have shown more fluctuation. For the majority of this period, median weekly earnings in South Ayrshire were higher than for Scotland and Great Britain, with this gap narrowing most in 2007 and the 3 years to 2015, before dropping to below the Scottish and British median in 2016.

7.3 2017 saw earnings in South Ayrshire again exceeding both Scottish and British median, with the gap again widening in 2018 and 2019.

Figure 25 – Median gross weekly earnings for full time employees in South Ayrshire, Scotland and Great Britain, 2002 to 2019[117]



7.4 Table 22 provides an overview of these trends using 'average annual growth rate' as the measure by which we can gauge the broad direction of travel for different periods of time. As can be seen below, the period 2002 to 2019 has seen an upward trend of around 2.2% per year. While this slowed when reviewing the trend for the last decade (annual growth rate of 1.4% per year), the last five years have again seen a general upward trend in earnings for full-time employees in South Ayrshire of just under 3% per year.

Table 22 - Gross weekly pay for full-time employees in South Ayrshire at median earnings. 2002-2019, average annual growth rate[118]

					Average annual growth rate		
	2002	2010	2015	2019	2002 to 2019	2010 to 2019	2015 to 2019
Median	£435	£552	£559	£621	2.2%	1.4%	2.8%

7.5 Data for the last ten years is presented as gross annual earnings in Table 22 in order to aid comprehension. In 2019, the estimated median earnings for full-time employees in South Ayrshire is £32,302.

[117] Office of National Statistics (ONS) *Annual Survey of Hours and Earnings, 1999 to 2019.* *https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/earningsandworkinghours*
[118] NOMIS *Annual Survey of Hours and Earnings – Resident analysis, 2002 to 2019.* https://www.nomisweb.co.uk/query/construct/summary.asp?mode=construct&version=0&dataset=30

Table 23 – Median gross annual earnings for full-time employees in South Ayrshire and Scotland, 2010 to 2019[119]

	South Ayrshire	Scotland	Change from preceding year (SAC)	Change from preceding year (Scotland)
2010	£28,725	£25,303		
2011	£28,564	£25,334	-0.6%	0.1%
2012	£29,110	£25,912	1.9%	2.3%
2013	£28,730	£26,411	-1.3%	1.9%
2014	£29,271	£26,967	1.9%	2.1%
2015	£29,052	£27,404	-0.7%	1.6%
2016	£27,804	£27,872	-4.3%	1.7%
2017	£28,912	£28,465	4.0%	2.1%
2018	£30,800	£29,260	6.5%	2.8%
2019	£32,302	£30,040	4.9%	2.7%

7.6 In terms of household incomes (rather than earnings for full-time employees only), data has been developed by Heriot Watt University for the Scottish Government which provides local levels incomes data split into deciles and centiles. Estimates of incomes by centile are provided at Table 24.

Table 24 – Local Level Household Gross Income Model Estimates for 2018, South Ayrshire[120]

	SG Income Estimates 2018 by Decile	South Ayrshire
Estimates of gross annual income	Lowest 10% below	£10,920
	20%	£15,080
	30%	£19,240
	40%	£23,400
	Median	£28,600
	60%	£34,840
	70%	£42,120
	80%	£52,520
	Highest 10% above	£69,160
Estimates of gross weekly income	Lowest 10% below	£210
	20%	£290
	30%	£370
	40%	£450
	Median	£550
	60%	£670
	70%	£810
	80%	£1,010
	Highest 10% above	£1,330

[119] As above

[120] Scottish Government Community Analysis Division *Local Level Household Income Model Estimates for 2018.* HNDA Datapack 2020.

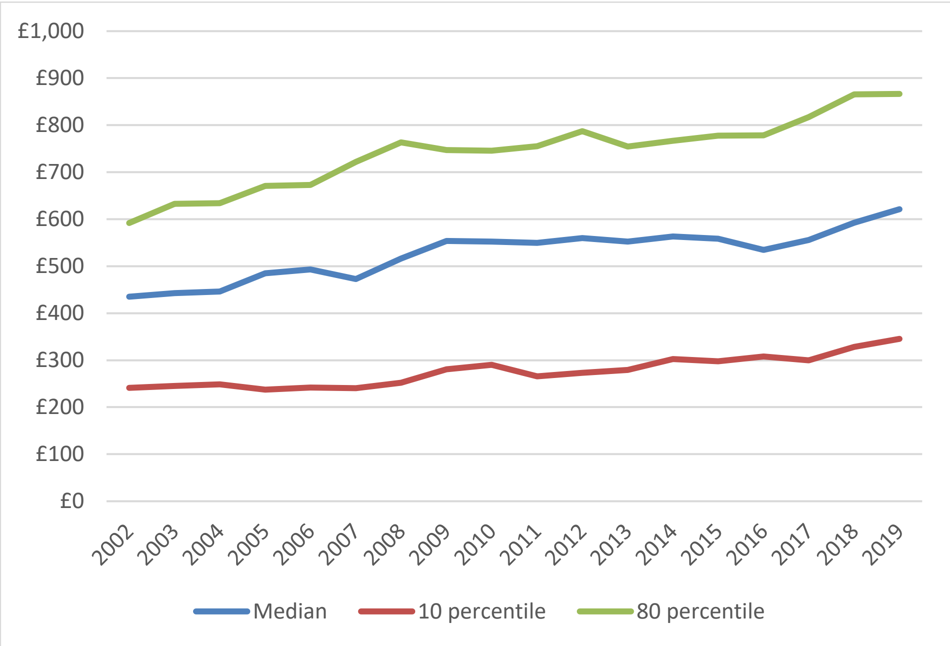
7.7 As can be seen above, the South Ayrshire median gross income is estimated at £28,600 (or £550 per week). The gross household incomes measure will be used to calculate affordability as this will allow for comparison between households' incomes, the rental market and house prices.

7.8 The 'full-time employees' measure is useful in allowing us to understand possible trends in earnings locally and to contribute to our understanding of the local economy.

7.9 In terms of income inequality in South Ayrshire, one way of considering this is to review how incomes of the least affluent (represented by the income of full-time employees at the 10th percentile) have changed over time relative to the median income and the incomes of the most affluent (represented by the earnings of full-time employees at the 80th percentile[121]).

7.10 Figure 26 demonstrates how these different earning levels have changed over time.

Figure 26 – Gross weekly pay for full-time employees in South Ayrshire at 10th percentile, median and 80th percentile, 2002-2019[122]



7.11 As can be seen above, earnings at the 10th and 80th percentile have followed a broadly similar trend to median earnings over the period.

7.12 An alternative way of displaying this data would be to review the extent to which earnings at the 10th percentile, median and 80th percentile have changed on average over time.

[121] Data on incomes at the 90th percentile in South Ayrshire have been suppressed by ONS as the quality of this data did not pass their confidence threshold. As such, the 80th percentile has been used as a proxy.

[122] NOMIS *Annual Survey of Hours and Earnings – Resident analysis, 2002 to 2019.* https://www.nomisweb.co.uk/query/construct/summary.asp?mode=construct&version=0&dataset=30

Table 25 - Gross weekly pay for full-time employees in South Ayrshire at 10th percentile, median and 80th percentile, 2002-2019, average annual growth rate[123]

	2002	2010	2015	2019	Average annual growth rate 2002 to 2019	2010 to 2019	2015 to 2019
Median	£435	£552	£559	£621	2.2%	1.4%	2.8%
10 percentile	£241	£290	£298	£345	2.3%	2.1%	3.8%
80 percentile	£592	£746	£778	£867	2.3%	1.7%	2.8%

7.13 Table 25 above shows that, on average, earnings at the 10th percentile and 80th percentile have varied little from the median. Over the long-term, the average annual growth rate for these three earning levels can be seen to be broadly similar, while recent years have seen marginally more growth among the least affluent full-time employees.

7.a Housing Market Partnership (HMP) - Income Growth assumptions

7.14 The HMP considered income growth locally for the period 2002-2019. This data showed that while median incomes have seen a broadly consistent gradual upward trend in Scotland and Great Britain as a whole (with slowing in 2010 and 2011 being the only exception), median incomes in South Ayrshire have shown more fluctuation. Nevertheless gross weekly pay for full-time employees in South Ayrshire had increased at an annual average growth rate of 2.2% during this period, and over the last five years had seen an annual average growth rate of about 2.8%. Data was presented on Gross Value Added (Balanced) for South Ayrshire, again showing a broadly upward trend.

The HMP considered which income growth scenario(s) were most likely to occur over the next twenty years, choosing between Modest Real Terms Growth (+3.5% per annum), No Real Terms Growth (+2% per annum) or Below Real Terms Growth (+0.5% per annum).

While it was recognised that there were likely to be a lot of unknowns given the changing national and international picture, it was felt that the most likely scenario based on existing data was **No Real Terms Growth**.

7.b HMP - Income Distribution assumptions

7.15 Data was considered on how incomes at different distribution points had changed over time (2002 – 2019), in order to support the HMP determining how income distribution

[123] NOMIS *Annual Survey of Hours and Earnings – Resident analysis, 2002 to 2019.* https://www.nomisweb.co.uk/query/construct/summary.asp?mode=construct&version=0&dataset=30

may change going forward. The group were asked to consider three possible scenarios – No Change, Greater Equality or Greater Inequality. The gross weekly pay of full-time employees at the 10th, median and 80th percentile[124] were considered. The data shows that, on average, incomes at the 10th percentile and 80th percentile have varied little from the median. Over the long-term, the average annual growth rate for these three income levels can be seen to be broadly similar, while recent years have seen marginally more growth among the least affluent full-time employees. There was consensus that based on the data presented the most likely scenario in terms of income distributions would be **No Change**.

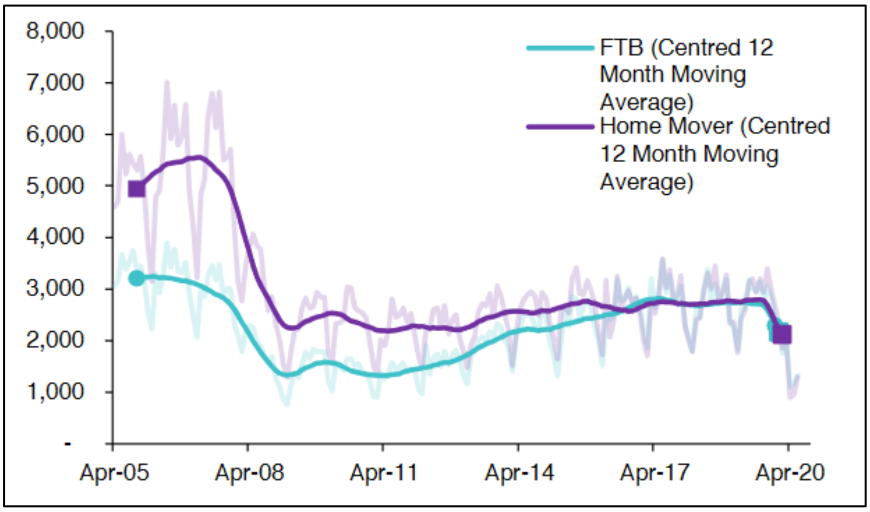
8. Affordability

8(a) Market conditions affecting home ownership

8.1 In the last quarter of 2020, there were 14,060 new loans for the purchase of a house across Scotland, down by 21.6% on the same quarter in 2019. This was made up of 7,210 new mortgages advanced to first-time buyers - an annual decrease of 18.6% - and 6,850 new mortgages advanced to home movers - down by an annual 24.6% (-2,230).

8.2 In terms of longer-term trends, we can see from Figure 27 that First-Time Buyers make up a considerable proportion of new loan approvals in 2020 – around 50% of mortgages. This compares with a rate of 37% in 2008.

Figure 27 - Loans for House Purchase, Scotland, Q3 2020 (12 Month Moving Total)[125]



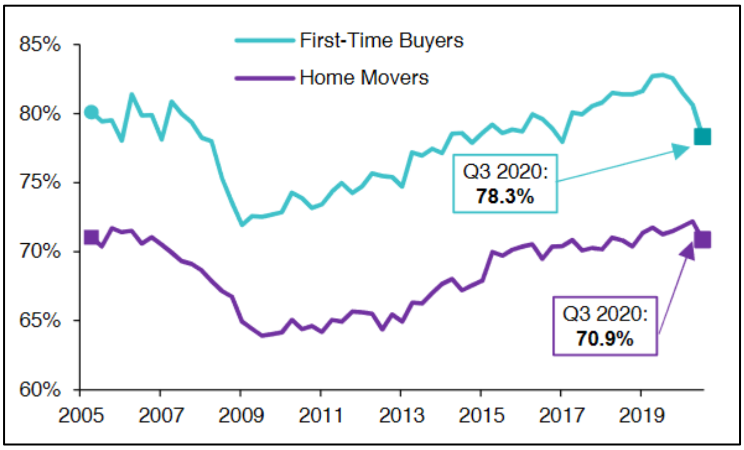
8.3 Prior to the Coronavirus pandemic, deposit constraints were considered to be seeing a period of continuing easement for First Time Buyers (FTBs) in Scotland. Figure 28 below shows trends in loan-to-value (LTV) ratios for new loans. In Q3 2020, the mean Loan-to-Value (LTV) ratio on new mortgages advanced to first-time buyers in Scotland was 78.3%. This is a reduction of 2.4 percentage points on the previous quarter and down 4.5 percentage points annually. This is considered to reflect reductions in the availability of high LTV ratio

[124] Data on the 90th percentile was not available at the time of writing.
[125] Scottish Government *Scottish Housing Market Review, October – December 2020*

mortgages. For home movers, the mean LTV ratio was 70.9% in Q3 2020, down 1.3 percentage points on Q2 2020 and 0.4 percentage points over the one year period.

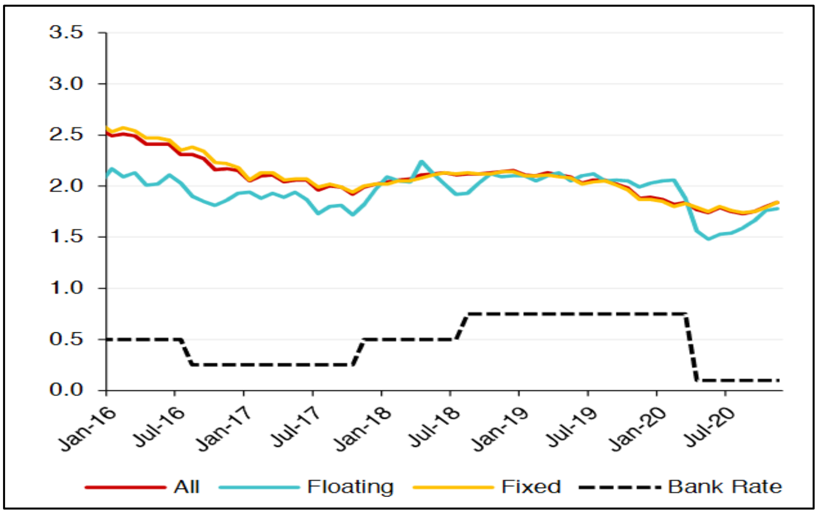
8.4 There has been a reduction in new lending at high LTV mortgage ratios across the UK since March 2020. The share of gross mortgage advances across the UK in Q3 2020 with an LTV ratio greater than 90% was 3.5%, 2.4 percentage points below the share in Q3 2019. There has also been a reduction in lending which is both high LTV and high LTI (loan-to-income). This is classified by the FCA as an LTV over 90% and an income multiple greater than or equal to 3.5 for single income purchasers, or greater than or equal to 2.75 for joint income purchasers. The share of gross advances classified as high LTV and LTI was 2.6% in Q3 2020, down 1.8 percentage points on Q3 2019[126].

Figure 28 – Mean loan-to-value for house purchase, Scotland (Quarterly)[127]



8.5 Figure 29 shows the effective interest rate on new mortgage advances for the UK as a whole. The effective interest rate is the average rate charged on the stock of loans/new lending in a given month.

Figure 29 – New Mortgage Interest Rates, UK (Monthly), 2004-2020[128]



[126] Scottish Government *Scottish Housing Market Review, October – December 2020*
[127] Scottish Government *Scottish Housing Market Review, October – December 2020*
[128] Scottish Government *Scottish Housing Market Review, October – December 2020*

8.6 In March 2020, Bank Rate was cut by a cumulative total of 65 basis points, leaving it at 0.1%. The reduction in Bank Rate has fed through to outstanding variable rate mortgages, with the average interest rate falling from 2.97% in February 2020 to 2.30% in June, where it has stabilised. While the average interest rate on new variable rate mortgages also fell, from 2.06% in February to 1.48% in May, it has since increased to 1.78% in November. The average fixed rate on new mortgages has been relatively steady throughout the period of Covid-19, standing at 1.84% in November compared to 1.80% in February.

8(b) Home ownership affordability locally

8.7 Owner occupation is the dominant tenure in South Ayrshire, accounting for 67% of all dwellings. Nevertheless, access to this tenure is not an option for many households locally, due primarily to the typical requirements of mortgage lending – including availability of a sizeable deposit and a stable income against which banks would be willing to lend.

8.8 As can be seen above, nationally the number of mortgage applications from first time buyers has increased in recent years to be similar to levels seen for home movers, while average loan-to-value ratios have equalled pre-crash levels.

8.9 Scottish Planning Policy 2014 states that "*affordable housing is defined broadly as housing of a reasonable quality that is affordable to people on modest incomes*". The CHMA recommend a relationship between 4 x income and the lower quartile house prices – as this is broadly equivalent to a 3.2 x income with a 20% deposit (i.e. an assumed 80% loan to value ratio).

8.10 Using the assumed affordability ratio of 4, and the South Ayrshire lower quartile house (LQ) price of £86,000[129], a household would require a minimum income of £21,500 per annum to afford entry level house prices. This represents incomes at the 36th percentile (£21,840) in the Heriot Watt income data. In other words, more than a third of households in South Ayrshire would not be able to afford a lower quartile house purchase.

8.11 The median house price in South Ayrshire is £135,000. Assuming the same affordability ratio of 4, a purchase at this price would require an income of £33,750 – meaning that only households at the 58th percentile and above would be able to affordably meet median house prices. This suggests that 57% of households in South Ayrshire would not be able to affordably meet median house prices.

Table 26 – Affordability ratio for lower quartile and median house prices, 2018/19 and incomes, 2018[130]

	Income	House prices	Affordability ratio
Lower quartile	£17,160	£86,000	5
Median	£28,600	£135,000	4.7

8.12 As noted previously, the average new build house price in South Ayrshire was £266,930 in 2019/20[131]. In order to afford this using the affordability ratio of 4, a household

[129] Centre for Housing Market Analysis *HNDA Datapack 2020*.
[130] Centre for Housing Market Analysis *HNDA Datapack 2020*.
[131] Registers of Scotland *Property Market Report 2019/20.* Table 15: Average residential property price for new builds by local authority, Scotland, 2003-04 to 2019-20, financial year data

would need to earn £66,733 per annum, and as such only households with incomes in the top 10% would be able to affordably meet the costs of an average new build property.

8.13 Conversely, using an affordability ratio of 4, lower quartile income households (earning £17,160 per year) could afford to buy properties priced at no more than £68,640, while median income households could afford properties up to £114,400.

8(c) Rental market affordability

8.14 In order to consider affordability in the rental market using the data highlighted in Section 3 above, one possible measure would be to compare lower quartile and median rents for the Ayrshires BRMA with LHA rates.

8.15 Previously, the most pronounced gap when considering the lower quartile of market rents was the level of LHA paid to single people under the age of 35 – the 'single room rate'. In South Ayrshire, this was previously £272 per month, meaning a gap of £78 per month for this group accessing lower quartile 1 bedroom accommodation in the social rented sector. This meant that a single person on benefits would find it very difficult to afford accommodation even at the lower end of the market. In order for this group to access accommodation on this basis, they may have to pay the shortfall from other benefits, referred to as paying a 'top-up'.

8.16 This could be further complicated in areas where there is a lack of 1 bedroom properties available, meaning that this group may have to seek 2 bedroom accommodation and would face an even greater shortfall. While sharing with other would-be tenants would make 2 bedroom accommodation more affordable, anecdotal evidence tells us that there are limited flat sharing opportunities available in South Ayrshire. Efforts in recent years to introduce organised sharing schemes locally further suggest that there is little appetite amongst landlords or tenants for this option.

8.17 It is worth noting that the Shared Room Rate was recently upgraded in April 2020 to £333. While this was a temporary measure in relation to the Coronavirus pandemic, if this was a longer-term change this would certainly go some way to improving affordability locally.

Table 27 – Private Rents (£ Monthly), 2020 compared to respective LHA 2020/21 rates, Ayrshires Broad Rental Market Area[132]

	LHA	Lower Quartile	Comparison to LHA	Median	Comparison to LHA
1 bedroom (Shared)	£272[133]	£273	-£1.00	£360	-£88.00
1 bedroom	£349	£350	-£0.95	£375	-£25.95
2 bedroom	£424	£425	-£1.16	£450	-£26.16
3 bedroom	£499	£500	-£1.36	£550	-£51.36
4 bedroom	£693	£625	£68.11	£850	-£156.89

[132] Scottish Government *Private Renting Statistics, 2010 to 2019* https://www.gov.scot/publications/private-sector-rent-statistics-2010-2019/

[133] The LHA 2019/20 'Shared Room Rate' was used here as a temporary alternative calculation was used in 2020/21 as a result of the Coronavirus pandemic. Using the previous rate provides a clearer picture of longer-term affordability in the sector.

8.18 The shortfall between LHA and actual rents is more pronounced across all property sizes when LHA is compared to median rents. A single person under the age of 35 would need to meet a shortfall of almost £88 per month in order to access median 1 bedroom shared accommodation, or £95 per month to access median 1 bedroom accommodation. A household requiring a 3 bedroom property would face a shortfall of more than £51 to access accommodation at the median rent.

8.19 In the social rented sector, rents are not capped at LHA rates and as such there would be no need for a tenant to 'top-up' from other benefits to meet rental costs higher than LHA where a person is receiving the full housing component of Universal Credit. In addition, the Scottish Government is currently mitigating the impacts of the 'bedroom tax' for social housing tenants and this position is unlikely to change in the future.

8.20 Having considered affordability for people in receipt of full benefits, we will now move to consider affordability in the social and private rented sector from an incomes perspective.

8.21 The calculations in Table 28 present various rental costs in the social and private sectors and compares these with the estimated gross lower quartile household income for South Ayrshire. While in practice lower income households may receive partial or full housing costs depending on their circumstances, this nonetheless provides one measure by which affordability can be considered.

Table 28 – Affordability of renting for households at or below the lower quartile income threshold[134]

	£ per week	£ per month	£ per year	% LQ income/housing costs
Average council rent (2 bed)	£74.93	£324.70	£3,896.36	22.7%
Average RSL rent (2 bed)	£84.85	£367.68	£4,412.20	25.7%
LQ PRS rent (2 bed)	£98.08	£425.00	£5,100.00	29.7%
Median PRS rent (2 bed)	£103.85	£450.00	£5,400.00	31.5%
Household LQ income (2018)	**£330**	**£1,430.00**	**£17,160**	

8.22 As can be seen above, a household earning the lower quartile income in South Ayrshire would be spending around a quarter of their income on housing costs in the social rented sector, or around a third of their income on housing costs for a property at the lower quartile or median rent in the PRS.

8.23 Using the assumed affordability ratio of 4 (25%), and the lower quartile 2 bedroom PRS rent of £425 per month, a household would require a minimum income of £20,400 per annum (£392.31 per week) to afford to meet their housing needs in the private rented market. This represents incomes at the 33rd percentile in the Heriot Watt income data. In other words, 32% of households would not be able to affordably meet lower quartile rents in the private rented sector.

[134] SAC *Annual Return on the Charter (ARC) 2019/20*, Ayrshire Housing rent data (South Ayrshire only 2018/19, PRS, Scottish Government *Private Renting Statistics, 2010 to 2020,* Centre for Housing Market Analysis *HNDA Datapack 2020.*

8.24 Conversely, using an affordability ratio of 4, lower quartile income households (earning £17,160 per year) could afford rents of not more than £82.50 per week or £357.50 per calendar month.

8.25 For many households in South Ayrshire, then, the private rented sector is unaffordable. Given that support for households entering the private rented sector is limited to the LHA, affordability remains an issue particularly for younger single people under the age of 35 who are only entitled to the 'shared' or 'single room' rate, a rate that falls short of the lower quartile costs of a one bedroom property. As there are few opportunities for sharing accommodation in South Ayrshire at present, this leaves single people under the age of 35 with few options, and could be a contributory factor in the overrepresentation of this demographic in households who apply for assistance under homelessness legislation.

8.26 While the 2020/21 'single room' rate is broadly equivalent to the one-bedroom rate as a consequence of temporary policy decisions taken by Government in light of the coronavirus pandemic, it is likely that this will return to its lower level in the future and as such 2019/20 rates have been used to consider affordability by this measure going forward.

8(d) Mid-market rents

8.27 Mid-market rent is an intermediate tenure intended to provide accommodation priced between social housing and market rents. Rents would typically be at or below LHA in order to maintain their affordability. Mid-market properties are aimed at people in relatively low-paid employment, and who are likely to have low priority for social housing. The Scottish Government supports the supply of mid-market rent by offering subsidies to developers who deliver this tenure. However, there has been relatively limited appetite among developers to deliver this type of accommodation in South Ayrshire.

8.28 This can be partially explained by the relatively limited gap between social housing and market rents locally, making such schemes less feasible than in areas where the LHA would provide a greater return on investment or make a project more viable.

8.29 Table 29 looks at the relative affordability of the mid-market rent model in South Ayrshire, using LHA as a proxy for this type of accommodation. As can be seen below, households in receipt of the median income looking for a three bedroom property would be able to affordably meet their needs in the South Ayrshire lower quartile to median rental market.

Table 29 – Affordability of renting for median income households[135]

	£ per week	£ per month	£ per year	% Median income/ housing costs
Average council rent (3 bed)	£79.09	£342.72	£4,112.68	14.4%
Average RSL rent (3 bed)	£92.82	£402.22	£4,826.64	16.9%
LQ PRS rent (3 bed)	£115.38	£500.00	£6,000	21.0%

[135] SAC *Annual Return on the Charter (ARC) 2019/20*, Ayrshire Housing rent data (South Ayrshire only 2018/19, PRS, Scottish Government *Private Renting Statistics, 2010 to 2020,* Centre for Housing Market Analysis *HNDA Datapack 2020.*

LHA (Mid-market rent)	£115.15	£499.00	£5,988	20.9%
Median PRS rent (3 bed)	£126.92	£550.00	£6,600	23.1%
Household median income (2018)	£550.00	£2,383.33	£28,600	

8.30 Using the standard affordability measure of 4, to afford a three bedroom mid-market rent in South Ayrshire a household would need to earn £23,952. This represents earnings at the 41st percentile, meaning that 40% of households would be unable to affordably meet these costs, and 60% of households would be able to afford this.

8.31 For a three bedroom property at the median rent, an income of £26,400 would be required to affordably meet these costs. This represents the 47th income percentile, meaning that 46% of households would not be able to afford this, but 54% of households would.

8.32 As such, the difference between those on median incomes who can afford LHA but couldn't afford median rents is relatively small – around 6% of households – many of whom would be able to affordably meet their needs in either owner occupation, social rented sector or at lower rents in the private rented sector.

8.33 Mid-market rent new supply in South Ayrshire in the coming years is likely to be limited, in part due to these issues of limited demand as well as the limited financial viability of this model locally, however South Ayrshire Council is open to working with providers to offer mid-market rent as a potential additional housing option for households on modest incomes.

9. Economic Trends

9 (a) Economic Growth (GVA)

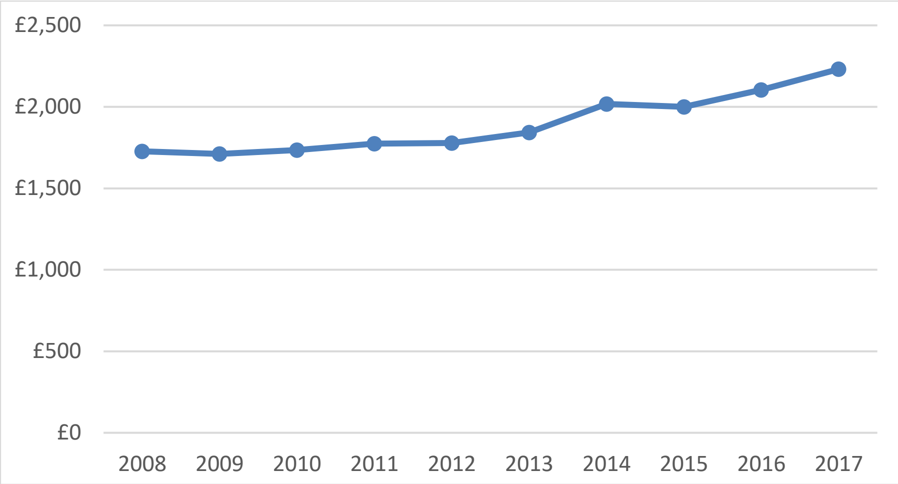
9.1 Gross value added (GVA) is a measure of the increase in the value of the economy due to the production of goods and services.

9.2 Statistical information on GVA by local authority has been produced by the Office of National Statistics (ONS), the Scottish Government and Skills Development Scotland using different methodologies. In order to give a complete picture of estimated trends in economic growth, summaries of key information from all three measures are presented for information.

9.3 The ONS's measure uses estimates from gross value added income (GVA(I)) and gross value added production (GVA(P)) to produce a balanced measure of regional GVA, known as GVA(B). Data presented below using this measure use current basic prices (value in £ million) unless otherwise stated, in order to include for the effects of inflation.

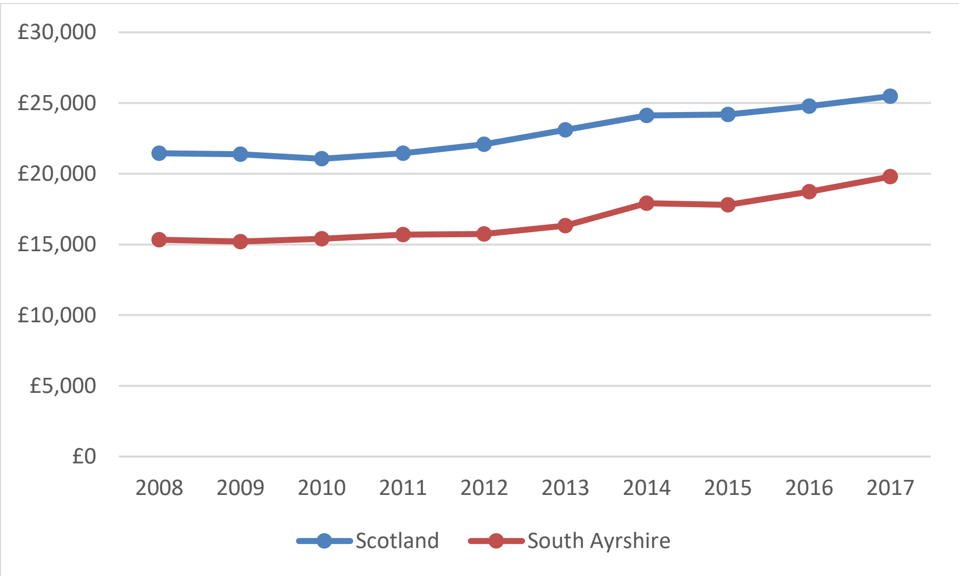
9.4 Figure 30 shows that, by this measure, South Ayrshire has seen a broadly upward trend in GVA over the last 10 years, increasing by 29% between 2008 and 2017. This compares with an increase in Scotland as a whole of 24% during the same period. The largest year-on-year increases in South Ayrshire's GVA were seen in 2014 (up 9.5% from the previous year), 2016 (up 5%) and 2017 (up 6%).

Figure 30 – Gross Value Added (Balanced) (£m) at current basic prices, South Ayrshire, 2008 to 2017[136]



9.5 In terms of comparing South Ayrshire's GVA to Scotland as a whole, one way of doing this is to present the GVA(B) per head of population. Figure 31 presents this information for both Scotland and South Ayrshire, and this information again is provided at current prices in order to account for inflation.

Figure 31 – Gross Value Added (Balanced) per head of population at current basic prices, Scotland and South Ayrshire, 2008 to 2017[137]



9.6 As can be seen above, South Ayrshire's GVA(B) per head of population is consistently lower than the figure for Scotland as a whole. In 2008, South Ayrshire's GVA(B) per head was about 28% lower than the Scottish figure, but this gap has to some extent narrowed at various points during the period, including 2010 and 2011, and particularly the period from 2014 through to 2017. Despite this, in 2017 South Ayrshire's GVA remained lower than the Scottish average – about 22% less than the figure for Scotland as a whole.

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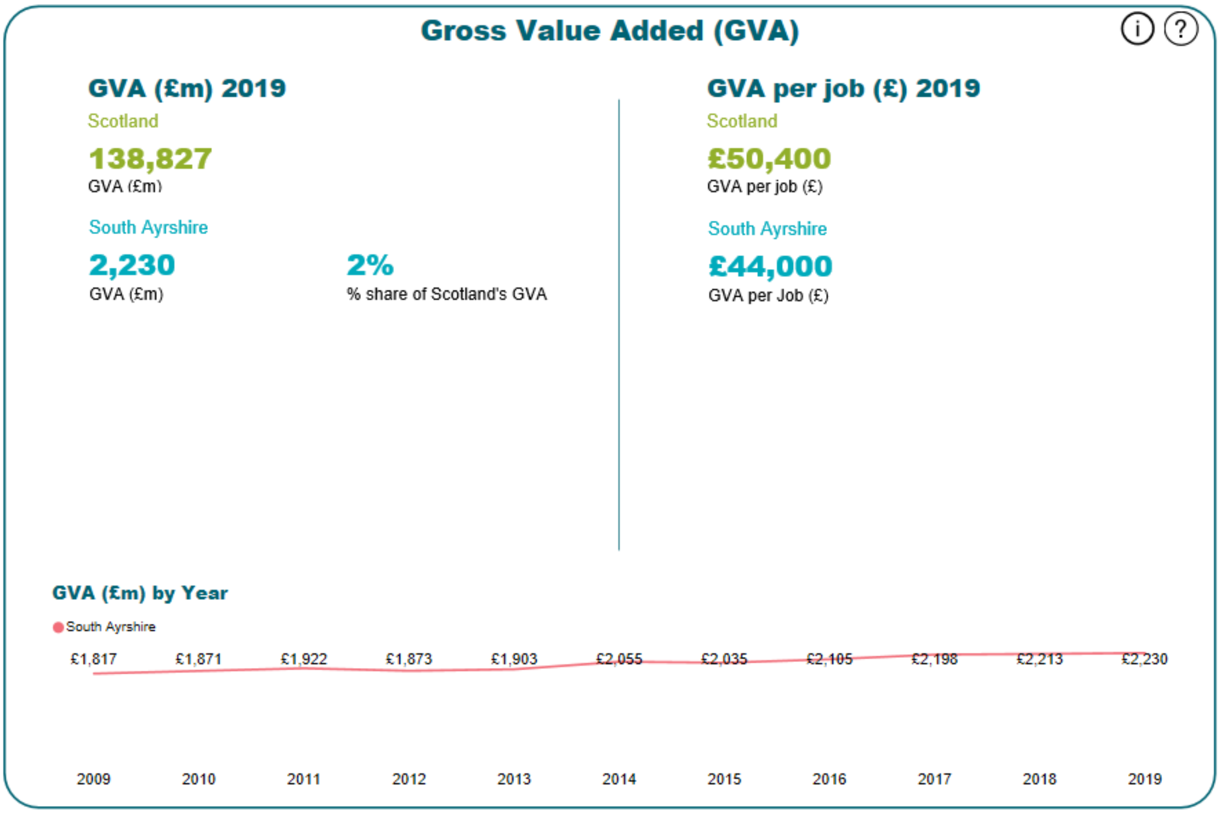
[136] Office of National Statistics *Regional economic activity by gross value added (balanced), UK: 1998 to 2017*
[137] Office of National Statistics *Regional economic activity by gross value added (balanced), UK: 1998 to 2017*

9.7 GVA figures to 2019 were recently produced for local authorities using the ONS's data and projections developed by Oxford Economics. Figure 32 presents some summary data from South Ayrshire's Regional Skills Assessment.

Figure 32 – Gross Value Added (Balanced), South Ayrshire, 2009-2019[138]

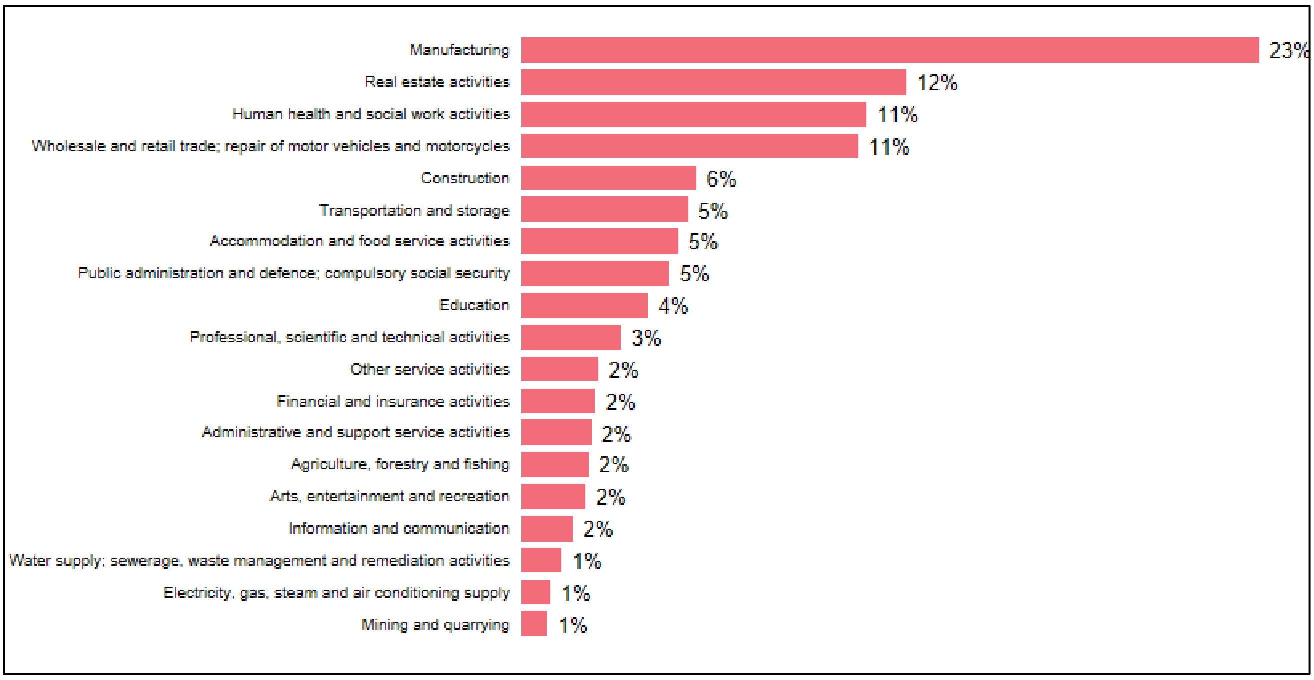


9.8 As can be seen above, GVA per job is less in South Ayrshire than in Scotland as a whole. We can again see that GVA as a whole is generally on an upward trajectory during this time, with a peak in 2014 followed by a period of growth from 2016 onwards.

9.9 In terms of contribution to GVA by industry, we can see in Figure 33 below that manufacturing accounted for almost a quarter of South Ayrshire's GVA in 2019. Major contributions were also made by real estate, human health and social work and retail industries.

[138] ONS/ Oxford Economics forecasts - Skills Development Scotland *Regional Skills Assessment* https://www.skillsdevelopmentscotland.co.uk/what-we-do/skills-planning/regional-skills-assessments/

Figure 33 – Total GVA by Industry, South Ayrshire, 2019[139]



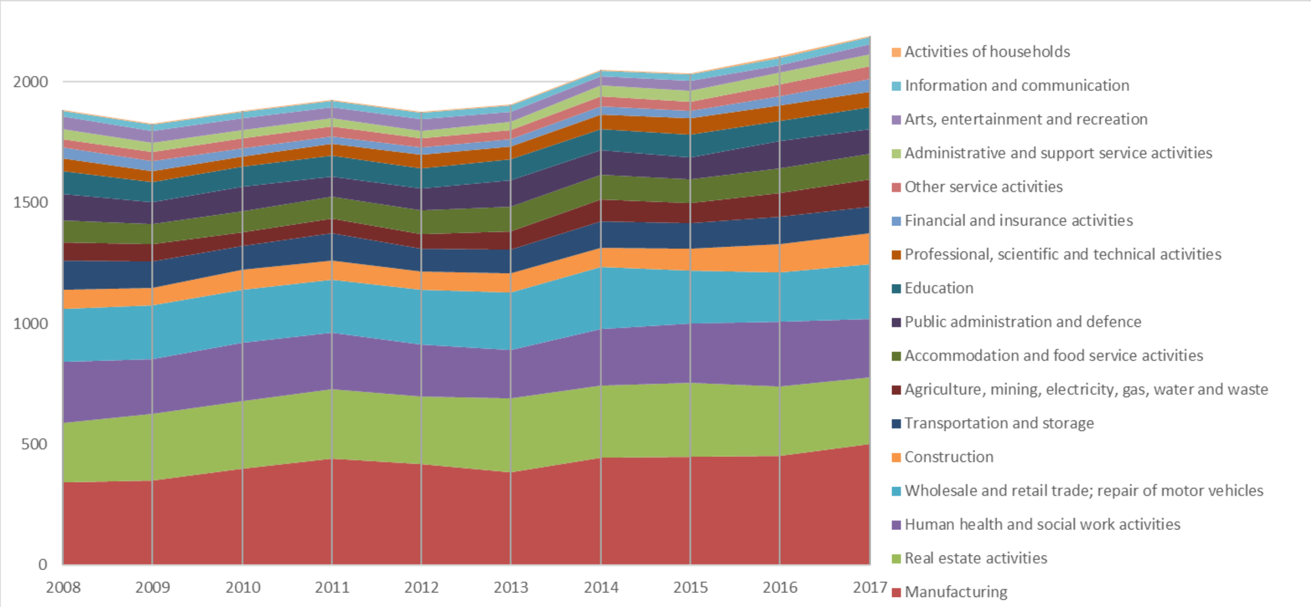
9.10 Figure 34 below shows the ongoing contribution made by manufacturing industries to the South Ayrshire economy in recent years. This increased to a value of £443m in 2011, before reducing in 2012 and 2013 before increasing each year from 2014 onwards to a high of £503m in 2017. Major contributions within this industry are in the "Other manufacturing" category, accounting for about half (47%) of this industry's GVA, the manufacture of food, beverages, textiles and clothing, accounting for about a third (32%) of this industry's GVA in 2017 and the Manufacture of metals, electrical products and machinery, contributing at about 13%. The contribution of the former category has increased over the last ten years while the latter category has decreased.

9.11 GVA from Real Estate activities peaked in 2013 and 2015 at £306m, but the last two years have seen reductions in this industry in 2016 and 2017. This industry nevertheless continues to make a substantial contribution to South Ayrshire's economy, at around 12% of GVA amounting to £276m. It is important to note that some of this contribution is inflated by the way this measure is calculated, including as it does the 'imputed rent' – the value of the service homeowners are providing to themselves by owning and living in their own home.

9.12 Significant contributions were also made in 2017 by Human Health and Social Work activities (11% of GVA) and wholesale and retail (more than 10% of GVA).

[139] ONS/Oxford Economics - Skills Development Scotland *Regional Skills Assessment* https://www.skillsdevelopmentscotland.co.uk/what-we-do/skills-planning/regional-skills-assessments/

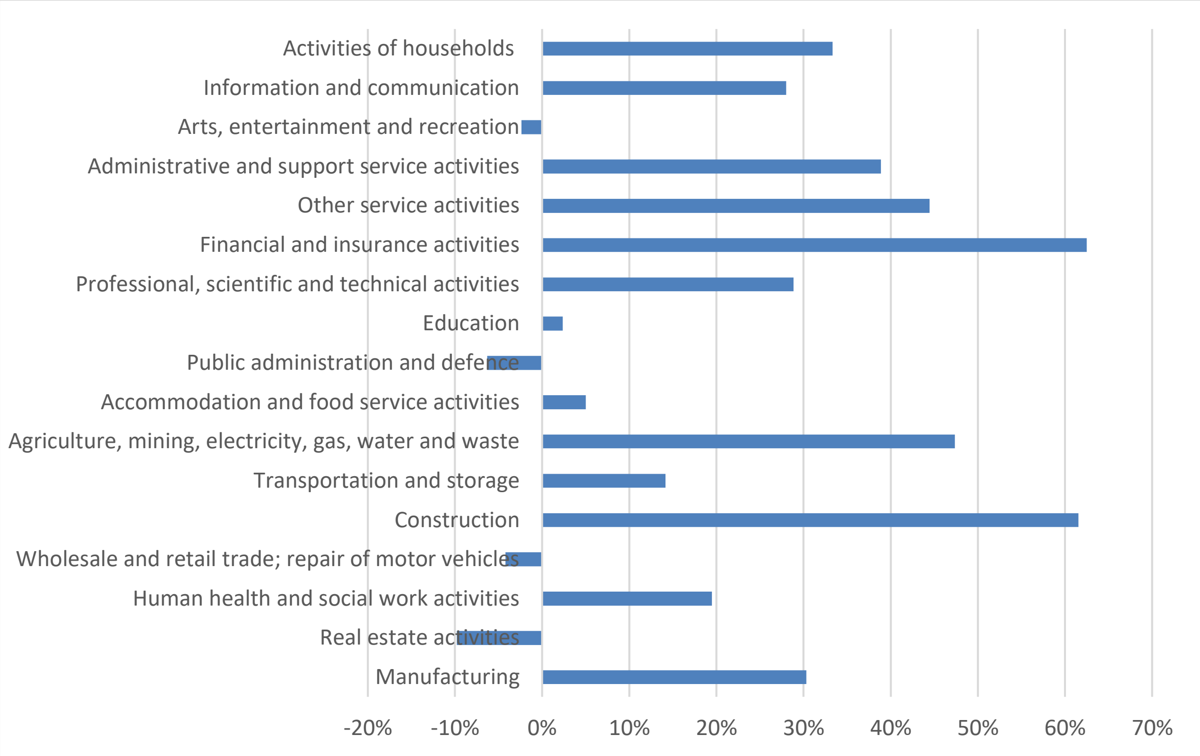
Figure 34 – Gross Value Added (Balanced) in 2016 pounds, £m, South Ayrshire, 2008-2017[140]



9.13 As can be seen in figure 35 below, the largest increases in GVA by industry over the last five years can be seen in the financial and insurance industries (an increase of 62.5% between 2013 and 2017), construction (61.5%) and agriculture (more than 47%). The largest decreases are in Real Estate (about -10% between 2013 and 2017), public administration and defence (-6%) and wholesale and retail (-4%).

[140] Office of National Statistics *Regional economic activity by gross value added (balanced), UK: 1998 to 2017*

Figure 35 – Percentage change in GVA by industry, South Ayrshire, 2013 to 2017[141]



9.14 A summary report was recently produced for Ayrshire as a whole[142]. This report placed GVA in Ayrshire at £5.7bn – down from £6.6bn in 2018 – and representing four per cent of total national output. By this measure Ayrshire is considered to be 'one of the smallest contributing RSA regions to the Scottish economy' along with South of Scotland, West Lothian, Dumfries and Galloway and the Scottish Borders.

9.15 This report found that from 2009 to 2019 the Ayrshire economy, measured by GVA, grew by 1.0 per cent on average each year. This was a slower rate of growth than Scotland, which over the same period experienced 1.4 per cent growth on average each year.

9.16 In terms of future economic activity, the Oxford Economics report forecast GVA in Ayrshire to grow by 1.3 per cent on average each year from 2019 to 2029. Whilst this rate of growth would be below that anticipated for Scotland (1.7 per cent) and the UK (2.0 per cent), it would be greater than the average annual growth rate that Ayrshire experienced from 2009 to 2019.

9.17 The relatively modest economic growth for Scotland as a whole in the short term is explained in this report by a reluctance by business to invest in the context of Brexit-related uncertainties, as well as Scotland's industrial mix – with the relative absence of the most dynamic sectors (like high value business services and digital sectors) being highlighted as a distinction between Scotland and the rest of the UK.

9.18 Ayrshire's GVA growth between 2019 and 2029 is anticipated to be driven by the Real Estate sector, with GVA generated by this sector expected to increase by £131.8m. It is again

[141] Office of National Statistics *Regional economic activity by gross value added (balanced), UK: 1998 to 2017*
[142] Skills Development Scotland *Regional Skills Assessment, Ayrshire – Summary Report 2019* https://www.skillsdevelopmentscotland.co.uk/media/46127/ayrshire-rsa-summary-report.pdf

important to note that this sector's contribution to GVA is inflated by 'imputed rent', as discussed previously.

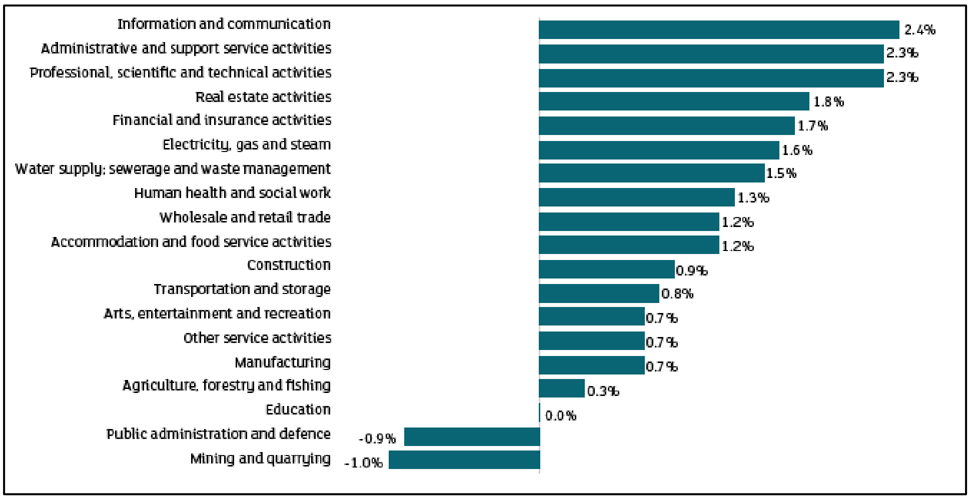
9.19 In addition to Real Estate, the sectors expected to have the greatest increases in GVA output between 2019 and 2029 are:

- Human Health and Social Work, £87.8m;
- Manufacturing, £77.4m;
- Wholesale and Retail Trade, £73.4m; and
- Administrative and Support Service Activities, £47.8m.

9.20 Most of the sectors with the greatest GVA in 2019 are those expected to see the greatest actual growth between 2019 and 2029.

9.21 In terms of relative growth, percentage change in GVA contributions highlights sectors that make smaller contributions to GVA but are forecast to grow at a faster rate during the period being considered. Sectors expected to see growth include Information and Communication – one of the smallest sectors in 2019 – with a projected annual increase of 2.4%, Administrative and Support Service Activities and Professional, Scientific and Technical Activities sectors – both expected to see annual increases of 2.3% to 2029. These industries' relative size means this expansion has a limited impact on overall GVA.

Figure 36 – Forecast average annual GVA change by industry, 2019-2029, Ayrshire[143]



9.22 It is anticipated that fiscal policy is likely to remain tight during this period, and as such this will have an impact on the growth prospects of the public sector. As such, Public Administration and Defence activities are projected to contract by an average of 0.9% per year to 2029.

9.23 Education is projected to remain the same during this period, but the Human Health and Social Work sector is projected to increase during this period in line with increased demand for these services as a result of population change.

143 Skills Development Scotland *Regional Skills Assessment, Ayrshire – Summary Report 2019* https://www.skillsdevelopmentscotland.co.uk/media/46127/ayrshire-rsa-summary-report.pdf

9.24 Ayrshire's largest industry in terms of GVA – the manufacturing industry – is anticipated to grow by 0.7% per year on average, less than the average of 1.3% for the Ayrshire economy.

9.25 In terms of productivity as a measure of economic activity – that is GVA per worker - Ayrshire's productivity was £40,300. This was lower than the Scottish average of £50,400.

9.26 From 2009 to 2019, productivity grew by an average of 1.3% per annum, keeping pace with that seen across Scotland (1.3%) and higher than the UK average for the same period (0.8%).

9.27 In the years between 2019 and 2029, productivity in Ayrshire is anticipated to grow at an average of 1.3% per year compared to the Scottish average of 1.4% and the UK rate of 1.5% per annum.

9.28 While productivity in Ayrshire was £43,500 compared to the national average of £47,300, productivity is expected to increase at 1.3% per year in line with the Scottish rate and only marginally behind the UK rate of 1.4%[144].

9 (b) Employment

9.29 South Ayrshire's employment level showed that 50,200 people over the age of 16 were in employment in South Ayrshire in 2019, an increase of 4% on the previous year and representing 74% of the working age population[145].

9.30 Figure 6.h below shows the employment rate in South Ayrshire in the period since 2004 and compares this to the rate in Scotland as a whole. The employment rate is a different measure from employment levels and is an expression of the proportion of the working age population (ages 16-64) who are in employment.

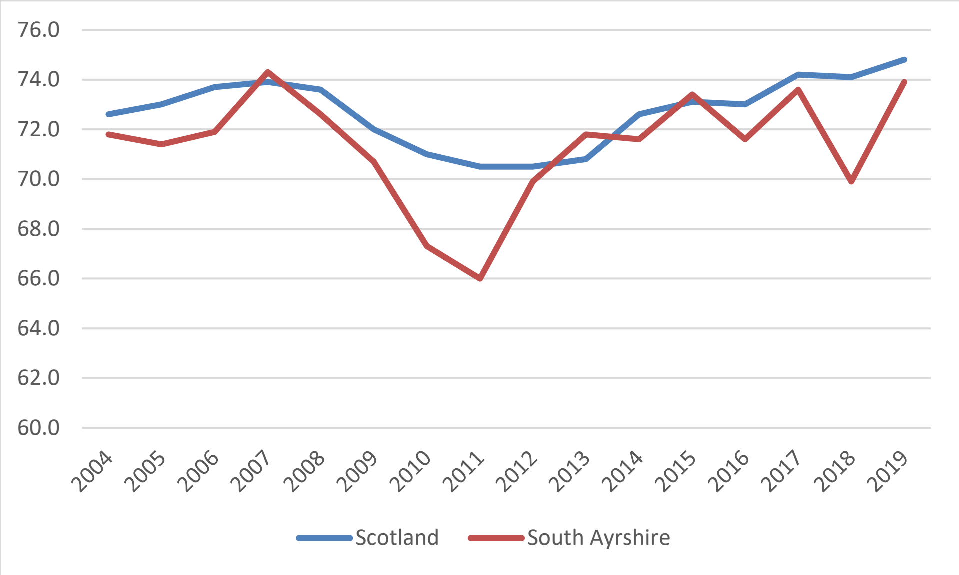
9.31 While employment rates in Scotland reduced between 2008 and 2011, this reduction was more keenly felt in South Ayrshire, falling to a low of 66% in 2011, compared to 70.5% for Scotland as a whole. South Ayrshire saw increases in the employment rate from 2011 to 2013 and then again between 2014 and 2015, being marginally higher than the Scottish average in both 2013 and 2015. Most recently, employment reduced from almost 74% (close to the Scottish average) in 2017 to less than 70% (more than 4 percentage points less than the Scottish average) in 2018, before increasing again to around 74% in 2019.

9.32 The change in employment rate between 2009 and 2019 in South Ayrshire was an increase of 3.2%, compared to an increase for Scotland as a whole of 0.5%. This still amounted to 200 less people in employment during the period, as this statistic is only an expression of the proportion of the population in employment rather than an expression of change in the absolute number of people in employment.

[144] Skills Development Scotland *Regional Skills Assessment, Ayrshire – Summary Report 2019* https://www.skillsdevelopmentscotland.co.uk/media/46127/ayrshire-rsa-summary-report.pdf

[145] Scottish Government *Annual population survey: results for year to 31 December 2019* https://www.gov.scot/publications/annual-population-survey-results-for-year-to-31-december-2019/

Figure 37 – Employment rate in South Ayrshire and Scotland, 2004 to 2019[146]



9.33 Table 30 below shows the employment rate by age for South Ayrshire and for Scotland as a whole. Youth (16-24) employment is higher in South Ayrshire than for Scotland as a whole, while the rate of employment for 25-34 year olds in South Ayrshire is lower. A higher proportion of 35-49 year olds are in employment in South Ayrshire than the Scottish average, while a lower proportion of people aged over 50 are in employment than for Scotland as a whole.

9.34 This is important given South Ayrshire's ageing population and the need to ensure housing needs can be met affordably in both the market and social sectors.

Table 30 – Employment rate by age group, Scotland and South Ayrshire, 2019[147]

	Age **16-24**	Age **25-34**	Age **35-49**	Age **50 - 64**	Age **65+**
Scotland	57.9%	81.6%	84%	70.5%	8.7%
South Ayrshire	61.6%	75.7%	88%	67.7%	7.4%

9.35 Looking at patterns of employment in Figure 38 below, the majority of people in employment over the age of 16 in South Ayrshire are working full-time. This is typically around 72%, however a dip in this share was seen from 2011 to 2015, rising again in 2016 and 2017 before falling to a low of 68% in 2018. 2019 again saw an increase above 72% of employees being in full-time employment – an increase of about 5% between 2018 and 2019.

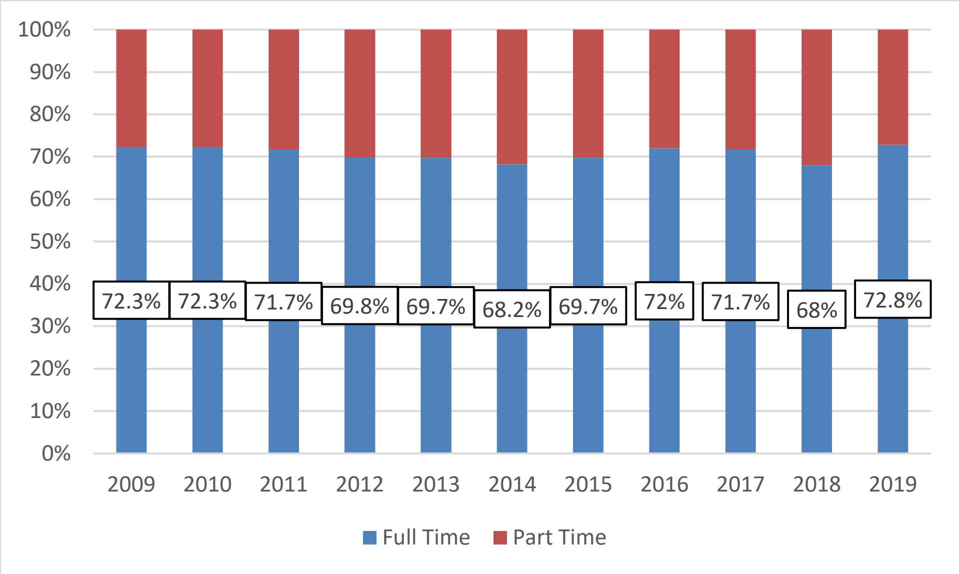
9.36 Overall, the period 2009 to 2019 saw a small increase (0.4%) in the proportion of people in employment working full time hours between 2009 and 2019.

9.37 In terms of jobs, 2019 recorded 900 more full-time jobs, and 300 less part-time jobs than in 2009. As we will see later, this runs somewhat counter to the trend seen for Ayrshire as a whole.

[146] Scottish Government *Scotland's Labour Market - People, Places and Regions: Annual population survey 2019* https://www.gov.scot/publications/scotlands-labour-market-people-places-and-regions-background-tables/
Table 1.1: Employment rates and levels by local authority, Scotland, 2004 to 2019
[147] As above. Table 1.4: Employment rates and levels by age and local authority, Scotland, 2004 to 2019

9.38 There is some differential by gender in this measure, with around 87% of men in employment working full-time in 2019 compared to 58% of women[148].

Figure 38 – Percentage of people in employment aged 16+ by work pattern, 2009-2019[149]



9.39 In terms of the industries providing employment in South Ayrshire, data from the Scottish Annual Business Statistics (SABS 2018) - collated by the ONS through the Annual Business Survey – gives us information on the role played by certain key sectors. Nevertheless it is important to note that some industries including the financial sector & parts of agriculture and the public sector are excluded from this dataset.

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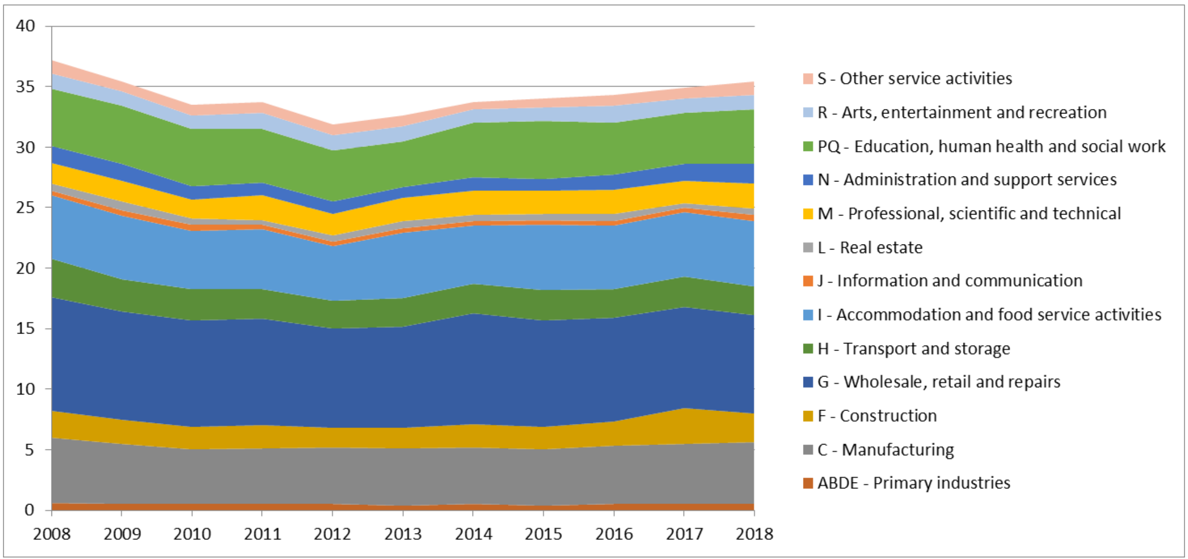
148 As above. Tables 1.9 and 1.10 – Number of men/women aged 16 and over in employment by work pattern and local authority.

149 Scottish Government *Scotland's Labour Market - People, Places and Regions: Annual population survey 2019* https://www.gov.scot/publications/scotlands-labour-market-people-places-and-regions-background-tables/ Table 1.8: Number of people aged 16 and over in employment by work pattern and local authority, Scotland, 2004 to 2019

Figure 39 – Employees by industry, thousands, South Ayrshire, 2008-2018[150]



9.40 As can be seen in Figure 39 above, the key industries in terms of employment in South Ayrshire are:

- Wholesale, Retail and Repairs (8,100 people in employment in 2018)
- Accommodation and Food Services Industries (5,400 people in employment)
- Manufacturing (5,100 people in employment)
- Education, Human Health and Social Work (4,500 people in employment)
- Construction (2,400 people)
- Transport and Storage (2,400 people)

9.41 Nevertheless, it is also important to note some emerging trends in relation to employment. The Wholesale, Retail and Repairs industry employs 1,300 less people than in 2008.

9.42 Modest growth was seen between 2008 and 2018 in the Accommodation and Food Services industries, increasing by 200 to 5,400 employees between these years. Manufacturing employed around 5,100 people in South Ayrshire in 2018 down from 5,400 in 2008 but part of an upward trend in recent years showing steady increase from 2015 onwards. Education, Human Health and Social Work employed 4,500, down 200 employees from 2008.

9.43 The largest increase in employees during this period was in the Professional, Scientific and Technical sector, with 400 more jobs in this sector in 2018 than in 2008. 2,100 people were employed in this industry in 2018, representing a peak for this sector.

9.44 As with Gross Value Added, employment trends and projections have been developed at an Ayrshire-wide basis in Skills Development Scotland's Regional Skills Assessment.

9.45 The Ayrshire-wide picture as at 2019 shows that in terms of employment, Human Health and Social Work and Wholesale and Retail Trade are the two largest sectors, creating 19% and 16% of all jobs respectively. Key roles in providing employment are also played by Manufacturing and Accommodation and food services, both providing 9% of jobs in Ayrshire.

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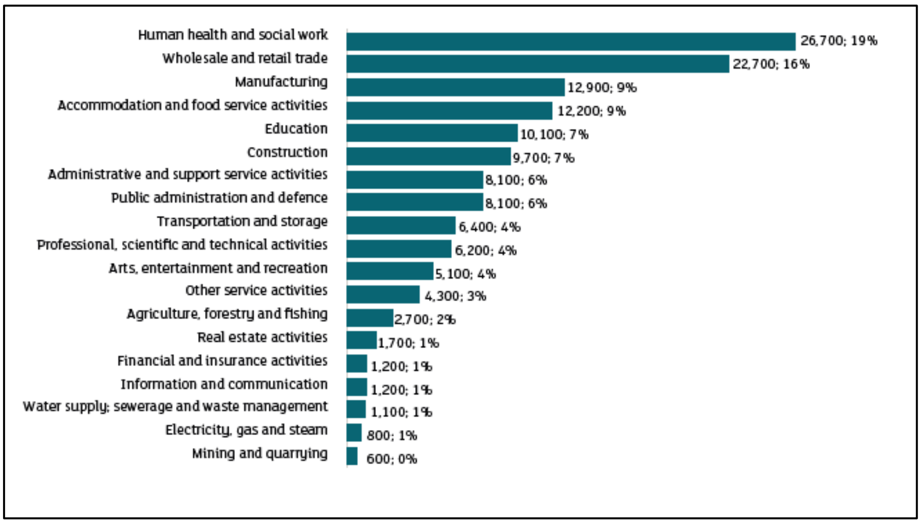
[150] Scottish Government *Scottish Annual Business Statistics 2018 – Web tables*

It is worth noting that while Real Estate accounted for a considerable proportion of GVA, in terms of employment this sector made a small contribution, accounting for 1,700 jobs in Ayrshire.

Figure 40 – Employment by industry and share of total employment, Ayrshire, 2019[151]



9.46 Between 2009 and 2019, employment in Ayrshire decreased by 2.9%, primarily as a result of contraction in a number of large industries including:

- Wholesale and retail (-2,600 jobs)
- Transportation and storage (-900 jobs)
- Agriculture, Forestry and Fishing (-700 jobs)

9.47 Whilst these sectors contracted, other sectors saw expansion, with the greatest absolute growth being seen in in the Professional, Scientific and Technical Activities sector in Ayrshire. This sector had 700 more jobs in 2019 than in 2009. Increases were also seen in Arts, Entertainment and Recreation (500 jobs) and Other Service Activities (400 jobs).

9.48 In terms of work patterns, Ayrshire's economy saw part-time employment increase by 1,000 jobs while full-time employment decreased by 5,300 between 2009 and 2019. Female employment decreased by 4,600 jobs while male employment increased by 300 jobs.

9.49 Economic forecasts by Oxford Economics predict that the decline in employment seen between 2009 and 2019 will continue, albeit seeing only a marginal reduction of 0.3% during the period to 2029 – about 400 fewer jobs in 2029 compared to 2019. At the same time, Scotland as a whole is anticipated to see a 3% increase in employment over this period.

9.50 At a local authority level, employment in East Ayrshire and North Ayrshire are forecast to stay the same, while employment in South Ayrshire is forecast to reduce by 0.1% per year.

9.51 Full-time employment is projected to decrease with 400 fewer full-time jobs in 2029, while part-time jobs are projected to stay the same.

9.52 While employment is projected to decrease for Ayrshire as a whole, different sectors will see expansion and contraction in terms of employment. As can be seen in Figure 41 below, it is anticipated that Administration and Support Services and Construction will see the

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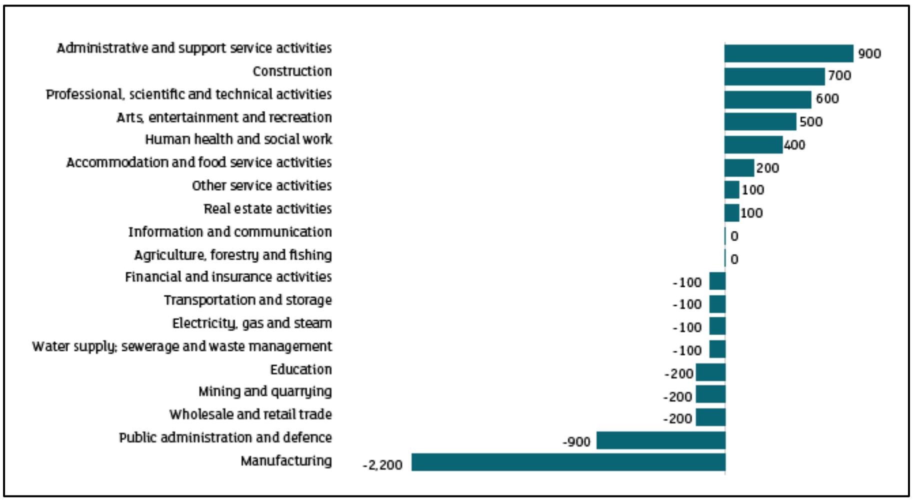
151 Skills Development Scotland *Regional Skills Assessment, Ayrshire – Summary Report 2019* https://www.skillsdevelopmentscotland.co.uk/media/46127/ayrshire-rsa-summary-report.pdf

greatest degree of increase in terms of employment, while Manufacturing and Public Administration and Defence are expected to see the greatest decrease.

Figure 41 – Forecast employment change by industry, Ayrshire, 2019-2029[152]



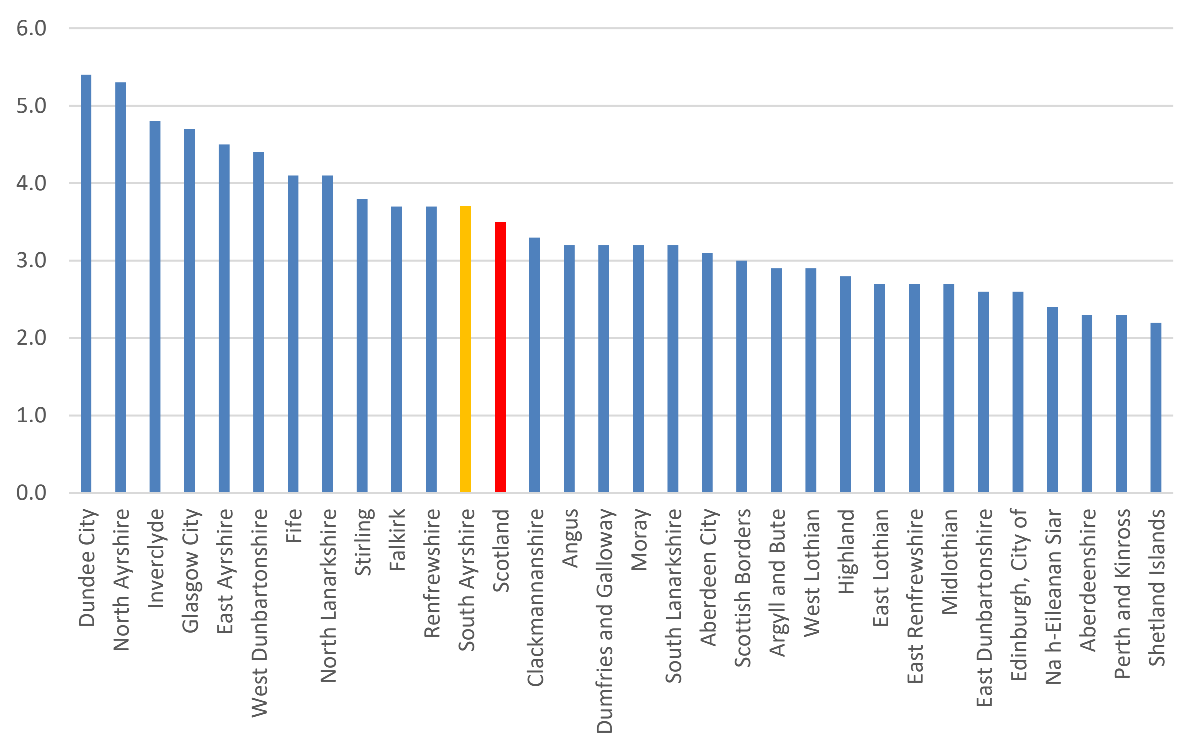
9 (c) Unemployment

9.53 Estimates based on the Scottish Government's Annual Population Study show that unemployment in South Ayrshire sat at 3.7% in 2019, an improvement on the previous year's figure of 4.3%. This was moderately higher than the Scottish average (3.5%), and lower than neighbouring authorities East Ayrshire (4.5%) and North Ayrshire (5.3%). For these estimates the International Labour Organisation (ILO)'s definition of unemployment is used, that counts "people aged 16 and over who are not in employment, would like a job, have actively sought work in the previous four weeks prior to their Labour Force Survey (LFS) interview and are available to start work within the next fortnight; or are out of work and have accepted a job which they are waiting to start in the fortnight following their LFS interview".

9.54 South Ayrshire's position in comparison to other local authorities and Scotland as a whole is depicted in Figure 42.

152 Skills Development Scotland *Regional Skills Assessment, Ayrshire – Summary Report 2019* https://www.skillsdevelopmentscotland.co.uk/media/46127/ayrshire-rsa-summary-report.pdf

Figure 42 – Model based ILO unemployment rates for people aged 16 or over by local authority, Scotland, 2019[153]

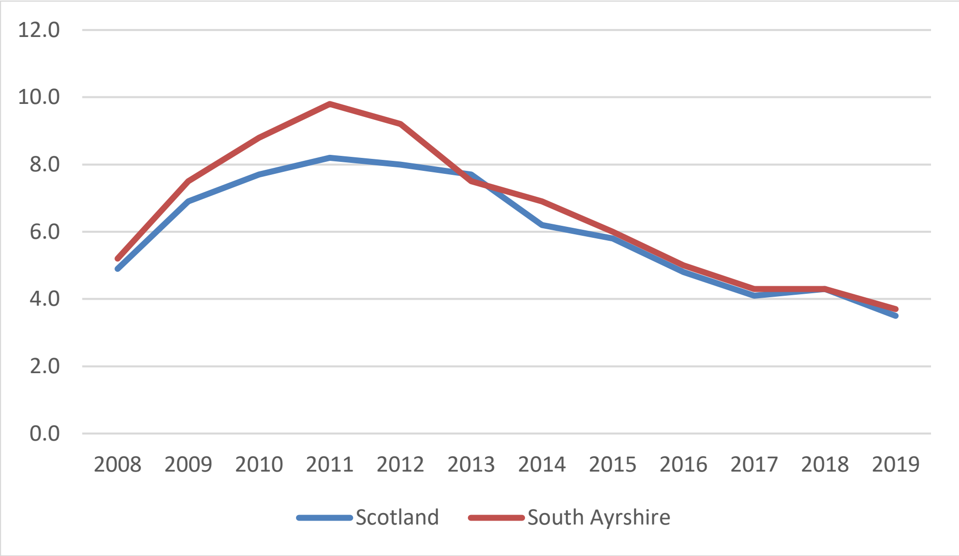


9.55 By this same measure, unemployment has decreased in every local authority since 2009. In South Ayrshire, this has meant a decrease of 3.8% during this period, meaning 2,200 less people were unemployed in 2019 than in 2009. This compares to a reduction for Scotland as a whole of 3.4%. Between 2018 and 2019, South Ayrshire saw a small reduction in unemployment (0.6%, or 300 less people unemployed) in the context of a similar trend for Scotland as a whole (a reduction in unemployment of 0.8%).

9.56 Figure 43 shows trends in unemployment during this period in South Ayrshire in comparison to Scotland as a whole. As can be seen, South Ayrshire's unemployment rate rose at a faster rate than the Scottish average between 2008 and 2011, peaking at almost 10% in 2011. Since that period, unemployment has been in decline in both South Ayrshire and Scotland, with South Ayrshire seeing a sharper drop than Scotland for some years, dropping below the Scottish average in 2013, and then broadly following the Scottish trend in subsequent years. In 2019, unemployment in South Ayrshire affected only 3.9% of the population.

[153] Scottish Government *Scotland's Labour Market - People, Places and Regions: Annual population survey 2019* https://www.gov.scot/publications/scotlands-labour-market-people-places-and-regions-background-tables/ Table 2.3: Model based ILO unemployment rates and levels for people aged 16 or over by local authority, Scotland, 2004 to 2019

Figure 43 - Model based ILO unemployment rates for people aged 16 or over, South Ayrshire and Scotland, 2008-2019[154]



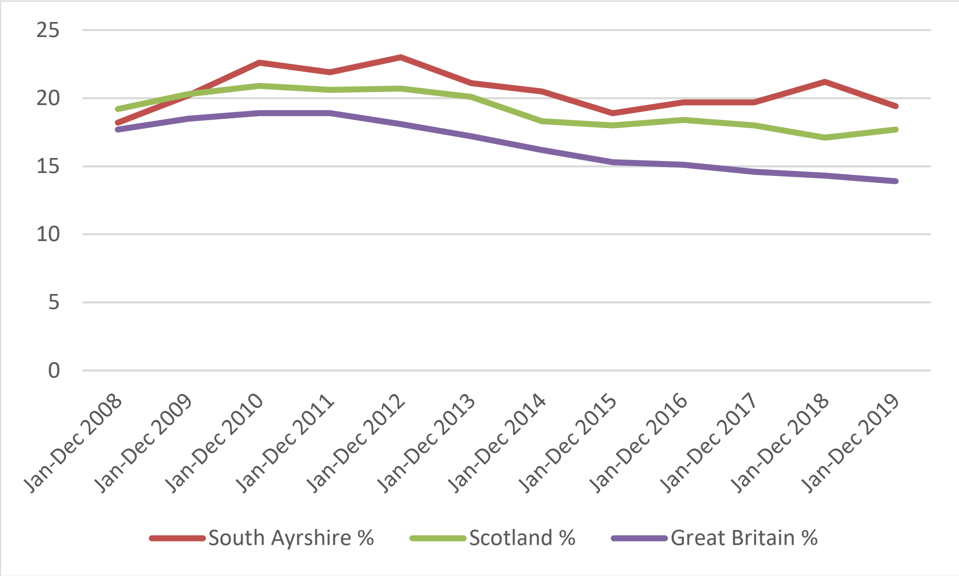
9.57 Another measure worth considering is workless households. In this context, a workless household would be a "household where no one aged 16 years or over is in employment. These members may be unemployed or economically inactive. Economically inactive members may be unavailable to work because of family commitments, retired or studying, or unable to work through sickness or disability".

9.58 According to official Labour Market Statistics produced by the Office of National Statistics[155], each year since 2010 has seen South Ayrshire being home to a higher proportion of workless households than in Scotland and Great Britain. In 2018, the proportion of workless households was more than 21% in South Ayrshire, compared to 17% of households in Scotland and 14% of households in Great Britain. This could in part be attributed to South Ayrshire's aging population and the number of older smaller and single older households (Table 5).

[154] Scottish Government *Scotland's Labour Market - People, Places and Regions: Annual population survey 2019* https://www.gov.scot/publications/scotlands-labour-market-people-places-and-regions-background-tables/ Table 2.3: Model based ILO unemployment rates and levels for people aged 16 or over by local authority, Scotland, 2004 to 2019

[155] NOMIS Official Labour Market Statistics, Labour Market Profile: South Ayrshire https://www.nomisweb.co.uk/reports/lmp/la/1946157432/report.aspx

Figure 44 – Workless households, South Ayrshire, Scotland and Great Britain, 2008-2019[156]



9.59 A further useful measure are levels and rates of economic inactivity. In South Ayrshire, a higher proportion of people are economically inactive than the average for Great Britain, but lower than the average for Scotland as a whole.

9.60 The most common reasons for economic inactivity in South Ayrshire are long-term illness and retirement. Around a quarter of those who are economically inactive in South Ayrshire are long-term sick, in line with the figure for Great Britain but lower than for Scotland as a whole, while the proportion of economically inactive individuals who are retired is far higher than for Scotland and Great Britain – more than 30% compared to 14.4% for Scotland.

9.61 Both of these reasons for economic inactivity can be partly explained by South Ayrshire's higher proportion of older people and ageing population.

[156] NOMIS Official Labour Market Statistics, Labour Market Profile: South Ayrshire https://www.nomisweb.co.uk/reports/lmp/la/1946157432/report.aspx

Table 31 – Economic Inactivity, South Ayrshire, Scotland and Great Britain, April 2019-March 2020[157]

	South Ayrshire (level)	South Ayrshire (%)	Scotland (%)	Great Britain (%)
All people				
Total	14,200	22.0	22.9	20.9
- Student	2,300	16.1	26.7	26.8
- looking after family/home	2,400	17.2	18.2	22.5
- temporary sick	!	!	1.9	1.9
- long-term sick	3,400	24.0	28.0	23.8
- discouraged	!	!	0.3	0.4
- retired	4,300	30.1	14.4	12.9
- other	1,700	11.8	10.6	11.7
Wants a job	3,200	22.4	20.5	20.8
Does not want a job	11,000	77.6	79.5	79.2

9.62 Also of interest is the relatively low proportion of economic inactivity as a result of the person being a student. For Scotland and Great Britain this is around a quarter, whereas in South Ayrshire this is only around 16%.

9.63 On a related note, economic inactivity for people aged 16-24 was high in South Ayrshire in 2018 in comparison to other local authority areas, more than 40% - with lower levels reported for 23 authorities[158], and higher than the Scottish average of 37%. Data by this measure for 2019 was not available.

[157] ONS Annual Survey, from NOMIS Official Labour Market Statistics, Labour Market Profile: South Ayrshire https://www.nomisweb.co.uk/reports/lmp/la/1946157432/report.aspx

[158] Scottish Government *Regional Employment Patterns Tables* https://www.gov.scot/publications/regional-employment-patterns-scotland-statistics-annual-population-survey-2018/pages/7/

Key Issues identified in this chapter

LHS & Development Plan	Key Issues Identified in the HNDA
Demographic issues for the local housing market(s)	1. **Ageing Population:** A slight reduction in population is predicted over the next 20 years after a period of relative stability. The age profile of our population is expected to change during this period, with the largest increases expected in 75+ age band, and largest decreases in the 45-59 age group. 2. **Smaller, older Households:** A small decrease of 0.2% in the number of households is expected from 2021 to 2040. The average household size is expected to decrease at a faster rate than the Scottish average. An increasing proportion of households will be in the 'older smaller' and 'single older' household types. 3. The projected decrease in population and households is likely to occur unless there is policy intervention. This is a risk that South Ayrshire Council should take into account when considering wider policy issues to identify opportunities to mitigate population decline. 4. **Net migration forecast to increase:** Net migration has been relatively stable over the last twenty years. While recent figures show a reduction in in-migration and an increase in out-migration, natural population change is expected to be partially offset by an increase in net migration over the next 20 years. This is primarily migration from elsewhere in Scotland, with migration from the rest of the UK also making a contribution. Nevertheless, projections anticipate a reduction in population of 5.1% during this period.
Affordability issues for the local housing market(s)	1. **Home ownership:** Owner occupation is the dominant tenure in South Ayrshire, accounting for 67% of all dwellings. However this tenure is unaffordable for many households locally, due primarily to the typical requirements in accessing a mortgage, including deposits, employment and income criteria. Home ownership is less affordable in South Ayrshire than in neighbouring authorities and Scotland as a whole. Average prices for new build developments are particularly difficult for many households to afford. 2. **Private renting:** For people in receipt of LHA, there is often a gap between the LHA and rental prices available. This is particularly pronounced for single people under the age of 35 (receiving the 'single room

	rate') trying to access one bedroom accommodation, where even lower quartile rents would result in a sizeable shortfall. Comparing rental costs to incomes, households on incomes in the lower quartile would have difficulty affording even lower quartile rents. Nevertheless, it is important to note that average PRS rents have changed relatively little in Ayrshire over the last ten years. 3. **Mid-market rents:** Data suggests the number of households on median incomes who could afford a rent at LHA but couldn't afford a median rent is low. As such, the demand for mid-market rent is likely to be less pressing in South Ayrshire than in other local authority areas where markets are more pressured.
Economic issues for the local housing market (s)	1. **Economic Growth:** South Ayrshire has seen an upward trend in GVA in recent years, but this is consistently less than the Scottish average. Ayrshire as a whole is one of the smallest contributing RSA regions to GVA, increasing at a slower rate than for Scotland as a whole. Projections to 2029 suggest GVA growth for the Ayrshire region, but this will still be at a slower rate than Scotland and Great Britain. 2. **Employment:** In recent years, fluctuations in the employment rate have been more volatile in South Ayrshire than for Scotland as a whole. For the Ayrshire region, employment levels have seen reductions in recent years, and this is expected to continue to 2029, albeit at a slower rate. Employment is anticipated to decrease in South Ayrshire by 0.1% per year, with the greatest reductions in jobs seen in Manufacturing and Public Administration, and the greatest increases in Administration and Support Services and Construction. 3. **Unemployment:** Unemployment reduced in South Ayrshire between 2018 and 2019. This was still moderately higher than the Scottish average, but less than neighbouring Ayrshire authorities. The proportion of workless households in South Ayrshire is higher than for Scotland and Great Britain, with much of this population made up of people who are long-term sick or retired. This can therefore be partially explained by South Ayrshire's ageing population. Meanwhile economic inactivity is very high for people aged 16-24 in South Ayrshire compared to Scotland as a whole.

Chapter 3: Housing Stock Profile, Pressures and Management Issues

Background

The aim of this chapter is to provide an overview of the current housing stock in South Ayrshire across the housing tenures, providing as complete a picture as possible of the current housing stock, its condition and issues relating to the occupation and management of this stock. The chapter presents information from a variety of sources in order to provide a picture of the housing stock locally. Despite this, there were some areas where up-to-date information was not available at the time of writing, and as such data from previous years has been presented in order to complete this picture. While an estimate of the overall number of dwellings was available for 2019, for example, data on dwelling size and property type were not available for the years 2018 or 2019 at the time of writing, and as such 2017 estimates have been used to provide context. While totals from different sources will not always 'agree' with each other, these have been included in order to give as full and accurate a picture as possible.

The information presented in this chapter has been used to inform the Housing Market Partnership in establishing 'existing need' for the HNDA's Housing Estimate, and will provide contextual data for the Local Housing Strategy, the IJB's Strategic Plan and the Local Development Plan.

Physical characteristics

10 Dwellings in South Ayrshire

10.1 There were an estimated 55,668[159] dwellings in South Ayrshire in 2019[160].

10.2 Table 32 below shows the number of dwellings located in South Ayrshire by locality. Table 33 shows the percentage of dwellings located in these areas.

[159] *NRS Household Estimates, Scotland, 2019 is the most recent and preferred dataset for the estimated dwellings in South Ayrshire. Estimates have also been used from NRS 2018 and Scottish Government 2018 to allow for sub-level analysis.*

[160] National Records of Scotland (NRS), *Household Estimates, Scotland, 2019.* https://www.nrscotland.gov.uk/statistics-and-data/statistics/stats-at-a-glance/infographics-and-visualisations#hh-estimates

Table 32 – Number of dwellings in South Ayrshire by locality, 2019[161]

Locality	Total number of dwellings	Occupied dwellings	Vacant dwellings	Long-term empty dwellings	Second homes
Ayr North and Former Coalfield Communities	10,414	10,040	346	147	28
Ayr South and Coylton	15,001	14,497	411	181	93
Maybole and North Carrick Communities	4,066	3,874	149	69	43
Prestwick	11,098	10,792	244	108	62
Troon	9,305	8,992	213	98	100
Girvan and South Carrick Villages	4,958	4,640	197	115	121
Maybole and North Carrick Communities	826	755	45	31	26
Grand Total	**55,668**	**53,590**	**1,605**	**749**	**473**

10.3 Table 33 below shows that the Ayr South and Coylton locality has the highest percentage of dwellings across all localities. The Maybole and North Carrick Communities locality has the lowest percentage of dwellings in South Ayrshire with only 1% of the housing stock.

Table 33 – Percentage of dwellings in South Ayrshire by locality, 2019[162]

Locality	Total number of dwellings	Occupied dwellings	Vacant dwellings	Second homes	Total
Ayr North and Former Coalfield Communities	19%	18.0%	0.6%	0.1%	18.7%
Ayr South and Coylton	27%	26.0%	0.7%	0.2%	26.9%
Maybole and North Carrick Communities	7%	7.0%	0.3%	0.1%	7.3%
Prestwick	20%	19.4%	0.4%	0.1%	19.9%
Troon	17%	16.2%	0.4%	0.2%	16.7%
Girvan and South Carrick Villages	9%	8.3%	0.4%	0.2%	8.9%
Maybole and North Carrick Communities	1%	1.4%	0.1%	0.0%	1.5%
Grand Total	**100%**	**96.3%**	**2.9%**	**0.8%**	100.0%

[161] National Records of Scotland (NRS), Small Area Statistics on Households and Dwellings, Dwelling Estimates by 2011 Datazone, 2019
https://www.nrscotland.gov.uk/statistics-and-data/statistics/statistics-by-theme/households/household-estimates/small-area-statistics-on-households-and-dwellings

[162] As above

11 Dwelling Size

11.1 As can be seen in Table 34 below, the majority of properties (across all tenures) in South Ayrshire have either 3 or 4 rooms (an estimated 29,181 dwellings, representing almost 53% of dwellings in South Ayrshire).

11.2 A relatively limited proportion of dwellings are smaller properties of 1 or 2 rooms, accounting for just under 11% of all dwellings.

11.3 By this estimation, around 65% of dwellings in South Ayrshire have four or more rooms. Given the downward trends in average household size seen in recent years and projected to continue in the years to come, this could be interpreted as something of a mismatch in terms of provision.

Table 34 – Dwellings in South Ayrshire by size (all tenures), 2017[163]

	1 room	2 rooms	3 rooms	4 rooms	5 rooms	6 rooms	7+ rooms	No. of Rooms unknown	TOTAL
No	97	5,787	13,618	15,563	10,615	4,862	4,681	98	55,321*[164]
%	0.2%	10.5%	24.6%	28.1%	19.2%	8.8%	8.5%	0.2%	

11.4 A large majority of RSL dwellings (RSLs with over 100 units in South Ayrshire), shown below, are 2 and 3 apartment dwellings, representing 74.1% of RSL stock. The locality with the greatest number of RSL dwellings is Ayr South and Coylton and within this area most of the dwellings are 2 apartments. Maybole and North Carrick locality has the smallest proportion of RSL dwellings.

Table 35 – RSL dwellings in South Ayrshire (RSLs with over 100 units) by size and location, 2019[165]

Locality	1 Apt	2 Apt	3 Apt	4 Apt	5 Apt	6 Apt	Total
Ayr North and Former Coalfield Communities	0	136	287	107	28	0	558
Ayr South and Coylton	19	218	181	144	15	6	583
Maybole and North Carrick Communities	0	52	75	53	0	0	180
Prestwick	0	74	179	47	6	0	306
Troon	0	123	153	50	14	0	340
Girvan and South Carrick Villages	0	67	99	88	0	0	254
Maybole and North Carrick Communities	0	6	4	6	0	0	16
Locality and HMA Unknown	***0***	***17***	***19***	***4***	***2***	***0***	**42**

[163] NRS, *Dwelling Estimates and Characteristics of Dwellings by 2011 Datazones, 2017.* Based on data from the Scottish Assessors' Association's Assessors' Portal. https://www.nrscotland.gov.uk/statistics-and-data/statistics/statistics-by-theme/households/household-estimates/small-area-statistics-on-households-and-dwellings

[164] * Symbol denotes use of National Records of Scotland data from an earlier year (2017) to provide sub-level analysis.

[165] RSL Stock Reports 2019, *RSLs with over 100 units within South Ayrshire (Ayrshire Housing, West of Scotland Housing Association Ltd, Hanover (Scotland) Housing Association, Trust Group Ltd)*

Total	19	693	997	499	65	6	2279
%	0.8%	30.4%	43.7%	21.9%	2.9%	0.3%	100%

11.5 Like the RSL dwellings, South Ayrshire's social housing stock is largely made up of 2 and 3 apartments dwellings, representing 72.8% of the Council's stock. In total, 2 and 3 apartment dwellings make up 73.1% of all social housing stock in South Ayrshire. 23.9% of all social housing dwellings are 4 apartments. The very small proportion of larger dwellings in the social housing sector demonstrates that most dwellings with 5, 6 and 7+ rooms shown in table 2.a are within the private sector.

11.6 Table 36 below shows that 3586 units equal to 45% of the Council's social housing stock is within the Ayr North and Former Coalfield Communities.

Table 36 – South Ayrshire Council social housing dwellings by size and location 2019[166]

	Apartment Size							
Locality	1	2	3	4	5	6	7	Total
Ayr North and Former Coalfield Communities	10	1090	1482	888	111	3	2	3586
Ayr South and Coylton	0	222	359	229	12	0	0	822
Maybole and North Carrick Communities	2	133	303	184	3	0	0	625
Prestwick	0	387	394	209	11	0	0	1001
Troon	29	371	363	188	11	0	0	962
Girvan and South Carrick Villages	6	197	475	224	9	0	0	911
Maybole and North Carrick Communities	0	10	34	37	8	0	0	89
Total	**47**	**2410**	**3410**	**1959**	**165**	**3**	**2**	**7996**
%	**0.6%**	**30.1%**	**42.7%**	**24.5%**	**2.1%**	**0%**	**0%**	**100%**

12 Dwelling Type

12.1 Estimates of dwelling types from 2017 indicate that the majority of properties in South Ayrshire are houses, accounting for almost three quarters of dwellings for South Ayrshire as a whole.

[166] South Ayrshire Council Housing Stock Report October 2019

Table 37 – Dwellings in South Ayrshire by property type, all tenures, 2017[167]

		House			Flat	Not known	Total
		Detached	Semi-detached	Terrace			
South Ayrshire	No.	14,179	13,498	12,508	15,048	88	**55,321*** [168]
	%	25.6%	24.4%	22.6%	27.2%	0.2%	
		72.6%					

12.2 Table 38 below shows that 875 RSL dwellings (35%) are flats, which is a higher proportion than that of the entire housing stock shown in table 3.a. 57.7% of RSL stock is made up of houses (houses and bungalows combined) and a small proportion is maisonette/other.

Table 38 – RSL dwellings in South Ayrshire (RSLs with over 100 units) by type and location, 2019[169]

Locality	Flat	House	Bungalow	Maisonette/ Other	Total
Ayr North and Former Coalfield Communities	205	331	12	10	558
Ayr South and Coylton	235	331	10	7	583
Maybole and North Carrick Communities	42	128	0	10	180
Prestwick	128	148	5	25	306
Troon	159	157	19	5	340
Girvan and South Carrick Villages	84	139	0	31	254
Maybole and North Carrick Communities	0	16	0	0	16
Locality/HMA unknown	22	16	4	0	42
Total	**875**	**1266**	**50**	**88**	**2279**
%	**38.4%**	**55.5%**	**2.2%**	**3.9%**	**100%**

12.3 Table 39 shows that 4156 or 52% of the Council's social housing stock is flats with the large majority of these being in the Ayr North and Former Coalfield Communities. There are 3588 houses (houses and bungalows combined) equal to 45% of the Council's housing stock.

12.4 The Council has 863 bungalows (11%) with the largest proportion located in Prestwick.

12.5 49% of all social housing dwellings are flats.

[167] NRS, *Dwelling Estimates and Characteristics of Dwellings by 2011 Datazones, 2017.* https://www.nrscotland.gov.uk/statistics-and-data/statistics/statistics-by-theme/households/household-estimates/small-area-statistics-on-households-and-dwellings

[168] * Symbol denotes use of National Records of Scotland data from an earlier year (2017) to provide sub-level analysis.

[169] RSL Stock Reports 2019, *RSLs with over 100 units within South Ayrshire (Ayrshire Housing, West of Scotland Housing Association Ltd, Hanover (Scotland) Housing Association, Trust Group Ltd)*

Table 39 – South Ayrshire Council social housing dwellings by type and location 2019[170]

Locality	Bungalow	Flat	House	Maisonette	Town House	Total
Ayr North and Former Coalfield Communities	194	2409	949	29	5	3586
Ayr South and Coylton	57	317	448	0	0	822
Maybole and North Carrick Communities	67	253	304	1	0	625
Prestwick	224	431	308	38	0	1001
Troon	160	425	314	63	0	962
Girvan and South Carrick Villages	146	321	328	116	0	911
Maybole and North Carrick Communities	15	0	74	0	0	89
Total	**863**	**4156**	**2725**	**247**	**5**	**7996**
%	**11%**	**52%**	**34%**	**3%**	**0%**	**100%**

13 Dwelling Age

13.1 Table 40 below shows the construction date for RSL dwellings in South Ayrshire. The majority of RSL stock was constructed post 1982.

Table 40 – RSL dwellings in South Ayrshire (RSLs with over 100 units) by age and location, 2019[171]

	Pre - 1919	1919 - 1944	1945 - 1964	1965 - 1982	1983 - 2002	Post 2002	N/A	Total
Ayr North and Former Coalfield Communities	3	8	31	37	102	375	2	558
Ayr South and Coylton	19	1	231	7	259	66	0	583
Maybole and North Carrick Communities	0	0	1	0	70	109	0	180
Prestwick	1	8	6	8	128	154	1	306
Troon	0	1	9	43	173	106	8	340
Girvan and South Carrick Villages	1	1	34	41	100	77	0	254
Maybole and North Carrick Communities	0	0	1	0	8	7	0	16
N/A	*0*	*0*	*0*	*0*	*4*	*38*	0	42
Total	**24**	**19**	**313**	**136**	**844**	**932**	**11**	**2279**

13.2 Table 41 shows the construction dates for council housing in South Ayrshire. Most of the Council's stock was constructed pre-1983.

[170] South Ayrshire Council Housing Stock Report October 2019
[171] RSL Stock Reports 2019, *RSLs with over 100 units within South Ayrshire (Ayrshire Housing, West of Scotland Housing Association Ltd, Hanover (Scotland) Housing Association, Trust Group Ltd)*

Table 41 – South Ayrshire Council social housing dwellings by age and location 2019[172]

Locality	1919-1944	1945-1964	1965-1982	1983-2002	Not Known	Post 2002	Total
Ayr North and Former Coalfield Communities	1040	1122	1047	179	33	165	3586
Ayr South and Coylton	75	342	324	21	1	59	822
Maybole and North Carrick Communities	141	220	240	24	0	0	625
Prestwick	326	362	233	62	2	16	1001
Troon	222	460	258	21	1	0	962
Girvan and South Carrick Villages	266	246	366	14	7	12	911
Maybole and North Carrick Communities	6	70	13	0	0	0	89
Grand Total	**2076**	**2822**	**2481**	**321**	**44**	**252**	**7996**

13.3 Data relating to dwelling age in private sector housing will be sourced during the development of the LHS to allow for stock management solutions relating to dwelling age to be considered.

14 Housing Tenure

14.1 A summary estimate of the tenure of dwellings in South Ayrshire has been produced by the Scottish Government using data from Housing Statistics Annual Returns and the Scottish Household survey and is presented at Table 42.

14.2 This data shows that owner-occupation remains the most common housing tenure in South Ayrshire, with 67% of dwellings being in owner-occupation. The next most common housing tenure is the social rented sector, representing 19% of dwellings (made up of Council housing at 15% of all dwellings and RSL housing at 4%).

Table 42 – Estimated number of dwellings in South Ayrshire by tenure, 2018[173]

	No.	%
Owner occupied	36,979	67
Local authority-owned	8,082	15
Private Rented Sector (inc. tied)	6,047	11
Housing Association (RSLs)	2,263	4
Vacant private dwellings and second homes	1,998	4
TOTAL	**55,369*[174]**	**100**

[172] South Ayrshire Council Housing Stock Report October 2019

[173] Scottish Government, *Housing Statistics for Scotland, Stock by tenure 2018,* https://www2.gov.scot/Topics/Statistics/Browse/Housing-Regeneration/HSfS/KeyInfoTables

[174] * Symbol denotes the use of a different data source (Scottish Government Housing Statistics 2018) to present sub-level analysis of dwellings in South Ayrshire.

14.3 By this estimate, the Private Rented Sector (PRS) continues to make a small but valuable contribution to meeting housing needs in South Ayrshire, accounting for more than 11% of all dwellings.

14.4 Meanwhile almost 2,000 privately-owned properties were estimated to be vacant or used as Second Homes. These estimates do not provide a split between long-term empty private properties and second homes, but local data below will provide some insight into this.

14.5 As the data above only provides summary estimates on tenure, we sought to use other sources to provide more detail on tenure composition in South Ayrshire.

Owner Occupied Sector

14.6 Table 43 below provides an estimate of owner-occupied dwellings by location in South Ayrshire. This has been calculated using the total number of dwellings in Table 1.a (NRS data) and deducting the figures for the social rented sector, private rented sector, long term empty homes and second homes.

14.7 As can be seen, Ayr South and Coylton has the greatest number of owner-occupied properties. Ayr North and Former Coalfield Communities has the third highest number of overall dwellings in South Ayrshire (19% of dwellings) but has the fourth highest number of owner-occupied dwellings. This is likely due to the number of social rented dwellings in Ayr North and Former Coalfield Communities.

Table 43 - Estimate of the owner-occupied sector in South Ayrshire (how this was calculated)*

Locality	No. of dwellings	%
Ayr North and Former Coalfield Communities	4705	13%
Ayr South and Coylton	11562	31%
Maybole and North Carrick Communities	2704	7%
Prestwick	8473	23%
Troon	6794	18%
Girvan and South Carrick Villages	3016	8%
Maybole and North Carrick Communities	508	1%
Grand Total	37611	100%

Private Rented Sector

14.8 Regarding the PRS, anonymised data was drawn from the Scottish Government's Landlord Registration system in order to identify a more up-to-date picture of the extent of the sector.

14.9 Based on records of properties on the Landlord Registration System, there were 6,451 private rented properties in South Ayrshire as at 25 November 2019[175]. As such, by comparing to the overall 2019 estimate of dwellings, we can say that an estimated 11.6% of dwellings in South Ayrshire were in the PRS.

[175] Analysis of properties registered on the Scottish Government's Landlord Registration system as at 25/11/19.

14.10 Table 44 below shows the number of private rented sector dwellings by location. As can be seen, the Ayr South and Coylton locality has the highest percentage of private rented dwellings and Maybole and North Carrick Communities has the lowest. This reflects the total number of dwellings in these areas. Prestwick has a slightly lower percentage of private rented dwellings and a slightly higher level of owner-occupied dwellings.

Table 44 – Private Rented Sector by location 2019[176]

Locality	Private Rented Units	%
Ayr North and Former Coalfield Communities	1390	21.6%
Ayr South and Coylton	1760	27.3%
Maybole and North Carrick Communities	445	6.9%
Prestwick	1148	17.8%
Troon	1011	15.6%
Girvan and South Carrick Villages	541	8.4%
Maybole and North Carrick Communities	156	2.4%
Grand Total	**6451**	**100%**

Social Rented Sector

14.11 Returns to the Scottish Housing Regulator indicate that 10,513 self-contained properties in South Ayrshire were owned by social landlords as at 31 March 2019. Social housing providers in South Ayrshire include the local authority and a number of local and national housing associations.

14.12 South Ayrshire Council is by far the biggest social landlord operating in the area, owning more than 8,150 self-contained properties and accounting for almost 78% of all social rented stock. Of this number, 8,108 are used for social housing.

14.13 The next largest provider of affordable housing in South Ayrshire is Ayrshire Housing, a housing association whose housing stock is primarily in the South Ayrshire local authority area. Ayrshire Housing owns more than 1,500 units of self-contained accommodation – 14% of all social housing stock in South Ayrshire. West of Scotland Housing Association also makes a sizeable contribution, owning more than 470 self-contained units in South Ayrshire – accounting for around 4.5% of social housing stock in South Ayrshire.

14.14 Other local and national RSLs operate in the area, offering a mix of general needs and specialist accommodation. More details are provided at Table 45.

[176] As above

Table 45 – Self-contained social housing stock by provision type and RSL, South Ayrshire, as at 31 March 2019[177]

Social Landlord	Gen. Needs	Shelt.	V. Shelt	Med. Depend.	Wheel chair	Ambulant disabled	TOTAL
ANCHO Ltd	6	0	0	0	0	0	**6**
Atrium Homes	1	0	0	0	0	0	**1**
Ayrshire Housing	1,381	0	0	0	45	76	**1,502**
Blackwood Homes and Care	30	0	0	13	24	1	**68**
Hanover (Scotland) Housing Association Ltd	66	109	0	0	0	0	**175**
Link Group Ltd	34	0	0	0	0	0	**34**
South Ayrshire Council	7,349	539	0	264	0	0	**8,152**[178]
Trust Housing Association Ltd	10	32	31	30	0	0	**103**
West of Scotland Housing Association Ltd	436	32	0	0	4	0	**472**
TOTAL	**9,313**	**712**	**31**	**307**	**73**	**77**	**10,513**

14.15 In addition, 13 general needs non-self-contained units are provided by South Ayrshire Council and West of Scotland Housing Association, while 1 medium dependency non-self-contained unit is provided by Blue Triangle, providing 11 bedspaces.

Empty homes

14.16 In terms of privately owned properties, 661 properties in South Ayrshire were classed as being 'long-term empty'[179]. This included properties being actively marketed with the help of the Council's Empty Homes Officer, properties empty for more than 6 months and properties empty for more than 12 months where the new 200% levy applies.

14.17 An additional 464 properties were classed as 'second homes'.

Table 46 – Long-term empty homes and second homes, South Ayrshire, as at 28 November 2019[180]

	Estimated dwellings, 2019	Long-term empty	LTE per 1,000 dwellings	Second homes	SH per 1,000 dwellings	Both LTE and SH	LTE & SH per 1,000 dwellings
South Ayrshire	55,668	661	11.9	464	8.3	1,125	20.2

14.18 As can be seen above, there were around 12 long-term empty homes and 8 Second Homes for every 1,000 dwellings in South Ayrshire.

[177] Scottish Housing Regulator, *Stock by Provision Type and LA Area, 2019*. Data provided as at 31 March 2019. Issued by Scotland's Housing Network, 6/11/19.

[178] This figure includes 50 units of Hostel accommodation, 98 temporary furnished properties, 55 units earmarked for disposal or demolition and excludes 3 non-self-contained units, as per 2018/19 Stock Reconcilliation.

[179] SAC Council Tax Records as at 28 November 2019.

[180] SAC Council Tax Records as at 28 November 2019.

14.19 Scottish Government estimates of long-term empty properties and second homes show a similar picture, although slightly higher estimates are produced - 749 long-term empty and 473 Second Homes in South Ayrshire[181].

14.20 Long-term empty properties represent a poor use of existing resources particularly where significant housing need exists in the local authority area.

Table 47 – Long term empty dwellings and second homes, South Ayrshire[182]

Locality	Long-term empty dwellings	%	Second homes	%
Ayr North and Former Coalfield Communities	147	19.6%	28	5.9%
Ayr South and Coylton	181	24.2%	93	19.7%
Maybole and North Carrick Communities	69	9.2%	43	9.1%
Prestwick	108	14.4%	62	13.1%
Troon	98	13.1%	100	21.1%
Girvan and South Carrick Villages	115	15.4%	121	25.6%
Maybole and North Carrick Communities	31	4.1%	26	5.5%
Grand Total	**749**	**100%**	**473**	**100%**

14.21 Table 47 shows the numbers of long-term empty properties and second homes by locality. Girvan and South Carrick Villages and Troon have the highest percentage of second homes. Maybole and North Carrick has the smallest number of second homes.

15 Dwelling Condition

Disrepair

15.1 An indication of the condition of dwellings in South Ayrshire is provided by the Scottish House Condition Survey, using data gathered between 2016 and 2018. It is important to note, however, that this data is based on a very low sample size in South Ayrshire – based on only 226 of the 55,320*[183] dwellings in South Ayrshire. This included only 56 flats, 49 social housing units and 23 PRS properties.

[181] National Records of Scotland (NRS), Small Area Statistics on Households and Dwellings, Dwelling Estimates by 2011 Datazone, 2019 https://www.nrscotland.gov.uk/statistics-and-data/statistics/statistics-by-theme/households/household-estimates/small-area-statistics-on-households-and-dwellings

[182] As above

[183] * Symbol denotes use of National Records of Scotland data from an earlier year (2017) to provide sub-level analysis.

Table 48 - Estimates of stock condition by dwelling characteristics, South Ayrshire, 2016-2018[184]

Dwelling Characteristics (All tenures)								
			Age of Dwelling		House or Flat		Number of Bedrooms	
		% of LA	Pre-1945	Post 1945	House	Flat	2 or fewer	3+
Disrepair	South Ayrshire	58%	72%	49%	53%	72%	63%	54%
	Scotland	70%	84%	64%	66%	77%	74%	67%
Disrepair to critical elements	South Ayrshire	43%	61%	32%	36%	62%	51%	36%
	Scotland	52%	68%	44%	47%	59%	55%	48%
Urgent disrepair	South Ayrshire	26%	33%	21%	19%	43%	31%	21%
	Scotland	29%	38%	24%	26%	33%	30%	27%
Extensive disrepair	South Ayrshire	4%	5%	3%	2%	10%	5%	3%
	Scotland	6%	8%	5%	5%	7%	6%	5%

15.2 As can be seen in Table 48 above, 58% of dwellings in South Ayrshire are estimated by the SHCS to have 'any disrepair' defined as "any damage where a building element requires some repair beyond routine maintenance". This is less than the Scottish average of 70%. Disrepair is estimated to be most pronounced in dwellings built before 1945, with around three-quarters of such properties suffering from any disrepair beyond routine maintenance.

15.3 Flats in South Ayrshire were more likely to be estimated to experience disrepair than houses, but disrepair was still estimated to be less than the Scottish average for this type of accommodation. The difficulty in arranging common repairs in mixed tenure blocks could be a factor in this, as it remains difficult for the local authority, our RSL partners and private owners to arrange common works when there is no majority agreement to proceed. Indeed, even where a majority exists, financial barriers can still prevent works going ahead.

15.4 Disrepair to critical elements is defined as damage to "elements central to weather-tightness, structural stability and preventing deterioration of the property". In South Ayrshire, 43% of dwellings were estimated to experience this type of disrepair by the SHCS, again less than the Scottish average of 52%. Again, dwellings built before 1945 and flats were most likely to experience this type of disrepair.

15.5 With regard to urgent disrepair (that is, dwellings that require "immediate repair to prevent further damage or health and safety risk to occupants"), more than a quarter of dwellings in South Ayrshire (26%) were estimated by the SHCS to meet this definition. A third of pre-1945 properties (33%) and 43% of flats were estimated to be affected by this level of disrepair, compared with around a fifth of homes built since 1945 (21%) and houses (19%).

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[184] Scottish Government *Scottish House Condition Survey 2016-2018* https://www.gov.scot/publications/scottish-house-condition-survey-local-authority-analyses/

15.6 Another measure of dwelling condition is extensive disrepair. In order to be described as extensive, "the damage must cover at least a fifth (20%) or more of the building element area". This is different from the previous measures in that it doesn't comment on the severity of the damage, rather the extent of it. By this measure, around 4% of all dwellings in South Ayrshire were estimated by the SHCS to suffer from extensive disrepair. This was again considered to be more common in dwellings built before 1945 than those built after (5% compared to 3%), and in flats than in houses (10% compared to 2%).

15.7 4% of dwellings translates to an estimated 2,000 units with extensive disrepair in South Ayrshire.

Table 49 - Estimates of stock condition by household attributes, South Ayrshire, 2016-2018[185]

Household Attributes							
		Tenure			Household Type		
		Owner-occupied	Social Housing	Private Rented	Older	Families	Other
Disrepair	South Ayrshire	55%	65%	*[186]	54%	70%	57%
	Scotland	66%	76%	79%	65%	71%	73%
Disrepair to critical elements	South Ayrshire	39%	52%	*	45%	52%	37%
	Scotland	49%	53%	63%	48%	52%	54%
Urgent disrepair	South Ayrshire	20%	42%	*	21%	42%	23%
	Scotland	26%	30%	37%	25%	29%	31%
Extensive disrepair	South Ayrshire	4%	-	*	*	-	8%
	Scotland	5%	6%	8%	4%	7%	6%

15.8 Table 49 above shows the estimated prevalence of different types of disrepair by household attributes, namely tenure and household type. Overall, these estimates suggest that social housing tenants are more likely to be in dwellings affected by disrepair than home owners, suggesting that 42% of social housing dwellings require urgent repair compared to 20% of owner occupied properties.

15.9 Estimates of disrepair in the private rented sector in South Ayrshire are not available due to the sample size used to compile this information. Again, it is important to reiterate that a very small sample size was used to compile this data – only 56 social housing units were surveyed by the SHCS between 2016 and 2018.

15.10 SHCS data also estimates that families and 'other' households are more likely to live in properties affected by disrepair than older households.

15.11 Disrepair in South Ayrshire is typically lower than the Scottish average, however estimates of urgent disrepair in social housing are higher in South Ayrshire than for Scotland

[185] Scottish Government *Scottish House Condition Survey 2016-2018* https://www.gov.scot/publications/scottish-house-condition-survey-local-authority-analyses/

[186] With SHCS data, (*) denotes that suppression has been applied where the base sample is too small to report (below 30 cases) or the estimate represents 2 or fewer sampled households.

as a whole. Given the limited sample size, it is important to view these estimates in the context of robust locally held data on stock condition in the social rented sector.

Scottish Housing Quality Standard

15.12 For the purposes of triangulation, we will now compare these estimates to locally held data, particularly compliance with the Scottish Housing Quality Standard (SHQS). This information is based on physical assessments of 78% of the Council's stock, surveyed through a range of in-house and external surveys. A further 15% of stock was assessed in 2012, while 25% of stock was assessed in full in 2017. Data on stock condition is updated on an ongoing basis, taking into account works carried out by the Council, including modernisation, roof replacement or external fabric works.

15.13 Table 50 shows the data reported to the Scottish Housing Regulator for the financial year 2019/20. As can be seen below, of the 8,108 self-contained units owned by South Ayrshire Council at 31 March 2020, only 98 units were recorded as SHQS failures at 31 March 2020. These fails were due to the energy efficiency of the properties.

15.14 An additional 87 units were exempt or held in abeyance at 31 March 2020. This included 5 units where bringing the property up to the SHQS was likely to require major structural works that would reduce the living space significantly. Of these, 3 were vacant while the remaining 2 were still tenanted.

15.15 Of the 82 properties held in abeyance, 19 of these were due to tenant objections to modernisation works, principally as a result of households being older or suffering from poor health. The remaining 63 properties were held in abeyance because of fails relating to door entry systems. In all cases this is the result of owner occupiers objecting to this work taking place within common blocks.

Table 50 – Scottish Housing Quality Standard – Stock Summary, South Ayrshire Council, 2019/20[187]

	No. of units as at 31 March 2020
C25.1 Total self-contained stock at the end of the reporting year	8,108
C25.2 Self-contained stock exempt from SHQS	5
C25.3 Self-contained stock in abeyance from SHQS	82
C25.4.1 Self-contained stock failing SHQS for one criterion	98
C25.4.2 Self-contained stock failing SHQS for two or more criteria	0
C25.4.3 Total self-contained stock failing SHQS	98
C25.5 Stock meeting the SHQS	7,923

15.16 This information runs counter to the suggestion that 65% of social housing in South Ayrshire is in disrepair.

15.17 Data reported to the Scottish Housing Regulator for the financial year 2019/20 by South Ayrshire Council, for instance, shows that almost 95% of tenants were satisfied with

[187] South Ayrshire Council *Annual Return on the Charter 2019/20.*

the quality of their home. Satisfaction with the Council's repairs service is also very high, with tenants reporting that 98% of reactive repairs were carried out 'right first time', while 91% of tenants were either 'very satisfied' or 'satisfied' with the repairs service they receive[188].

15.18 Similar metrics can be seen in RSLs returns, for example 97% of Ayrshire Housing's stock - primarily in South Ayrshire - meets the SHQS, while 92% of repairs were carried out 'right first time' and 95% of tenants were satisfied with the repairs service they received[189].

15.19 Given the high rate of SHQS compliance reported by South Ayrshire Council and our partner RSLs, it is unlikely that the estimates provided by the Scottish House Condition Survey provide an accurate picture of property condition in the social rented sector.

16 Occupancy

16.1 Occupancy rating indicates whether a household's accommodation is overcrowded or under-occupied by comparing the actual number of rooms available to the household based on the number of rooms required. In the section which follows, we will utilise census data to provide a sketch of under-occupancy and overcrowding in South Ayrshire.

Under-occupancy

16.2 Information presented in Scotland's Census 2011 showed that only 22% of households in South Ayrshire are accommodated in dwellings where the number of rooms are considered to meet the basic needs of their family (the basic occupancy requirement). A high proportion of households in South Ayrshire were under-occupied (72% of the population), while almost half (45%) of all households were under-occupying by at least 2 bedrooms.

Table 161 - Scotland's Census 2011, Occupancy rating per room[190]

	Total Number of households	Number of households meeting the basic occupancy requirement	Under-occupied by +2 or more rooms	Under-occupied by 1 room
Scotland	2,372,777	591,439	903,732	663,261
		25%	38%	28%
South Ayrshire	51,286	11,130	23,323	13,575
		22%	45%	26%

16.3 Data provided latterly in the Scottish Household Condition Survey for 2013-2015 indicates that there continues to be a majority of households under-occupying with a minimum of 60% of households across all tenures being under-occupied by at least 2 bedrooms. This is much more prevalent in owner occupation than in social and private rented sectors.

[188] South Ayrshire Council *Annual Return on the Charter 2019/20.*
[189] Ayrshire Housing *Annual Return on the Charter 2018/19.*
[190] Scotland's Census 2011, Occupancy rating per room

16.4 As shown in the table below, it is predominately older households who are under-occupying in South Ayrshire.

Table 162 - SHCS Local Authority Analysis Tables 2016-2018 under-occupied[191]

	Exceeds Minimum Bedroom Standard by 2+ bedrooms by Household Attributes					
	Tenure			Household Type		
	Owner-occupied	Social Housing	Private Rented	Older	Families	Other
South Ayrshire	46%	14%	*[192]	48%	13%	30%
Scotland	46%	8%	14%	42%	18%	31%

16.5 It is important to recognise that under-occupancy is not necessarily a negative factor on the housing market, as many households will elect to live in a home that is bigger than their basic needs.

16.6 Under-occupancy becomes an issue where demand for larger properties greatly exceeds supply.

16.7 Equally, however, where supply of larger properties exceeds demand, under-occupancy can ensure these larger properties remain utilised. This is particularly the case in South Ayrshire's social rented sector, where demand for larger properties (3 or more bedrooms) is limited and where housing need is primarily amongst smaller households. By allowing smaller households to access a larger property than their basic needs would require, landlords can make best use of stock that would otherwise remain empty.

Overcrowding

16.8 The converse of under-occupancy is overcrowding – where households are living in accommodation that has too few rooms to meet their basic requirements. Overcrowding is an indicator of housing need and can assist with informing future new build programmes along with allocation policies.

16.9 Information provided in Scotland's Census 2011 shows that 6% of households in South Ayrshire were overcrowded which is similar to the national figure of 9%.

Table 163 Percentage of households who are overcrowded[193]

	Total number of households	Overcrowded by 1 bedroom	Overcrowded by 2 bedroom or more
Scotland	2,372,777	168,653	45,692
		7%	**2%**
South Ayrshire	51,286	2,620	638
		5%	**1%**

[191] SHCS Local Authority Analysis Tables 2016-2018 Under-occupied

[192] With SHCS data, (*) denotes that suppression has been applied where the base sample is too small to report (below 30 cases) or the estimate represents 2 or fewer sampled households.

[193] Scotland's Census 2011 occupancy rating per room

16.10 The Scottish Household Condition Survey 2013-2015, based on the information provided, concludes that overcrowding is more prevalent in social housing compared to within owner occupied households. It also appears that overcrowding is mostly in flatted accommodation which would be reflective of the social housing stock availability in South Ayrshire. Information on household types experiencing overcrowding locally is not available from this source.

Table 164 Dwellings which are overcrowded by characteristic, tenure type and household type [194]

	Overcrowding by Dwelling Characteristics			Overcrowding by Household Attributes					
		House or Flat		Tenure			Household Type		
	% LA	House	Flat	Owner-occupied	Social Housing	Private Rented	Older	Families	Other
South Ayrshire	1%	1%	4%	1%	2%	*[195]	-	6%	-
Scotland	3%	2%	4%	2%	5%	5%	1%	7%	2%

16.11 The prevalence of overcrowding (and indeed under-occupancy) in the social rented sector is a further argument in favour of ensuring lets to existing tenants remain an important aspect of our allocations policies. By continuing to support lets to transfer applicants as well as mutual exchanges as these arise, the local authority and RSLs can ensure they make best use of their existing stock.

17 Concealed Households

17.1 A concealed household is where two or more households are living together in a single dwelling. This can be a reason for households being classed as overcrowded.

17.2 Previous information provided in Scotland's Census 2011 indicated that 1% of families in households at that time were concealed families with the majority of the family reference persons (FRP) being aged under the age of 35 – representing 61% of all concealed households.

Table 55 – Estimated Concealed households in South Ayrshire by Family Reference Person age group, 2011[196]

	All families in households	FRP aged 24 and under	FRP aged 25 to 34	FRP aged 35 to 49	FRP aged 50 to 64	FRP aged 65 to 74	FRP aged 75 to 84	FRP aged 85 and over
All families in households	33,534	1,031	3,567	10,208	10,550	4,798	2,739	641
Concealed families:	384	125	108	45	35	41	24	6

[194] SHCS Local Authority Analysis Tables - % of dwellings which are overcrowded
[195] With SHCS data, (*) denotes that suppression has been applied where the base sample is too small to report (below 30 cases) or the estimate represents 2 or fewer sampled households.
[196] Scotland's Census DC1110SC

Total								

17.3 The most recent analysis of households in Scotland who are both overcrowded *and* concealed was carried out in 2020 by the Centre for Housing Market Analysis, utilising Scottish Household Survey data for the period 2016-2018.

17.4 This analysis estimated that there were 82 households who were both overcrowded and concealed in South Ayrshire[197]. This figure is particularly important given its use in the calculation of existing need using the Government's HoTOC method. This will be discussed in greater depth in Chapter 4 ("Estimating Future Need and Demand").

17.5 Given the proportion of concealed households where the Family Reference Person is under the age of 35, it is likely that the majority of households who are both concealed and overcrowded will also be skewed towards a younger demographic. National welfare policy – particularly the restriction of local housing allowance for single people under the age of 35 – is likely to contribute to this, given the difficulties this will cause this group in accessing PRS accommodation.

18 Stock Turnover

Stock

18.1 A breakdown of South Ayrshire Council's housing stock is presented in Table 56 below.

Table 56 – South Ayrshire Council housing stock by property size and type, as at 31 March 2020[198]

	1 bed[199]	2 bed	3 bed	4 bed	5+ bed	Grand Total	%
Flat	1,777	1,931	527	20	-	4,255	**52.5%**
House	3	1,195	1,380	145	4	2,727	**33.6%**
Bungalow	723	104	39	-	-	866	**10.7%**
Maisonette	-	230	25	-	-	255	**3.1%**
Townhouse	-	-	4	-	1	5	**0.1%**
Grand Total	**2,503**	**3,460**	**1,975**	**165**	**5**	**8,108**	**100%**
%	**30.9%**	**42.7%**	**24.4%**	**2.0%**	**0.1%**	**100%**	

18.2 As can be seen above, smaller properties account for the majority of South Ayrshire Council's housing stock. Almost three-quarters of properties offered by the local authority have 2 bedrooms or less.

18.3 Flats are the most common type of property offered by the local authority, accounting for more than half of all units, while houses to meet a range of needs make up the remainder of this stock.

[197] Scottish Government *HNDA Tool v4.0, December 2020.*
[198] Northgate Housing system report used to inform Annual Return on the Charter 2019/20. (-) denotes no properties currently match this criteria.
[199] Includes 52 properties (bungalows and flats) highlighted as 0 bedrooms.

Lets and Re-lets

18.4 In the five years to 2019/20, South Ayrshire saw an average of 770 lets and relets per year, as shown in Table 57 below. The majority of these – around 73% of all lets – were classified as Mainstream housing units. About 18% were Ground Level units and about 9% were Sheltered Housing units.

18.5 For Mainstream properties, 2 bedroom properties are the most commonly available, typically representing more than half of all lets. For Ground Level accommodation, 1 bedroom properties are the most commonly let, again typically accounting for more than half of all lets. Due to the stock profile of Sheltered Housing in South Ayrshire, all properties let over the last five years have been one bedroom.

Table 57 – Lets and relets by type of provision, South Ayrshire, 2015/16 to 2019/20[200]

	Bedrooms	2015/16	2016/17	2017/18	2018/19	2019/20	Average
Mainstream	1	178	180	150	168	147	165
	2	328	339	271	301	270	302
	3	100	90	90	91	85	91
	4+	4	7	4	5	7	5
	TOTAL	**610**	**616**	**515**	**565**	**509**	**563**
Ground Level	1	73	58	116	68	74	78
	2	61	58	51	58	60	58
	3+	3	4	6	6	12	6
	TOTAL	**137**	**120**	**173**	**132**	**146**	**142**
Sheltered Housing	1	86	60	62	59	58	65
	TOTAL	**86**	**60**	**62**	**59**	**58**	**65**
GRAND TOTAL		**833**	**796**	**750**	**756**	**713**	**770**

18.6 Table 58 below demonstrates total South Ayrshire Council lets by source of let. Lets to homeless households and households threatened with homelessness have been the most common source of lets over the last five years, accounting for around 51% of lets in 2019/20. This proportion of lets demonstrates the Council's support for the Scottish Government's Rapid Rehousing approach, having set a target of 51% of all lets per year be allocated to households in this group. Further consideration will be given to the needs of homeless households in Chapter 5 ("Specialist Provision").

18.7 Lets to applicants on the Housing List represented about 28% of lets in 2019/20, an increase on the 2018/19's rate of one quarter of lets, but down from being around a third of lets in previous years. Lets to existing tenants (transfer list) accounted for around a fifth of all lets in 2019/20, up from around 17% in the preceding year.

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[200] Northgate housing system reports used to inform South Ayrshire Council Annual Return on the Charter (Indicator C7), 2015/16 to 2019/20.

Table 58 – South Ayrshire Council lets by source and mutual exchanges, 2015/16 to 2019/20[201]

	2015/16		2016/17		2017/18		2018/19		2019/20	
	No.	%	No.	%	No.	%	No.	%	No.	%
Homeless	409	49.1%	381	47.9%	349	46.5%	425	56.2%	363	50.9%
Housing list	294	35.3%	287	36.1%	222	29.6%	203	26.9%	202	28.3%
Transfer list	130	15.6%	128	16.1%	179	23.9%	128	16.9%	148	20.8%
Total lets	**833**	**100%**	**796**	**100%**	**750**	**100%**	**756**	**100%**	**713**	**100%**
Mutual exchanges	42		50		51		50		51	

18.8 Table 59 below splits the lets described above by provision type. About 62% of Mainstream lets were to people on the homeless list in 2019/20, down from around 65% in 2018/19.

18.9 About 29% of Ground Level lets were to the homeless list in 2019/20, again an increase from around 36% in 2018/19.

18.10 Around 9% of Sheltered Housing lets were to homeless people in 2019/20.

Table 59 – Lets and relets by type of provision and source of let, 2015/16 to 2019/20[202]

		2015/16	2016/17	2017/18	2018/19	2019/20
Mainstream	Homeless	365	347	307	371	316
	Housing List	182	205	121	121	120
	Transfer list	63	64	87	73	73
	Total	**610**	**616**	**515**	**565**	**509**
Ground Level	Homeless	38	28	37	48	42
	Housing List	56	48	71	43	58
	Transfer list	43	44	65	41	46
	Total	**137**	**120**	**173**	**132**	**146**
Sheltered Housing	Homeless	6	6	5	6	5
	Housing List	56	34	30	39	24
	Transfer list	24	20	27	14	29
	Total	**86**	**60**	**62**	**59**	**58**

18.11 Ayrshire Housing and West of Scotland Housing Association are the two RSLs with the greatest number of housing units in South Ayrshire. Tables 60 and 61 below shows the lets and re-lets reported by these RSLs from 2015/16 to 2019/20. Combined these RSLs have around 157 lets and re-lets per year based on the five-year data below.

[201] South Ayrshire Council Annual Return on the Charter (Indicator C7), 2015/16 to 2019/20.
[202] Northgate housing system reports used to inform South Ayrshire Council Annual Return on the Charter (Indicator C7), 2015/16 to 2019/20.

Table 60 - Ayrshire Housing lets by source, South Ayrshire only, 2015/16 to 2019/20[203]

	2015/16		2016/17		2017/18		2018/19		2019/20	
	No.	%	No.	%	No.	%	No.	%	No.	%
Homeless	16	12.7%	8	5.6%	8	6.8%	19	18.3%	27	16.2%
Housing list	75	59.5%	88	61.5%	63	53.4%	52	50.0%	70	41.9%
Transfer list	19	15.1%	23	16.1%	23	19.5%	11	10.6%	22	13.2%
Nominations	16	12.7%	24	16.8%	24	20.3%	21	20.2%	48	28.7%
Other	0	0.0%	0	0.0%	0	0.0%	1	1.0%	0	0.0%
Total lets	**126**	**100%**	**143**	**100%**	**118**	**100%**	**104**	**100%**	**167**	**100%**
Mutual exchanges	19		17		14		20		28	

Table 61 – West of Scotland lets by source, South Ayrshire only, 2015/16 to 2019/20[204]

	2015/16 [205]		2016/17		2017/18		2018/19		2019/20	
	No.	%	No.	%	No.	%	No.	%	No.	%
Homeless	![206]	!	3	11.5%	4	25.0%	6	18.8%	6	28.6%
Housing list	!	!	12	46.2%	6	37.5%	13	40.6%	8	38.1%
Transfer list	!	!	2	7.7%	1	6.3%	1	3.1%	2	9.5%
Nominations	!	!	9	34.6%	5	31.3%	12	37.5%	5	23.8%
Other	!	!	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Total lets	!	!	**26**	100.0%	**16**	100.0%	**32**	100.0%	**21**	100.0%
Mutual exchanges	14		3		3		2		3	

18.12 As can be seen above, both Ayrshire Housing and West of Scotland have demonstrated a willingness to support the Council in meeting the needs of homeless households, particularly in the context of the Rapid Rehousing approach. In 2018/19, both RSLs let more than 18% of their lets and relets to homeless households nominated through Section 5 arrangements, although this saw a slight decrease in 2019/20 for Ayrshire Housing, and a slight increase for West of Scotland. Overall this is nevertheless twice the amount seen for 2017/18 – 17.6% of lets for these RSLs in 2019/20 compared to 9% of all lets for 2017/20.

18.13 An initial target of 25% of all RSL lets has been agreed as part of South Ayrshire's Rapid Rehousing Transition Plan, and RSLs have accommodated increasing numbers of homeless households in recent years, as well as providing support for the Council's Housing First project which aims to provide wraparound support to people with complex needs and experience of

[203] Data provided by Ayrshire Housing for re-lets annually between 2015/16 – 2019/20
[204] Data provided by West of Scotland Housing Association for 2015/16 – 2019/20
[205] Relet information not available at local authority level for 2015/16 at time of writing
[206] The (!) symbol denotes that local data is not available for this time period.

repeat homelessness. Section 5 and nomination agreements are currently under review in partnership with RSLs.

Demand for social rented accommodation

18.14 While the term 'demand' when used in housing market analysis literature tends to refer only to private sector solutions, this HNDA – and indeed the Housing Service generally – uses the term 'demand' to describe the property sizes, types and neighbourhoods where our housing applicants wish to reside, and conversely where they do not wish to reside (properties classed as 'zero demand' and 'low demand' properties).

18.15 Use of this terminology in relation to social housing is in common usage throughout Scotland, while the phrase 'Low demand' in reference to social housing stock is used by the Scottish Housing Regulator as one of its performance indicators[207]. As such, we conclude it is acceptable to use the word 'demand' in this context.

Property size and provision type

18.16 A total of 3,165 applicants are currently held on South Ayrshire Council's waiting list (excluding homeless applicants)[208].

18.17 Table 62 below provides a breakdown of the number of applicants by bedroom size required and accommodation needs.

Table 62 – Total number of people currently on SAC waiting list, broken down by bedrooms requested and provision type[209]

	1 bed	2 bed	3 bed	4 bed	5 bed	Total
Mainstream	644	1,165	294	68	9	**2,180**
Ground Level	280	291	30	3	0	**604**
Sheltered Housing	380	1	0	0	0	**381**
Total	**1,304**	**1,457**	**324**	**71**	**9**	**3,165**

18.18 As can be seen above, around 87% of the applicants registered on the waiting list have requested 1- or 2-bedroom accommodation. A far smaller number of applicants have requested 3-bedroom accommodation, amounting to little more than 10% of applicants. Around 2.5% of applicants are looking for larger accommodation.

18.19 One way of expressing demand and supply in social housing is to produce 'applicant-to-let' ratios. These ratios offer an indication of where stock is most pressured, but must be reviewed in conjunction with information on actual numbers of applicants, lets and actual stock in order to be meaningful.

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[207] Scottish Housing Regulator *Social Housing Charter: Technical Guidance – April 2019* https://www.housingregulator.gov.scot/for-landlords/advisory-guidance/technical-guidance/how-to-complete-your-annual-return-on-the-charter-arc-2020-return

[208] South Ayrshire Council, Number of current applications Northgate Report, as at 11 August 2020.

[209] South Ayrshire Council, Number of current applications Northgate Report, as at 11 August 2020.

Table 63 – Applicant-to-let ratios by property size and type of provision, South Ayrshire[210]

	1 bed	2 bed	3 bed	4 bed	5 bed	Total
Mainstream	3.9	3.9	3.2	13.6	9*	3.9
Ground Level	3.6	5.1	5.2	3*	-	4.2
Sheltered Housing	5.8	-	-	-	-	5.8
Total	4.2	4.1	3.3	11.8	9.0	4.1

18.20 As can be seen in Table 63 above, there were around 4 applicants for every Mainstream let. A similar proportion was seen for both 1- and 2-bedroom properties by this provision type. For these properties there is both high demand and a high level of supply. Lower demand can be seen for 3-bedroom Mainstream accommodation, yet there were still around 3 applicants for every let by this measure. In 2019/20, 3-bedroom properties accounted for around a quarter of the Council's housing stock (1,975 units or 24%), yet only 10% of all applicants were looking for this size of accommodation. This suggests something of a mismatch between demand and supply.

18.21 A higher applicant-to-let ratio can be seen for 4- and 5-bedroom houses, yet this should be viewed in the context of the small numbers of applicants seeking this type of accommodation, coupled with the small numbers of lets over the last five years. In 2020, only 71 applicants across all provision types were looking for 4-bedroom accommodation while only 9 applicants were looking for 5+ bedrooms. South Ayrshire sees on average about 6 lets per year to 4-bedroom properties, and an average of less than 1 per year to 5 bedrooms.

18.22 There were again around 4 applicants for every ground level let, with 2 and 3 bedrooms seeing the greatest demand, although it is again important to note that only 30 households are currently on the list for 3-bedroom accommodation, compared to the 280 and 290 applicants currently held for 1- and 2-bedroom properties respectively.

18.23 There were around 6 applicants for each sheltered housing let.

Voids

18.24 The term 'void' in the social rented sector refers to an empty property within the affordable housing stock. In this terminology a property can be described interchangeably as 'a void' or 'being void' – both mean the same thing.

18.25 Over the last five years South Ayrshire Council has averaged 109 void properties as at 31st March. 2019/2020 saw a slight increase compared to previous years, with 139 properties void at the end of the financial year. Of this number, only 29 voids as at 31 March 2020 were classed as being in a low demand area with 4 of these being void for longer than six months.[211]

[210] South Ayrshire Council, Number of current applications Northgate Report, as at 11 August 2020, compared to average lets 2015/16 to 2019/20. (*) denotes average of less than 1 let per year, (-) denotes no relets during this time period.

[211] South Ayrshire Council, Full Stock as at 31.03.2020

Table 64 – South Ayrshire Council voids data, 2015/16 to 2019/20[212]

	2015/16	2016/17	2017/18	2018/19	2019/20
Void as at 31 March	107	98	104	100	139
Void for more than 6 months	7	7	1	7	18

18.26 A similar increase was reflected in the number of void properties which have been void for longer than six months, increasing from 7 in 2019 to 18 in 2020. This increase has been partially driven by a group of 15 properties where further consideration was being given to their longer-term future, due to there being zero demand from the Council's waiting list[213].

18.27 Although there were 18 properties being reported as being void for longer than 6 months as at 31st March 2020 only 15 of these were lettable HRA stock.

18.28 The majority of long-term voids reported at 31st March 2020 were flats, with only one long-term void being a house. The properties varied in size from 1 bedroom – 3 bedrooms however, 11 of the properties were 2 bedrooms.

18.29 Of the 713 lets seen during 2019/20, 658 of these were relets. Table 65 highlights the relet time for different classifications of demand.

Table 65 – Relets and relet times during 2019/20 by classifications of demand[214]

	Relets	Relet time (days)
Not in low demand	555	28.2
Low demand	67	48.5
No/zero demand	36	
Total	**658**	31.4

Low/zero demand stock

18.30 Information on 'low demand' and 'zero demand' stock in South Ayrshire is provided in Tables 66 below.

[212] South Ayrshire Council Annual Return on the Charter (Indicator C20), 2015/16 to 2019/20.
[213] South Ayrshire Council Annual Return on the Charter 2019/20 (Supporting comments, Indicator 18)
[214] South Ayrshire Council Annual Return on the Charter 2019/20 (Supporting comments, Indicator 30)

Table 66 – Low and zero demand stock in South Ayrshire by beds and property type, as at 31 March 2020[215]

		0	1	2	3	Total
Low demand	Bungalow	29	11	2	1	43
	Flat	8	346	93	191	638
	House	-	-	7	81	88
	Maisonette	-	-	45	4	49
	TOTAL	**37**	**357**	**147**	**277**	**818**
Zero demand	Bungalow	1	2	-	-	3
	Flat	6	17	9	69	101
	House	0	-	-	6	6
	Maisonette	0	-	28	6	34
	Total	**7**	**19**	**37**	**81**	**144**
Grand Total (Low and zero demand)		**44**	**376**	**184**	**358**	**962**

18.31 While a considerable number of the low demand properties are 1-bedroom flats (more than one third – 363 properties) it is important to note that 233 of these are in Riverside Place in Ayr, scheduled for demolition in 2020/21. When these units are removed from consideration, the most pronounced low demand stock in South Ayrshire is in 3-bedroom properties of all types, accounting for almost half (47% - 277 properties) of the remainder (585 units).

18.32 A further 69 1-bedroom flats and 29 'zero bedroom' bungalows highlighted as low demand were to be found in Sheltered Housing units. Demand varies across Sheltered Housing, with a high number of applicants relative to the average number of lets, yet some flats and bungalows within particular units have proven to be more difficult-to-let than others.

18.33 In other areas, specific house types in particular neighbourhoods have proven difficult to let including, for instance, 2-bedroom maisonettes.

18.34 A similar picture can be seen for 'zero demand' accommodation, with 3-bedroom properties of all types and 2-bedroom maisonettes proving the most difficult to let.

18.35 For properties classified as "no/zero demand" voids, where there was no demand from existing waiting list, Housing staff actively trawl waiting lists and explore interest from applicants registered on other lists in order to secure sustainable lets for these properties.

19 In-Situ Solutions/Management Solutions

Transfers and mutual exchanges

19.1 One of the primary means by which local authorities and partner RSLs can make best use of their existing housing stock is through their allocations policies. Where existing tenants' circumstances change, it is sometimes necessary for that tenant to request a

[215] South Ayrshire Council, Full Stock as at 31.03.2020. (-) denotes that there were no or low demand properties in this property type.

'transfer' – meaning a move within the housing provider's own stock that better meets the household's housing needs.

19.2 A successful transfer can support tenancy sustainment, prevent overcrowding or reduce under-occupancy.

19.3 As can be seen in Table 67 below, social landlords in South Ayrshire continue to give a proportion of their lets to transfer applicants. South Ayrshire Council typically allocates around 20% of lets to transfer applicants, while Ayrshire Housing tends to allocate around 15% of lets to existing tenants. This is less common for West of Scotland Housing Association, but this may be a result of the smaller number of properties owned by this RSL in South Ayrshire.

19.4 In addition, where tenants wish to swap properties with other social housing tenants either from the same landlord or from another RSL, this can be achieved through a 'mutual exchange' – meaning a mutually beneficial swap between social housing tenants either facilitated by their housing providers (i.e. a mutual exchange list) or arranged independently between the tenants.

19.5 Table 67 also demonstrates the number of mutual exchanges seen during the 5 year period to 2019/20. 82 mutual exchanges took place amongst the three largest social housing providers in South Ayrshire during 2019/20.

Table 67 – Transfers and mutual exchanges by social landlords in South Ayrshire, no. and proportion of all lets, 2015/16 to 2019/20[216]

		2015/16		2016/17		2017/18		2018/19		2019/20	
		No.	%	No.	%	No.	%	No.	%	No.	%
Transfers	**SAC**	130	15.6%	128	16.1%	179	23.9%	128	16.9%	148	20.8%
	Ayrshire Housing	19	15.1%	23	16.1%	23	19.5%	11	10.6%	22	13.2%
	West of Scotland	![217]		2	7.7%	1	6.3%	1	3.1%	3	14.3%
Mutual exchange	**SAC**	42		50		51		50		51	
	Ayrshire Housing	19		17		14		20		28	
	West of Scotland	14		3		3		2		3	

Adaptations

19.6 While the needs of older households and people with disabilities will be considered in depth in Chapter 5 ("Specialist Provision"), some data on adaptations and existing wheelchair accessible housing is included here to provide some context with regard to the potential for 'in situ' solutions to some of the needs highlighted above.

19.7 It is recognised that some unmet housing need will be met by adaptations being carried out to people's own homes, both in the social and private sectors. The table below

[216] SAC Annual Return on the Charter, 2019/20; Data provided by Ayrshire Housing and West of Scotland Housing Association for South Ayrshire only lets.

[217] The (!) symbol denotes that local data is not available for this time period.

sets out the number of adaptations carried out over the last five years in South Ayrshire by sector. This data excludes adaptations to RSL stock as this was not available at the time of writing.

Table 68 – Private Sector and Council house adaptations, 2014/15 to 2019/20[218]

	Private Sector adaptations	Council house adaptations
2014/15	218	358
2015/16	188	353
2016/17	206	304
2017/18	162	275
2018/19	190	323
2019/20	184	254

19.8 The most common adaptations include the installation of Wet Floor Showers (accounting for more than half the private sector adaptations carried out in 2019/20), the installation of stair lifts (around 10% of adaptations) and providing ramp access to people's homes (again around 10%)[219].

19.9 In terms of supporting people to live independently in South Ayrshire Council's housing stock, a recent report has been compiled to identify properties that provide 'wheelchair access'. While this doesn't clarify the total number of properties that have adaptations in our housing stock, it does give us some indication of existing provision for this particular client group, and how these needs are currently being met by in situ solutions.

19.10 As can be seen in Table 69 below, 392 properties provide 'wheelchair access'. Of this number, 299 were adapted to meet a person's specific needs, while 93 units were built to provide 'wheelchair access' at the design stage.

19.11 A further 48 new build properties have been identified that have been designed to be readily adapted to meet the needs of a wheelchair user.

Table 69 –South Ayrshire Council self-contained housing stock by wheelchair access, as at 31 December 2019[220]

Wheelchair access	No. of properties
Y - Adaptation	**299**
Y - New Build 2011	**8**
Y - New Build 2013	**2**
Y - New Build 2014	**6**
Y - New Build 2015	**18**
Y - New Build 2016	**14**
Y - New Build 2017	**29**
Y - New Build 2019	**16**
New Build could be adapted - 2015	**12**

[218] Annual Return on the Charter, Scottish Government Housing Statistics Return
[219] Uniform Report on Private Sector Adaptations carried out during 2019/20
[220] Northgate Housing Management system report, as at 31 December 2019

New Build could be adapted - 2016	**6**
New build could be adapted - 2011	**8**
New build could be adapted - 2013	**2**
New Build could be adapted - 2018	**6**
New build could be adapted - 2014	**10**
New Build could be adapted - 2019	**4**
Total	**440**

Stock improvements

Long-term empty homes and buybacks

19.12 Another means by which the local authority can make best use of existing stock is to support the owners of long-term empty properties to bring their properties back into use.

19.13 Given the high numbers of privately-owned long-term empty properties in South Ayrshire, the Council for the last 8 years has employed an Empty Homes Officer. The role of the Empty Homes Officer is to instigate contact with the owners of privately owned empty homes in our area with a view to supporting them to bring these back into use.

19.14 The kind of support provided by the Empty Homes Officer varies, but some of the most common tools are providing advice and information on a range of relevant topics, including advice on repairs, renting a property, selling a property and the various discounts and incentives available to help owners achieve their goals within their budgets.

19.15 An Empty Homes Loan scheme has also been developed, offering the option of an interest free loan of up to £20,000 to assist with repairs and refurbishments to bring the property up to a lettable standard, in order to allow renting as affordable housing in the private sector or the sale of the property at an affordable cost[221].

19.16 The Empty Homes Officer also provides a 'Matchmaker Scheme' with the aim of linking the owners of empty homes with prospective purchasers looking for opportunities to develop in the area, as well as helping link developers with prospective tenants from our waiting lists when works are complete.

19.17 Since 2012, 94 long-term empty properties have been brought back into use after receiving support from the Empty Homes Officer[222]. The end use of these properties can vary, with some being sold for owner-occupation, others being used as Private Lets and a number being utilised by the Council as temporary accommodation (through our Private Sector Leasing scheme). A number of such properties have also been purchased by the Council for use as mainstream accommodation through our Buyback scheme.

19.18 The Buyback Scheme is primarily utilised to purchase ex-local authority properties of strategic importance, for example where demand is high for accommodation in a particular area and where purchasing would give full or majority ownership of a block.

[221] As defined by the Scottish Government's LIFT scheme.
[222] South Ayrshire Council, Empty Homes Closed Cases data

19.19 This Scheme has received financial support from the Scottish Government's Affordable Housing Supply programme, and since 2014 87 ex-local authority properties have been bought back and brought back into use by South Ayrshire Council[223].

Utilising existing stock differently

19.20 In order to find housing solutions to manage the needs of specific groups of individuals locally, South Ayrshire Council has developed core and cluster models of accommodation using existing housing stock, albeit previously held in private ownership. These models allow applicants to have their own mainstream tenancies whilst receiving appropriate onsite support.

19.21 Currently there are two core and cluster models of accommodation operating in South Ayrshire. 12 properties were purchased in Girvan and have been allocated to service users, identified by the Health and Social Care Partnership, with physical disabilities. Similarly 4 properties were purchased in Ayr and allocated to service users who require support in terms of their mental health.

Development of additional stock management solutions

19.22 The data presented in this chapter shows that most of the social housing stock is made up of 2, 3 and 4 apartment dwellings. Consideration will be given to the needs of larger households within the social rented sector as part of the LHS development.

19.23 The number of flats within the Ayr North and Coalfield Communities highlights a need to further examine the density of this dwelling type within the Ayr North area as part of the LHS.

19.24 South Ayrshire Council's Housing Stock was largely constructed pre-1982. There is a need to consider the challenges that this older stock will present in achieving net zero ambitions and longer-term maintenance. This will be considered as part of the LHS.

19.25 The LHS will also take into consideration data that will be gathered via consultations with South Ayrshire tenants and residents, findings from a rural housing study, a full analysis of the Council's housing lists and private sector dwelling age. Additional stock management solutions are likely to be identified when this data is available.

[223] South Ayrshire Council, Buy Back Properties data 2014-2020

Key issues identified in this chapter

LHS & Development Plan	Key Issues Identified in the HNDA
Housing (condition) quality	1. **Disrepair:** Data from the Scottish House Condition Survey (SHCS) estimates that a significant proportion of dwellings across the tenures in South Ayrshire (63%) are in some form of disrepair, with almost half of all dwellings estimates to have disrepair to critical elements, and more than a quarter estimated to be in urgent disrepair. These issues are estimated to be particularly pronounced in older (pre-1945) dwellings, flats and smaller properties (2 bedrooms or less). 2. **Tenure:** SHCS estimates suggest that disrepair is more prevalent in the social rented sector, but this runs counter to the Council and our RSL partners' compliance with the Social Housing Quality Standard (SHQS), and levels of satisfaction with repairs and maintenance services locally. Disrepair is estimated to be less prevalent but still present for owner-occupiers, while SHCS does not provide estimates of disrepair in the PRS due to small sample sizes. 3. **Household types:** Families in South Ayrshire were the household type estimated to be most likely to be living with disrepair of some sort in their home, while older households were more likely to have disrepair to critical elements of their home.
Housing stock pressures	1. **Lets and Relets:** South Ayrshire Council sees on average around 770 lets and relets per year from its stock. 2-bedroom properties are the most commonly available property type, representing half of all lets and relets in recent years. For Ground Level accommodation, 1-bedroom properties were the most commonly available. Recent years have also seen an increasing proportion of lets to homeless households in line with the Council and our RSL partners' commitment to the Rapid Rehousing approach to homelessness. 2. **Demand:** In terms of property size, the greatest demand for accommodation in South Ayrshire is for 1- or 2-bedroom properties, with 87% of all Housing List and Transfer List applicants seeking this type of accommodation. By contrast, less than 10% of applicants are seeking 3-bedroom accommodation. There are on average 4 applicants to every Mainstream or Ground Level let, and about 6 applicants for every Sheltered Housing Let. There is something of a mismatch between available stock and demand, with almost a quarter of lets

	and relets being for 3-bedroom properties while only 10% of applicants would want this size of property. **3. Low/zero demand:** In terms of low and zero demand properties, the characteristics of these vary. When we exclude properties scheduled for demolition, 3-bedroom properties make up most low demand stock. 2-bedroom maisonettes are in low demand, while in other areas some sheltered housing stock is considered to be low demand. A property having low or zero demand can be attributed to a few possible factors, including limited demand for this size of accommodation and the specific location and property type available.
Size, type, tenure and location of future social housing supply	1. **Size:** Based on both the decreasing average household size shown previously as well as the significantly greater demand for 1- and 2-bedroom properties shown in this chapter, it is likely that the focus of future social housing supply should be on properties with a smaller number of bedrooms. Nevertheless, there remains a more limited but still significant demand for larger properties that we should still seek to address where appropriate. 2. **Type:** In addition to mainstream accommodation, there remains a significant expressed need for ground level accommodation to meet the needs of households with limited mobility. This will be discussed further in the 'specialist provision' section of the HNDA. There is a substantial difference in the number of flats located within the Ayr North and Coalfield Communities in comparison with all other localities. 3. **Location:** As South Ayrshire is a single functional HMA, demand is expressed at a local authority level only and housing estimates will be produced for the South Ayrshire HMA.
Sustaining communities e.g. using tenure diversification/ regeneration	1. **Support for private owners:** South Ayrshire Council promotes best use of existing stock in the private sector through aiding owners of long-term empty properties and properties in poor condition. 2. **Strategic investment:** Where the purchase of a property would be strategically advantageous, the Council operates a buyback scheme, buying back ex-local authority properties from private owners. 3. **Utilising existing stock differently:** Where existing stock could be more effectively used to fulfil a strategic function, the Council works in partnership to achieve this.

Chapter 4: Estimating future need and demand

20 Background

20.1 The Centre for Housing Market Analysis (CHMA) has developed an HNDA Tool to support local authorities and their Housing Market Partnerships (HMPs) in developing their HNDA.

20.2 Future house prices, rents and incomes are difficult to predict long-term and with precision. However, HNDAs must project housing estimates into the future to enable medium- and long-term planning of housing, The Tool does this, in part, by projecting house prices, rent prices and incomes to make an assessment of the future affordability of different housing tenures.

20.3 The Tool is populated with a range of scenarios about future incomes, house and rental prices. These scenarios are selected by the Housing Market Partnership based on what scenarios best reflect what might happen in the local area in the future.

20.4 The Tool is designed to produce a range of broad housing estimates about several alternative futures; any of which might occur but one or two of which are more likely to occur based on previous housing market trends and local knowledge of housing markets.

20.5 The chapter which follows describes the decisions taken by South Ayrshire's HMP and the considerations that went into these decisions.

20.6 The HMP has given particular weight to the Guidance provided by the CHMA[224] noting that a good predictor of the future is what happened in the past – and that analysing what has previously happened to incomes, house prices and rental prices locally is a good way to anticipate what may happen to them in future.

21 Demographic assumptions

21.1 In terms of the demographic assumptions to be utilised in the Tool, the HMP opted to use the National Records of Scotland (NRS) projections, given that Guidance provided by the CHMA advised that these data would be considered sufficient to produce a range of broad estimates of future housing need.

21.2 Consideration was given by the HMP to the three variant NRS projections of the number of households in South Ayrshire, namely the Principal Projection, the High Migration Variant and the Low Migration Variant.

- **Principal Projection:** This projection is based on the assumptions that the NRS think are most likely to occur. The assumptions about future patterns in fertility, mortality and migration are based on analysis of past trends. This analysis allows the differences in trends between each area and the Scotland-level trends to be incorporated into the projection.

[224] Centre for Housing Market Analysis *HNDA Tool Instructions 2018* https://www.gov.scot/publications/hnda-tool-instructions-2018/

- **High migration and low migration variant projections:** Migration variant household projections are calculated by replacing the principal population projection with a variant migration population projection, keeping all other inputs to the household projections (communal establishment rates, headship rates, survey data and household estimates) unchanged.

21.3 Data presented in the Key Housing Market Drivers Chapter showed that South Ayrshire's population had stayed relatively constant over the years from 1998-2019 declining by only 0.6% during this period[225]. The years 2001-2019 had seen an upward trend in the number of households, but this again was a relatively limited change compared to most other areas in Scotland[226].

21.4 Projections presented in the Key Housing Market Drivers Chapter showed that South Ayrshire's population is projected to decrease by 5.1% between 2021 and 2040[227], while the number of households was projected to decrease by 0.2% between 2021 and 2040[228]. Projected changes in South Ayrshire's population comprised a decrease in population through natural change of -13.3% (meaning more deaths than births), coupled with an increase in population as a result of net migration of 8.6% (meaning more people migrating to South Ayrshire than those leaving) and 0.4% other changes. It was noted that this increase was broadly driven by considerable net migration from other areas in Scotland (+6,306) and the Rest of the UK (+4,744), while migration to/from overseas resulted in a net decrease (-1,424)[229].

21.5 Taking this data into account, consideration was also given to a number of other factors which could potentially result in more or less migration to the area, including:

- Britain's exit from the EU
- Decreasing levels of employment for Ayrshire as a whole between 2009 and 2019 and predictions that employment in South Ayrshire could reduce by around 0.1% per year[230]
- The potential impact of investment through the Ayrshire Growth Deal
- The increased flexibility offered by the new Local Development Plan
- The potential impact of the coronavirus pandemic on employment
- The shift towards 'working from home' for many people as a consequence of the Coronavirus pandemic

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[225] NRS *Mid-2019 population estimates by Council area in Scotland, South Ayrshire Council area profile* *https://www.nrscotland.gov.uk/files/statistics/council-area-data-sheets/south-ayrshire-council-profile.html*

[226] NRS *Estimates of Households and Dwellings in Scotland, 2019. https://www.nrscotland.gov.uk/statistics-and-data/statistics/statistics-by-theme/households/household-estimates/2019*

[227] As above

[228] *NRS* Household Projections for Scotland, 2018-based - https://www.nrscotland.gov.uk/statistics-and-data/statistics/statistics-by-theme/households/household-projections/2018-based-household-projections/list-of-data-tables

[229] *NRS* Population Projections for Scottish Areas (2018-based). https://www.nrscotland.gov.uk/statistics-and-data/statistics/statistics-by-theme/population/population-projections/sub-national-population-projections/2018-based

[230] Skills Development Scotland *Regional Skills Assessment, Ayrshire – Summary Report 2019* https://www.skillsdevelopmentscotland.co.uk/media/46127/ayrshire-rsa-summary-report.pdf

21.6 Following consideration of the relevant data and additional local, national and international factors, the HMP agreed that the Principal Projection and High Migration variant should be utilised in the HNDA Tool.

22 Income assumptions

Income Growth

22.1 In terms of Income Growth, the HMP was asked to consider which scenario(s) were most likely to occur over the next twenty years, choosing between:

- Modest Real Terms Growth (+3.5% per annum)
- No Real Terms Growth (+2% per annum)
- Below Real Terms Growth (+0.5% per annum)

22.2 Data on income growth locally for the period 2002-2019 – again from the Key Housing Market Drivers Chapter - showed that while median incomes have seen a broadly consistent gradual upward trend in Scotland and Great Britain as a whole (with slowing in 2010 and 2011 being the only exception), median incomes in South Ayrshire have shown more fluctuation. Nevertheless, gross weekly pay for full-time employees in South Ayrshire had increased at an annual average growth rate of 2.2% during this period, and over the last five years had seen an annual average growth rate of about 2.8%[231]. Data was also presented on Gross Value Added (Balanced) for South Ayrshire, again showing a broadly upward trend[232].

22.3 Based on this data, the HMP agreed that the most likely scenario was **No Real Terms Growth**.

Income Distribution assumptions

22.4 In relation to income distribution, the HMP were asked to consider three possible scenarios. These were as follows:

- **No change:** The incomes of the least affluent and the most affluent increase at the same rate as median household income. The gap in the income distribution between the most and least affluent will not change over time.
- **Greater equality:** The income growth rate for the least affluent households is one percentage point per annum above the growth rate in median household income, while the income growth rate for the most affluent households is one percentage point below the growth rate in median household income. As a result, the gap in the income distribution between more and less affluent households will narrow over time.
- **Greater inequality:** The income growth rate for the least affluent households is one percentage point per annum below the growth rate in median household income, while the income growth rate for the most affluent households is one percentage point above the growth rate in median household income. As a result,

[231] Office of National Statistics (ONS) *Annual Survey of Hours and Earnings, 1999 to 2019.* *https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/earningsandworkinghours*
[232] Office of National Statistics *Regional economic activity by gross value added (balanced), UK: 1998 to 2017*

the gap in the income distribution between more and less affluent households will increase over time.

22.5 Data from the Key Housing Market Drivers chapter on how incomes at different distribution points had changed over time showed the gross weekly pay of full-time employees at the 10th, median and 80th percentile[233]. This data highlighted that, on average, the degree of change seen during this time in incomes at the 10th percentile and 80th percentile had varied little from trends seen in change to the median[234]. Over the long-term, the average annual growth rate for these three income levels can be seen to be broadly similar, while recent years have seen marginally more growth among the least affluent full time employees.

22.6 Based on these trends, the HMP agreed that the most likely scenario was **No Change**. The HMP also agreed that affordability analysis should be carried out using the HNDA Tool's default settings – presenting information on affordability for households at Lower Quartile income.

23 Affordability assumptions

House Sales assumptions

23.1 In terms of trends in local house prices, the HMP were asked to consider the following scenarios:

- **Trend growth – 1.6% per annum**
- **Moderately high – 2.3% per annum**
- **Moderately low – 0.7% per annum**
- **High – 2.9% per annum**
- **Low – 0.3% per annum**

23.2 Data from the Key Housing Market Drivers chapter on trends in house prices over the years from 2003/04 to 2019/20 in South Ayrshire showed that prior to the housing market crash of 2007/08, South Ayrshire's average house prices were higher than for Scotland as a whole.

23.3 Since 2009/10, however, the converse has been true and the years since 2016/17 have seen divergence between the Scottish average and house prices in South Ayrshire, with average prices locally showing only limited growth compared to upward trends for Scotland as a whole[235].

23.4 New build purchase prices had seen more growth locally, but this only represents a proportion of the whole market. Furthermore upper quartile house prices were shown to

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[233] Data on incomes at the 90th percentile in South Ayrshire have been suppressed by ONS as the quality of this data did not pass their confidence threshold. As such, the 80th percentile has been used as a proxy.

[234] NOMIS *Annual Survey of Hours and Earnings – Resident analysis, 2002 to 2019.* https://www.nomisweb.co.uk/query/construct/summary.asp?mode=construct&version=0&dataset=30

[235] Registers of Scotland *Property Market Report 2019/20.* Table 3: Average residential property price by local authority, Scotland, 2003-04 to 2019-20, financial year data. https://www.ros.gov.uk/data-and-statistics/house-price-statistics. Excludes sales under £20,000 and over £1m.

have increased to a far greater extent over the last ten years than lower quartile and median house prices locally[236].

23.5 In addition to this data, the HMP consider other possible factors likely to impact on house prices in South Ayrshire in the coming years, including:

- Predicted job losses in some sectors making it more difficult for households to access a mortgage
- Predicted increases in employment in other sectors as a consequence of the Ayrshire Growth Deal
- Some banks moving away from High Loan-to-Value mortgage products in recent months (in the context of general increases in LTV rates over recent years)
- Previous years' house price trends showing limited growth locally.

23.6 Taking these factors into account, the HMP agreed that **Moderately low growth** (+0.7% per annum) was the most likely scenario in terms of house prices in South Ayrshire. The HMP also agreed that the HNDA Tool's default setting with regard to house price affordability should be used.

Rental Price assumptions

23.7 The following rental price scenarios were considered by the HMP:

- **Trend growth – 1.6% per annum**
- **Moderately high – 2.3% per annum**
- **Moderately low – 0.7% per annum**
- **High – 2.9% per annum**
- **Low – 0.3% per annum**

23.8 Data on trends in rents in the Ayrshire Broad Rental Market Area (BRMA) from the Key Housing Market Drivers chapter showed that the last ten years have seen relatively limited change in the average monthly rent in the Ayrshires BRMA – increases of about 1.5% for a 2 bedroom property over the last ten years compared to an increase of 25% for Scotland as a whole. A similar disparity can be seen across almost all property sizes[237].

23.9 Based on these trends, the HMP agreed that **Moderately low growth** (+0.7% per annum) or **Low growth** (+0.3% per annum) were the most likely scenarios in terms of rental prices.

23.10 The HMP also agreed to utilise the HNDA Tool's default affordability thresholds in order to understand potential demand for 'below market rent', shared equity and other similar alternative models of affordable housing provision.

23.11 The HMP also agreed that the default setting with regard to house purchases be utilised – assuming that 60% of households who can afford to buy will enter owner occupation.

[236] Registers of Scotland *Property Market Report 2019/20.* Table 3: Average residential property price by local authority, Scotland, 2003-04 to 2019-20, financial year data and Table 15: Average residential property price for new builds by local authority, Scotland, 2003-04 to 2019-20, financial year data

[237] *Scottish Government* Private Renting Statistics, 2010 to 2019 https://www.gov.scot/publications/private-sector-rent-statistics-2010-2019/

24 Estimate of Existing Need

24.1 In the context of the HNDA, Existing Need refers to any need that couldn't be met by existing stock within the local authority area and across the tenures.

24.2 The CHMA's preferred methodology is the Households in Temporary Accommodation, Overcrowded and Concealed (HoTOC) method. This methodology produces an existing need figure of **only 314 households.**

24.3 Feedback received from partners in both the Housing Market Partnership and the Housing Supply Sub-Group highlighted a belief that this methodology considerably underestimated existing need in South Ayrshire.

24.4 As such, we have reviewed alternative methodologies used by other local authorities and have worked with the CHMA to identify a methodology that better represents local circumstances. Comparison of these methodologies is presented at Appendix 1.

24.5 A South Ayrshire Council alternative methodology was developed to take account of local and national data collated for the HNDA, using this to present a fuller and more nuanced picture of existing need, and how this might be addressed by in situ solutions.

24.6 This calculation begins by calculating gross existing need before providing an estimate of how much of this need can be met by in-situ solutions.

24.7 A **net figure** of existing need is then produced – that is to say, existing need that we estimate will not be met by these in situ solutions and where a new build property would be required.

24.8 This methodology considers data in relation to the following areas of housing need:

- Homeless households and those in temporary accommodation
- Those with insecurity of tenure (at risk of homelessness)
- Concealed households
- Overcrowded households
- Unmet housing need among wheelchair users
- Unmet housing need for ground level accommodation (excluding wheelchair users)
- Poor quality housing

24.9 Using this methodology produces a **net existing need** figure of 1,328 households[238].

25 Affordability Model

25.1 The HMP considered whether estimates of existing need are solely about social housing or whether they extend to private housing.

25.2 If the Affordability model is set to "Off" in the HNDA tool, this would allocate all Existing Need to the social rented sector. The HMP agreed this would be unacceptable given the importance of developments to the housing market and economy locally. Agreement was reached to use the Affordability Model.

[238] Full detail on this calculation is presented at Appendix 1.

26 Years to clear existing need

26.1 Guidance from the CHMA indicates that one means of setting the 'Years to Clear Existing Need' indicator would be to consider social renting completions over the last ten years.

Table 70 – Social and private sector completions, South Ayrshire, 2010/11 to 2019/20[239]

	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20
Social sector	0	167	14	84	7	58	151	30	106	84
Private sector	133	195	142	125	115	231	257	174	119	153
TOTAL	**133**	**362**	**156**	**209**	**122**	**289**	**408**	**204**	**225**	**237**

26.2 As can be seen in Table 70 above, social sector completions over the last ten years have seen a general upward trend, and on average about 70 units of social housing per year are completed by the local authority and our RSL partners.

26.3 Despite this, it is anticipated that social rented sector completions will be higher than this in the years to come, particularly in the context of a cross-party political focus on affordable housing.

26.4 As such, we should also refer to South Ayrshire's Strategic Housing Investment Programme (SHIP).

Table 71 – Strategic Housing Investment Programme affordable housing site starts, 2021/22 to 2025/26[240]

Pre-2021/22	2021/22	2022/23	2023/24	2024/25	2025/26	TOTAL
305	210	229	232	170	130	**1,276**

26.5 While the SHIP sets out anticipated site starts across social housing providers, Scottish Government guidance also recognises that not all projects go ahead as planned, and as such recommends applying a minimum slippage factor of 25%.

26.6 In addition, while we can be relatively sure that most projects earlier in this programme will go ahead as planned, future years offer less certainty, given uncertainty across a range of factors, including the availability of subsidy.

26.7 As such, while Existing Need could theoretically be addressed in 8-10 years based on anticipated site starts, we believe it would be more prudent to set a period of 10-12 years to clear Existing Need.

27 Scenario Testing and Projected Housing Estimate figures

27.1 In summary, the HMP agreed that the following scenarios will be tested using the HNDA Tool.

[239] Scottish Government New Build Housing Statistics, *Social sector starts and completions* and *Private sector starts and completions.* https://www.gov.scot/publications/housing-statistics-for-scotland-new-house-building/

[240] South Ayrshire Strategic Housing Investment Programme (SHIP) 2021/22 to 2025/26

Table 72 – Agreed scenario testing parameters, 2021-2040[241]

	Demographic	Income Growth	Income Distribution	House price	Rental price
Scenario 1	Principal Projection	No Real Terms Growth	No change	Moderately low	Moderately low
Scenario 2	High Migration	No Real Terms Growth	No change	Moderately low	Moderately low
Scenario 3	Principal Projection	No Real Terms Growth	No change	Moderately low	Low
Scenario 4	High Migration	No Real Terms Growth	No change	Moderately low	Low

27.2 Scenario testing was carried out by inputting these agreed parameters into the HNDA Tool. The following additional parameters were utilised:

- Use HoTOC Method - No
- South Ayrshire Council HMP's own estimate of existing need – 1,328 households
- Use affordability model? – Yes
- Years to clear existing need – 10 years
- Default thresholds for house price affordability ratio – 3.9 and 25%
- Proportion of market who buy – 60%
- Upper income-to-rent threshold – 25%
- Lower income-to-rent threshold – 25% (anticipating limited role of mid-market rent in meeting need)

27.3 The outputs from this process are summarised in Table 73 below. These estimates will be utilised in setting Housing Supply Targets during the Local Housing Strategy (LHS) development process.

[241] Minutes of Housing Market Partnership and Housing Supply Sub-Group meetings available at Appendix 3

Table 73 – Key Findings Template: Estimate of Additional (New) Future Housing Units[242]

HOUSING NEED AND DEMAND ASSESSMENT Key Findings Template: Estimate of Additional (New) Future Housing Units				
		Number of years to clear existing need		
Total households with **existing need (net)**	1,328	10		
	Household Projection Period			
	2021-2040			
	Principal Projection	Low Migration Projection	High Migration Projection	
Total number of new **households over the projection period**	309	0	434	
	HNDA Projection Period			
	2021-2040			
	ANNUAL NEED - YEARS 1 TO 5[243]			
Total households over the projection period who *may* afford:	Scenario 1	Scenario 2	Scenario 3	Scenario 4
OWNER OCCUPATION	74	79	74	79
PRIVATE RENT	63	68	64	69
BELOW MARKET RENT	7	7	6	7
SOCIAL RENT	51	55	51	55
Total additional future housing units	**195**	**210**	**195**	**210**

[242] Output from CHMA's *Housing Need and Demand Assessment tool v4.0*.

[243] Please note, the use of rounding when displaying the Housing Estimate figures results in small discrepancies between the individual units required and totals, as well as totals compared to the Cumulative Total At End of Projection Period figures.

Total households over the projection period who *may* afford:	ANNUAL NEED - YEARS 5 TO 10[244] Scenario 1	Scenario 2	Scenario 3	Scenario 4
OWNER OCCUPATION	53	57	53	57
PRIVATE RENT	44	47	46	49
BELOW MARKET RENT	4	5	4	5
SOCIAL RENT	31	33	29	31
Total additional future housing units	**133**	**143**	**133**	**143**

Total households over the projection period who *may* afford:	ANNUAL NEED - YEARS 10 TO 15 Scenario 1	Scenario 2	Scenario 3	Scenario 4
OWNER OCCUPATION	0	0	0	0
PRIVATE RENT	0	0	0	0
BELOW MARKET RENT	0	0	0	0
SOCIAL RENT	0	0	0	0
Total additional future housing units	**0**	**0**	**0**	**0**

[244] Data beyond Year 10 produced negative figures, and as such these have been zeroed.

Total households over the projection period who *may* afford:	ANNUAL NEED - YEARS 15 TO 20			
	Scenario 1	Scenario 2	Scenario 3	Scenario 4
OWNER OCCUPATION	0	0	0	0
PRIVATE RENT	0	0	0	0
BELOW MARKET RENT	0	0	0	0
SOCIAL RENT	0	0	0	0
Total additional future housing units	**0**	**0**	**0**	**0**

Total households over the projection period who *may* afford:	CUMULATIVE TOTAL AT END OF PROJECTION PERIOD[245]			
	Scenario 1	Scenario 2	Scenario 3	Scenario 4
OWNER OCCUPATION	635	683	635	683
PRIVATE RENT	536	577	551	593
BELOW MARKET RENT	54	58	52	56
SOCIAL RENT	412	444	399	430
Total additional future housing units	1,637	1,762	1,637	1,762

[245] Please note, the use of rounding when displaying the Housing Estimate figures results in small discrepancies between the individual units required and totals, as well as totals compared to the Cumulative Total At End of Projection Period figures.

Key issues identified in this chapter

LHS & Development Plan	Key Issues Identified in the HNDA
Overall Need	The two principal projection scenarios (1 & 3) and the two high migration scenarios (2 & 4) produce the same figures for additional future housing units required over the projection period. The 4 scenarios produce similar annual need figures for each tenure.
Owner Occupation	74-79 units required annually to meet housing need in years 1 to 5 and 53-57 annually in years 5 to 10. This is realistic, achievable, and well within historic outputs. The HNDA highlights a significant number of older households under-occupying in owner occupied housing and an increase in smaller older households. It is essential that the LHS considers the contribution that owner occupation can make in meeting the needs of older residents and meeting downsizing needs.
Private Rent	63-69 units required annually to meet housing need in years 1 to 5 and 44-49 annually in years 5 to 10. The private rented sector has an important role to play in meeting housing need in all scenarios. This need is unlikely to be met from new supply but from changes in within existing stock. The Council is working with owners of empty properties to bring these properties back into use which in some circumstances results in properties entering the private rented sector. Further consideration of the use of incentives for empty homes will be included within the LHS While the Council's Social Lettings Service aims to improve access for low-income single households under 35 and for low-income families, the housing market and the landlord's desire to remain in the sector impacts on the growth of this service. As such, affordability and growth of the Private Rented Sector should be further considered within the LHS. The LHS should consider a need to address information gaps that exist in relation to rents and disrepair.

	When we set the Housing Supply Target consideration needs to be given to the profile of the private rented sector and aspirations of homeownership. LHS should consider different models of homeownership and increasing supply of affordable housing.
Below Market Rent	6-7 units required annually to meet housing need in years 1 to 5 and 4-5 annually in years 5 to 10. There is little appetite among developers to deliver this type of accommodation in South Ayrshire. This can be partially explained by the relatively limited gap between social housing and market rents locally, making such schemes less feasible than in areas where the LHA would provide a greater return on investment or make a project more viable. Development of this sector continues to be explored in South Ayrshire.
Social Rent	A need for 51-55 new units of Social Housing required annually in year 1 to 5 and 31-33 annually in years 5 to 10. Figures to address housing need do not account for demolitions. There is also a need to consider new build to address levels of poverty and deprivation within certain areas. The LHS should consider the needs of the aging population and the increase in smaller older households.

Chapter 5: Specialist Provision

28. Introduction

28.1 This chapter highlights the contribution that specialist housing provision plays in enabling people to live well, with dignity and independence for as long as possible.

28.2 This chapter seeks to identify the scale and nature of specialist housing provision available in South Ayrshire to meet a variety of needs, as well as estimating the scale and type of any unmet needs, either now or predicted for the future.

28.3 The Scottish Government's HNDA guidance notes that some people may have similar needs, despite their individual illness, health condition or equality characteristic; and therefore the focus of the HNDA is on understanding and, as far as possible, quantifying, the implications for accommodation and support provision. Specialist Provision refers to three broad categories of need covering six types of housing or housing-related provision, as outlined in the following table:

Table 74 – Specialist Provision Typology

Category of Housing Need	Type of Housing Provision
Property Needs	1. Accessible and adapted housing. 2. Wheelchair housing. 3. Non-permanent housing e.g. for students, migrant workers, asylum seekers, refugees.
Care and Support Needs	4. Supported provision e.g. care homes, sheltered housing, hostels and refuges. 5. Care/ support services for independent living.
Locational or Land Needs	6. Site provision e.g. sites/ pitches for Gypsy/ Travellers and sites for Travelling Show People, city centre locations for student accommodation.

28.4 To evidence need for the above, the following key groups, as a minimum, should be considered:

- older people
- people with a physical disability
- people with a mental health condition
- people with a learning disability
- homeless people
- people fleeing/ at risk of domestic abuse
- people requiring non-permanent accommodation e.g. homeless people, students, migrant workers, asylum seekers, refugees, care leavers, ex-offenders
- Armed Forces communities
- minority ethnic people (including Gypsy/ Travellers)

- Travelling Show People

29. Accessible and Adapted Housing

National policies

29.1 Key national policies and strategies impacting on the provision of accessible and adapted properties include the following:

- Equality Act 2010
- Age, Home and Community: a Strategy for Housing Scotland's Older People, 2012-2021
- Age, Home and Community: Next Phase
- Public Bodies (Joint Working) (Scotland) Act 2014 and the Integration of health and social care and the Reshaping Care for Older People agendas
- Scottish Government Equipment and Adaptation Guidance, 2009
- Adapting for Change: Final Report of the Adaptations Working Group, 2012
- Scotland's National Dementia Strategy 2013-2016
- Healthcare Quality Strategy and the 2020 Vision
- Fairer Scotland Action Plan, 2016

29.2 The focus of national policy in this area is to eliminate any unlawful discrimination and advance equality of opportunity, to deliver high quality services and ensure that everyone can live longer and healthier lives at home and/or in a homely setting.

29.3 In relation to adaptations, the national aim is to move towards a tenure-blind approach that is co-ordinated and consistent across social rented and private housing sectors.

Local policies

29.4 South Ayrshire Council's Local Housing Strategy 2017-2022 sets out the commitment that "people across South Ayrshire are able to access advice and support that helps them to meet their housing needs and aspirations". This is supported by the outcomes that "People across South Ayrshire have access to housing-related support that helps them to live as independently as possible" and "Housing options advice effectively supports people across South Ayrshire to access suitable and affordable accommodation". The Local Housing Strategy also sets out our commitment to continue to work with the HSCP to deliver adaptations to privately owned and Council-owned properties.

29.5 The Housing Contribution Statement embedded in the HSCP's Integrated Joint Board Strategic Plan 2021-2031 sets out how the Council and HSCP will work together to meet individual needs, including those of people with physical disabilities and older people.

Property needs

29.6 People have various housing needs and these will almost certainly change through a lifetime. The design and form of all housing should be flexible enough to accommodate a range of these needs. This approach is sometimes referred to as 'barrier-free' housing, referring to housing and its environment that is designed to allow for the needs of almost everyone.

29.7 In South Ayrshire, the ‘barrier-free’ concept has been applied in social housing new build properties through the use of the Lifetime Homes standard, a 16 point Design Criteria that can be applied universally to new homes at minimum cost[246]. These features range from parking width and the gradient of approach externally through to circulation space and the width of doorways and halls internally. The standard also includes design features to support adaptation in the future where required, such as supporting the installation of entrance level bathroom facilities, bedroom hoists and through-floor lifts.

29.8 As the Lifetime Homes standard puts it, “each design feature adds to the comfort and convenience of the home and supports the changing needs of individuals and families at different stages of life”. The Lifetime Homes approach is about developing properties that are adaptable by design, with the aim of creating and encouraging better living environments for everyone. “From raising small children to coping with illness or dealing with reduced mobility in later life, Lifetime Homes make the ups and downs of daily living easier to manage”.

29.9 The provision of suitably designed housing - whether barrier-free for the majority or to different standards for people with specific needs - will allow an increasing number of people to live independently for most of their life.

29.10 It is important to recognise, however, that anybody at some stage in their life may need additional support to maintain their independence, particularly as they become older or where particular needs develop or become more pronounced. In these instances, we would seek to work with our partners to consider the options open to the individual, including the delivery of adaptations that would enable independent living or finding alternative accommodation where appropriate.

29.11 The Housing (Scotland) Act 2006 places a duty on all local authorities in Scotland to provide mandatory grant assistance for most essential adaptations and for the provision of a standard amenity. South Ayrshire Council are committed to helping people with disabilities remain independent in the community for as long as practically possible.

29.12 Over the course of the current scheme of assistance from April 2017 until March 2020 South Ayrshire Council has approved 480 application for mandatory grant for private sector disabled adaptations and spent £1,796,433 on these works[247].

29.13 In South Ayrshire, funding for adaptations comes from three separate sources, dependent on tenure:

- Private Sector (PRS and owner-occupied) – funded by the Health and Social Care Partnership (HSCP), and paid through SAC’s Scheme of Assistance. Homeowners and private tenants can request financial assistance if there is an assessed need for an adaptation.

[246] More information on the Lifetime Homes standard can be found at www.lifetimehomes.org.uk

[247] Scottish Government *Scheme of Assistance Statistics* https://www.gov.scot/publications/housing-statistics-scheme-of-assistance/

- Council Housing – funded by the HSCP, and paid through South Ayrshire Council's Housing Revenue Account (HRA). Adaptations are either carried out on a reactive basis, as part of the new build process or as part of a planned modernisation programme.
- RSLs – Disabled adaptations for housing association tenants are paid through Scottish Government funding.

Suitable for

29.14 By ensuring properties are accessible at the design stage or through adaptations, we can meet a wide variety of needs, but could specifically benefit the following groups:

- People with temporary or permanent impaired mobility due to accident, illness or old age and who may use a wheelchair for some of the time;
- People who have difficulty with steps, bending down or reaching or who lack dexterity;
- People with impaired sight or hearing;
- People with impaired memory, learning or reasoning;
- People pushing and manoeuvring prams.

Evidence

Current type of needs and level of needs and provision

29.15 The Scottish House Condition Survey 2015-17 estimates that 46% of households in South Ayrshire have a household member who is long-term sick or disabled (LTSD), while 61% of older households are estimated to include a LTSD person[248].

29.16 According to the 2011 Census, 7.2% of the population of South Ayrshire have a physical disability, compared with 6.7% of the population of Scotland[249]. The same source estimates that the physical activities of 11,870 people in South Ayrshire are limited 'a lot' by their disability, while a further 12,671 people are estimated to have their physical activities are limited 'a little'[250].

29.17 South Ayrshire has an older population than is the case for Scotland as a whole. Approximately 26% of South Ayrshire's population is aged over 65, compared to 19% of the Scottish population as a whole[251]. Furthermore, in line with estimates throughout Scotland, South Ayrshire's population is ageing, with the average age of our population expected to increase over the ten years from 2018 to 2028[252], with particular increases in the number of people in the 65-74 and 75+ age groups.

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[248] Scottish Government (2018) *Scottish House Condition Survey 2015-17 Local Authority Tables*

[249] Scottish Census 2011 https://www.scotlandscensus.gov.uk/ods-analyser/jsf/tableView/tableView.xhtml

[250] Scottish Census 2011 https://www.scotlandscensus.gov.uk/ods-web/area.html

[251] NRS *Mid-2019 Population Estimates Scotland,* Table 2: Estimated population by sex, single year of age and administrative area, mid-2019 https://www.nrscotland.gov.uk/statistics-and-data/statistics/statistics-by-theme/population/population-estimates/mid-year-population-estimates/mid-2019

[252] *NRS* Mid-2019 Population Projections by Council Area in Scotland, South Ayrshire Council Area profile - https://www.nrscotland.gov.uk/files/statistics/council-area-data-sheets/south-ayrshire-council-profile.html

29.18 Local authorities and Registered Social Landlords (RSLs) are required to report on the type of provision they offer as part of the Annual Return on the Charter (ARC). The table below provides the publicly available data on the types of self-contained housing provision in South Ayrshire, as at 31 March 2019.

29.19 In this instance 'wheelchair housing' is defined as 'properties built or adapted to give extra floor area, whole house heating, special features in the bathroom and kitchen and other features', while 'medium dependency' refers to 'properties [whose] design is based on the standards of general needs housing but with the addition of other features of the above sheltered housing definition'. 'Ambulant disabled' accommodation refers to 'properties for people who have disabilities but are not confined to wheelchairs. Such accommodation is built or adapted to general needs housing standards but has a level or ramped approach, a WC and bathroom at entrance level and other special features'.

Table 75 - Social landlord stock by provision type, as at 31 March 2019[253]

	General needs	Sheltered	Very sheltered	Medium dependency	Wheelchair housing	Ambulant disabled	Total
ANCHO Ltd	6	0	0	0	0	0	**6**
Atrium Homes	1	0	0	0	0	0	**1**
Ayrshire Housing	1,381	0	0	0	45	76	**1,502**
Blackwood Homes and Care	30	0	0	13	24	1	**68**
Hanover (Scotland) HA	66	109	0	0	0	0	**175**
Link Group Ltd	34	0	0	0	0	0	**34**
South Ayrshire Council	7,349	539	0	264	0	0	**8,152**
Trust HA	10	32	31	30	0	0	**103**
West of Scotland HA	436	32	0	0	4	0	**472**
TOTAL	**9,313**	**712**	**31**	**307**	**73**	**77**	**10,513**

29.20 In terms of accessible housing types, 'Medium Dependency' housing is predominantly delivered by South Ayrshire Council, while 'Ambulant disabled' housing is predominantly provided by Ayrshire Housing.

29.21 In addition to new build provision and existing adapted units meeting the needs of people with physical disabilities, it is important to remember that many individuals' needs will be met by adaptations being carried out to people's own homes, both in the social and private sectors. The table below sets out the number of adaptations carried out over the last five years in South Ayrshire by sector. This data excludes adaptations to RSL stock as this was not available at the time of writing.

Table 76 - Private Sector and Council house adaptations, 2014/15 to 2019/20[254]

	Private Sector adaptations	Council house Adaptations
2014/15	218	358

[253] Scottish Housing Regulator (2019) *All stock landlords dataset by provision type and local authority area, as at 31 March 2019.* More up-to-date authority-level data was not available at time of writing.

[254] Annual Return on the Charter, Scottish Government Housing Statistics Return

2015/16	188	353
2016/17	206	304
2017/18	162	275
2018/19	190	323
2019/20	184	253

29.22 Helping people to remain in their own home for longer remains a priority for both local and national government, and as such it is safe to assume that this approach will continue to be utilised in helping to meet people's needs across the tenures going forward.
29.23 As noted previously (in the preceding section on 'in-situ solutions' within the "Housing Stock Pressures" chapter), the most common adaptations in South Ayrshire relate to the installation of Wet Floor Showers, the installation of ramps and stairlifts[255].

Gaps or shortfalls in needs and provision

29.24 About 18% of South Ayrshire Council's lets were classified as Ground Level accommodation, suitable particularly for people with the needs identified in this section.
29.25 Table 77 demonstrates the lets for this type of accommodation over the last five years. The most common type of Council-owned Ground Level accommodation becoming available are 1-bedroom. These accounted for about half of lets to this type of accommodation. A smaller but still significant number of 2-bedroom properties also became available during this time.

Table 77 – Lets and relets by bedroom size, Council-owned Ground Level accommodation, 2015/16 to 2019/20[256]

	Bedrooms	2015/16	2016/17	2017/18	2018/19	2019/20	Average
Ground Level	1	73	58	116	68	74	78
	2	61	58	51	58	60	58
	3+	3	4	6	6	12	6
	TOTAL	**137**	**120**	**173**	**132**	**146**	**142**

29.26 As at 11 August 2020 there were 604 applicant households held for Ground Level accommodation on South Ayrshire Council's waiting list. As with recent lets, demand is primarily split between 1- and 2-bedroom properties, with far less demand for this type of accommodation from people looking for properties with three bedrooms or more.

Table 78 – Applications for Ground Level accommodation on SAC waiting list, broken down by bedrooms requested[257]

	1 bed	2 bed	3 bed	4 bed	5 bed	Total
Applicants	280	291	30	3	0	**604**
Average lets 2015/16 to 2019/20	77.8	57.6	5.8	1*	-	142

[255] Uniform Report on Private Sector Adaptations carried out during 2019/20, Northgate Report on Council Housing Adaptations carried out during 2019/20
[256] Northgate housing system reports used to inform South Ayrshire Council Annual Return on the Charter (Indicator C7), 2015/16 to 2019/20.
[257] As above, and South Ayrshire Council, Number of current applications Northgate Report, as at 11 August 2020. * denotes average of less than 1 let per year, rounded up to 1 for calculation purposes.

Applicant-to-let ratio	3.6	5.1	5.2	3*	-	4.2

29.27 Table 78 shows the number of current applicants and the average number of lets by property type, before providing an 'applicant-to-let' ratio to provide an indication of demand for consideration in concert with the total number of applicants.

29.28 As can be seen above, the greatest pressure for this type of accommodation can be seen for 2-bedroom properties, where there are about 5 applicants to every let. There is also significant demand for 1-bedroom ground level accommodation, around 4 applicants for every let.

29.29 While there were 5 applicants for every let for 3-bedroom properties, in practice need is far less pronounced for this type of accommodation with only 33 applicants looking for properties of 3-bedrooms or more.

29.30 HNDA Guidance requires us to estimate separately the needs of households who require 'wheelchair accessible housing' as well as those who would benefit from 'accessible and adapted housing'. We are also required to estimate those needs which would be met by in situ solutions, such as adaptations and lets of existing stock.

29.31 Given that people's needs are on a spectrum, this is difficult to do in practice, however we have developed a methodology for achieving both elements of this.

29.32 In order to estimate the number of lets that were suitable or potentially suitable for a wheelchair user household, the properties let during 2019/20 were compared to the list of units that were identified as being wheelchair accessible (or could easily adapted to achieve this).

Table 79 – Number of lets to wheelchair accessible properties, or properties designed to be adaptable to meet the needs of a wheelchair user household, 2019/20[258]

	Wheelchair accessible?	No. of lets
Mainstream	New build, could be adapted	15
	Ramp	3
	Wheelchair accessible	1
	Not wheelchair accessible	490
Ground level	Wheelchair accessible	20
	Ramp	11
	Not wheelchair accessible	115
Sheltered housing	Wheelchair accessible	2
	Ramp	8
	Not wheelchair accessible	48
Total lets		**713**
Lets to wheelchair accessible or ramped housing		**60**

29.33 Table 79 above shows that South Ayrshire Council had 60 lets to properties that were wheelchair accessible, new-builds that could be easily adapted to be wheelchair accessible, or were fitted with a ramp.

29.34 This tells us that there were 115 Ground Floor lets and 48 Sheltered Housing lets that were not wheelchair accessible.

29.35 Information on categories of lets by property accessibility was also sought from RSLs. Table 80 below presents the information received in summary.

Table 80 – Number of lets to RSL properties by provision type (summarised), 2019/20[259]

	General needs	Wheelchair Accessible	Accessible or adapted	Sheltered/very sheltered	Total
Ayrshire Housing	145	4	18	0	**167**
West of Scotland	14	0	3	4	**21**
Hanover	0	14	0	0	**14**
Link	1	0	0	0	**1**
Blackwood	2	3	0	0	**5**
TOTAL	**162**	**21**	**21**	**4**	**208**

29.36 This data tells us that RSLs in South Ayrshire let at least 21 properties that would be suitable for wheelchair users, while a further 21 properties were let that met the definition of being accessible. A further 4 sheltered housing properties were let by RSLs during this period.

[258] Northgate housing system reports used to inform South Ayrshire Council Annual Return on the Charter (Indicator C7), 2015/16 to 2019/20, cross referenced with FOI-2020-10240 report - Northgate Housing Management system, March 2020

[259] Annual Return on the Charter information provided by Ayrshire Housing, West of Scotland, Hanover and Link. Information sought from Trust and ANCHO.

29.37 As previously noted, while some unmet need is also likely to be met by adaptations, it is important to note the pressure on budgets in this area of work. At the present time, private sector adaptations are provided for people assessed to have 'substantial' and 'critical need' only. Households' whose needs are assessed as 'moderate' or 'low' are not currently provided within existing budgets.

29.38 184 adaptations were carried out to homes in the private sector during 2019/20, while 253 adaptations were carried out to Council stock.

29.39 In order to estimate the proportion of adaptations benefitting wheelchair user households and those benefitting non-wheelchair user households, officers were asked the approximate proportion of each type of adaptation where the applicant was a wheelchair user in any given year. These proportions were then applied to the number of adaptations carried out during 2019/20.

Table 81 – Private sector adaptations in 2019/20, estimated split using an officers' knowledge and experience[260]

	No. adapts in year	Estimated % adapt type for wheelchair users	Estimated Adapts. Wheelchair Users in year	Estimated Adapts. Non-Wheelchair User in year
Wet Floor Shower	94	30%	28	66
Stairlift	24	10%	2	22
Ramp	18	90%	16	2
Miscellaneous (i.e. professional fees, various etc.)	18	30%	5	13
Bathroom Alterations	7	30%	2	5
Closomat or Wash/Dry WC	4	30%	1	3
Hoist	4	90%	4	0
Kitchen Adaptation	4	100%	4	0
Throughfloor lift	4	100%	4	0
Low Level Access Shower	4	0%	0	4
Doorway Alterations	1	90%	1	0
Ramped Shower	1	30%	0	1
Step Alterations	1	0%	0	1
TOTAL	**184**		**67**	**117**
Estimated % of adaptations			**36.4%**	**63.6%**

[260] Uniform Report on Private Sector Adaptations carried out during 2019/20. Percentages estimated based on officer knowledge.

29.40 Using this methodology, we can estimate that 67 private sector adaptations benefitted wheelchair user households, while 117 private sector adaptations benefitted non-wheelchair user households.

29.41 The same methodology was applied to Council adaptations.

Table 82 – Council housing adaptations in 2019/20, estimated split based on officers' knowledge and experience[261]

	No. adapts in year	Estimated % of adaptations in year to wheelchair users	Estimated Adapts. Wheelchair Users	Estimated Adapts. Non-Wheelchair Users
Handrail	88	0%	0	88
Wetfloor shower	50	25%	13	37
Banister	46	0%	0	46
Miscellaneous works including preparatory works	14	20%	3	11
Doorway alterations/Door opener	11	100%	11	0
Ramp	11	100%	11	0
Overbath shower	6	0%	0	6
Step-in shower	6	0%	0	6
Lever Taps	5	30%	2	3
Step alterations	5	0%	0	5
Closomat or washdry wc	4	50%	2	2
Miscellaneous bathroom adaptations	4	50%	2	2
Removal of an adaptation	2	0%	0	2
Major adaptations	1	0%	0	1
Total	**253**		44	209
Estimated % of adaptations			17.4%	82.7%

29.42 The estimates above suggest that about 44 Council adaptations would have benefitted wheelchair user households, while 209 benefitted non-wheelchair user households.

[261] Northgate Report on Council housing adaptations carried out during 2019/20. Percentages estimated based on officer knowledge.

Future type and level of needs & provision required

29.43 Several factors are likely to contribute to the future need for accessible accommodation, as well as the continuing need to make best use of existing stock through adaptations and appropriate management decisions.

29.44 Firstly, the high proportion of older households estimated to include a LTSD person will become more relevant over time given the continuing trend towards an ageing population. This will have an impact on the kind of housing stock required, as well as the need for a wider range of support models. The shift in Scotland's population generally and South Ayrshire's population specifically towards an older population can be expressed through the concept of a 'dependency ratio' (meaning the proportion of older people and children relative to the working age population). South Ayrshire's dependency ratio is higher than the Scottish average (67 compared to 55) and this is forecast to increase in the years to come[262].

29.45 Secondly, the reduction in household sizes and accompanying increase in the total number of households projected for South Ayrshire in the coming years may result in less informal care being provided by other household members and make demand for adaptations (and accessible housing) to help people manage independently more urgent.

29.46 Thirdly, as we will see in the section which follows the estimated increase in the number of households with a wheelchair user (or 'wheelchair user households') may further increase demand for accessible housing options and adaptations.

29.47 Taking these factors into account, it is critical that we plan ahead and work collaboratively in terms of housing, communities and care to ensure these needs can be met effectively. Housing and the HSCP recognise the need to not only respond to existing needs but to take a longer-term strategic planning approach to meeting the needs of our population as it ages, and structures are in place to support this.

29.48 A calculation of net existing need for 'Accessible and Adapted housing' is carried out at Appendix 1 and is summarised in Table 83 below for information.

29.49 Table 83 takes an estimate of gross existing need – informed by data sources including housing lists - and subtracts this from data presented in Tables 79, 80, 81 and 82 above in order to arrive at a figure of 'net existing need' for accessible and adapted housing of 101 households whose needs will not be met by in situ solutions. Note that this is distinct from the 'net existing need' for wheelchair accessible housing – this is presented in the section which follows.

[262] *NRS* Mid-2019 Population Projections by Council Area in Scotland, South Ayrshire Council Area profile - https://www.nrscotland.gov.uk/files/statistics/council-area-data-sheets/south-ayrshire-council-profile.html

Table 83 – Estimate of net existing need in South Ayrshire, 'Accessible and adapted housing', 2021 extracted from Appendix 1

Accessible and adapted housing	Calculation of net existing need	
	Estimate of gross existing need (Accessible and adapted housing)	615
In situ solutions	Estimated adaptations for non-wheelchair users, 2019/20 (council)	209
	Estimated adaptations for non-wheelchair users, 2019/20 (private)	117
	SAC Ground level lets, 2019/20 - excluding wheelchair accessible lets	115
	SAC Sheltered housing lets, 2019/20 - excluding wheelchair accessible lets	48
	RSL Accessible or Adapted lets, 2019/20 - excluding wheelchair accessible lets	21
	RSL Sheltered housing lets, 2019/20 - excluding wheelchair accessible lets	4
Net existing need		**101**

29.50 To estimate how that figure would change over the duration of the HNDA, this figure has been increased at the same rate as South Ayrshire's over-60 population in Table 84 below. While we understand that age is far from being the only factor resulting in this type of need, it should be considered as a proxy we can use to estimate how unmet need will change over time, given the links between ageing and reduced mobility.

Table 84 – Estimated unmet need in South Ayrshire, utilising NRS Mid-2018 population projections[263]

	2021	2022	2023	2024	2025	2026	2027	2028
Population aged 60+	38,318	38,931	39,558	40,221	40,838	41,313	41,789	42,267
Rate of increase per year	1.7%	1.6%	1.6%	1.7%	1.5%	1.2%	1.2%	1.1%
Estimated net existing need – Accessible and adapted housing	101	103	104	106	108	109	110	111

29.51 As such, we can say that – if no new developments were completed to provide accommodation to people in need of Accessible or Adapted – there would be an estimated need for 111 units of housing for this group by 2028.

30. Wheelchair housing

National policies

[263] Estimate of unmet need based on NRS Mid-2018 Population Projections - South Ayrshire Summary Dataset https://www.nrscotland.gov.uk/statistics-and-data/statistics/statistics-by-theme/population/population-projections/sub-national-population-projections/2018-based/summary-datasets

30.1 In addition to those mentioned previously, policy and research of specific relevance to wheelchair accessibility are as follows:

- National Health and Wellbeing Outcomes – Outcome 2 of the national framework is - People, including those with disabilities or long-term conditions, or who are frail, are able to live, as far as reasonably practicable, independently and at home or in a homely setting in their community
- A Fairer Scotland for Disabled People: delivery plan, 2016-2021
- Still minding the Step?: a new estimation of housing need among wheelchair users in Scotland, CIH/Horizon Housing, 2015
- Lifetime Homes Standards – as highlighted previously, Lifetime Homes are ordinary homes designed to incorporate 16 Design Criteria that can be universally applied to new homes at minimal cost.
- Scottish Building Standards – require all buildings to be constructed to allow all users safe, convenient and unassisted access. A proportion of bedrooms in any dwelling should be wheelchair accessible and a means of unassisted access must be available to, and throughout, at least one level of each dwelling. The guidance is based around the "Housing for Varying Needs" standard.
- Scottish Government *MHDGN 2019/02 – Guidance for Setting of Local Housing Strategy targets to support the delivery of more Wheelchair Accessible housing.*
- Housing for Varying Needs – A design guide, 1998.

Local policies

30.2 The relevant local policies and strategies are:

- SAC Local Housing Strategy 2017-2022, where in addition to the priorities set out above there is an ambition to ensure "there is an adequate supply of housing across South Ayrshire to meet a variety of needs".
- SAC Strategic Housing Investment Plan
- SAC Local Development Plan
- Affordable Housing Policy
- SAC Housing Contribution Statement 2021-2024
- South Ayrshire HSCP IJB Strategic Plan 2021-2031

Property needs

30.3 The Scottish Government has recently issued Guidance to Local Authorities on setting targets to support the delivery of wheelchair accessible housing[264]. This Guidance Note follows on from the action set out in the "A Fairer Scotland for Disabled People" delivery plan[265]:

[264] Scottish Government *MHDGN 2019/02 – Guidance for Setting of Local Housing Strategy targets to support the delivery of more Wheelchair Accessible housing.*

[265] Scottish Government *A Fairer Scotland for Disabled People: delivery plan* https://www.gov.scot/publications/fairer-scotland-disabled-people-delivery-plan-2021-united-nations-convention/

"to work with local authorities, disabled people and other stakeholders to ensure that each local authority sets a realistic target within its LHS for the delivery of wheelchair accessible housing across all tenures and report annually on progress".

30.4 The responsibility for setting targets for wheelchair accessible homes sits with the local authority as the statutory authority for housing, but should be taken as a corporate responsibility as it will require input from other services, including Health and Social Care Partnerships, Social Work and planning to help with service planning and implementation.

30.5 There is no universally agreed standard to define housing for wheelchair users to live in. Terms like "Wheelchair Accessibility" or "Wheelchair Liveability" are used to refer to properties that are suitable for wheelchair users to live in as distinct from properties that may be accessible for wheelchair users to visit, or that can be adapted for wheelchair users.

30.6 The Scottish Government's Guidance Note on this subject makes it clear that the setting of targets for the delivery of new 'wheelchair accessible homes' across all tenures means 'homes that are suitable for wheelchair users to live in' and should:

- As a minimum comply with the design criteria indicated as the 'Basic Requirement' for wheelchair users in the Housing for Varying Needs 'Summary of Design Criteria'[266]
- Wherever possible include the design criteria indicated as 'Desirable' in Housing for Varying Needs[267].

30.7 In addition to new supply, adaptations to existing homes will also help to meet the needs of wheelchair user households. This includes properties developed to the Lifetime Homes standard to support affordable reconfiguration to adapt to changing life circumstances, but also includes most existing homes where adaptation was not built into their initial design.

Suitable for

- Wheelchair users within South Ayrshire and their families, including families with disabled children and young adults; disabled parents with dependent children; adults who acquire a disability, either suddenly due to an accident or illness, or over time through degenerative ill-health or increased frailty among older people.
- Homes that are built to meet the needs of people with a physical disability could also meet the needs of older people with limited mobility.
- People with mobility and other health issues that would require specialist accommodation of this type

Evidence

Current type of needs and level of needs and provision

[266] Scottish Government *Housing for Varying Needs – A Design Guide* https://webarchive.nationalarchives.gov.uk/20131205120927/http://www.archive2.official-documents.co.uk/document/deps/cs/HousingOutput/content/indexBlue.html

[267] Scottish Government *MHDGN 2019/02 – Guidance for Setting of Local Housing Strategy targets to support the delivery of more Wheelchair Accessible housing.*

30.8 Census data estimates that a higher proportion of South Ayrshire's population has a physical disability than the Scottish average - 7.2% in South Ayrshire, compared with 6.7% for Scotland as a whole[268]. In South Ayrshire, the physical activities of an estimated 11,870 people in South Ayrshire are limited 'a lot' by their disability, while a further 12,671 people are estimated to have their physical activities limited 'a little'[269].

30.9 While this is useful in terms of context, it does not allow for a useful estimate of wheelchair user households in South Ayrshire.

30.10 Horizon Housing recently commissioned a research report providing estimates of unmet need for wheelchair standard accommodation in Scotland[270]. This report used the findings of the English Housing Survey (EHS) – considered to provide the most accurate data on wheelchair use and unmet need for its respective population – to estimate wheelchair use and unmet need for Scotland as a whole, as no data of comparable quality is available for Scotland.

30.11 We have adopted a similar methodology in discussion with the Centre for Housing Market Analysis to provide estimates of wheelchair use, unmet need and future need in South Ayrshire.

30.12 While the Horizon Housing report estimated proportions of households based on the 2014/15 EHS, more recent estimates are now available. As such, our estimates of wheelchair use are based on the 2018/19 EHS (presenting 2017/18 data on this topic)[271].

30.13 In 2017/18, then, it was estimated that:

- 0.6% of all English households includes a person who uses a wheelchair all the time
- 0.3% of all English households includes a person who uses a wheelchair indoors only
- 2.6% of all English households includes a person who uses a wheelchair outdoors only[272]

30.14 In order to estimate wheelchair user households in South Ayrshire in 2018, the proportions found in the EHS were applied to the NRS estimate of all households in South Ayrshire for that year – 52,281 households[273]. These calculations are shown in Table 85 below. Proportions are rounded for display purposes.

Table 85 – Estimate of wheelchair user households in South Ayrshire, 2018[274]

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[268] Scottish Census 2011 https://www.scotlandscensus.gov.uk/ods-analyser/jsf/tableView/tableView.xhtml
[269] Scottish Census 2011 https://www.scotlandscensus.gov.uk/ods-web/area.html
[270] Adapted from Horizon Housing *Still Minding the Step? A new estimation of the housing needs of wheelchair users in Scotland.* https://www.horizonhousing.org/media/1522/still-minding-the-step-full-report.pdf
[271] National Statistics *English Housing Survey 2018: Accessibility of English Homes Factsheet* https://www.gov.uk/government/statistics/english-housing-survey-2018-accessibility-of-english-homes-fact-sheet
[272] National Statistics *English Housing Survey 2018: Accessibility of English Homes Annex Table AT6* *https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/898206/2018-19_EHS_Adaptations_and_Accessability_Annex_Tables.xlsx*
[273] NRS *Estimates of Households and Dwellings in Scotland, 2019.* *https://www.nrscotland.gov.uk/statistics-and-data/statistics/statistics-by-theme/households/household-estimates/2019*
[274] Adapted from Horizon Housing *Still Minding the Step? A new estimation of the housing needs of wheelchair users in Scotland.* https://www.horizonhousing.org/media/1522/still-minding-the-step-full-report.pdf

Steps	Calculation	Result
Calculate the number of households using a wheelchair all the time	Assume EHS 2017/18 ratio, 0.6% of all South Ayrshire households	314 households
Calculate the number of indoor only user households	Assume EHS 2017/18 ratio, 0.3% of all South Ayrshire households	154 households
Calculate the number of outdoor only user households	Assume EHS 2017/18 ratio, 2.6% of all South Ayrshire households	1,342 households
Estimated total of wheelchair user households in South Ayrshire		**1,810 households**

30.15 South Ayrshire's previous HNDA (2016-2020) estimated 1,850 wheelchair users in South Ayrshire[275], as such the estimate above demonstrates some degree of continuity.

30.16 In terms of provision, information on wheelchair accessible homes in South Ayrshire has been collated from several sources.

30.17 Using the data provided by Local authorities and Registered Social Landlords (RSLs) as part of the Annual Return on the Charter (ARC), the table below provides the publicly available data on 'wheelchair housing' provision in South Ayrshire, as at 31 March 2019. As noted previously, by this definition 'wheelchair housing' refers to 'properties built or adapted to give extra floor area, whole house heating, special features in the bathroom and kitchen and other features'.

[275] Using WestMarc "Active Wheelchair Patients" data, with updated information unavailable at time of writing

Table 86 – Wheelchair housing stock by social landlord in South Ayrshire, as at 31 March 2019[276]

	Wheelchair housing
ANCHO Ltd	0
Atrium Homes	0
Ayrshire Housing	45
Blackwood Homes and Care	24
Hanover (Scotland) HA	0
Link Group Ltd	0
South Ayrshire Council	0
Trust HA	0
West of Scotland HA	4

30.18 As can be seen above, the majority of 'wheelchair housing' provision by this definition is reported by RSLs operating in South Ayrshire, particularly Ayrshire Housing and Blackwood Homes and Care, while South Ayrshire Council reports no properties meeting this definition.

30.19 In terms of South Ayrshire Council's housing stock, a recent report has been compiled to identify properties that provide 'wheelchair access'. While this doesn't clarify the number of properties that are 'wheelchair accessible' as defined above (i.e. suitable for a person in a wheelchair to live in rather than just to visit, and meeting the specified design criteria), it does give us some indication of existing provision for this client group. As can be seen in Table 4 below, of the Council's self-contained housing units currently being utilised as Council housing, 392 properties provide 'wheelchair access'. Of this number, 299 were adapted to meet a person's specific needs, while 93 units were built to provide 'wheelchair access' at the design stage.

30.20 A further 48 new build properties have been identified that have been designed to be readily adapted to meet the needs of a wheelchair user.

[276] Scottish Housing Regulator *All stock landlords dataset by provision type and local authority area*

Table 87 – South Ayrshire Council self-contained housing stock where wheelchair access is present or could be easily achieved, as at 31 December 2019[277]

Wheelchair access	No. of properties
Y – Adaptation	299
Y - New Build 2011	8
Y - New Build 2013	2
Y - New Build 2014	6
Y - New Build 2015	18
Y - New Build 2016	14
Y - New Build 2017	29
Y - New Build 2019	16
New Build could be adapted – 2015	12
New Build could be adapted – 2016	6
New build could be adapted – 2011	8
New build could be adapted – 2013	2
New Build could be adapted – 2018	6
New build could be adapted – 2014	10
New Build could be adapted – 2019	4
Grand Total	**440**

30.21 As noted previously, in addition to new build and existing accessible and adapted housing meeting the needs of households where a family member has a physical disability, adaptations are regularly carried out to properties in both the private and social sectors. Many of these are in place to support wheelchair accessibility, including the installation of wet floor showers, door widening and through floor lifts.

Gaps or shortfalls in needs and provision

30.22 One measure by which we can estimate the number of wheelchair users and unmet need for specialist accommodation from people looking for social housing is by looking at the Council's housing lists. 99 current live applicants on our waiting list have information in their notes that indicates they are a wheelchair user[278].

30.23 While this estimate gives some idea of demand for social housing to meet these needs, the Scottish Government's Guidance requests that local authorities provide targets for wheelchair accessible accommodation across all tenures.

[277] FOI-2020-10240 report - Northgate Housing Management system, Grand Total excludes 3 non-self-contained units and 50 hostel units

[278] Northgate Housing Management system report, as at 9 March 2020

30.24 The aforementioned report produced for Horizon Housing[279] provided estimates of unmet housing need amongst wheelchair users for Scotland as a whole. This research utilised accessibility data from the 2014/15 EHS due to the limitations of the Scottish Household Survey for this purpose. In order to calculate a South Ayrshire estimate of unmet need, the assumptions used in this report have been applied to the estimates of wheelchair use in South Ayrshire presented in Table 87 above[280].

30.25 The 2014/15 EHS estimated that around 19% of households that required adaptations in their home, due to their long-term limiting disability, felt their home was unsuitable for their needs[281]. This estimate has not been updated with subsequent EHS data releases, and as such the 2014/15 proportion will be used here.

30.26 This report also used the Scottish Household Survey 2015's estimate of unmet need in relation to indoor only wheelchair users. This survey found that of households who answered 'Yes' to question CC7 ('Does your home require adaptations to make it easier for you or anyone in your household'), 25.6% of these households stated that their home was not suitable for their needs.

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[279] Horizon Housing *Still Minding the Step? A new estimation of the housing needs of wheelchair users in Scotland.* https://www.horizonhousing.org/media/1522/still-minding-the-step-full-report.pdf

[280] NRS *Mid-2018 Population Estimates by Council Area in Scotland, South Ayrshire Council Area profile* – https://www.nrscotland.gov.uk/files/statistics/council-area-data-sheets/south-ayrshire-council-profile.html

[281] National Statistics *English housing survey 2014 to 2015: adaptations and accessibility of homes report.* Annex Table 1.3. https://www.gov.uk/government/statistics/english-housing-survey-2014-to-2015-adaptations-and-accessibility-of-homes-report

Table 88 - Estimate of unmet housing need among wheelchair user households in South Ayrshire, 2018[282]

Household type	Estimated households, 2018, as per Table 3.a	Calculation	Unmet need
Number of households using a wheelchair all the time	314 households	Assume 19% (all of those in EHS requiring adaptations and accommodation unsuitable)	60 households
Number of indoor only user households	154 households	Assume 25.6% (all of those in SHS requiring adaptations and accommodation unsuitable)	39 households
Number of outdoor only user households	1,342 households	Assume 19% (all of those in EHS requiring adaptations and accommodation unsuitable)	254 households
Estimated unmet housing need among wheelchair user households in South Ayrshire in 2018			**353 households**

30.27 Using this methodology, then, there were estimated to be 353 wheelchair user households in South Ayrshire with an unmet housing need as at 2018.

30.28 In order to get a baseline figure for 2021 we have again used the EHS as a base for calculations. Responses to questions in the 2017/18 EHS in relation to wheelchair use were compiled along with the same data from the 2008/09 survey[283], and the relevant proportions were applied to South Ayrshire's estimated total number of households in the relevant years. This calculation provided estimates of wheelchair user households, as shown in Table 89 below.

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282 Adapted from Horizon Housing *Still Minding the Step? A new estimation of the housing needs of wheelchair users in Scotland.* https://www.horizonhousing.org/media/1522/still-minding-the-step-full-report.pdf

283 National Statistics *English Housing Survey 2018: accessibility of English homes. Annex Table AT6.* https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/898206/2018-19_EHS_Adaptations_and_Accessability_Annex_Tables.xlsx

Table 89 - Estimates of wheelchair user households in South Ayrshire, 2009 and 2018[284]

	2009		2018		Change - 2009 to 2018		
	No.	%	No.	%	No.	%	Change per year
Total households	50,952	100%	52,281	100%	1,329	2.6%	
uses wheelchair all the time	390	0.8%	314	0.6%	-76	-19.5%	-8
uses wheelchair indoors only	86	0.2%	154	0.3%	68	78.2%	8
uses wheelchair outdoors only	1,072	2.1%	1,342	2.6%	271	25.3%	30
Total wheelchair user households	1,548	3.0%	1,810	3.5%	262	16.9%	29

30.29 Following on from this, the annual change per year for 2009-2018 was calculated and then applied to subsequent years, starting with 2018 as the Baseline. For 'indoor only' wheelchair users, for example, change per year is 7.5 additional households. This is rounded to 8 for display purposes, but calculations are based on the unrounded figure.

Table 90 - Estimates of wheelchair user households in South Ayrshire, 2018-2021[285]

	2018	2019	2020	2021	Estimated Change per year
uses wheelchair all the time	314	306	297	289	-8
uses wheelchair indoors only	154	161	169	176	8
uses wheelchair outdoors only	1,342	1,373	1,403	1,433	30
Total wheelchair users	**1,810**	**1,839**	**1,868**	**1,897**	29

30.30 Using this methodology, we can estimate that in 2021 there are 1,897 wheelchair user households in South Ayrshire.

30.31 By applying the method of calculating unmet needs described above to these figures, we can further estimate that in 2021 there are 371 wheelchair user households with unmet needs.

[284] Calculated by applying the proportion of English households with a wheelchair user for 2009 and 2018 (National Statistics *English Housing Survey 2018: accessibility of English homes. Annex Table AT6.* https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/898206/2018-19_EHS_Adaptations_and_Accessability_Annex_Tables.xlsx) to South Ayrshire's households as at 2009 and 2018 as per NRS estimates.

[285] Calculated by applying the change per year estimate between 2009 and 2018 shown in Table 3.f to South Ayrshire's estimated wheelchair households in 2018 and subsequent years.

Table 91 – Estimate of gross unmet need among wheelchair users in South Ayrshire, 2021[286]

	Estimated wheelchair users	Estimated wheelchair users with unmet needs	
		Estimated % unmet needs	No.
uses wheelchair all the time	289	19.0%[287]	55
uses wheelchair indoors only	176	25.6%[288]	45
uses wheelchair outdoors only	1,433	19.0%	272
All wheelchair users with unmet needs	**1,897**		**371**

30.32 Going forward, we can again assume that some of these identified needs will be met by in situ solutions, such as allocations to existing stock and adaptations to people's homes.

30.33 An estimate of net existing need for 'Wheelchair accessible housing' is carried out at Appendix 1. This is achieved by taking the estimate of gross existing need presented in Table 3.g above and deducting from this in situ solutions that may contribute to addressing it. This is summarised at Table 3.h below for information.

30.34 This calculation produces a net existing need for 'Wheelchair accessible housing' at 179 households whose needs will not be met by in situ solutions. As noted previously, this is distinct from the 'net existing need' for 'Accessible and Adapted housing' presented in the preceding section.

Table 92 - Estimate of net existing need in South Ayrshire, 'Wheelchair Accessible Housing', 2021, extracted from Appendix 1

Wheelchair accessible housing	**Calculation of net existing need**	
	Estimate of gross existing need (Wheelchair housing), 2021	371
In situ solutions	SAC Lets to wheelchair accessible housing	60
	RSL lets to wheelchair accessible housing	21
	Estimated adaptations for wheelchair users, 2019/20 (council)	44
	Estimated adaptations for wheelchair users, 2019/20 (private)	67
Net existing need		**179**

30.35 Given that a higher proportion of South Ayrshire's population has a physical disability, and that South Ayrshire has an older population than the rest of Scotland, the estimates

[286] Adapted from Horizon Housing *Still Minding the Step? A new estimation of the housing needs of wheelchair users in Scotland.* https://www.horizonhousing.org/media/1522/still-minding-the-step-full-report.pdf

[287] National Statistics *English housing survey 2014 to 2015: adaptations and accessibility of homes report.* Annex Table 1.3. https://www.gov.uk/government/statistics/english-housing-survey-2014-to-2015-adaptations-and-accessibility-of-homes-report

[288] Scottish Household Survey 2015 – Question CC7. Quoted in Horizon Housing *Still Minding the Step? A new estimation of the housing needs of wheelchair users in Scotland.* https://www.horizonhousing.org/media/1522/still-minding-the-step-full-report.pdf

delivered by the methodology below could be said to present a lower estimate of housing need for this client group.

Future type and level of needs & provision required

30.36 Projecting these figures forward (using the methodologies described above), we can estimate that by 2028 there will be 221 households with unmet needs if no new build development was to take place.

Table 93 – Estimate of net existing need in South Ayrshire, 'Wheelchair Accessible Housing', 2021-2028[289]

	2021	2022	2023	2024	2025	2026	2027	2028
Total wheelchair users with unmet needs	179	185	191	197	203	209	215	221

30.37 These estimates will be taken into account when setting targets for Wheelchair Accessible Housing in our Housing Supply Target to ensure the needs of wheelchair user households are considered at design stage.
30.38 The Council and our partners will also continue to ensure new build properties can be easily adapted to meet the changing needs of individuals and communities, and that adequate resources are in place to support the adaptation of existing stock.
30.39 Housing providers should also give consideration to how existing stock can be managed as effectively as possible to meet the needs of this population.

31. Non-permanent and transitional housing

National policies

31.1 Key national policies in relation to non-permanent and transitional housing include:

- Housing (Scotland) Act 2001
- Homelessness etc. (Scotland) Act 2003
- The Homeless Persons (Provision of Non-permanent Accommodation) (Scotland) Regulations 2010
- The Homeless Persons (Unsuitable Accommodation) (Scotland) Order 2004
- Licensing of Houses in Multiple Occupation Statutory Guidance for Scottish Local Authorities
- Housing (Scotland) Act 2006
- Children and Young People (Scotland) Act 2014
- Youth Homelessness Prevention Pathway
- Equally Safe: Scotland's strategy to eradicate violence against women

31.2 In terms of people fleeing violence and abuse, relevant policies, strategies and research include:

[289] Calculated by applying the change per year estimate between 2009 and 2018 shown in Table 3.f to South Ayrshire's estimated wheelchair households in 2018 and subsequent years, before applying estimates of unmet need utilised in Horizon Housing report to these estimates. This results in a change per year of 6 wheelchair user households with unmet needs.

- Domestic Abuse, Housing and Homelessness in Scotland: An Evidence Review
- Refuges for Women, Children and Young People in Scotland

31.3 Recent changes to the law that are pertinent include the Domestic Abuse (Scotland) Act 2018, which for the first time recognises domestic abuse (in addition to domestic violence) as a crime.

Local policies

31.4 The following local policies and strategies are particularly relevant to this topic:

- SAC Local Housing Strategy 2017-2022
- SAC Rapid Rehousing Transition Plan 2019-2024
- SAC Improving Housing Outcomes for Young Care Leavers Action Plan
- South Ayrshire HSCP IJB Strategic Plan 2021-2031

31.5 In addition, in relation to the provision of accommodation and support to meet the needs of people experiencing or threatened with homelessness or those fleeing abuse, South Ayrshire Council's Rapid Rehousing Transition Plan 2019-2024 is the most relevant local document.

31.6 South Ayrshire Council also recently pledged to support the Chartered Institute of Housing's *Make a Stand* campaign, encouraging housing providers to put in place robust supports for people with experience of domestic abuse.

Property needs

Temporary accommodation for homeless households

31.7 South Ayrshire provides temporary accommodation for use by households who are homeless or threatened with homelessness.

31.8 The Homeless Persons (Unsuitable Accommodation) Scotland Order 2004 and subsequent related legislation is in place to ensure this accommodation meets certain standards of quality and amenity. While previously these standards had only applied to housing used to accommodate certain groups (such as people with children), Rapid Rehousing Transition Planning and the recommendations of the Homelessness and Rough Sleeping Action Group (HARSAG) have resulted in plans to extend the definition of 'Unsuitable Accommodation' to all households from October 2020. As such, this has an impact on the type of temporary accommodation that can be offered to homeless households, with authorities being in breach where duration of stay in unsuitable accommodation is longer than 7 days. Despite this, some exemptions remain in place (for example, for temporary accommodation provided by RSLs).

31.9 South Ayrshire Council's Rapid Rehousing Transition Plan commits to the following overarching principles:

- We will increase our focus on preventing homelessness
- We will ensure appropriate housing and support options are available to meet people's needs and support tenancy sustainment

- We will ensure stays in temporary accommodation are minimised while supporting sustainable rehousing
- We will improve access to various accommodation options for statutorily homeless people, and as a means of preventing homelessness
- We will ensure Rapid Rehousing is considered as part of strategic planning.

31.10 Most pertinent here are the commitments to minimise time spent in temporary accommodation and preventing homelessness. By reducing the need for homeless services through more effective prevention, it is hoped that we can move towards a model – in line with the Government's expectations - where stays in temporary accommodation are rare, appropriate and as brief as possible.

Young people leaving care

31.11 It is important to recognise that there is no single housing solution that will be right for each individual care leaver[290]. Nevertheless, the general principles of legislation and best practice in Scotland have highlighted the need to listen to young people, to emphasise early intervention rather than crisis response, and to focus on relationship-based practice with the young person at the centre of decision-making.

31.12 At the centre of this policy approach is a determination to address the inequalities seen across a range of outcomes between care leavers and young people without care experience.

31.13 The Children and Young People (Scotland) Act 2014 inserted a new section into the Children (Scotland) Act meaning that young people who are looked after in foster, kinship or residential care would be eligible to remain in their current care placement until they turn 21. This is called Continuing Care.

31.14 Any eligible young person ceasing to be looked after on or after their 16th birthday can request Continuing Care. A young person receiving Continuing Care will no longer be defined as 'looked after' but will continue to receive the same support. When Continuing Care ends the young person is then eligible for Aftercare support – that is, advice, guidance and assistance as set out in the 1995 Act - until they turn 26.

31.15 A recent report[291] by the Rock Trust published recommendations on preventing homelessness and improving outcomes for this group. Key recommendations are as follows:

- **Staying Put and Continuing Care:** Every young person is encouraged, enabled and empowered to 'stay put' and this is the default option within individual care plans. Long-term planning and commissioning should support the principles of Continuing Care until the age of 21.
- **For young people moving on from care:** Pathways planning and reviews should apply to all looked after young people and care leavers up to age 26. Transitions to

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[290] The Scottish Government's definition of a care leaver 'is a young person who ceased to be looked after on, or at any time after, their sixteenth birthday'

[291] Rock Trust *Youth Homelessness Prevention Pathway: Improving Care Leavers Housing Pathways.* https://www.rocktrust.org/wp-content/uploads/2015/09/Youth-Homelessness-Prevention-Pathway-Care-Leavers.pdf

independent living should be graduated, anticipating the need for the young person to return to a care setting in the event of a crisis. At the point of leaving care, no young care leaver should be homeless. A young person leaving care and making a homeless application should be regarded as a self-referral for care and accommodation, not as a homeless application.

- **Addressing or reducing risk of homelessness:** The default position is that any care leaver at risk of becoming, or presenting as, homeless, should be regarded as having eligible needs under the terms of the 2014 Act. A holistic assessment of needs should be completed as standard practice which addresses all support needs and ensures that flexible multi-agency, person-centred responses to these needs are available for care leavers until their 26th birthday.
- **Rapid response to crisis homelessness:** A 'no wrong door' approach should be taken in responding to care leavers experiencing homelessness, ensuring care leavers in most acute need are responded to timeously, holistically and appropriately. No care leaver under the age of 26 years to whom corporate parenting duties apply should be regarded as homeless – and if they do report as homeless, they should be referred to the corporate parent for appropriate accommodation and care.

31.16 In this context, then, the property needs of care leavers should be considered in conjunction with the need to meet their holistic support needs. Possible housing options that would support a gradual transition to independence might include:

- Properties in the vicinity of a previous care setting, ensuring continuity of care;
- Housing First for Youth, providing intensive specialist support in a property in the community;
- Starter Flats, offering a good quality, decorated property with support provided initially as temporary with the intention that this would become permanent;
- Shared accommodation integrating support and education for young people.

Suitable for

31.17 The main client groups being discussed in this section are people who are experiencing homelessness or housing need. While the profile of homeless households is not uniform, a large proportion of households applying for assistance under homelessness legislation in South Ayrshire are single people and is generally skewed towards younger households.

31.18 Specialist, non-permanent accommodation should also be available to support young people leaving care in transitioning from care to independent living and crucially avoiding the need for care leavers to make a homeless application for their housing needs to be met.

31.19 In addition, it is important to ensure sufficient supply of non-permanent accommodation is available for women or lone parents fleeing domestic abuse as well as students, economic migrants and asylum seekers or refugees.

Evidence

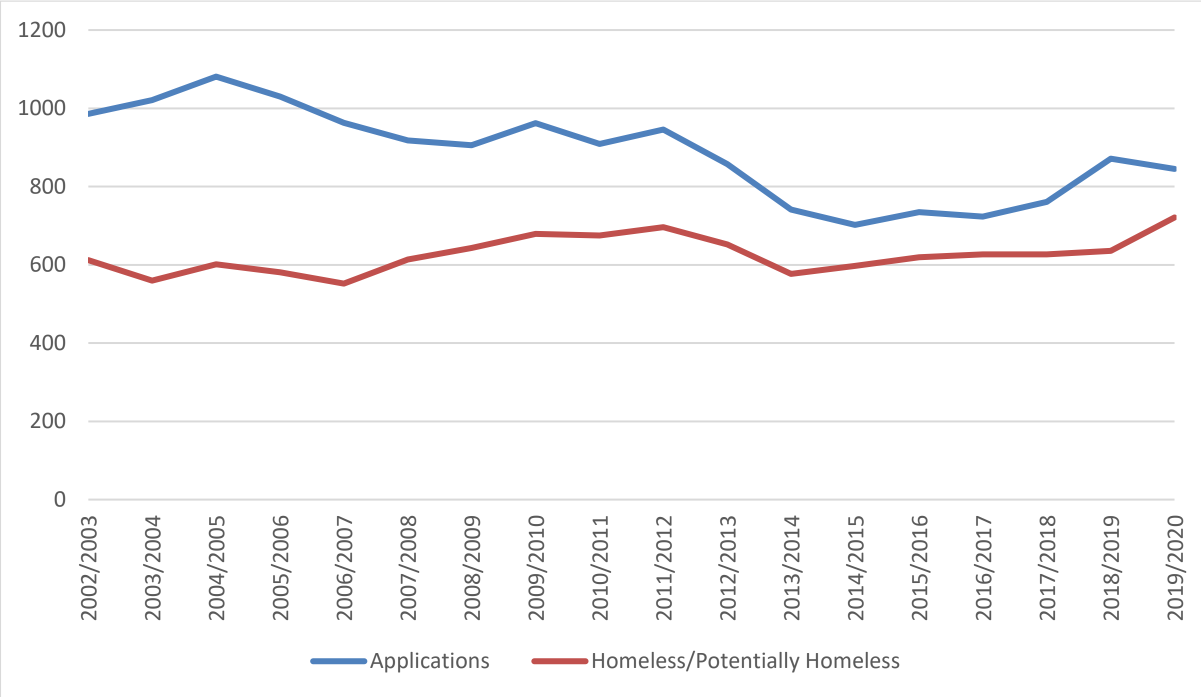
Current type of needs and level of needs and provision

Temporary accommodation for homeless households

31.20 In 2019/20, South Ayrshire Council saw a slight decrease in the number of applications for assistance under homelessness legislation on the previous year. During this year, 845 applications for assistance were received, a reduction of about 3% on the previous year's total of 871. Nevertheless, it is important to recognise that this remains a very high number of applications and is in the context of a general upward trend since 2012/13. Last year's recent high of 871 represented the largest year-on-year increase in recent years but did not exceed the general level of applications before 2012/13, or the peaks in applications seen in 2004/05 (1,081), 2009/10 (962) and 2011/12 (946).

31.21 While the total number of applications decreased in 2019/20, the total number of people being assessed as homeless/potentially homeless increased, narrowing the gap between applications and acceptances. Around 83% of all households assessed were found to be homeless/potentially homeless, an increase on 2018/19 (78%) and 2017/18 (79%), but back at levels seen in 2016/17 (89%).

Figure 45 – Applications and homeless/potentially homeless assessments in South Ayrshire, 2002-03 to 2019/20[292]



31.22 Most households applying as homeless are single people. Of the 845 applications received during 2019/20, 635 of these applications were from single people – representing more than three-quarters of all applications. Single parents were the next most represented group, accounting for about 17% of applications.

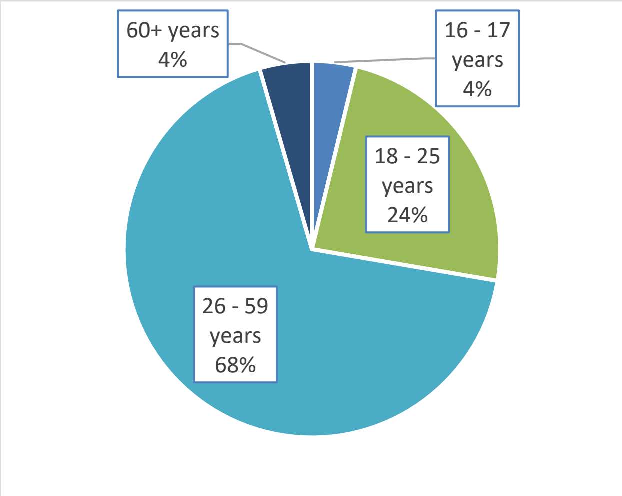
Table 94 – Homeless applications by household type, South Ayrshire, 2015/16 to 2019/20[293]

	2015/16	2016/17	2017/18	2018/19	2019/20
Single person	507	496	564	632	635
Single parent	152	160	132	159	144
Couple	44	26	29	44	33
Couple with children	29	38	32	35	33
Other	2	2	2	1	0
Other with children	1	1	2	0	0

31.23 In terms of age, younger applicants are over-represented in homeless applications, with under 25s typically accounting for about 30% of all applicants.

[292] Scottish Government *Annual Report for South Ayrshire (HL1), 2019/20*
[293] Scottish Government *Annual Report for South Ayrshire (HL1), 2019/20*

Figure 46 – Homeless applications in South Ayrshire by age, 2019/20[294]



31.24 In terms of the need for temporary accommodation, there remains a substantial number of households who require accommodation in any given year. There were 237 households in temporary accommodation as at 31 March 2020, an increase of 5% on the previous year's figure (225 households at 31 March 2019), and in line with a general upward trend, shown in Table 95 below. By the end of April 2020, however, this had increased to 257 households (an 8% increase on the preceding month) and to 263 households by mid-May (an 11% increase from the end of March) as a result of the need to respond to the coronavirus pandemic.

Table 95 – South Ayrshire Homeless households in Temporary Accommodation by type of accommodation (HL3) as at 31 March[295]

	2016	2017	2018	2019	2020
LA furnished	51	63	78	88	103
Housing association	12	7	9	10	11
Hostel: LA	48	44	45	46	46
Hostel: Other	12	10	11	10	10
Bed & Breakfast	0	0	0	0	0
Womens refuge	7	3	2	6	2
Other (PSL)	61	63	71	65	65
TOTAL	**191**	**190**	**216**	**225**	**237**

31.25 Table 4.b also demonstrates the type of stock utilised as temporary accommodation in South Ayrshire. This primarily comprises Council-owned stock, with other properties secured through Private Sector Leasing (or PSL – an arrangement where properties are leased from private owners for a period of between 3 and 5 years) and a small number of RSL-owned stock.

31.26 The remaining temporary housing offered is classified as Hostel type accommodation but the exact nature of this varies between different buildings and providers.

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[294] Scottish Government *Annual Report for South Ayrshire (HL1), 2019/20*
[295] Scottish Government *Annual Report for South Ayrshire, 2019/20 (HL3)*

31.27 South Ayrshire Council owns three buildings of hostel-type accommodation – namely Viewfield Gate and Elba Gardens in Ayr, and Secession House in Troon. These buildings provide 50 units of temporary accommodation.

31.28 The support provided to users in these properties tends to be more intensive and is provided on-site. As noted previously, three Council-owned hostels provide accommodation with support to people who are experiencing homelessness. Viewfield Gate provides 24 hour support with waking night shift, while Elba Gardens and Secession House have staff support on site until 2am, which starts again at 8am. The stated aim of the hostel is to "support people within the hostel and provide them with the necessary skills to sustain permanent accommodation in the community", and this service is considered to be 'very good' by the Care Inspectorate[296].

31.29 In addition, an RSL-operated hostel provides accommodation with support to people assessed as homeless, and who typically have complex needs. The service aims to "provide high quality accommodation which is secure, safe, comfortable" and "to maximise the opportunities for the service user to develop, both in terms of acquiring/consolidating skills abilities and to building self-esteem". This service is also considered to be 'very good' by the Care Inspectorate[297].

31.30 By developing a flexible temporary accommodation stock profile, South Ayrshire Council has ended the need to rely on unsuitable accommodation like Bed and Breakfasts and Hotels.

31.31 In-keeping with the Council's support for the national Rapid Rehousing approach to homelessness, reducing the total number of temporary accommodation units, limiting the time individuals spend in temporary accommodation, as well as changing the character of temporary accommodation locally remain high priorities, but the current backlog will make this more challenging.

31.32 Table 4.c provides detail on the number of placements during the reporting year. As can be seen below, there remains a significant need for temporary accommodation to support people experiencing or threatened with homelessness, and most services see considerable stock turnover in a year.

[296] Care Inspectorate *Viewfield Gate Housing Support Service Inspection Report, 27 January 2017*

[297] Care Inspectorate (2017) *Chalmers Court Housing Support Service Inspection Report, 5 May 2017*

Table 96 – Number of temporary accommodation placements in South Ayrshire by type, 2016/17 to 2019/20[298]

	2016/2017	2017/2018	2018/2019	2019/2020
Ordinary Local Authority dwelling	212	234	320	316
RSL dwelling	27	23	19	17
Local Authority owned hostel	250	224	314	367
RSL owned hostel	49	44	45	40
Other hostel	12	0	0	0
B&B	0	0	0	0
Women's Refuge	15	19	18	12
Private Sector Lease	288	283	262	222
Other	0	0	16	0
Total	**853**	**827**	**994**	**974**

31.33 In addition, we are taking longer to close cases, increasing from around 18 weeks in 2018/19 to around 22 weeks in 2019/20. This means that people are spending longer in temporary accommodation and is partly the result of an increasing need for assistance under homelessness legislation but also partly due to an active decision to improve the choice offered to homeless households. This decision was taken with a view to reducing repeat homelessness, refusals and supporting tenancy sustainment by ensuring offers of housing are person-centred.

31.34 South Ayrshire Council's RRTP set as a target a maximum period in all temporary accommodation placements to 26 weeks in Year 1 of the RRTP. As can be seen in the table below, about 16% of households spent longer than 6 months in temporary accommodation. This can be partly explained by our efforts to ensure lets are sustainable and anticipate that this will remain high for 2020/21 given the backlog in relets caused by the Coronavirus pandemic.

Table 97 - Closed HL1 cases in South Ayrshire by total duration in temporary accommodation, 2017/18 to 2019/20[299]

	2017/18		2018/19		2019/20	
	No.	%	No.	%	No.	%
Up to 1 month	107	17.7%	119	18.0%	122	18.9%
1 to 2 months	85	14.1%	106	16.0%	107	16.6%
2 to 3 months	111	18.4%	111	16.8%	128	19.8%
3 to 6 months	194	32.2%	216	32.6%	187	28.9%
6 months to 1 year	93	15.4%	85	12.8%	77	11.9%
1 year or over	13	2.2%	25	3.8%	25	3.9%
TOTAL	603	100%	662	100%	646	100%

Young people leaving care

[298] Scottish Government *Annual Report for South Ayrshire (HL3), 2019/20*
[299] Scottish Government *Quarterly Report for South Ayrshire- data to 31 March 2020*

31.35 Between 1 August 2019 and 31 July 2020, 29 young people over the age of 16 left care in South Ayrshire[300].

31.36 As can be seen in Table 98 below, over the last five years South Ayrshire has seen an average of 33 young people leaving care each year.

Table 98 – Care leavers over 16 years old, South Ayrshire, 2015/16 to 2019/20[301]

	2015/16	2016/17	2017/18	2018/19	2019/20	Average
Care leavers	28	46	24	39	29	33

31.37 While the needs of many care leavers can be met by the provision of good quality accommodation with minimal support, other young people have more significant support needs, requiring a greater degree of support in their transition to interdependence.

31.38 Various non-permanent accommodation options are provided in South Ayrshire for young people with experience of care in addition to the priority awarded to this group in accessing permanent accommodation. Non-permanent accommodation options are focussed on supporting graduated transition, and these responses are guided by partnership working between housing services, Children and Families and other partners, primarily through the authority's Youth Housing Support Group (YHSG).

31.39 The YHSG works with a revolving caseload of around 50 young people[302] at any given time, the majority of whom are care experienced. This group involves fortnightly meetings between housing, social work and other relevant partners to provide a cooperative approach to meeting the housing and support needs of South Ayrshire's most vulnerable young people.

31.40 At present, 8 supported accommodation placements are commissioned by South Ayrshire HSCP. This contract has recently been re-designed and its remit expanded to include person-centred outreach Housing Support services to young people aged 16-25, and is being co-commissioned by the HSCP and Housing Service.

31.41 Referrals to this service are currently made through the multi-disciplinary YHSG, where decisions are made about the housing and support needs of young people who are close to the homeless system.

31.42 Most of the young people supported by this service are known to social work and many will have experience of having been looked after or accommodated.

31.43 From 1 April 2014 to 31 March 2019, 47 care leavers entered supported accommodation. The age of young people entering this accommodation-based model is low as 43% of young people were 16 and 34% were 17 years old. The average length of time that young people spend in supported accommodation is 29 weeks. Of the 47 young people, 15

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[300] Scottish Government *Children's Social Work Statistics, 2019/20* - Table 3.4: Percentage of care leavers over 16 years old with a pathway plan and a pathway co-ordinator, by local authority, 2019-20. https://www.gov.scot/publications/childrens-social-work-statistics-2019-20/pages/9/

[301] Scottish Government *Children's Social Work Statistics, 2015/16 to 2019/20* - Table 3.4: Percentage of care leavers over 16 years old with a pathway plan and a pathway co-ordinator, by local authority.

[302] As per Youth Housing Support Group monitoring tool, 2020/21

moved to homeless accommodation, 7 moved onto mainstream housing and 6 of those are successfully sustaining their tenancy[303].

31.44 South Ayrshire Council also offers 'Starter Flats' to young people with experience of care, as a means of supporting young people in their first tenancy. The Starter Flat project provides young people with mainstream accommodation in the community coupled with specialist life-skills support designed to meet the needs of this group. Again, referrals are made via the collaborative Youth Housing Support Group. This accommodation is offered initially as a Short SST, with the intention that this will be made permanent if the young person settles in the tenancy.

31.45 In addition, our Children's House in Coylton currently provides 1 self-contained flat within the existing accommodation to support young people in learning life skills. This flat is included within the Children's House registration, and it is hoped that another such flat can be provided near the Children's House in Ayr in the future.

31.46 Opportunities to develop 3-4 'satellite flats' within the vicinity of Children's Houses are also currently being explored following approval at Leadership Panel.

Women fleeing violence

31.47 There were 112 incidents of domestic abuse recorded by the police in Scotland per 10,000 population in 2018-19[304]. At a local authority level, South Ayrshire recorded a rate of 95 per 10,000 population[305].

31.48 In 2018-19, 88% of all domestic abuse incidents occurred in a home or dwelling. As such, there is a clear link between domestic abuse and acute housing need.

31.49 A relatively high proportion of households applying as homeless cite domestic abuse as the technical reason for homelessness on their application. As can be seen in Table 99 below, 133 applications were made for the reason of fleeing domestic abuse.

Table 99 - Homeless applications citing domestic abuse as technical reason for homelessness, South Ayrshire, 2015/16 to 2019/20[306]

	2015/2016	2016/2017	2017/2018	2018/2019	2019/2020
Dispute within household: violent or abusive	88	80	134	117	133

31.50 South Ayrshire Women's Aid (SAWA) is the primary resource for women and children fleeing domestic abuse in South Ayrshire, offering emotional and practical support to people fleeing abuse.

[303] South Ayrshire Health and Social Care Partnership *Improving Outcomes for Young People Leaving Care 2019-2024.*
[304] Scottish Government, Domestic Abuse recorded by the police in Scotland, 2018-19
[305] Scottish Government, Domestic Abuse Statistics, Table 5: Rate of incidents of domestic abuse recorded by the police per 10,000 population3, by local authority, 2009-10 to 2018-19

[306] Scottish Government *Annual Report for South Ayrshire (HL1), 2019/20*

31.51 SAWA currently have the capacity to offer 8 accommodation placements within The Willows Refuge for women and children fleeing domestic abuse and assist woman to access their housing needs via the local authority, local RSL's or the PRS.
31.52 SAWA offer woman and children crisis support and on-going support to women survivors of Domestic Abuse, support is provide to assist with identifying options and choices, providing information about legal, financial, housing and benefit rights and entitlements, and makes referrals for additional home security, such as locks, security alarms, etc.
31.53 In terms of permanent accommodation, people fleeing domestic abuse receive a priority in accessing social housing as part of the local authority and RSLs' allocations policies.

People fleeing conflict

31.54 South Ayrshire Council has over the last ten years provided permanent accommodation to people fleeing conflict from within its existing housing stock. The Council has settled a total of 21 households through the Afghan Relocation Scheme and to date, 8 out of the 21 remain in South Ayrshire. The other 13 households have left for either family or employment reasons.
31.55 On 8th October 2015, South Ayrshire Council gave a commitment to support in principle, the Syrian Vulnerable Persons Relocation (VPR) Scheme. At the closure of the Syrian Vulnerable Persons Scheme at the end of December 2019 the Council had assisted a total of 41 individuals to resettle in South Ayrshire. The Housing Service continues to play an instrumental role in linking in with all key services and agencies involved to ensure a consistent and continuous approach to service provision for these individuals as well as ensuring that all children/toddlers are fully integrated into our education system. The service is also instrumental in ensuring that the adults are able to live independently and have the opportunity to integrate into South Ayrshire life.
31.56 Housing Support has been put in place, and continues to be in place, to help these individuals across a variety of areas, including skills projects to improve access to employment, namely voluntary work placements in a number of Council services, and efforts to ensure cultural and religious needs of this group can be met.
31.57 The Council also recently recruited a Liaison Officer to support minority groups in South Ayrshire, with a remit to ensure that the housing and support needs of specifc communities are met.

Gaps or shortfalls in needs and provision

Temporary accommodation for homeless households

31.58 In common with other local authority areas, further work is required for us to move towards a model of temporary accommodation usage more in line with the Scottish Government's Rapid Rehousing agenda. While South Ayrshire has a better offer in terms of temporary accommodation than many other authorities, duration of stay is still longer than we would like.
31.59 In order to address this, steps need to be taken to promote greater homelessness prevention activity. This includes working together to improve partnership working and developing homelessness prevention pathways, particularly for groups at greater risk of

homelessness, including young people leaving care, people leaving institutions like hospitals and prisons, and people fleeing domestic abuse.

31.60 South Ayrshire Council's Rapid Rehousing Transition Plan 2019-2024 also identifies several actions directly related to minimising stays in temporary accommodation and supporting sustainable rehousing. These include 'flipping' properties where households are settled, reviewing the long-term role of temporary accommodation models and looking at providing more intensive support in the community, including Housing First.

31.61 The RRTP also estimates that for around 1% of homeless households – around 7-8 households per year – independent living within the community is not possible. These needs are currently generally met within existing temporary accommodation provision – particularly our hostels where round-the-clock support is available.

Young people leaving care

31.62 As noted above, on average, 33 young people over the age of 16 per year left care over the five years to 2020[307].

31.63 While the housing needs of young people leaving care will usually be planned out in advance with the young person, and most needs met by accessing appropriate accommodation, our Housing Options team still receives a number of applications each year from people with care experience – that is, people who have advised they have previously been looked after. The HL1 only collects limited data on this, but the information presented in Table 100 below shows that people with care experience are still over-represented in homelessness statistics.

Table 100 – Homeless applicants with care experience, responding to the question "Whether any adult member of the applicant household aged under 25 was looked after as a child by their local authority, South Ayrshire, 2015-16 to 2019/20"[308]

	2015/2016	2016/2017	2017/2018	2018/2019	2019/2020
Less than 5 years ago	17	20	35	25	25
5 or more years ago	32	22	17	23	14
Total	49	42	52	48	39

31.64 While 8 units are currently provided as accommodation with support primarily to meet the needs of this group, the Council has recognised a need for further housing options to meet the needs of this group.

31.65 This includes additional options to provide housing with support for young people on a short- and longer-term basis, both in specialist accommodation and in the community.

[307] Scottish Government *Children's Social Work Statistics, 2015/16 to 2019/20* - Table 3.4: Percentage of care leavers over 16 years old with a pathway plan and a pathway co-ordinator, by local authority.

[308] Scottish Government *Annual Report for South Ayrshire (HL1), 2019/20*

31.66 HSCP partners estimate that an additional 12 units of accommodation with support would be required to meet the anticipated short-term needs of young people leaving care, informed by the data presented above[309].

Future type and level of needs & provision required

Temporary accommodation for homeless households

31.67 It is difficult to predict future trends in homelessness, however our approach over the years has been to ensure a flexible supply of temporary accommodation is available to meet needs. This approach has broadly allowed us to avoid relying on emergency accommodation types like Bed and Breakfast, instead utilising our own stock as well as long-term, sustainable solutions like Private Sector Leasing.

31.68 Requests for assistance under homelessness legislation have seen an upward trajectory in recent years, and as such temporary accommodation will need to continue to keep pace with these changes. As at 31 March 2020, 232 households were in temporary accommodation. It is anticipated that this will continue to increase in 2021 given the challenges in re-letting properties brought about by the Coronavirus pandemic. As such, at least 232 units of temporary accommodation will be required going forward.

31.69 Over the coming years we will continue to implement the actions set out in our Rapid Rehousing Transition Plan with a view to preventing homelessness and reducing reliance on temporary accommodation. This will also include a review of the nature of temporary accommodation to ensure this continues to offer the best possible outcomes for people experiencing homelessness.

31.70 In addition to meeting the immediate emergency needs of homeless households, South Ayrshire Council has recognised a need to deliver accommodation and support options to meet people's longer-term needs.

31.71 Our RRTP sets out an intention to continue to expand our Housing First project to provide accommodation and support to up to 50 people with experience of repeat homelessness and multiple complex needs, while our Social Lettings Service will aim to support 80 low income and homeless households to access accommodation in the Private Rented Sector[310]. Prevention pathways and joint working will also be a greater priority, particularly in the context of the recent publication of findings from the Prevention Review Group and its emphasis on a broad prevention duty for public bodies and our partners[311].

31.72 For the 1% of homeless households where independent living in the community is not possible, the Council should continue to work with the Health and Social Care Partnership to meet these needs. This amounts to between 7 and 8 households per year, but this figure may vary if repeat homelessness amongst this group is effectively prevented.

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[309] Discussion as part of Improving Housing Outcomes for Young Care Leavers group, December 2020 – informed by the report South Ayrshire Health and Social Care Partnership *Improving Outcomes for Young People Leaving Care 2019-2024.*

[310] South Ayrshire Council *Rapid Rehousing Transition Plan 2019-2024* and *Rapid Rehousing Transition Plan 2019-2024 Year 1 update*

[311] https://www.crisis.org.uk/ending-homelessness/scotland-prevention-review-group/

31.73 Alongside our actions and targets set out in the RRTP, we will set out actions within the Local Housing Strategy to consider the future accommodation requirements to meet the needs of this client group.

Young people leaving care

31.74 While it is very difficult to accurately say how many young people will leave care over the age of 16 in the future, we believe the average level of need – around 30-35 young people per year - is likely to be sustained in the years to come[312].

31.75 It is estimated that an additional 12 units of accommodation with support would be required to meet the anticipated short-term needs of young people leaving care[313], while other needs can be met through mainstream housing with appropriate support.

31.76 We are also keen to ensure we can effectively prevent homelessness for young people leaving care, as well as those with care experience as much as possible. The Council and HSCP have worked together to co-commission a Housing Support contract for young people aged 16-25 that will provide both accommodation-based support (primarily aimed at young people with experience of care) and outreach support for young people across South Ayrshire.

31.77 Engagement with young people with experience of care has indicated a need to provide more permanent and non-permanent housing options that support graduated transition towards independence. Examples cited in discussions have included:

- 'Satellite flats' within close proximity of existing Children's Houses (or connected to them) offering continuity of support provision
- Foyer shared accommodation models, providing housing, support and help developing life skills
- Temporary accommodation developed specifically for this client group informed by the principles of psychologically informed environments
- Shared housing with support on site
- A Housing First for Youth project offering accommodation in the community with intensive support.

31.78 The Council and HSCP will continue to work together through the Improving Housing Outcomes for Young Care Leavers group to identify suitable accommodation and support options to meet the various needs of this population, while continuing to focus on effective homelessness prevention.

People fleeing conflict

31.79 In September 2020, the Council made a further commitment to support the decongestion of the Aegean Refugee Camps. It is anticipated that, if this is approved by the Westminster Government, the Council will accommodate approximately a similar number to

[312] Scottish Government *Children's Social Work Statistics, 2015/16 to 2019/20* - Table 3.4: Percentage of care leavers over 16 years old with a pathway plan and a pathway co-ordinator, by local authority.

[313] Discussion as part of Improving Housing Outcomes for Young Care Leavers group, December 2020 – informed by the report South Ayrshire Health and Social Care Partnership *Improving Outcomes for Young People Leaving Care 2019-2024.*

the Syrian Vulnerable Persons Scheme - 42 individuals. This need will be met from within the existing housing stock.

32. Supported housing provision

National policies

32.1 Regarding care homes, sheltered housing and housing with support, the most relevant national policies, research and strategies are as follows:

- *All our Futures: Planning for a Scotland with an Ageing Population*
- *Scotland's National Dementia Strategy 2017-2020*
- *The Same as You? A review of services for people with learning disabilities*
- *Mental Health Strategy for Scotland 2017-2027*
- *Age, Home and Community: the next phase*

32.2 For long-term supported accommodation models for people with experience of repeat homelessness and complex needs, the strategic direction set out in the Scottish Government's 2018 guidance document 'Rapid Rehousing Transition Plans: Guidance for Local Authorities and Partners' is key.

Local policies

32.3 Again the most relevant local strategies in relation to this topic are:

- SAC Local Housing Strategy 2017-2022
- South Ayrshire HSCP Integrated Joint Board Strategic Plan 2021-2031

32.4 In addition, in relation to the provision of accommodation and support to meet the needs of people experiencing or threatened with homelessness or those fleeing abuse, South Ayrshire Council's Rapid Rehousing Transition Plan 2019-2024 is the most relevant local document.

Property needs

Care homes

32.5 Care home provision in South Ayrshire is delivered by private sector providers, voluntary organisations and the local authority. Provision meets a range of needs and care home residents are either Long Stay, Short Stay, or Respite.

- Long Stay Residents: Residents whose intention when admitted to an adult care home was to stay for more than six weeks, regardless of how long they actually stay.
- Respite residents: Residents who stay in an adult care home to provide respite or holiday relief to them and/or their carer. A period of respite is normally one night or one weekend or a few weeks at most.
- Short Stay residents: Residents whose intention when admitted to an adult care home was to stay for fewer than six weeks, and the reason for the short stay is not respite

relief. If a resident stays longer than 6 weeks they are counted as a long stay resident instead.

32.6 Care homes deliver personalised care to meet residents' various needs and deliver activities for residents to help prevent social isolation.

Sheltered housing

32.7 For some older households, sheltered housing will be the most appropriate option. There are significant differences in design and services provided between sheltered houses and the Council's other mainstream properties.

32.8 On most developments, individual properties have been equipped with amenities which are specifically designed to meet the needs of elderly residents. These features normally include:

- A 2-way speech intercom system linked to the warden.
- Pull cords in each room to summon the warden in the event of an emergency.
- Electrical sockets fitted within easy reach.
- Non-slip flooring and grab rails next to the bath and WC.
- Community Alarm System, which residents can use to alert staff at the Council's 24 hr monitoring station if they need help.

32.9 There are also a number of communal facilities such as a laundry, a residents' lounge and kitchen, an office for the warden and a bedsit for tenants' visitors on some of the newer developments.

32.10 In terms of support, our sheltered housing complexes offer a good quality service through Sheltered Housing Wardens and the Community Alarm systems which give people security and peace of mind within their own home environment.

32.11 The wardens operate an "active aging" programme within units in order to support service users' need to maintain a stimulating and fulfilling lifestyle, while supporting their all-round health and well-being.

Housing with Care

32.12 Housing with care options are also available in South Ayrshire to meet the needs of people with disabilities. These properties are developed or adapted to meet the particular needs of the intended client group, with in-house support and/or care provided as part of this package.

Long-term supported accommodation models

32.13 The Scottish Government's Rapid Rehousing Transition Plan guidance recognises that for some homeless households with multiple needs beyond housing (for example, addiction or mental health issues), more support is required in order to support independent living and ensure a tenancy can be sustained in the long-term.

32.14 For some households this will mean Housing First, a targeted approach to responding to repeat homelessness by providing accommodation in the community with intensive support based on an individual's needs and preferences. Rapid Rehousing guidance describes Housing First as the 'first response for people with complex needs and facing multiple disadvantages'[314].

32.15 The key principles of Housing First are ensuring that households receive:

- Prompt access to accommodation without 'housing readiness' test being applied
- Choice and self-determination in accommodation and support
- Intensive, person-centred support that links in with other providers
- A focus on recovery and harm reduction
- Social inclusion and integration

32.16 For a small number of others, a longer-term supported accommodation model is advocated. This is described by the Guidance as 'highly specialist provision within small, shared, supported and trauma informed environments if mainstream housing, including Housing First, is not possible or preferable'[315].

Suitable for

32.17 There are a range of different types of supported housing models available, but those being discussed here variously meet the needs of the following groups:

- older people
- people with a physical disability
- people with a mental health condition
- people with a learning disability
- people with other long-term limiting health conditions which might be affected or exacerbated by their living conditions
- people experiencing homelessness, particularly those with complex needs
- people with addiction issues
- people fleeing domestic abuse

[314] Scottish Government *Rapid Rehousing Transition Plans: Guidance for local authorities and partners*.
[315] Scottish Government *Rapid Rehousing Transition Plans: Guidance for local authorities and partners*.

Evidence

Current type of needs and level of needs and provision

Care homes

32.18 Care homes in South Ayrshire are provided by private sector providers, voluntary organisations and the local authority, and access is secured by social work referral.

32.19 The most recent Care Home Census for Adults in Scotland was published in 2018[316]. The census provides an overview of public and private care homes across Scotland, and tracks trends over a ten-year period. Data is provided at both a national and local level, with information provided for all adult care homes and for care homes specifically for older people.

32.20 Looking first at the data on all adult care homes, there can be seen to be a Scotland-wide trend towards a reducing number of care homes overall. In 2017, there were 20% less care homes in Scotland than in 2007.

32.21 This has been accompanied by a reduction of 4% less care home places in 2017 compared to 2007. This less pronounced reduction in the number of places over the number of care homes suggests that smaller homes have closed, and that larger homes have become more predominant.

32.22 A similar trend can be seen for care homes in South Ayrshire, as demonstrated in Table 5.a below. The total number of care homes has reduced slightly in South Ayrshire in the last ten years, from 32 care homes in 2007 to 30 care homes in 2017. During the same period, the number of care home places in South Ayrshire has increased, from 980 in 2007 to 1,197 places in 2017.

32.23 South Ayrshire differs from Scotland as a whole in that the general national trend has been for fewer adults to reside in care homes, with a reduction of about 5% in the ten years to 2017. In South Ayrshire, this same period saw a general upward trend – an 11% increase from 948 residents in 2007 to 1,056 residents in 2017.

32.24 In South Ayrshire, the majority of these remain long-stay residents with the number of short stay and respite residents staying static and making up less of the overall proportion of residents in 2017 (3.2% compared to 3.6% in 2007). By contrast, the proportion of residents who are short stay or respite residents for Scotland as a whole has increased significantly, from 3.2% in 2007 to 5.2% in 2017.

32.25 In terms of overall occupancy rates, this has reduced as capacity has increased, with 97% of places filled on 31 March 2007 and only 85% of places filled in 2016. The last year for which records are available has seen a narrowing in this gap between the number of places and the number of residents, however, increasing to 88% capacity in 2017.

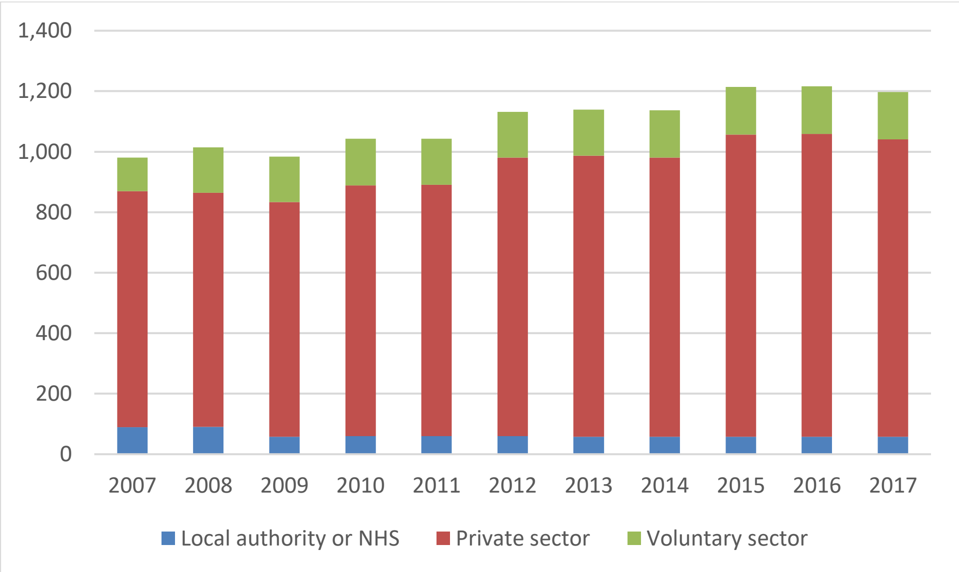
[316] NHS Information Services Division (2018) *Care Home Census for Adults in Scotland, 2007-2017* https://www.isdscotland.org/Health-Topics/Health-and-Social-Community-Care/Publications/2018-09-11/2018-09-11-CHCensus-Report.pdf

Table 101 – Number of Care Homes for Adults, Registered Places, Residents and Percentage Occupancy in South Ayrshire, as at 31 March 2007, 2016 and 2017[317]

	2007	2016	2017	% change 2007 to 2017	% change 2016 to 2017
Total Number of Care Homes for Adults	32	31	30	*-6*	*-3*
Total Number of Registered Places	980	1,216	1,197	*22*	*-2*
Total Number of Residents	948	1,037	1,056	*11*	*2*
Total Number of Long Stay Residents	914	1,009	1,022	*12*	*1*
Total Number of Short Stay and Respite Residents	34	28	34	*0*	*21*
Percentage Occupancy	97	85	88	*-9*	*3*

32.26 While the total number of registered places in South Ayrshire has seen an upward trajectory, the last ten years have also seen a further shift away from public sector provision, towards a greater degree of provision by private and voluntary sector providers, as can be seen in Figure 47.

Figure 47 – Number of Registered Care Home Places for Adults by sector in South Ayrshire, 2007-2017[318]



32.27 This overall increasing trend can be seen to have levelled off in the last few years, as reducing occupancy rates have also seen some levelling.

32.28 As can be seen in Table 102 below, capacity in local authority owned care homes has reduced by 35% since 2007, while this has increased by 26% in the private sector and by 42% in the voluntary sector.

[317] NHS Information Services Division (2018) *Care Home Census for Adults in Scotland, 2007-2017 Data Tables* https://www.isdscotland.org/Health-Topics/Health-and-Social-Community-Care/Publications/2018-09-11/2018-09-11-CHCensus-Report.pdf

[318] NHS Information Services Division (2018) *Care Home Census for Adults in Scotland, 2007-2017 Data Tables* https://www.isdscotland.org/Health-Topics/Health-and-Social-Community-Care/Publications/2018-09-11/2018-09-11-CHCensus-Report.pdf

32.29 The number of residents accommodated in the private and voluntary sectors has likewise seen an upward trend during this period, increasing by 13% in the private sector and 40% in the voluntary sector, while seeing a 49% reduction in the public sector.

Table 102 - Number of Care Homes, Registered Places and Residents by sector in South Ayrshire, 2007, 2016 and 2017[319]

		2007	2016	2017	% change 2007 to 2017	% change 2016 to 2017
Number of Care Homes	Local authority or NHS	4	3	3	-25	0
	Private sector	21	21	20	-5	-5
	Voluntary sector	7	7	7	0	0
Number of Registered Places	Local authority or NHS	89	58	58	-35	0
	Private sector	781	1,001	983	26	-2
	Voluntary sector	110	157	156	42	-1
Number of Residents	Local authority or NHS	75	49	38	-49	-22
	Private sector	771	848	875	13	3
	Voluntary sector	102	140	143	40	2

32.30 This trend in South Ayrshire to some extent again runs counter to the national picture. Like South Ayrshire, the total number of care home places in Scotland has seen significant decline in public sector provision, reducing by 28% over the last ten years. Like in South Ayrshire, Private Sector provision of places has increased for Scotland as a whole, but to a lesser extent – an increase of only 7% compared to a 26% increase in South Ayrshire. Unlike South Ayrshire, care home places owned by voluntary sector providers have decreased significantly, reducing by 29% over the last ten years, compared to an expansion of 40% in South Ayrshire.

32.31 In terms of the intended client groups for care homes and care home places in South Ayrshire, as with Scotland as a whole, the vast majority of provision is in Older People care homes, and this picture has changed little over the years.

32.32 80% of care homes in South Ayrshire are classed as 'Older People' care homes, while 92% of care home places are considered to be for older people. 93% of residents are in 'Older People' care homes, while occupancy rates are slightly higher for this type of accommodation than for care home accommodation as a whole, suggesting greater demand from this client group.

32.33 Older people care homes have seen a trend in Scotland towards more short-term and respite stays, with 4% less long-stay residents in 2017 against 2007, while the number of short-stay residents increased by 96% during the same period. Nevertheless short-term and respite stays only account for a small proportion of residents, increasing from 2.3% of older people care residents in 2007 to 4.5% of older people care home residents in 2017.

32.34 In South Ayrshire, short-term and respite stays represented around 2.4% of older people care home residents in 2017, actually seeing a reduction during this period from 2.6% in 2007.

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[319] NHS Information Services Division (2018) *Care Home Census for Adults in Scotland, 2007-2017 Data Tables* https://www.isdscotland.org/Health-Topics/Health-and-Social-Community-Care/Publications/2018-09-11/2018-09-11-CHCensus-Report.pdf

32.35 The percentage of long stay residents living with dementia (either medically or non-medically diagnosed) in a care home for older people increased from 54% at 31 March 2007 to 62% at 31 March 2017.

32.36 In South Ayrshire, while the proportion of long-stay residents medically diagnosed with dementia has increased during the ten year period to March 2017, from 50 % to 55%, the overall proportion of residents with dementia (that is medically diagnosed and non-medically diagnosed dementia) has remained around 60% throughout this period, suggesting the proportion of households with dementia has stayed the same but medical diagnosis has become more common.

Sheltered housing

32.37 Sheltered Housing in South Ayrshire is provided by the local authority and a number of registered social landlords. As at 31 March 2019, there were 743 units of sheltered and very sheltered accommodation in South Ayrshire.

Table 103 – Self-contained units of sheltered housing accommodation in South Ayrshire, 2019[320]

	Sheltered	Very sheltered
South Ayrshire Council	539	0
Hanover (Scotland) Housing Association Ltd	109	0
Trust Housing Association Ltd	32	31
West of Scotland Housing Association Ltd	32	0
TOTAL	**712**	**31**

32.38 In terms of South Ayrshire's own stock, sheltered housing provision can be found throughout the local authority area, however the bulk of stock is held in Troon, Ayr and Prestwick, accounting for around 79% of all sheltered housing units.

32.39 Applications for sheltered housing in South Ayrshire are made to the relevant housing provider, while South Ayrshire Council has nomination agreements in place with local providers to support access to accommodation. For South Ayrshire Council-owned accommodation, applicants complete the standard Application for Housing as well as a supplementary questionnaire which asks about their personal needs and health. Priority is then awarded on the following basis:

- High priority: where rehousing to sheltered accommodation is essential
- Medium priority: where rehousing to sheltered accommodation would be of benefit
- Low priority: where rehousing to sheltered accommodation is aspirational, in that it would be neither essential nor of specific benefit

32.40 Where rehousing to sheltered accommodation is required urgently, for example because of a risk of being admitted to hospital or residential care, or because they are being

[320] Scottish Housing Regulator (2019) *All stock landlords dataset by provision type and local authority area, as at 31 March 2019*

discharged from this type of care, then they will be assessed in accordance with the Community Care Category policy of the Council's Special Categories for Rehousing[321].

32.41 Allocations to Council-owned sheltered housing are spread between Transfer applicants (75% of lets) and Non-Council applicants (25% of lets). In addition, in order to help create balanced communities within our sheltered housing complexes, allocations for each complex are spread between the three priority lists in the proportions of High (60%), Medium (30%) and Low (10%).

32.42 As demonstrated in Chapter 3 ('Housing Stock Profile, Pressures and Management') there are approximately 6 applicants to every let in sheltered housing.

32.43 Despite this, about 98 Sheltered Housing properties within South Ayrshire Council's stock have been classified as being in 'low demand', as at 31 March 2020. A further 10 properties are considered to have 'no demand', meaning that there is no-one currently on the waiting list for these properties. Overall, one-fifth of South Ayrshire's sheltered housing stock is classified as having zero or low demand. This is primarily due to many of these units being in first floor positions with no lift access, while some units are less popular than others.

32.44 This suggests something of a mismatch between need and demand with this type of accommodation.

32.45 Regarding RSL-owned sheltered housing complexes in South Ayrshire, the Council operates a nominations agreement with these other landlords, meaning that households can be nominated by the Council for vacancies that arise within this stock. The remaining vacancies are offered to applicants on the housing association's own lists, and as such households are encouraged to apply directly to local RSLs as well as completing the Council's application.

Housing with care

32.46 As can be seen in Table 103 above, Trust Housing operates 31 self-contained units of enhanced sheltered accommodation (classified as 'very sheltered' housing) at Old Street in Girvan. This accommodation operates the Housing with Care model and includes mobility and wheelchair standard accommodation. This complex offers a mix of one- and two-bedroom properties to meet a range of needs.

32.47 The Housing Service has in recent years increasingly worked with the HSCP to offer more specialist accommodation options for people with particular needs. One recent example includes the 'off-the-shelf' purchase and subsequent adaptation of 12 new-build properties in Girvan for people with learning disabilities (with the first tenancies commencing in 2019/20). These properties allowed for round-the-clock support to be provided on-site via a support flat and offered a more appropriate support option to be delivered to this client group than would have been possible in tenancies scattered throughout the community. In addition, this project also resulted in the purchase and repurposing of an existing building to provide 4 properties with support in Ayr for people with poor mental health who require intensive support (first tenancies commencing 2020/21).

[321] More information available at https://www.south-ayrshire.gov.uk/council-housing/special-categories.aspx

32.48 It is our intention to identify similar opportunities to accommodate people experiencing homelessness for whom a property in the community would not allow for their support needs to be met. This is an action within the Council's Rapid Rehousing Transition Plan.

Long-term Supported accommodation models

32.49 There is a recognition that for many homeless households, accommodation with floating support is not enough to help sustain a tenancy in the long-term.

32.50 Of the 845 applicants who applied for assistance under homelessness legislation during 2019/20, around 7.5% of applicants had previously been assessed as homeless within the preceding year (not requiring an identical household). This is less than in previous years (typically around 10%), but still amounts to 63 people[322].

32.51 In 2019/20, 871 support needs assessments were carried out. Of those homeless households assessed, it was found that:

- 357 applicants were found to have a mental health problem
- 113 required support with drug or alcohol dependency
- 129 had another medical condition
- 40 had a learning disability
- 65 required support with a physical disability
- 631 needed support with basic housing management and independent living skills

32.52 South Ayrshire also received applications from 133 households who reported having slept rough in the 3 months preceding an application, and 59 households who reported having slept rough the night before making an application. These figures have seen significant increase since 2016/17, rising from 34 households reporting sleeping rough in 2015/16 to 192 households in 2019/20.

[322] Scottish Government *Annual Report for South Ayrshire (HL1), 2019/20*

Table 104 – Households reporting sleeping rough prior to homeless application, South Ayrshire, 2015/16 to 2019/20[323]

	2015/16	2016/17	2017/18	2018/19	2019/20
Slept rough during the 3 months preceding application	28	36	74	112	133
Slept rough the night before the application	6	5	34	47	59
All households reporting sleeping rough before application	**34**	**41**	**108**	**159**	**192**

32.53 Recent national research[324] tried to identify severe and multiple disadvantage in local authority areas in Scotland. Severe and multiple disadvantage is a shorthand way of describing issues faced by adults involved in homelessness, substance misuse and criminal justice systems. This research estimated that, as at 2017/18, there were approximately 130 people experiencing severe and multiple disadvantage in South Ayrshire.

32.54 South Ayrshire Council's own analysis of support needs using 'Better Futures' assessment data collated by the Council and our partners indicated that around 15% of clients would benefit from 'High Wraparound Support' (i.e. Housing First), while a further 1% would benefit from 'residential support'[325].

32.55 In 2019/20, 721 households were assessed to be homeless. As such, by applying the proportions estimated in the RRTP to this figure, we can estimate that 108 homeless households (15%) would benefit from Housing First while approximately 7-8 households (1%) would benefit from residential supported accommodation[326].

Gaps or shortfalls in needs and provision

Sheltered housing

32.56 Data presented above shows that while there is relatively high demand for sheltered housing, there are also properties that are described as being more difficult-to-let, where there is 'no' or 'low' demand.

32.57 Given South Ayrshire's ageing population, it is important to ensure existing stock meets client demands

Future type and level of needs & provision required

32.58 As seen in Chapter 2, South Ayrshire's population is expected to reduce by around 2% over the next ten years. At the same time, the population profile is expected to change towards an older age demographic, with the largest increases expected in the over 75s age group.

[323] Scottish Government *Annual Report for South Ayrshire (HL1), 2019/20*

[324] Mandy Littlewood, Heriot-Watt University: *Developing a Profile of Severe and Multiple Disadvantage in Scotland - Working Paper: Homelessness Data Sources.* Quoted in Scottish Government *Rapid Rehousing: Guidance for Local Authorities and Partners.*

[325] South Ayrshire Council *Rapid Rehousing Transition Plan 2019-2024*

[326] Scottish Government *Annual Report for South Ayrshire 2019-20 – HL3*.

32.59 This population is expected to increase by 27% between 2018 and 2028. As such, planning across a wide range of partners must take place to ensure appropriate new models of provision in terms of care, housing and support are available to meet these changing needs.

Table 105 – South Ayrshire Population projection by age group, 2018 and 2028[327]

	2018		2028		% Change 2018 to 2028
Age groups	No.	%	**No.**	**%**	
0-14	16,545	15%	**14,952**	14%	-10%
15-29	17,136	15%	**15,772**	14%	-8%
30-44	17,177	15%	**17,213**	16%	0%
45-59	25,205	22%	**20,408**	18%	-19%
60-74	23,735	21%	**26,061**	24%	10%
75 & over	12,752	11%	**16,206**	15%	27%
All ages	112,550		**110,612**		-2%

Care homes

32.60 Previous HNDA's have used population projections to estimate the number of care home places required to meet the needs of South Ayrshire's ageing population. Table 5.f uses the most recent population data and population projection data to 2028 to calculate the number of care home places required to maintain the current level of provision.

Table 106 – Care home places required to maintain existing level of provision per 1,000 people aged 75 or over, South Ayrshire, 2018-2028[328]

	2018	2028
Over 75 population	12,752	16,206
Care Home Places per 1,000	95	95
Care Home Places	1,211	1,539

32.61 As at 2018, there were approximately 95 care home places per 1,000 people over the age of 75. For this level of provision to be maintained in the context of an increasing population in this age group and without significant service transformation, an additional 328 care home places would theoretically be required by 2028.

32.62 The Health and Social Care Partnership's LIST team took an alternative approach to reviewing this issue, and used figures of actual residence in Care Homes broken down by age and applied trends from NRS population projections to estimate what need for care home places will look like in 2029/30.

32.63 It is important to note that this data included households accommodated in 'outwith authority' placements – that is where South Ayrshire is paying for the person's needs to be met in a more appropriate setting in another local authority area.

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[327] NRS (2020) *Population projections for Scottish areas, South Ayrshire, 2018-based.* https://www.nrscotland.gov.uk/statistics-and-data/statistics/statistics-by-theme/population/population-projections/sub-national-population-projections/2018-based/summary-datasets

[328] Analysis using 2018-based population projections and data from 2018/19 Care Home census

Table 107 - Projections of long-term care home residents by age paid by South Ayrshire, 2018/19-2030/31[329]

	ALL	18-64	65-74	75-84	85+
2018/19	1,040	95	88	290	567
2019/20	1,054	76	98	323	557
2020/21	1,073	75	99	330	569
2021/22	1,105	75	98	349	584
2022/23	1,129	74	98	358	599
2023/24	1,148	73	99	369	607
2024/25	1,166	72	100	376	618
2025/26	1,180	72	102	383	623
2026/27	1,199	71	104	388	636
2027/28	1,221	70	105	393	652
2028/29	1,248	70	107	398	673
2029/30	1,269	69	109	402	689

32.64 Using this methodology, at least 1,248 spaces would be required by 2028/29. As care homes in South Ayrshire were not at capacity in 2018, this would mean an increase of 37 spaces from the 1,211 spaces recorded in the 2018 care home census.

32.65 Consideration should be given to whether increasing the volume of care home spaces is the most appropriate response in the broad national context (e.g. 'shifting the balance of care') set out in various recent policy documents[330], as well as evidence of reducing occupancy rates locally[331].

32.66 The Council and our partners should work together to set out appropriate strategies, separate to the LHS, to meet this need going forward, while supporting the principles of 'right advice, right home, right support'[332].

Sheltered housing

32.67 There can be seen from the data presented above to be a mismatch in demand for sheltered accommodation in some areas. There is a high demand for this type of accommodation – about 6 applicants for every let – but some sheltered housing accommodation has been classified as no or low demand.

32.68 The longer-term role of sheltered housing should be explored further with our partners during the development of the LHS to ensure current supply is continuing to meet the changing needs of our population.

Housing with care

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[329] Analysis using 2018/19 actual rates of care home residence, applied to NRS population projections. PHS care home census 2018/19, National Records of Scotland 2018-based population estimates and projections

[330] See for instance Scottish Government (2018) *Age, Home and Community – The Next Phase* https://www.gov.scot/publications/age-home-community-next-phase/pages/1/

[331] NHS Information Services Division (2018) *Care Home Census for Adults in Scotland, 2007-2017 Data Tables* https://www.isdscotland.org/Health-Topics/Health-and-Social-Community-Care/Publications/2018-09-11/2018-09-11-CHCensus-Report.pdf

[332] Scottish Government (2018) *Age, Home and Community – The Next Phase*

32.69 Several developments have been taken forward by the Housing service and our RSL partners in recent years to meet the specific identified needs of HSCP clients. We intend to continue to work in partnership through more regular meetings and joint planning sessions in order to identify similar opportunities to progress new build and buyback opportunities to meet specific housing and support needs in our community.

32.70 In addition to meeting these specific needs, we again need to plan for the future, thinking about different accommodation and support models. These considerations tie in with the response to the issue of social isolation amongst older people and people with disabilities. This is again something that requires partners to work together to respond as needs arise by providing solutions at a neighbourhood level, as bricks and mortar solutions will only go so far in meeting these needs. Housing with care will be considered as part of the development of the Local Housing Strategy.

Long-term supported accommodation

32.71 Given the identified need for longer-term accommodation for some households for whom a tenancy in the community is not the most appropriate or preferred option, the Council will work with HSCP partners to consider options to provide long-term supported accommodation models for the 7-8 homeless households per year who would benefit from this type of accommodation.

33. Care and Support needs for independent living at home

National policies

33.1 In addition to the overarching policies set out under previous templates, the following are also relevant:

- Scotland's National Dementia Strategy: 2017 – 2020
- Scotland's Mental Health Strategy: 2017 – 2027
- Scotland's Carers Strategic Policy Statement
- Scotland's National Performance Framework
- National Telehealth and Telecare Delivery Plan for Scotland
- Keys To Life – improving quality of life for people with learning disabilities
- Regulation of Care (Scotland) Act 2001 and Community Care and Health (Scotland) Act 2002
- Scottish Strategy for Autism

Local policies

33.2 Local policies relevant to care and support include:

- South Ayrshire Council Our People Our Place Council Plan 2018 - 2022
- South Ayrshire Council Strategic Housing Investment Plan 2020/20 – 2024/25
- SAC Local Housing Strategy 2017-2022

- South Ayrshire HSCP Integration Joint Board Strategic Plan 2021-2031
- South Ayrshire Health & Social Care Partnership: Adult Learning Disability Strategy 2017 – 2023
- Ayrshire & Arran Autism Strategy 2015 – 2025
- Current support contracts

Property needs

33.3 This section relates to those households and individuals who require some form of support which may be met partly on-site from, for example, a key worker or warden, with additional support from a community psychiatric nurse, or general nurse, social worker, physiotherapist, care assistant, or housing support officer among others.

33.4 There are a wide range of relevant care and support services available across South Ayrshire, to enable residents to live independently in their own, primarily mainstream, home. These are services generally unconnected with the forms of specialist housing outlined in previous templates. These services will include:

- Telecare and community alarms;
- Home helps and support workers;
- Carers;
- Social workers;
- Welfare Rights;
- Housing support services.

Suitable for

33.5 The supported provision in this section would be suitable mainly for older people; those with a physical disability, learning disabilities, or mental health issues; and people with other long-term limiting health conditions which might be affected or exacerbated by their living conditions.

33.6 These services are available for anyone living in their own home, across all tenures, requiring care and/or support to continue to live independently. This will include older persons including those with dementia; young adults and looked-after children leaving formal care; persons with mental health issues, those on the autistic spectrum, and people with learning disabilities; and families with other particular needs.

Evidence

Current type of needs and level of needs and provision

Housing support

33.7 As per the provisions of the Housing (Scotland) Act 2010, South Ayrshire Council offers an assessment of support needs where we believe the household would benefit from support[333]. We then enable the provision of this support to those assessed as needing it.

[333] As prescribed in the Housing Support Services (Homelessness) (Scotland) Regulations 2012

33.8 Provision of housing support includes in-house services such as our Housing First project, support in temporary accommodation and housing management support, as well as contracted out support services. These person-centred services include independent information and advice provision, life skills training and outreach support in people's homes.
33.9 To inform both our Rapid Rehousing Transition Plan and the future shape of contracted out services, analysis was carried out on a number of datasets to estimate the proportion of homeless households that would require different types of support[334].
33.10 This analysis showed that a high proportion (84%) of homeless households had low or medium support needs, while about 15% of households would benefit from Housing First, and a further 1% would benefit from supported residential accommodation.

Table 108 – Estimate of support needs for backlog of homeless households, 2018[335]

Support needs	Description	Estimated proportion of current homeless cases
No/low support needs	Those with no/low support requirement, who could easily move into mainstream settled housing with no need for specific support other than signposting and low-level housing management support provided by housing providers.	55%
Medium support needs	Those with medium support needs whether visiting housing support, or multi-professional wraparound support to enable independent living in mainstream housing	29%
SMD/Complex needs	Those with severe and multiple disadvantage or complex needs who would benefit from intensive wraparound support and a Housing First approach	15%
Residential support	Those where independent living within the community is not possible for whatever reason (safety, risk to self/others, choice) and for whom shared accommodation is the preferred housing option	1%

33.11 Following on from this research, a review of existing Housing Support arrangements was carried out in early 2020. This review found that there was a lot of good practice and innovative work already happening in South Ayrshire, and that providers were typically delivering pro-active and persistent approaches to Housing Support.

[334] See South Ayrshire Council *Rapid Rehousing Transition Plan, 2019-2024* for full calculation.
[335] South Ayrshire Council *Rapid Rehousing Transition Plan, 2019-2024*.

33.12 Nevertheless, the report highlighted a need for greater coordination of care between providers to support access, avoid overlap and to ensure that services complemented each other. Services should be person-centred, trauma-informed and should work towards more collaboration.

33.13 These themes were echoed at joint Housing and Health and Social Care consultation sessions for the HNDA in February and March of 2021.

33.14 Redesigned Housing Support Contracts informed by this review and with these principles at their core have since been completed, coming into effect from 1 September 2021.

Independent living at home

Telehealth and telecare

33.15 The national Telehealth and Telecare Delivery Plan aims to increase provision and improve access to Telecare solutions (an additional 300,000 people in Scotland by March 2016) to help address the challenges presented by the ageing population.

33.16 South Ayrshire Council continues to promote the benefits of these services in order to support independent living. There were a total 2,650 people receiving packages for telecare and/or community alarms in 2017; this being 1,010 with Community Alarm only and a further 1,640 receiving both Community Alarm and Telecare. This is an increase from 2,350 in 2016 and 2,000 in 2011.

Table 109 - Total no of Telecare/Community Alarm clients, South Ayrshire and Scotland, 2017[336]

	Community Alarm only	Telecare only	Both	Total
South Ayrshire	1,010	0	1,640	2,650
Scotland	88,270	4,710	35,770	128,750

Home care

33.17 Some people need help with day-to-day living. The main outcomes of this support for Older People are:

- prevention of: tenancy failure; hospital admissions; rent arrears/debt; social isolation; anti-social behaviour;
- access to: social activities; health services; accommodation; home improvement, repair & handyperson services; personal/community alarms;
- increased personal safety; social skills; confidence; and managing behaviour;
- maintaining independent living.

33.18 Support can be required by people in all kinds of situations, arising from:

[336] Scottish Government *Social Care Services Scotland, 2017* https://www2.gov.scot/Topics/Statistics/Browse/Health/Data/HomeCare/SocialCareDataSets2017

- Physical disability
- Age and fragility
- Dementia
- Mental illness
- Learning disabilities
- Progressive illnesses
- Children with special needs
- Family support

33.19 Home carers can help with the following:

- Personal Care (this may include laundry/shopping where appropriate)
- Health – (i.e. medication - some health areas such as dressings/peg feeding)
- Assistance to make food/cook/eat
- Social and emotional support
- Parenting/practical skills

33.20 As can be seen in Table 6.c below, there were 1,330 people aged 65+ receiving Home Care in South Ayrshire in 2017, an increase from 1,290 in 2016. This amounts to less than 6% of the 65+ age group[337].

33.21 This slight increase runs counter to both national and local trends that have shown an overall decrease in the number of care at home clients since 2012, with the Scottish figure continuing to decrease between 2016 and 2017.

Table 110 - Number of people aged 65+ receiving care at home & free personal care[338]

	2012	2013	2014	2015	2016	2017
No of people 65+ receiving Home Care in South Ayrshire.	1,630	1,640	1,460	1,350	1,290	1,330
No of people 65+ receiving Home Care in Scotland	51,120	50,360	50,440	50,160	48,920	48,810

People with learning disabilities

33.22 The Scottish Government defines people with learning disabilities as having a significant, lifelong condition that started before adulthood, which affected their development and which means they need help to understand information; learn skills and cope independently.

33.23 People with a learning disability, their families and carers have the right to be valued as individuals and lead fulfilling lives. They have the right to access and participate in their

[337] Analysis using *Social Care Services Scotland, 2017* and Census 2011 data.
[338] Scottish Government *Social Care Services Scotland, 2017* https://www2.gov.scot/Topics/Statistics/Browse/Health/Data/HomeCare/SocialCareDataSets2017

communities and benefit from a fair and inclusive society as well as contributing to the local economy.

33.24 South Ayrshire Health and Social Care Partnership have a vision that: "*All citizens of South Ayrshire who have learning disabilities live longer, healthier lives; are supported to participate fully in all aspects of society; prosper as individuals; and are valued contributors to a fair and equal South Ayrshire*."

33.25 Providing effective supports for people with learning disabilities that seek to address their personal outcomes is a priority for the South Ayrshire Health and Social Care Partnership. Whenever possible, South Ayrshire HSCP will work to support people to live healthily and well within their local communities with their families and friends.

33.26 South Ayrshire HSCP will seek to enable people to enjoy the facilities and activities that are available, locally, in partnership with local groups and provider organisations from across the sectors. The HSCP recognise that the ways in which they have traditionally supported people needs to change. The HSCP will seek to change in a way that provides people with choice and control and offers them maximum flexibility under Self Directed Support to live their lives in ways that they want and which best meets their personal aspirations.

33.27 There is often a need for additional care and support to enable people with Learning Disabilities to sustain independent living.

Adults with learning disabilities

33.28 In 2019, 470 adults with learning disabilities were known to South Ayrshire Council, as per the most recent Learning Disability Statistics Scotland (LDSS) report[339]. This equates to 5.0 people with learning disabilities per 1,000 adults. This is slightly lower than the Scotland rate of 5.2 people per 1,000 adults.

33.29 The age and gender characteristics of people with learning disabilities in South Ayrshire is presented in Table 111 below.

[339] Scottish Commission for Learning Disability *Learning Disability Statistics Scotland 2019.* https://www.scld.org.uk/wp-content/uploads/2019/12/Learning-Disability-Statistics-Scotland-2019.pdf

Table 111 - Adults with learning disabilities known to South Ayrshire Council by age, 2019[340]

	16-17	18-20	21-34	35-44	45-54	55-64	65 and over	Not Known	Total
Males	0	10	94	43	52	48	30	1	280
Females	0	5	50	27	38	38	28	2	190
TOTAL	0	15	144	70	90	86	58	3	470

33.30 LDSS 2019 also collects information on adults known to local authorities who are on the autism spectrum. Most adults within this group will also be recorded as having both learning disabilities and on the autism spectrum, with only a small number recorded as being on the autism spectrum but with no associated learning disability.

Table 112 - Adults who are on the autism spectrum known to local authorities, South Ayrshire and Scotland, 2019[341]

	South Ayrshire	Scotland
Adults who are on the autism spectrum	77	4,383

33.31 In terms of people's living circumstances, almost two thirds of adults with a learning disability in South Ayrshire do not live with a family carer. This is in line with the picture for the rest of Scotland.

Table 113 - Adults with learning disabilities who live with a family carer , South Ayrshire and Scotland, 2019[342]

	South Ayrshire	Scotland
Adults with learning disabilities who live with a family carer	113	7,393
Adults who do not live with a family carer	178	10,175

33.32 As can be seen in Table 114 below, where accommodation type is known, the most common type people with learning disabilities are currently living in is mainstream housing with support. A smaller proportion live in mainstream accommodation with no support, while a similar proportion of adults with learning disabilities are accommodated in adult care homes.

[340] Scottish Commission for Learning Disability, *Learning Disability Statistics Scotland 2019*
[341] Scottish Commission for Learning Disability, *Learning Disability Statistics Scotland 2019*
[342] Scottish Commission for Learning Disability, *Learning Disability Statistics Scotland 2019*

Table 114 - Accommodation type for adults with learning disabilities, South Ayrshire and Scotland, 2019[343]

	South Ayrshire	Scotland
Mainstream with support	175	6,787
Mainstream with no support	44	6,159
Mainstream support status not recorded	0	1,638
Supported Accommodation	9	3,466
Registered adult care home	39	1,837
Other	36	921
Not known	167	2,776

Mental Health

33.33 Mental health covers a range of issues – from feelings related to emotional wellbeing like happiness and sadness, to mental ill health like the reactions that happen in response to stress, to diagnosable mental disorders such as schizophrenia and bi-polar disorder[344].

33.34 Support for mental health in Ayrshire is provided by statutory services, voluntary and wider community support organisations as well as families, carers and individuals. Each has an equally important role. Each offers choice to people – ways they can access and receive support to improve their mental health.

33.35 In the 2018/2019 financial year, 22% of people were prescribed medication for anxiety, depression, or psychosis (ADP) in South Ayrshire. This is higher than the Scotland rate of 19% of the population[345].

33.36 Ayrshire Mental Health Conversation: Priorities and Outcomes 2019 -2027 was commissioned by North, East and South Ayrshire Health and Social Care Partnerships and aims to provide a consistent Ayrshire response to the Scottish Government Mental Health Strategy 2017-2027 and to set out shared priorities.

33.37 The document highlights that discrimination, income inequality, stress, abuse, alcohol, and drugs impact negatively on mental wellbeing and that civic engagement, neighbourhood safety, financial security, physical health, education, income equity, green space and social support contribute to mental wellbeing.

33.38 In 2019/20, 871 support needs assessments were carried out of those presenting to the local authority for assistance under Homelessness legislation. Of those homeless households assessed, it was found that 357 applicants were found to have a mental health problem.

33.39 Housing Support Services provide a strength-based, person-centred and trauma informed support service to those at risk of or experiencing homelessness, increasing capacity to manage their own accommodation, health, safety, security, and social and economic wellbeing.

[343] Scottish Commission for Learning Disability, *Learning Disability Statistics Scotland 2019*
[344] *The Ayrshire Mental Health Conversation, Priorities and Outcomes 2019-2027*
[345] Public Health Scotland, *Needs Assessment South Ayrshire HSCP, September 2020*

33.40 SAC will work with the HSCP during the development of the LHS to further consider possible requirements for supported accommodation models for those with mental illness.

Future type and level of needs & provision required

Housing Support

33.41 The Housing First model is currently supporting 25 households with multiple complex needs and experience of repeat homelessness. Despite this, the Council's RRTP estimated that around 100 households would benefit from this approach, however limitations to available funding have meant that a more modest target of 50 Housing First tenancies by 31 March 2024 has instead been agreed[346].

33.42 Given this gap, we need to ensure the support being provided through our Housing Support contracts is as robust as possible and meets the needs of households who would have otherwise benefitted from Housing First. New housing support contracts have been developed to make best use of existing resources, and to ensure support is person-centred, trauma-informed and based on the principles of partnership working and further work to ascertain future needs can be carried out as part of review of service delivery as well as data collected from engagements.

Independent living at home

33.43 Recognising the challenges facing us in the years to come elucidated throughout this document, South Ayrshire HSCP IJB Strategic Plan 2021-2031 sets out the overall approach that will be taken to community health and care. This includes:

- Investing in and redesigning our new Reablement Service
- Recommissioning care at home purchased services
- Implementing CM2000 to in-house care at home to optimise scheduling and monitoring of care delivered.
- Focussing on support in the community and locality-based models of care

33.44 With regard to people with learning disabilities, as shown in Table 6.g above, where the accommodation type is known, the majority of people with learning disabilities' housing needs will be met by mainstream accommodation with support. As such, many of this group's needs will be met by the type of accommodation being delivered through the Strategic Housing Investment Programme.

33.45 South Ayrshire IJB's Strategic Plan 2021-2031 also sets out a commitment to self-directed support as a mechanism for people to have more choice and control in their lives as well as highlighting our intention to work together to identify housing need and to develop Social Housing specifically for people with Learning Disabilities. 27 units are currently being developed by an RSL partner to meet the identified specific needs of this population.

[346] South Ayrshire Council *Rapid Rehousing Transition Plan 2019-2024* and *RRTP Year One update*

33.46 SAC and the HSCP have set out a commitment in the IJB Strategic Plan and Housing Contribution Statement to work in partnership in the years to come to identify opportunities to meet similar specific needs as these arise – particularly in relation to people with learning disabilities and poor mental health – as well as a commitment to plan for the future to more strategically address these needs. This approach will be reiterated in our Local Housing Strategy.

34. Locational and land needs

National policies

34.1 Relevant national policies and research relevant to locational and land needs include:

- Gypsy/Travellers and the Scottish Planning System – A Guide for Local Authorities, 2015
- Guidance for Local Authorities on Managing Unauthorised Camping by Gypsy/Travellers in Scotland, 2017
- The Equality Act, 2010
- Gypsy/Travellers in Scotland: Twice Yearly Count – January 2009 and July 2009

Local policies

34.2 Relevant local policies pertaining to locational and land needs include:

- SAC Local Housing Strategy 2017-2022
- SAC Local Development Plan
- An Accommodation Needs Assessment of Gypsy/Travellers in West Central Scotland, 2007
- Gypsy and Travellers Local Housing Strategy Evidence Review, 2016

Property needs

Gypsy/Travellers

34.3 Guidance produced by Planning Aid for Scotland (PAS)[347] notes that while a 'nomadic lifestyle is the most notable aspect of Gypsy/Traveller culture', the living arrangements of families can vary significantly. While 'some Gypsy/Travellers are always on the move […] others for various reasons have ceased to travel and reside full-time in bricks and mortar housing'.

34.4 Despite this, PAS Guidance notes that it is important to recognise that 'regardless of their current or future living arrangements, individuals should still be recognised as belonging to the Gypsy/Traveller community'.

34.5 There are three principal types of Gypsy/Traveller provision:

[347] PAS *Gypsy Travellers and the Scottish Planning System – A Guide for Local Authorities* https://www.pas.org.uk/wp-content/uploads/2019/07/2-A-Guide-for-Local-Authorities.pdf

- **Permanent sites** providing permanent accommodation to Gypsy/Travellers for the majority of the year.
- **Transit sites** are permanent developments used only temporarily by their residents, usually when they are *en route* between more long-term locations
- **Stopping places** are pieces of land where Gypsy/Travellers have traditionally stayed for short periods of time.

34.6 Whether public or private, permanent sites should be sustainable, close to essential services and transport links. Key aspects PAS Guidance encourages local authorities to consider include:

- **Size of site/number of pitches:** Smaller, more numerous sites are preferable for public provision in order to offer a choice of accommodation options for different family groups
- **Location:** LDPs often consider location of sites in terms of proximity to other settlements, but plans should also be realistic about supporting access to essential services and amenities, and should be flexible given the cost of land in built-up areas.
- **Type of land:** Should not be on or near contaminated land or sites at risk of flooding
- **Water, electricity and sewage:** Essential services should be supplied to sites. Public sites should include amenity blocks for toilets, bathing, utilities and cooking facilities, bearing in mind cultural sensitivities around the separation of cooking, bathing and living spaces.
- **Roads and access:** Sites should be easy to reach from main roads, but usually not right beside them. Layout and parking arrangements should reflect the needs of the community, with enough parking in place for work vehicles in addition to caravan stances and cars.
- **Character and appearance:** In line with the general principles of planning, sites should not have a significantly negative impact on the character and appearance of their surroundings.
- **Residential amenity:** There should be no significant harm to the residential amenity of neither site residents nor neighbouring properties.
- **Access to public services:** It should be possible for site residents to reach essential facilities including schools, hospitals, shops and recreation. Proximity to public transport would also be beneficial.

34.7 With regard to transit sites and stopping places, these do not require the same level of proximity to amenities and services, but should provide basic facilities including water, electricity, rubbish collection and sanitation.

34.8 PAS Guidance notes that a lack of permanent sites across Scotland, and the blocking-off of long-standing stopping places has coincided with an overall increase in unauthorised encampments. As such, it is important that local authorities consider the needs of this group in order to ensure existing and future housing need is satisfied. This is particularly important in ensuring Gypsy/Travellers achieve equal access to health, education and employment opportunities.

Travelling Show People

34.9 Travelling Show People are a distinct community from Gypsy/Travellers, are not a minority ethnic group and do not seek this status. Nevertheless, they have a distinctive cultural and historic identity. They are business people whose occupation and resultant lifestyle generally require that they and their families travel.

34.10 In the past, the accommodation needs of Travelling Show People and Gypsies and Travellers have sometimes been treated as being the same issue, which has resulted in unsatisfactory arrangements.

34.11 Historically, Travelling Show People travelled around Scotland, usually from March to October, mostly following a set route, attending fairs, galas and shows, and living on the fairgrounds in their caravans. During the winter months they would have lived on winter parking sites, sometimes rented from local authorities on vacant land.

34.12 In more recent years, the majority of Show People have tended to live on permanent Show People's sites, which, among other things, provide better opportunities for children's education. While Show People do still attend fairs, it is usually with smaller caravans, with their main home being on the permanent site.

34.13 Permanent sites for this group would provide accommodation, as well as space for the storage and maintenance of equipment.

Suitable for

34.14 The accommodation and land provision being discussed in this section would be suitable for households and individuals from the Gypsy/Traveller community. The specific needs of the Travelling Show People community will also be considered.

Evidence

Current type of needs and level of needs and provision

34.15 In August 2006 the consultancy firm Craigforth were commissioned to conduct a wide-ranging accommodation needs assessment of Gypsies/Travellers and Travelling Show People in West Central Scotland[348]. The research was jointly commissioned by eleven local authorities[349] and what was then Communities Scotland.

34.16 The research was specifically commissioned to assist authorities in developing and updating their Local Housing Strategies (LHSs) and aimed to identify and quantify

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[348] Craigforth *An Accommodation Needs Assessment of Gypsies and Travellers in West Central Scotland.* https://www.south-ayrshire.gov.uk/documents/an%20accommodation%20needs%20assessment%20of%20gypsies%20-%20travellers%20in%20west%20central%20scotland.pdf

[349] Argyll & Bute, West Dunbartonshire, East Dunbartonshire, Glasgow, East Renfrewshire, Renfrewshire, Inverclyde, South Lanarkshire, East Ayrshire, North Ayrshire and South Ayrshire

Gypsy/Travellers' accommodation needs over the succeeding five years as well as providing some insight into longer term requirements.

34.17 The study highlighted national trends for this population and the sometimes-contrasting trends in West Central Scotland (that is, the Glasgow, Clyde Valley and Ayrshire authorities). These included:

- A national trend towards a growing site and encampment-based population in the five years to 2006, contrasting with a declining site and encampment-based population in West Central Scotland during the same period.
- Summer population of sites and encampments tends to be almost 50% greater in size than the Winter population for Scotland as a whole, with less fluctuation in West Central Scotland (27% greater in the Summer months than Winter)
- A younger population demographic in West Central Scotland compared to national trends, in particular a higher proportion of people under the age of 16.
- A heterogeneous population, 1 in 2 classified themselves as Scottish Travellers and 1 in 5 as Roma/Romany – the 2 largest groups. Only 1 in 7 classify themselves using the generic term Gypsy/Traveller
- Only 40% of the population travelled for significant periods (more than 4 weeks per year)

34.18 The study noted the following specific to South Ayrshire:

- While occupancy of the existing public sector site was 100%, there was limited evidence of additional demand for accommodation, with only one household on the waiting list at the time of the review.
- The review noted a history of Summer encampment activity in the area, and while an average of only 10 households had been recorded in the area each year during the preceding four years, this was considered to be an underestimate. The years of 2005 and 2006 saw 18 separate encampments ranging from 2 households to 28 households, typically lasting for 3-7 days.
- The demand for encampments was considered at the time of review to relate to Irish ferry routes, with common encampment locations being Maidens, Ayr, Girvan, Prestwick and Troon.
- This review set the priorities to 'develop new transit provision as part of a joint Strategy with North and East Ayrshire Councils' and to 'consider in the medium to longer-term the development of new year-round provision of 6-8 pitches, possibly involving the private sector'.

34.19 A follow-up desktop study was carried out jointly by the same 11 authorities in 2016[350]. This study comprised a comprehensive literature review and evidence gathered from local authorities in the form of templates.

National data

[350] *Gypsy and Travellers Local Housing Strategy Evidence Review - A joint study to inform the development of Local Housing Strategies for the Glasgow, Clyde Valley and Ayrshire authorities*

34.20 The Gypsy/Traveller population have been historically difficult to quantify. This is partially explained by the peripatetic character of some households' lifestyles, and conversely the fact that the majority of Gypsy/Travellers in Scotland live in mainstream accommodation and may be reluctant to self-identify.

34.21 The data that is available estimates only the population residing on official Gypsies/Travellers' sites and on known unauthorised encampments. This is known as the 'Twice Yearly Count of Gypsies Travellers in Scotland' and is based on local authority returns. The last published official count was undertaken in July 2009, at that time there were estimated to be around 186 Gypsy/Traveller households living in the Glasgow, Clyde Valley and Ayrshire authorities, and 684 estimated households across the whole of Scotland.

34.22 SAC will further explore the housing needs of the local Gypsy/Traveller community during the next LHS as the data considered here is from research dating back 15 years.

Table 115 – Estimated Gypsy/Traveller Households in Scotland, Glasgow Clyde Valley and Ayrshire authorities only, July 2009[351]

Local Authority	Estimate of households on Council/RSL Sites	Estimate of households on Private Sites	Estimate of households on Unauthorised Encampments	Total estimate of number of households
East Ayrshire Council	0	3	13	16
East Dunbartonshire	0	0	0	0
East Renfrewshire	0	0	0	0
Glasgow City	0	0	0	0
Inverclyde	0	0	23	23
North Ayrshire	6	0	4	10
North Lanarkshire	0	0	2	2
Renfrewshire	0	0	11	11
South Ayrshire	7	0	2	9
South Lanarkshire	25	57	10	92
West Dunbartonshire	20	0	3	23
Glasgow, Clyde Valley and Ayrshires Area	**58**	**60**	**68**	**186**

34.23 Winter counts (carried out each January to 2009) tended to report fewer households living on sites and encampments than those counts carried out during the Summer. The last Winter count (January 2009) found 121 households in the Glasgow, Clyde Valley and Ayrshires authorities and 497 households for Scotland as a whole.

34.24 Although this data gives a picture of the households living in sites and encampments, a Scottish Government review of the count estimated that this may only record between a third and a half of the Gypsy/Traveller population.

34.25 Scotland's Census 2011 indicated there were 1,254 households where the household reference person indicated that they were 'White: Gypsy/Traveller' for the Glasgow, Clydeplan and Ayrshire area. Of this number, 98 households were in South Ayrshire[352].

Permanent Sites

34.26 In terms of Permanent Site provision for the Gypsy/Traveller community, South Ayrshire Council has had a Travelling Persons' Site included in its housing stock since 1987. The Houdston Travelling Persons' Site comprised 8 pitches of year-round accommodation large enough to hold 2 caravans along with towing vehicles and also included an amenity unit to provide for the wider needs of the community. This site had a full-time manager and tenant surveys frequently showed very high levels of satisfaction with the provision available.

[351] Scottish Government, *The Twice Yearly Count of Gypsies/Travellers in Scotland No. 16, July 2009* https://www.webarchive.org.uk/wayback/archive/20170701074158/http://www.gov.scot/Publications/2010/08/18105029/9

[352] 2011 Census Table KS201SC - Ethnic group http://scotlandscensus.gov.uk/census-results

34.27 Unfortunately, in 2015, due to the impacts of Storm Frank, the site suffered significant flood damage and became uninhabitable despite the Council's efforts (with support from Scottish Government funding) to enhance the site's flood defences.

34.28 New provision was developed in 2019 by South Ayrshire Council following a period of close consultation with the families, making reference to recent guidance on standards for Gypsy/Travellers' sites – particularly the requirement to ensure access to schooling and amenities, as well as the needs identified in our HNDA through Consultation with this group, again around accessibility, space for vehicles and access to services.

34.29 The Council's development team worked closely with the families to identify the type of permanent accommodation they would like to see. Discussions were around traditions and culture, how the community's lifestyle had changed and was changing over time and the type of accommodation they would want for future generations. Of particular importance were issues around energy efficiency, security of tenure and the ability to access insurance – three key issues of importance not previously addressed by the provision at Houdston.

34.30 The resultant proposals involved developing eight semi-detached 'lodges', each with separation from the living and sleeping areas to the kitchen and bathroom area. The separation was allowed for by a 'through and through' corridor which in standard house types looks like a front and back door. This area was simply finished to allow for easy maintenance and cleaning. The lodges were designed to let in as much light as possible, incorporating rooflights, windows and open spaces. These lodges are arranged facing inward towards a central common area, with space for vehicles throughout and room for a tow at the top of the site.

34.31 Construction of the new permanent Travelling Person's site, Houdston-Reid Lea started in January 2019 and was fully completed in August 2019. All units have been built to the relevant standards of new build development and as a result SAC has been able to access government subsidy for this project, issue families with Scottish Secure Tenancies and will allow families access to insurance on their contents.

34.32 Homes were also built to achieve the Housing for Varying Needs standard in order that they can be easily adapted to meet households' changing requirements over time. One unit was specifically adapted at the development stage to meet the needs of a person with physical disabilities, and this unit can be freely adapted to mainstream accommodation if required in the future.

Gaps or shortfalls in needs and provision

Permanent sites

34.33 Of the 7 permanent units developed for this community in 2019, one property is currently vacant. This unit was built to amenity space standards to meet a specific housing need that has subsequently been met elsewhere, and it is our intention to convert this property into two accommodation units, giving a total of 8 units to meet the needs of this community.

34.34 At the present time we believe there to be no additional housing need for permanent accommodation for Gypsy/Travellers at this time, given that our specialist accommodation for this group both has the capacity to meet current and future needs, and is not currently at capacity. This will be kept under review during the lifetime of the HNDA.

Transit sites and stopping spaces

34.35 As well as permanent provision, there is still the need to assess the need for transit sites and stopping places in South Ayrshire. There is currently no such provision within South Ayrshire.

34.36 In 2016, South Ayrshire's HNDA highlighted the continued need for a transit site of between 4 and 6 pitches within the local authority's boundaries. This need had previously been identified in 2006 by the Craigforth review, and Scottish Government funding was secured to support the delivery of such a site. At the present time a suitable site has not yet been identified.

34.37 Guidance for local authorities produced by PAS [353] notes that the prevalence of unauthorised encampments is directly related to the availability of permanent sites (both public and private), transit sites and the blocking of traditional stopping spaces.

34.38 Unauthorised encampments are typically the result of Gypsy/Travellers stopping for a short period when travelling through or visiting an area. Encampments vary in size from small family groups (typically 1-2 vans) to larger groups of up to 20+ vans. Locations used also vary considerably and can include open ground in rural location or within/adjacent to towns, industrial locations, and retail or business parks.

34.39 A recent report by Engage Scotland and Craigforth on behalf of the Scottish Government[354] collated information from local authority data returns in order to provide an up-to-date picture of provision for Gypsy/Travellers in Scotland.

34.40 An important aspect of this report was a review of unauthorised encampment activity. As this was again based on reporting of encampments by Council officers, other agencies and local communities, the authors note the difficulty in assessing the extent to which data provides a comprehensive account of encampment activity. One issue noted was that local authorities are more likely to be aware of larger encampments and those in more 'visible' locations, while encampments in less visible or more rural areas may go unreported.

34.41 This report found that unauthorised encampments are more prevalent in some local authority areas than others. Unauthorised encampments appear to be most prevalent across the Ayrshire region (with this primarily focussed in North Ayrshire), Fife, Aberdeen City, Aberdeenshire, Moray, and the area around and to the north of Inverness. Local authorities across these regions typically report an average of more than 30 unauthorised encampments per year, compared to an average of 15-20 across other parts of Scotland.

34.42 South Ayrshire by contrast reported an average of only 9 camps per annum, with an average camp size of around 3 vans per encampment.

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[353] PAS *Gypsy Travellers and the Scottish Planning System – A Guide for Local Authorities* https://www.pas.org.uk/wp-content/uploads/2019/07/2-A-Guide-for-Local-Authorities.pdf

[354] Scottish Government *Gypsy Traveller sites in Scotland, 2018* https://www.gov.scot/publications/gypsy-traveller-sites-scotland

34.43 Table 116 below presents data on the West Central Scotland/Glasgow, Clyde Valley and Ayrshires authorities.

Table 116 – Unauthorised encampments by local authority area, 2016 to 2019, Glasgow, Clyde Valley and Ayrshire authorities only[355]

	Number of locations used	Average camps per annum	Average per location per annum	Average camp size (vans)
SCOTLAND	**406**	**414**	**1.0**	**2.1**
East Ayrshire	12	13	1.1	3.9
East Dunbartonshire	8	3	0.4	n/a
East Renfrewshire	2	7	3.6	n/a
Glasgow	0	0	0	0
Inverclyde	12	6	0.5	n/a
North Ayrshire	54	72	1.3	2.5
North Lanarkshire*	n/a	n/a	n/a	n/a
Renfrewshire**	n/a	17	n/a	n/a
South Ayrshire	27	9	0.3	3.2
South Lanarkshire	9	12	1.3	n/a
West Dunbartonshire	11	12	1.1	6.0

34.44 While unauthorised encampments are comparatively limited in South Ayrshire, this data indicates that there is still a need for some form of transit-type provision within the local authority area – be this fixed transit sites or negotiated stopping spaces. In addition, the number of unauthorised encampments increased during 2020/21, with 34 unauthorised encampments taking place that year[356].

34.45 Negotiated stopping is a term used to describe methods that Local Authorities can use to manage unauthorised encampment by people, most often Gypsies and Travellers, on land that they don't own. Negotiated stopping involves Local Authority officers making an

[355] Scottish Government *Gypsy Traveller sites in Scotland, 2018* https://www.gov.scot/publications/gypsy-traveller-sites-scotland. *Data not available for LA ** Data on individual encampment locations not available
[356] Data presented at Member Officer Working Group, 23 April 2021.

agreement with Gypsies and Travellers on unauthorised encampments. The terms of the agreement can vary depending on the situation but will usually include matters such as correct waste disposal and other things which can be described as 'good neighbourliness'. Provision and use of services, such as portaloos and household waste disposal, will often form part of the agreement. Some authorities also supply water where possible[357]. This approach is currently being piloted by a number of authorities in Scotland, including East Ayrshire and is one potential option that the Council and our partners could explore to address this issue and improve provision for this group.

34.46 Relatively recent contact between members of the Showman's Guild and the Council suggests that this group are not currently seeking sites to live on in South Ayrshire, but contact will be made with the Showman's Guild – Scottish Section as part of this consultation process to ensure this is accurate.

Future type and level of needs and provision required

34.47 Based on the information above, the majority of households where a member identifies as a member of the Gypsy/Traveller community are living in mainstream settled accommodation. As such, most needs of the Gypsy/Traveller community can be met from within existing projections of need for housing in the area.

34.48 In terms of future demand for specialist provision, one way of gauging this would be to review population projections by ethnicity.

34.49 Academic population projections by ethnicity tend not to provide information on 'White Irish', 'White Polish' and 'White Gypsy/Traveller' population as distinct from the general 'White Scottish'/'White British' population[358]. As such it is very difficult to estimate future demand using these sources of information.

34.50 One crude method of gauging this might be to assume the same proportion of households in 2011 to be Gypsy/Travellers in future years. Comparing the estimated number of households in South Ayrshire in 2011 to those projected by the NRS for 2028 would result in a broadly similar Gypsy/Traveller population in 2028 – an estimated 101 households.

Table 117 – Estimate of Gypsy/Traveller population in South Ayrshire, 2011[359] and 2028[360]

	2011	2028
Households	51,286	53,063
Estimated Gypsy/Traveller Households	98	101

34.51 This estimate is only indicative, however, and it is important to bear in mind that in-bound migration from elsewhere in Scotland and the rest of the UK remains an important

[357] Leeds Gypsy and Traveller Exchange website (2018) https://www.negotiatedstopping.co.uk/what-is-negotiated-stopping

[358] Walsh et. al (2018) *Increasingly Diverse: the Changing Ethnic Profiles of Scotland and Glasgow and the Implications for Population Health.* https://link.springer.com/article/10.1007/s12061-018-9281-7

[359] *Scotland's Census 2011*

[360] Calculated using *NRS* Mid-2019 Population Projections by Council Area in Scotland, South Ayrshire Council Area profile - https://www.nrscotland.gov.uk/files/statistics/council-area-data-sheets/south-ayrshire-council-profile.html

component of population change over the next ten years, and as such the Gypsy/Traveller population may increase in line with this. In addition, the age profile of the Gypsy/Traveller community highlighted in the 2006 Craigforth report (that is, a younger demographic than the general population) may result in less reductions in population as a result of natural change impacting on households.

34.52 Nevertheless, since 2001, research has shown a reduction in the site and encampment-based population in the Glasgow, Clyde Valley and Ayrshires authorities. The Craigforth study from 2006, for instance, saw a reduction of 17% in Winter and 5% in Summer between estimated numbers of households on sites and encampments between 2001 and 2006[361].

34.53 A further reduction can be seen in the last official 'Twice Yearly Count' data from January and July 2009.

34.54 This data estimates the number of site and encampment-based Gypsy/Traveller households (i.e. households who were living on Council or RSL sites, Private sites or on unauthorised encampments at the time of each count) based on local authority data submissions.

[361] Craigforth (2006) *An Accommodation Needs Assessment of Gypsies and Travellers in West Central Scotland.* https://www.south-ayrshire.gov.uk/documents/an%20accommodation%20needs%20assessment%20of%20gypsies%20-%20travellers%20in%20west%20central%20scotland.pdf

Table 118 – Total Gypsy/Traveller households living on sites or encampments, Glasgow, Clyde Valley and Ayrshires and South Ayrshire only, 2009[362]

		2006	2007	2008	2009	% Change 2006-2009
Winter (January)	GCVA	151	182	107	121	-19.9%
	South Ayrshire	8	8	16	9	12.5%
Summer (July)	GCVA	198	266	218	186	-6.1%
	South Ayrshire	16	38	26	9	-43.8%

34.55 As can be seen in Table 118 above, the number of households living on sites or encampments at the time of each count has shown a general downward trend since 2006.

34.56 In South Ayrshire, the number of households has stayed relatively steady during the Winter months, while Summer months have seen a declining trend since 2007, consistent with trends for the rest of the Glasgow, Clyde Valley and Ayrshires authorities.

34.57 As noted previously, the majority of Gypsy/Traveller households live in mainstream rather than specialist accommodation. The most recent 'Twice Yearly Count' (July 2009) estimated a population of 2,120 people living on sites or unauthorised encampments[363].

34.58 The 2011 Census estimated that there were 1,792 households in Scotland where the Household Reference Person (HRP) identified as a Gypsy/Traveller, and only a fraction of these (259 households - about 14%) described their accommodation as a 'caravan or other mobile or temporary structure'.

Table 119 – Estimated Gypsy/Traveller households in Scotland by accommodation type, 2011[364]

	All HRP	House or Bungalow	Flat: tenement or converted or commercial	A caravan or other mobile or temporary structure
Gypsy/Traveller	1,792	779	754	259

34.59 While it is considered by some commentators that this figure may be an underestimate of the number of households accommodated on sites and in unauthorised

[362] Scottish Government (2010) *The Twice Yearly Count of Gypsy/Travellers in Scotland No. 15 – January 2009* https://lx.iriss.org.uk/content/gypsiestravellers-scotland-twice-yearly-count-no-15-january-2009 and *No. 16 – July 2009* https://www.webarchive.org.uk/wayback/archive/20170701074158mp_/http://www.gov.scot/Publications/2010/08/18105029/9

[363] Scottish Government (2010) *The Twice Yearly Count of Gypsy/Travellers in Scotland No. 16 - July 2009* https://www.webarchive.org.uk/wayback/archive/20170701074158mp_/http://www.gov.scot/Publications/2010/08/18105029/9

[364] *Scotland's Census 2011*

encampments[365], it nonetheless demonstrates the prevalence of Gypsy/Traveller households living in mainstream housing, and as such this should be factored in to considerations on additional specialist provision.

34.60 Given that the needs of most Gypsy/Traveller households in South Ayrshire are currently met in mainstream accommodation, and that the current Specialist Provision for this group has a number of void properties – it is our belief that the current specialist accommodation provision at Houdston Reid-Lea site will be sufficient to meet existing and anticipated needs for the duration of the HNDA.

34.61 Consultation with professionals working directly with the Gypsy/Traveller community[366] has indicated the continuing need for some form of transit provision in South Ayrshire. This group felt that unauthorised encampment activity indicated a need for some form of transit provision – whether this was a fixed site or negotiated stopping. This group agreed that there remains a need for up to 6 pitches to meet this need. Given the location of recent encampment activity as well as officer engagement with the families visiting the area, it was felt that demand is greatest around Ayr and Prestwick and any solution taken forward should reflect this.

34.62 Following on from the publication of the CoSLA report "Improving the Lives of Gypsy/Travellers 2019-2021", a motion was passed at a special Council meeting to work towards the implementation of this report's recommendations. A Member Officer Working Group has since been established, and the focus so far has been on the first of the report's recommendations, to "Provide More and Better Accommodation".

34.63 This group is currently reviewing options to meet this need, including transit provision and negotiated stopping options.

34.64 With regard to the future needs of the Travelling Show People community, contact will be made with the Showman's Guild to seek views on the future need for land provision in South Ayrshire.

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[365] Scottish Government (2018) *Gypsy Traveller sites in Scotland* https://www.gov.scot/publications/gypsy-traveller-sites-scotland

[366] See Appendix 4

Appendix 1: Estimate of existing need

1. Background

1.1 The Centre for Housing Market Analysis (CHMA) has developed an HNDA Tool to support local authorities and their Housing Market Partnerships (HMPs) in developing their HNDA.

1.2 One of the central tasks of the HNDA is to project a range of housing estimates into the future across the various tenures in order to enable medium and long term planning of housing. These estimates are influenced by housing need and demand locally. Housing need and demand fall into two categories[367]:

- **Future need:** Future need is mainly driven by future household formation (projections). By its very nature this has to be met through the provision of additional housing units. This is what the HNDA Tool outputs. Most additional housing units will be delivered through new build, but delivery should also be considered through changes in housing stock such as conversions and bringing empty properties back into use. The actual amount and type of additional units that can to be delivered is decided in the Housing Supply Target.
- **Existing need:** Existing need is driven by several factors such as homelessness, overcrowding, care and support needs, etc. Most existing need is met using in-situ solutions e.g. adaptations, transfers, stock improvements, etc. However, a proportion of need must be met through additional housing units where an in-situ solution cannot be found.

1.3 Given the centrality of existing need to the housing estimate, the HMP felt it was necessary to consider a range of options for calculating this figure – with input from the CHMA - in order to most accurately reflect local circumstances.

1.4 This paper will present a number of methods of calculating existing need considered, before describing a proposed methodology for South Ayrshire.

2. Homeless in Temporary Accommodation, Overcrowded and Concealed (HoTOC) method

2.1 The HNDA Tool is pre-populated with the CHMA's preferred methodology for calculating existing need.

2.2 The Homeless in Temporary Accommodation, Overcrowded *and* Concealed (HoTOC) method is a simple calculation which combines a count of households in temporary accommodation with an estimate of the number of households that are both overcrowded *and* concealed.

2.3 For South Ayrshire, this produces a figure of just 314 households with existing need that cannot be met by in situ solutions. This comprises 232 households in temporary

[367] CHMA (2020) *Housing Need and Demand Assessment – A practitioners' guide*

accommodation at 31 March 2020 – using the lower HL1 estimate rather than the higher HL3 count of 237 households – and 82 households who are both overcrowded *and* concealed.

2.4 This figure was felt by the HMP to be a significant underestimate of need, particularly given the number of households currently on the Council's housing list with a recognised level of housing need, as well as estimates of unmet needs for accommodation to meet the existing needs of wheelchair users.

2.5 This sentiment was echoed by members of the Housing Supply Sub-Group, whose membership includes local RSL partners and private sector developers.

2.6 As such, the HMP requested that alternative methodologies be considered.

3. Current circumstances of housing list applicants method

3.1 An alternative methodology was proposed following consultation with the CHMA. This methodology is based on the current circumstances of housing applicants noted on their housing application.

3.2 This methodology reviews the applicants on the Housing List and Transfer List and:

- **Discounts any applicant household** currently in a tenancy (including Council, RSL and private sector lets), owner-occupying or in a shared ownership property.
- **Count any applicant household** whose circumstances indicate they are leaving an institution, sharing accommodation with friends and family, homeless or living in other unsuitable accommodation (i.e. living in a caravan). Allocating this person a property would not free up space for another household, and as such this provides an indication of existing need for additional housing units.

3.3 The figures from the Homeless in Temp/Overcrowded AND Concealed (HoTOC) method would be discounted as this could lead to double counting, given that much of the expressed need from overcrowded and concealed households would be present in housing lists.

Table 120 – Households included in estimate of existing need requiring additional housing unit, SAC Housing List and Transfer List applicants as at 11 August 2020[368]

Current circumstances	Households
Caravan	10
Family/Parents	439
Homeless	270
Hospital	7
Institution	3
Military	2
No fixed abode	19
Lodging	20
Prison	7
Tied accommodation	10
TOTAL	**787**

[368] Northgate Report run on 11 August 2020.

Table 121 – Households excluded from estimate of existing need requiring additional housing unit, SAC Housing List and Transfer List applicants as at 11 August 2020[369]

Current circumstances	Households
Local authority	953
Owner-occupation	569
Private tenancy	601
RSL	247
Shared ownership	8
TOTAL	**2,378**

3.4 This method provides an existing need figure of 787 households, and the calculation of inclusions and exclusions is shown in Tables 120 and 121 above for information.

3.5 While this methodology produced a figure that was closer to local experience, on reflection members of the HMP and Housing Supply Sub-Group raised concerns that this figure only identified needs at the most extreme end of housing need. Both groups noted the importance of ensuring consideration is given to the local households who would require a new build house to meet their needs – public or private - but in applying for housing would not necessarily fall into one of the narrow categories cited above.

3.6 Furthermore, both groups highlighted that there would likely be a proportion of households who would not apply to the local authority for housing, yet may well be in considerable housing need. This methodology was felt to underestimate this important population. While it is recognised that providing a picture of these needs is challenging, this HNDA provides a wealth of robust local and national data that can be used to triangulate such an estimate of need.

3.7 In addition, the Specialist Provision chapter estimated unmet needs amongst wheelchair chair user households and posited that, in the context of an ageing population, these needs would be likely to become more pronounced. This methodology again did not take these needs into account.

4. South Ayrshire Council alternative methodology

4.1 As such, an alternative methodology has been developed to take account of local and national data collated for the HNDA, using this to present a more complete and nuanced picture of existing need, and how this might be addressed by in situ solutions.

4.2 This calculation begins by calculating gross existing need in the paragraphs which follow, before providing an estimate of how much of this need can be met by in-situ solutions.

4.3 A **net figure** of existing need is then produced – that is to say, existing need that we estimate will not be met by these in situ solutions and where a new build property would be required.

4.4 This methodology considers data in relation to the following areas of housing need:

- Homeless households and those in temporary accommodation
- Those with insecurity of tenure (at risk of homelessness)

[369] Northgate Report run on 11 August 2020.

- Concealed households
- Overcrowded households
- Unmet housing need among wheelchair users
- Unmet housing need for ground level accommodation (excluding wheelchair users)
- Poor quality housing

4.5 While the housing needs of people with complex needs/experience of severe and multiple disadvantage[370] was considered as part of this exercise, informal guidance from the CHMA suggested that this information would be best considered as part of the Specialist Provision section, as these needs could potentially be met in situ or through residential accommodation rather than by a new build property.

4.6 Local and national data are presented for each of these categories, before determining which measure or measures should be utilised to present a balanced picture of existing need against each category.

4.7 This picture of existing need is then balanced by the role of in situ solutions locally. This includes:

- Mainstream social housing lets
- Adaptations carried out (social and private sectors)
- Lets to ground level and sheltered housing accommodation
- Long-term empty homes brought back into use
- SHQS compliance works

4.8 Deducting the contribution of in situ solutions provides an estimate of current existing housing need that requires a new build housing solution in either the social or private sector.

4.9 In the sections which follow, this paper will endeavour to set out how each estimate was arrived at and the rationale for selecting one figure over another.

[370] As defined by the Scottish Government guidance document *Scotland's Transition to Rapid Rehousing* https://social-bite.co.uk/wp-content/uploads/2018/07/Rapid_Rehousing_Guidance1.1.pdf

Indicators of existing need

Homeless households and those in temporary accommodation

4.10 Available data in relation to this measure are as follows:

- There were 232 households in temporary accommodation in South Ayrshire as at 31 March 2020[371].
- There were 405 households with open homeless applications as at 23 February 2021[372].

Figure to be used: It is recommended that the HMP utilise the HL1 figure of **232 households**, as this is considered to be the most robust measure by the Scottish Government.

Those with insecurity of tenure (at risk of homelessness)

4.11 Available data in relation to this measure are as follows:

- 222 households in 2019/20 became homeless from an insecure tenancy or an institution[373]. This included the following categories:
    - Private rented tenancy, tied accommodation, armed forces accommodation, caravan or mobile home, lodgers, shared property in PRS – 146 households
    - Prison, hospital, children's residential accommodation, supported accommodation, Armed Forces accommodation – 76 households
- 1,087 households on the Council's housing list for mainstream accommodation had 'insecurity of tenure' points. This figure excludes households on the Ground Level and Sheltered Housing waiting lists as these groups' needs will be considered in our estimates of need for specialist accommodation[374].

Figure to be used: It is recommended that the HMP utilise the number of households who became homeless from an insecure tenancy or an institution during 2019/20 – 222 households, however in order to mitigate double counting, it has been necessary to consider how many households in these categories were in temporary accommodation at 31 March 2020. 49 of these households were recorded in the HL2 temporary accommodation data, and as such it is recommended that the figure of **173 households** is used here (222 households less 49 already counted).

[371] Analysis of HL1 data held locally.
[372] Northgate Report on open homeless cases, 23 February 2021
[373] Scottish Government *Annual Report for South Ayrshire 2019-20 – HL1*.
[374] Northgate Report on applicants with certain points attributes, as at 9 February 2021

Concealed households

4.12 Available data in relation to this measure of need are as follows:

- Scotland's Census 2011 indicated that there were 384 concealed family households in South Ayrshire[375].
- Local authority concealed family estimates produced by the CHMA utilising the Scottish Household Survey 2016-18 estimated that there were 800 households with at least one concealed family in South Ayrshire[376].
- 468 applicants on South Ayrshire's housing list for accommodation had Sharing Amenities points indicating that they were sharing with another household. This excluded those with Medical Points to avoid double counting[377].
- In 2019/20, 443 households seeking assistance under homelessness legislation made a homeless application having previously been living with friends, family or long-term sofa surfing[378].

Figure to be used: It is recommended that the HMP utilise the Scotland's Census figure – **384 households -** as this data is considered to be robust, and this figure is supported by local housing list and homelessness data on the approximate level of existing need from concealed households.

Overcrowded households

4.13 Available data in relation to this measure of need are as follows:

- Scotland's Census 2011 indicated that there were 2,620 households with one bedroom or fewer than they required[379].
- The Census indicated that 638 households had two bedrooms or fewer than they required[380].
- 310 households on the Council's housing list had been awarded overcrowding points based on their circumstances. This excluded those with Medical Points to avoid double counting[381]. As it is recommended that the 'Sharing Amenities' figure is not utilised for 'Concealed households' measure, this has not been factored in as an area of potential double counting.

Figure to be used: It is recommended that for this measure the HMP utilises an average of the Council's housing list estimate (638 households) and the lower of the two Census estimates (310 households). While the higher figure of overcrowding locally can be

[375] Scotland's Census DC1110SC
[376] CHMA (2020) *Estimating concealed family rates with overcrowding using Scottish survey data (2016-2018)* https://www.gov.scot/binaries/content/documents/govscot/publications/advice-and-guidance/2020/11/concealed-and-overcrowded-households-methodology-2020/documents/concealed-and-overcrowded-2020-households-methodology-note/concealed-and-overcrowded-2020-households-methodology-note/govscot%3Adocument/CHMA%2B-%2BHNDA%2BRefresh%2B-%2B2019%2B-%2BGuidance%2B-%2BPublish%2B-%2BConcealed%2Band%2BOvercrowded%2BAccessible%2BVersion.pdf
[377] Northgate Report on applicants with certain points attributes, as at 9 February 2021
[378] HL1 statistics for 2019/20.
[379] Scotland's Census DC1110SC
[380] Scotland's Census DC1110SC
[381] Northgate Report on applicants with certain points attributes, as at 9 February 2021

considered to be robust given its source, we must also consider that some of these needs will already have been counted within this calculation, for example amongst homeless and concealed households. The lower Census figure reflects the greatest need amongst households who are overcrowded and using this allows us to counteract the potential for double counting to some extent. Equally, we must consider local data on this issue, while at the same time recognising the potential to underestimate the number of households with these circumstances by solely referring to the Council's current housing list. As such, an average figure between these two positions is proposed as a best estimate of the true picture. This produces an estimate of **474 households** who are currently overcrowded.

Unmet housing need among wheelchair user households

4.14 Data in relation to this measure is as follows:

- South Ayrshire Council recently developed an estimate of unmet housing need amongst wheelchair users based on applying trends seen in national data to our population, producing a local estimate of need. This exercise provided an estimate of 371 wheelchair user households with unmet housing needs[382].
- A recent report found that 99 households on South Ayrshire Council's housing list had made reference to requiring wheelchair accessible accommodation in their application[383].

Figure to be used: It is recommended that the HMP utilises the higher estimate – **371 households -** given that there is likely to be unmet need not expressed on the Council's housing list. This might include households who are currently ambulant but who currently use a wheelchair outdoors only and those who wish to meet their needs in the private sector or via an RSL.

Unmet need for ground level accommodation (excluding wheelchair users)

4.15 Available data in relation to this measure includes the following:

- 542 households were on the housing list for ground level accommodation, excluding wheelchair user households[384].
- 361 households were on the housing list for sheltered accommodation, excluding wheelchair user households[385].
- 327 households were on the housing list for ground level or sheltered accommodation (excluding wheelchair user households)[386].

Figure to be used: While the lower figure of 327 presents information on households whose existing circumstances mean that they would qualify for 'Medical Points', utilising this figure potentially underestimates the households who require a move into more suitable accommodation but are not yet at crisis point. Given the local authority's ageing population

[382] See Appendix 1
[383] Northgate Housing Management system report, as at 9 March 2020
[384] Northgate Housing Management system report, as at 11 August 2020
[385] Northgate Housing Management system report, as at 11 August 2020
[386] Northgate Housing Management system report, as at 9 February 2021

and focus on proactive approaches to need, it is recommended that the HMP utilise instead the median figure between the total households on the waiting list for Ground Level or Sheltered Housing accommodation (903 households) and the number of these with current medical points (327). This provides a median point of **615 households**.

Poor quality housing

4.16 Data in relation to this measure are as follows:

- 15 households on our housing list had been awarded points for poor quality housing (rising/penetrating dampness, structural instability, inadequate heating, lighting and ventilation[387].
- Data from South Ayrshire's Environmental Health team indicates that 269 residential properties in South Ayrshire were considered to be below the tolerable standard[388].
- 29 dwellings had a current closing order or demolition order against them[389].
- Between 700 and 3,300 dwellings estimated to show evidence of extensive disrepair, with a mid-range estimate of 2,000 dwellings[390].
- 98 properties owned by South Ayrshire Council were recorded as SHQS fails, while a further 82 properties were held in abeyance[391].

Figure to be used: The SHCS estimate of between 700 and 3,300 dwellings is considered to be a robust source of data, however this does not provide a figure that we could say would necessitate new units of accommodation, while it would be difficult to estimate how much of this need could be met by in situ solutions. A more conservative methodology might be to sum the number of dwellings that do not meet the SHQS, tolerable standard or where a closing order/demolition order has been served. This produces a figure of **478 housing units**.

[387] Northgate Housing Management system report, as at 9 February 2021
[388] Environmental Health records, as at 26 February 2020
[389] Environmental Health records, as at 26 February 2020
[390] Scottish House Condition Survey, 2016-18
[391] Annual Return on the Charter, 2019/20.

In situ solutions

4.17 Data in relation to the following in situ solutions to housing need will also be considered in coming to a figure of 'existing need'. All data sourced from the Annual Return on the Charter unless otherwise stated.

Mainstream housing need

- SAC Mainstream lets, 2019/20, excluding wheelchair accessible lets[392] - 490
- RSL General Needs lets, 2019/20, excluding wheelchair accessible lets – 162[393]

Wheelchair accessible housing need

- SAC lets to wheelchair accessible housing, 2019/20[394] - 60
- RSL lets to wheelchair accessible housing, 2019/20 - 21
- Estimated adaptations for wheelchair user households, 2019/20 (council) - 44
- Estimated adaptations for wheelchair user households, 2019/20 (private) - 67

Accessible and adapted housing need

- Estimated adaptations for non-wheelchair users, 2019/20 (council) - 209
- Estimated adaptations for non-wheelchair users, 2019/20 (private) - 117
- SAC Ground level lets excluding wheelchair accessible lets, 2019/20[395] - 115
- SAC Sheltered housing lets excluding wheelchair accessible lets, 2019/20[396] - 48
- RSL lets to accessible or adapted properties, excluding wheelchair accessible lets, 2019/20 – 21
- RSL lets to sheltered housing properties, excluding wheelchair accessible lets, 2019/20 - 4

Poor quality housing

- Long-term empty properties brought back into use - 20[397]

[392] Northgate housing system reports used to inform South Ayrshire Council Annual Return on the Charter (Indicator C7), 2015/16 to 2019/20, cross referenced with FOI-2020-10240 report - Northgate Housing Management system, March 2020.
[393] Annual Return on the Charter information provided by Ayrshire Housing, West of Scotland, Hanover and Link. Information sought from Trust, Blackwood, ANCHO.
[394] Northgate housing system reports used to inform South Ayrshire Council Annual Return on the Charter (Indicator C7), 2015/16 to 2019/20, cross referenced with FOI-2020-10240 report - Northgate Housing Management system, March 2020
[395] Northgate housing system reports used to inform South Ayrshire Council Annual Return on the Charter (Indicator C7), 2015/16 to 2019/20, cross referenced with FOI-2020-10240 report - Northgate Housing Management system, March 2020
[396] Northgate housing system reports used to inform South Ayrshire Council Annual Return on the Charter (Indicator C7), 2015/16 to 2019/20, cross referenced with FOI-2020-10240 report - Northgate Housing Management system, March 2020
[397] Empty Homes closed cases, 2019/20

- Estimated reduction in number of properties no longer failing SHQS/held in abeyance at end of 2020/21[398]

5. Estimate of existing need (net)

5.1 The tables below present the outcome of these calculations. The first section of the table presents an estimate of **gross existing need**, followed by an estimate of how much of this need can be met by in situ solutions.

5.2 By deducting these figures, we can arrive at a figure of **net existing need** – that is to say existing need that cannot be met by in situ solutions – and that would therefore require a new build housing solution.

[398] Annual Return on the Charter, 2019/20

Table 122 – Calculation of Existing Need (Net)

Mainstream housing needs	Homeless households and those in temporary accommodation	**Currently homeless households**		
		Households in temporary accommodation as at 31 March 2020	HL1 statistics, 31 March 2020	232
		Open homeless applications	Northgate Report, as at 23/2/:	405
		FIGURE TO BE USED		232
		Those with insecurity of tenure (at risk of homelessness)		
		Households who became homeless from insecure tenancy or institution in 2019/20	HL1 statistics, 31 March 2020	222
		Households who became homeless from insecure tenancy or institution in 2019/20 - less those in ten	HL1 statistics, 31 March 2020	173
		Households with waiting list points: insecure tenure - MAINSTREAM ONLY	Northgate Report, as at 9/2/2:	1,087
		FIGURE TO BE USED		173
	Concealed households	**Concealed households**		
		Concealed families (all) - does not include single households	Scotland's Census 2011	384
		Estimate of concealed households	CHMA - LA concealed 2016-20	800
		Households with waiting list points: sharing amenities - EXCLUDING THOSE WITH MEDICAL POINTS	Northgate Report, 9/2/21	468
		Households who have become homeless from friends/family/sofa surfing	HL1 statistics, 31 March 2020	443
		FIGURE TO BE USED		384
	Overcrowding	**Overcrowded households**		
		Households with 1 bedrooms or fewer than needed	Scotland's Census 2011	2,620
		Households with 2 bedrooms or fewer than needed	Scotland's Census 2011	638
		Households with waiting list points: overcrowding - EXCLUDING THOSE WITH MEDICAL POINTS	Northgate Report, 9/2/21	310
		FIGURE TO BE USED	Average 2 and 3	474
		SUBTOTAL (Mainstream housing need)		**1263**

Specialist housing needs	Accessible housing	**Wheelchair accessible housing**		
		Unmet housing need among wheelchair user households, 2021	SAC Estimate of unmet need a	371
		Households on waiting list: wheelchair	Northgate Report, March 202(	99
		FIGURE TO BE USED		371
		SUBTOTAL (Wheelchair accessible housing)		371
		Accessible and adapted housing		
		Households on waiting list: ground level - Excluding Wheelchair user households	Northgate Report, August 202	542
		Households on waiting list: sheltered housing - Excluding Wheelchair user households	Northgate Report, August 202	361
		Households with waiting list points: medical - Ground level and sheltered only (excluding Wheelchair	Northgate Report, February 2(	327
			Median (903, 327)	615
		SUBTOTAL (Accessible and adapted housing)		**615**

Property condition	Poor quality housing	**Dwellings in disrepair**		
		Households with waiting list points: Living in unsuitable accommodation	Northgate Report, February 2(	15
		Residential properties below the tolerable standard	Environmental Health report,	269
		Estimate of dwellings with extensive disrepair, South Ayrshire (low estimate)	SHCS 2016-2018	700
		Estimate of dwellings with extensive disrepair, South Ayrshire (medium estimate)	SHCS 2016-2018	2,000
		Estimate of dwellings with extensive disrepair, South Ayrshire (high estimate)	SHCS 2016-2018	3,300
		SHQS fails as at 31 March 2020	Annual Return on the Charter	98
		SHQS abeyance as at 31 March 2020	Annual Return on the Charter	82
		Closing orders and demolition orders currently in place	Environmental Health report,	29
		FIGURE TO BE USED	BTS+Orders+SHQS	478
		SUBTOTAL (Poor quality housing)		**478**
		TOTAL ESTIMATE OF EXISTING NEED (Gross)		**2,727**

Mainstream	Mainstream housing need	**Calculation of net existing need**		
		Estimate of gross existing need (Mainstream)	Subtotal (Mainstream Need)	1263
	In situ solutions	SAC Mainstream lets, 2019/20 (SAC) - excluding wheelchair accessible lets	Annual Return on the Charter	490
		RSL lets (General needs), 2019/20	ARC info provided by RSLs, 20	162
		Net existing need		**611**
Specialist Provision	Wheelchair accessible housing	**Calculation of net existing need**		
		Estimate of gross existing need (Wheelchair housing), 2021	Subtotal (Wheelchair accessib	371
	In situ solutions	SAC Lets to wheelchair accessible housing	ARC, 2019/20 and Northgate r	60
		RSL lets to wheelchair accessible housing	ARC info provided by RSLs, 20	21
		Estimated adaptations for wheelchair users, 2019/20 (council)	Estimate based on ARC data, 2	44
		Estimated adaptations for wheelchair users, 2019/20 (private)	Estimate based on ARC data, 2	67
		Net existing need		**179**
	Accessible and adapted housing	**Calculation of net existing need**		
		Estimate of gross existing need (Accessible and adapted housing)	Subtotal (Accessible and adap	615
	In situ solutions	Estimated adaptations for non-wheelchair users, 2019/20 (council)	Annual Return on the Charter	209
		Estimated adaptations for non-wheelchair users, 2019/20 (private)	Annual Return on the Charter	117
		SAC Ground level lets, 2019/20 - excluding wheelchair accessible lets	Annual Return on the Charter	115
		SAC Sheltered housing lets, 2019/20 - excluding wheelchair accessible lets	Annual Return on the Charter	48
		RSL Accessible or Adapted lets, 2019/20 - excluding wheelchair accessible lets	ARC info provided by RSLs, 20	21
		RSL Sheltered housing lets, 2019/20 - excluding wheelchair accessible lets	ARC info provided by RSLs, 20	4
		Net existing need		**101**

Property condition	Poor quality housing	**Calculation of existing need**		
		Estimate of gross existing need (Poor quality housing)	Subtotal (Poor quality housing	478
	In situ solutions	Long-term empty properties brought back into use, 2019/20	Empty homes closed cases, 20	20
		Reduction in properties no longer failing SHQS/held in abeyance at end of 2021	ARC, 2019/20 estimate	21
		Net existing need		**437**
		TOTAL ESTIMATE OF EXISTING NEED (Net)		**1,328**