Glasgow City Council

City Development Plan 2

Background Report

Housing

March 2024

Section 6 and 7 – Updated February 2025

Contents

Requirement for an updated Housing Background Report

This Housing Background Report was first produced for submission as part of the CDP2 Evidence Report in 2024 and dated March 2024. This updated Housing Background Report has been produced in response to the Scottish Minister's appointed Reporter's findings that the evidence report submitted by Glasgow City Council contained insufficient information to enable the planning authority to prepare its local development plan. The Reporter's recommendations specifically relate to the Local Housing Land Requirement and the Report states 'I recommend that the evidence report should provide additional and clearer information on matters relating to the indicative LHLR'. As such sections 6 and 7 of this Housing Background Report have been updated.

Executive Summary

Population

1. The city has experienced population growth over the past 15 years although this growth has not been distributed evenly across the city. Significant growth has been experienced in central parts of the city (Calton and Anderston/City/Yorkhill), but decline has been recorded in some parts south of the river (Linn, Newlands/Auldburn and Cardonald).

2. The city's population is projected to continue to grow over the next 20 years but at a slower rate than in the past. Projected growth of around 1,453 residents a year presents as a positive outlook compared with national projections.

3. Recent population growth has been driven by both positive natural change and positive net migration but recent negative natural change (fewer births and more deaths) and an increase in the number of older people compared with children, places more emphasis on inward migration as the main source of future population growth.

4. A third of in-migrants to Glasgow each year come from international locations, and it seems likely that many of them were attracted to the city to become students given the similar increases in student enrolment figures and evidence that Glasgow is good at retaining students. The city's ability to attract international migrants in the future will be dependent on a supportive UK government migration policy both in terms of economic and academic migrants.

5. Glasgow has the largest number of children and the largest number of older people of any Local Authority in Scotland and while it continues to be the only Local Authority where children outnumber older people (65 and over) the number of older people has grown over the past 10 years.

6. Life expectancy and healthy life expectancy is lower in Glasgow than elsewhere in Scotland emphasising the importance of considering health benefits from good quality housing.

Households

1. The city has experienced a 10% growth in the number of households over the past 20 years - at around 1,364 additional households a year. Household numbers are projected to continue to grow over the next 20 years, at around a similar level – 1,424 additional households a year.

2. Growth in the number of households has not occurred evenly across the city with significant growth in central wards (Calton and Anderston/City/Yorkhill) coinciding with population growth and purpose-built student accommodation development in those wards.

3. Generally, changes in household numbers appear to coincide with planned interventions such as the Transformational Regeneration Areas and Community Growth Areas, as well as being reflective of wider policy commitments, for example, to support rapid large-scale population growth in the city centre.

4. Average household size in the city in 2002 was smaller than the national figure (2.07 people compared to 2.25) but both followed a declining trend between 2002 and 2012. While this decline continued in Scotland for the period 2012 to 2022 (to 2.11 people), average household size has increased in Glasgow, effectively returning it to its 2002 position.

5. Glasgow has one of the largest groups of homeless households in Scotland and recent changes to national governmental decisions, to make it easier to present as homeless in Glasgow, and to batch process asylum applications, have impacted on the number of homeless applications the Council has received recently. The Council announced a Housing Emergency that acknowledges the challenged it faces to carry out its statutory duties.

6. Initial outputs from the Census include lower population and household figures for Glasgow than recent NRS estimates, albeit based on a lower-than-expected Census return. The 2020 based population projection for Scotland indicates a considerably lower population than previously anticipated. Although no equivalent projection is available for Glasgow, it may be expected that the city's population would also not be projected to grow to the extent previously expected.

Housing Stock

1. The city has experienced growth in the number of homes over the past 20 years - at around 1,654 additional homes a year compared with 1,364 additional *households* a year over the same period. Broadly, Glasgow has added more people than homes, and more homes than households, over the past two decades.

2. There are around 325,000 homes in Glasgow. Most homes are rented, and it has a relatively high social rented stock, at 107,000 homes, and a significant private rented sector relative to the Scottish provision, with 62,000 homes. Unlike Scotland as a whole, the majority of homes are not owner-occupied, but this tenure still accounts for 138,000 homes. Since 2013, there have been absolute increases in the stock of each tenure, resulting in a small proportional shift of the supply to private rented (3%) and owner occupied (1%).

3. Many of the city's homes are old, and their current condition is a concern. For example, the Scottish Housing Condition Survey estimates that 19% of all homes would not meet the Energy Efficient standard. A key challenge for residents in the future will be identifying and securing the investment required to maintain and improve their older properties. Policy needs to support efforts to improve housing condition, through adaptations and the use of new technologies, in order to meet the ambition of net zero targets.

4. House prices have doubled since 2004. Flatted properties prices have also increased significantly. New build homes were on average £108,000 more expensive than an existing home in Glasgow compared to £29,835 more expensive in 2014, leading to the conclusion that most housing need at the lower end of the private market is likely to be met from existing stock. Rent has also increased over the past 4 years, from £381 to £412 per month in the social rent sector, and, more significantly, up from £845 to £1,179 per month in the private rental sector. Over 10 years, the average private rent in the city has doubled. Notwithstanding the impact of the emergency rent control measures applied during 2023 and beyond, the ability for the rental sector to accommodate acute need is a major concern, and this is due to rental levels, particularly in the private rented sector, rather than availability of stock.

5. The mismatch of affordable housing demand and a lack of affordable housing options arising from development in the private sector is a major concern and will need careful consideration in the development of policy for market sector housing.

Summary of Population, Households and Housing Stock

1. A recent House of Lords Built Environment Committee report on Meeting Housing Demand outlined the main issues for the UK housing market which also apply to Glasgow. Broadly a lack of affordable housing, a lack of specialist housing to accommodate the increase in older people, poor conditions in the private rental sector, poor design of new homes, lack of SME sector and slow build-out.

2. The key additional issues for Glasgow are:
    - Glasgow has experienced steady population and household growth over the past two decades, and much of the population growth has been concentrated in a few centrally located wards. Future population growth is projected to be at a rate of 1,453 residents per year and is expected to be mainly generated by migration from international destinations.

    - Glasgow has more older people in 2022 than it had in 2011, but life expectancy and healthy life expectancy continue to lag behind the Scottish average and, unlike elsewhere in Scotland, children continue to outnumber older people.

    - Glasgow experienced a 10% increase in the number of households over the past 20 years, and the number of additional households is expected to increase by between 1,105 and 1,756 households per year.

    - Glasgow's housing stock has increased by around 1,654 homes a year over the past 20 years, and, as well as a large owner-occupied sector, it has more significant social rented and private rented sectors than Scotland as a whole. Affordability is a significant concern, with market and private rented sectors experiencing notable price and rent increases in recent years, placing a larger burden on affordable housing providers than might otherwise have been expected.

    - Housing condition is a concern. A key challenge for residents in the future will be identifying and securing the investment required to maintain and improve their older properties. Policy should support the improvement of housing condition, and the pursuit of net zero targets, through the adaptation of homes, and through the adoption of new technologies.

Performance of the Market in Glasgow

1. The Housing Land Audit data shows that after a difficult period following the global financial crash of 2008, the completion rate of new homes has recovered to around 2,000 homes per year.

2. It would appear that the City Development Plan policy CDP10 Meeting Housing Needs aim "to ensure that the City's growing and diverse population has access to a choice of housing or appropriate quality and affordability across all tenures" has broadly been successful. All wards have experienced some development over the past decade, albeit some places more than others.

3. House type choice has been demonstrated, with a range of detached, semi-detached, terraced and flatted homes being delivered across the past decade, albeit around 54% were flats compared with 46% houses. Further, the balance of tenure across the city was 47% affordable to 53% market, suggesting choice in this regard insofar as similar amounts of new homes have been built for each tenure, albeit in some places more of one tenure or the other was experienced.

4. It would appear that good progress on the City Development Plan aims of supporting the re-use of brownfield land has been made. Most new homes were new build (rather than conversions) but the balance of greenfield to brownfield has remained about 20/80 across the past 5 years. The tenure balance on brownfield land has been evenly split, with 47% for market tenure and 53% for affordable.

5. The spatial strategy aims to support the development of a compact city, meaning broadly that it will support more homes in urban locations. The Housing Land Audit shows that over the past decade most homes were built in the inner and outer urban areas rather than the city centre. Remarkably, 5 times more homes were built in non-urban areas than in the city centre over the past decade.

6. Flats accounted for all new homes in the city centre and were the most common new home in both the inner and outer urban area. Detached houses were the most common new home in non-urban areas, reflecting the success of the Community Growth Areas at delivering larger, family-size housing within the City boundaries.

Performance of Policy Interventions in Glasgow

1. Action programming sites in Glasgow has not been a particularly reliable means to deliver new homes due to the reluctance of the market to operate in parts of the city. Instead, the flexibility provided by policy support for housing development on unplanned brownfield sites has been more successful at delivering new homes.

2. Large-scale interventions, either via a masterplan, strategic partnership, or urban development company have generally been successful, albeit there are exceptions, and they generally take many years before delivering the first new homes. Many of these have involved support for the demolition of substandard housing, and the value of demolition as a meaningful tool for making better places and delivering new home should be maintained.

Glasgow's Established Housing Land Supply

1. *Scale of Supply*: 8,030 homes are anticipated to be delivered before City Development Plan 2 is expected to be adopted in 2027. If there are no further additions or deletions, the established supply at 2027 would have a remaining capacity of 26,802 homes. Glasgow's land supply is, however, subject to considerable change at each Audit.

2. *Tenure balance of Supply*: At 2023, the established supply consisted of 22.5% affordable and 77.5% market tenure homes although in the shorter term the tenure balance is more even (45% affordable, 55% market).

3. *Distribution of the Supply – by ward*: The established supply is concentrated in four key wards – namely Ward 9 Calton, Ward 10 Anderston/City/Yorkhill, Ward 16 Canal and Ward 21 North East accounting for 54% the supply at 2023. Beyond 2028 the proportion of the established supply in these wards increases from 54% to 60%.

4. *Distribution of the Supply – by greenfield/brownfield*. The established supply is mainly in brownfield locations. 89.5% of homes programmed to be built over the next 7 years will be in brownfield locations.

5. *Current Pipeline*. Around 41% of the established supply at 2023 has no planning consent. There were proposals for 4,005 homes pending detailed planning permission and a further 243 pending planning permission in principle at August 2023.

6. Vacant and Derelict Land and Urban Capacity sites will have a role in identifying future land supply.

Student Accommodation

1. The complexity of the student accommodation market in Glasgow is not reflected in the NPF4 policy suite. A bespoke policy approach is likely to continue to be beneficial.

2. The city has experienced a significant growth in student numbers in recent years, fuelled, at least in part, by additional international students.

3. The city has also experienced recent and significant rent increases in student accommodation.

4. The market's interest in building additional Purpose-built Student Accommodation in the city has increased again after a few years of only a few applications. According to market reports, most pipeline PBSA in Glasgow are proposed as studio type rather than cluster flats which is unlike the UK trend overall (42% of PBSA units are studios),

5. The Council led working group identified that:
    - Affordability is a major concern for most students.
    - There is clear student preference for on-campus accommodation.
    - There is an existing demand for cluster flats rather than studios to lower rental costs, and lessen the impacts of loneliness; and
    - Around 600 beds a year will be required to meet institution's growth aspirations, but market reports indicate investor appetite for far more.

HMO / Co-Living

1. The complexity of the HMO / Co-Living market in Glasgow is not reflected in the NPF4 policy suite. A bespoke policy approach is likely to continue to be beneficial.

2. The licencing data suggests that, during the City Development Plan period from 2017 to 2021, there was a sizeable demand for Housing for Multiple Occupation in the City, with over 3,000 valid licences operating each year.

3. Applications for HMOs between 2017 and 2023 were in the main either lawful or refused where they required planning permission. Applications for HMO removal were approved.

4. City Development Plan SG10 restricts HMOs in areas of high concentration. Key areas of concentration relate to the main university campuses.

5. HMOs remain a key component of the city's housing offer, and Co-Living is emerging as a model for large scale schemes.

Housing for Older People

1. The Glasgow HSCP indicates that Glasgow has 85,623 (13.5%) older people aged 65 and over. This is lower than the NRS estimate of 87,100 people. 9.7% of Glasgow residents who are 65 and over are either receiving care at home or are living in a care home.

2. In Glasgow, the total number of care homes has decreased 21% from 81 in 2012 to 64 in 2022. The overall care home capacity in Glasgow was 4,123 in 2022. This is a decrease of 5% since 2012. Despite the reduction in overall capacity, the occupancy rate has decreased from 89% in 2012 to 83% in 2022.

3. 42.8% of Glasgow's older people aged 65 and over who have high levels of care needs live at home, rather than in a care home (2022). This is higher than the 35.0% for Scotland overall.

4. The LHS sets out a joint target between housing, health and social care, to deliver 90 homes within specialist housing developments for older people (by 2028). These will be for older people at risk of admission to or long-stay within to hospital or residential care.

Housing for Disabled People

1. The Glasgow HSCP highlights that 31% of residents in Glasgow have at least one long-term health condition based on data from the Census 2011. This varies across Glasgow, with the North East Locality being 33.7%.

2. Learning Disability – The Glasgow HSCP estimated that around 0.6% of residents in Glasgow have a learning disability and about 2.1% have a learning difficulty accounting for 3,700 and 13,600 people respectively.

3. There is an identified need and commitment within the Glasgow City Integration Joint Board's Strategic Plan for developing specialist housing, which would be designed to meet the needs of young people with a range of complex social, health/nursing needs and severe mobility problems.

4. Mental Health – The proportion of people with mental health needs is estimated to be about 50% higher in Glasgow than for all of Scotland. Current demand for accommodation based Mental Health services in Glasgow outstrips supply.

5. There is an identified need for single person Supported Living service models with on-site staff support 24/7. This would be accommodation-based services for individuals with severe and enduring Mental Health issues.

6. Physical Disability – The HNDA estimated that there may be demand for between 3,000 and 3,720 wheelchair accessible and adaptable homes in Glasgow.

7. The Local Housing Strategy 2023 to 2028 set a target for 10% of all homes within new affordable housing developments of 20 homes or home to be fully wheelchair adaptable.

Housing for Gypsies and Travellers

1. Gypsies and Travellers encompass a range of groups with different histories, cultures and beliefs. The Scottish Government has provided a definition of Gypsies and Travellers for planning purposes.

2. The number of Gypsy/Travellers in Scotland is unclear. The 2011 census suggests that there are approximately 420 Gypsy/Travellers in Glasgow.

3. Within the Glasgow City Council area, there are no dedicated local authority owned sites for Gypsy / Travellers. The Glasgow City Region Housing Need and Demand Assessment (2023) did not identify evidence of existing or projected unmet need for sites for the gypsy/traveller community within the Glasgow City area. However, occasional temporary roadside encampments could indicate unmet demand.

4. Travelling Showpeople are a distinct community in Glasgow. Around 80% of the Scottish Travelling Showpeople community is estimated to be located in Glasgow, often co-located with their vehicles in shared yards.

5. The LHS has committed to undertake research engaging with the Travelling Showpeople community to establish a robust quantitative estimate of the number of sites and type of accommodation that may be required in Glasgow and keep under review as needs change.

Self Build

1. At May 2023, there were over 400 people registered on the Self-Build Register.

2. The Maryhill showcase has allowed the Council to implement a scheme that can be learnt from.

3. The Council has committed in the LHS to examining options to develop new policy that could boost the supply and delivery of custom and self-build opportunities in the city.

New Interventions

1. Short term lets – the Council along with other Local Authorities across Scotland now operates a short-term let licencing scheme in addition to the established planning control position across Glasgow.

2. Masterplan consent areas – Glasgow City Council currently shares a Simplified Planning Zone (SPZ) in Hillington with Renfrewshire Council. The initial scheme is due to expire by August 2024.

3. 25% Affordable Housing Contribution – NPF4 introduces a 25% affordable housing contribution. The City Development Plan does not include justification for a contributions policy. This report sets out the evidence base regarding affordable housing in Glasgow.

4. Agent of Change principle - This is addressed by the Infrastructure Audit – Culture, Tourism and Heritage but in short introduces a requirement for new developments to consider their impact on existing businesses like music and theatre venues.

5. Town centre housing opportunities – NPF4 sets out the role of city, town and local centres to include opportunities for housing and requires a proportion of the Local Housing Land Requirement to be delivered in city and town centres. The City Centre Living Strategy sets out a commitment to attract around 20,000 additional residents to the city centre between 2018 and 2035. The Town Centre Evidence Report considers opportunities for housing across all centres.

6. Rural Resettlement opportunities – this is not considered to apply to Glasgow.

Local Housing Land Requirement

1. NPF 4 sets a Minimum All-Tenure Housing Land Requirement (MATHLR) of 21,350 for Glasgow. This includes a flexibility allowance to provide a contingency in delivery. The Local Housing Land Requirement should exceed the MATHLR.

2. Outputs from the Housing Need and Demand Assessment on newly arising households, updated information on existing need, and need arising from demolished houses, were used to identify a 10-year housing estimate of 18,285 additional homes. Various other sources of potential sources of need and demand were considered, specifically: a. research commissioned by Homes for Scotland on concealed and overcrowded households, b. need arising from student households, and separate targets for c. the City Centre population and d. the Local Housing Strategy Housing Supply Target.

    a. It was considered that the Homes for Scotland research did not identify a net need figure for additional housing, and that therefore there was not a strong case for a plus adjustment to the 10-year figure.

b. In terms of student housing, the complexity of this market indicates that a bespoke policy approach would be appropriate, rather than a specific land requirement at this stage. Provision of land for purpose built student accommodation is being considered separately from the Local Housing Land Requirement (LHLR).
c. The ambition to double the City Centre population by 2035 does not provide an additional requirement for land but sets out Council policy to focus efforts on growing the population in a specific location. The Deliverable Housing Land Pipeline, required to deliver the LHLR, will include a range of allocations across the city and work will include identifying sites which can deliver on both the City Centre Living Strategy commitment and NPF4 Policy 27 requirement to provide a proportion of the LHLR in city and town centres.
d. The Local Housing Strategy 2023-28 includes a Housing Supply Target of 13,000 houses over the next five years (2023 to 2028) grounded on the Housing Needs and Demand Assessment (HNDA). As such, it does not provide an additional target. The LHS recognises that this is an ambitious and challenging five year target. It has been made more challenging by short-term asylum pressures and the declaration of a housing emergency. It is noted that the Council is reliant on the Scottish Government and Registered Social Landlords fully funding the delivery of the affordable homes required to address both the current emergency and future housing need, and that housing land is unlikely to be the main constraint. In allocating sites to form the Deliverable Housing Land Pipeline, these sites will work to deliver the LHS housing supply target (including the tenure split of 50/50 affordable and market tenure homes) and LHLR.

3. Although the 2024 Housing Land Audit will not reflect the position in the adopted City Development Plan (2017), it does provide an indication that the 10-year figure of 18,285 would be achievable.

4. The approach adopted for the MATHLR process has been replicated in order to identify a Local Housing Land Requirement for Glasgow. It is considered, appropriate, therefore, to apply 25% delivery flexibility to the 10-year housing estimate (with the exception of the 230 house figure for demolitions). This results in a **Local Housing Land Requirement for Glasgow of 22,569 homes.**

5. A full site appraisal process will be carried out for the Proposed Plan, in order to identify sites to comprise the Deliverable Housing Land Pipeline.

Implications for City Development Plan 2

1. The Council is committed to providing housing to meet residents' needs, regenerate neighbourhoods, and re-use vacant and derelict land, while reflecting Glasgow place at the heart of a compact city region. Housing delivery must take place in partnership with affordable housing funders, Registered Social Landlords and private housebuilders. The evidence set out in this report will inform the production of City Development Plan 2.

2. The following activities will be required:

   - Additional analysis to determine if a 25% affordable housing policy is appropriate. Consideration of the implications of including such a policy in CDP2, both in terms of impact on other required policy outcomes and in practical delivery terms.
   - Site Appraisal process to include: assessment of all existing sites, call for sites, Urban Capacity Study and Green Belt Review.
   - Development of a Deliverable Housing Land Pipeline to meet the range of needs identified in this report (affordable, specialist needs), deliver on a range of affordable and housing tenures and deliver across the city including in the city centre, town centres and to deliver on regeneration priorities.
   - Update CDP policy with regards purpose built student accommodation.
   - Development of policy to accompany the Deliverable Housing Land Pipeline, to recognise the role of windfall sites in Glasgow's housing land supply.

1 Introduction

1.1 Purpose of the Report

1.1.1 This report forms part of the Evidence Report for City Development Plan 2.

1.1.2 The purpose of this paper is to highlight the key evidence and sources that have been identified, and which will be relied upon when developing localised policy approaches relevant to the preparation of City Development Plan 2 for Glasgow.

1.1.3 This paper covers a wide range of housing issues including: demographic trends, land supply, existing policy interventions, specialist housing, market outlook and possible new interventions, housing need and demand, and the setting of the Local Housing Land Requirement.

1.1.4 In producing this report, evidence has also been collected through engagement with the public and other stakeholders. More information about the early engagement can be found in the Report of Engagement. This information is also referenced in this document.

2 Glasgow's Housing Profile

2.1 Context

2.1.1 At 2024, Glasgow is the largest city in Scotland by residents, households, homes and residential density.

Residents	Over 635,000 people
Households	Over 293,000 households
Homes	Over 313,000 dwellings
Residential Density	3,637 residents per square kilometre

Source: From National Records of Scotland estimates

2.1.2 The Glasgow housing journey is complex, it emerges from a medieval market town, is greatly changed by the extraordinary growth during the industrial revolution and has been shaped by its transition to a modern proto-knowledge city.

2.1.3 Historically, Glasgow has accommodated a large amount of social housing, and higher than average proportion of social housing than elsewhere in Scotland. At 2019, Glasgow had the highest number (~108,000) and almost the highest proportion (33%) of affordable tenure homes in the country. These are currently provided by 59 Registered Social Landlords that let out homes in the city at affordable rates, including community-based housing associations that operate in particular parts of the city as well as larger-scale organisations that operate across the city.

2.1.4 There are more than 138,000 homeowners in Glasgow accounting for 44% of all homes, this is the most common tenure of home in the city, but it is the lowest percentage in Scotland.

2.1.5 The city accommodates a larger number and proportion of private rental, mid-market rental and other forms of renting than elsewhere in Scotland. There are over 35,000 registered private landlords, and there were around 59,000 registered private rented properties at 2019. There are also five higher education institutes in the city which attract a combined enrolment of over 100,000 students. This is reflected by a recent increase in the purpose-built student accommodation capacity in the city to around 19,500 rooms at August 2023.

2.1.6 The past 40 years of housing development in the city has been characterised by conservation of the city’s tenement stock, widening the choice of housing type and tenure, and the renewal and replacement of municipally built housing, which was itself originally constructed to address the poor quality and overcrowding of tenemental housing.

2.1.7 The scale and range of challenges that the city has faced in the past has required a range of innovative responses, and each response has reshaped where people live, and the way people live. To that extent, the identification of conservation areas, allied to the conservation and improvement of tenement stock, have been designed to preserve the City’s housing assets, while masterplans, and local and strategic development frameworks have all been introduced to regenerate the city through the prioritisation of the City’s brownfield supply.

2.1.8 Glasgow City Region is also part of the only metropolitan region in Scotland. Glasgow City is an integral part of its complex and interdependent network of connections and relationships. Partnership working on housing matters is now long-established and can be traced through the formation of New Towns in the 1960s to the collaborative preparation and publication of successive Structure Plans and Strategic Development Plans for the region. These agreements laid the basic foundations for a spatial strategy that seeks to mould new development into a compact city region. A policy approach that now runs through much of the Scottish Government’s National Planning Framework 2023.

2.1.9 The commitment to developing a compact city model over the past 25 years has been shared by the Clydeplan authorities and has more recently evolved into collaboration on regional infrastructure provision. In that respect, the Glasgow City Region Housing Market Partnership and the Glasgow City Region Regional Partnership have important roles identifying and delivering homes in Glasgow, and have prepared a Housing Need and Demand Assessment for the Glasgow City Region. This document includes an analysis of demographics and identifies future housing needs within the city.

2.1.10 Internationally, the city’s commitment to homes for all, its history of innovation, openness to new ideas, and willingness to collaborate and share experiences was amongst the reasons that the United National Economic Commission for Europe held a Conference on City Living in Glasgow on 13 September 2019. They acknowledged the city as an exemplar on the implementation of the Geneva UN Charter on Sustainable Housing, and signed the Glasgow Message.

2.1.11 Glasgow is also the main host local authority welcoming asylum seekers and refugees to Scotland. Over the period 2017 to 2022, around 4,000 households were given leave to stay in the UK and presented their need in Glasgow. At April 2023, there were around a further 5,000 households in the city awaiting Home Office decisions on their applications. This situation is dynamic. A new fast track asylum process and removal of local connection requirement for homelessness has potential to increase significantly the expected rate of resettlement.

2.1.12 This chapter identifies relevant evidence sources that describe the main characteristics of Glasgow City, and which will influence the need for land for new homes. Namely, it's population and household trends and projections, based on data mainly from the National Records of Scotland and the Census 2022, as well as other national datasets, policy commitments and funding models.

2.2 Glasgow City Council Area Profile

2.2.1 The National Records of Scotland have prepared a Glasgow City Council Area Profile which was last updated in July 2022, and which was due to be updated again in September 2023.

2.2.2 The Profile sets out the main population and household characteristics for the city, including graphs and charts showing population estimates, population projections, births, deaths, life expectancy, migration, marriages and civil partnerships, households estimates, household projections, and dwellings. The have also prepared a set of interactive maps that detail projected changes by ward to 2023.

2.2.3 In combination with the profiles for other Local Authority areas, it shows that more people live in Glasgow than any other part of Scotland, and that there are more homes in the city than anywhere else in the country.

2.2.4 The Census 2022 will provide a breadth and depth of data about the people of Glasgow but is not yet fully published. The initial outputs - Scotland's Census 2022 - Rounded population estimates – provide headline figures for Local Authorities and was published on 14 September 2023. The next publications are due in spring 2024 with the bulk of the main publication due in the summer of 2024.

2.2.5 The Local Housing Strategy 2023 to 2028 sets out the key short-term housing issues for Glasgow and was informed by an LHS Supporting Information Paper (Jan 2023), Glasgow's Housing Contribution Statement 2019-2022 (Nov 2022), and its Consultation and Engagement Report.

2.2.6 Other Glasgow profiles have been prepared including Understanding Glasgow: The Glasgow Indicators Project by the Glasgow Centre for Population Health; the Thriving Glasgow Portrait by Gallant and the University of Glasgow, NOMIS Labour Market Profile by the ONS, and the Demographics Profile (2020) by the Glasgow City Health and Social Care Partnership.

2.2.7 An independent, narrative driven, profile has also been prepared by the Place Commission\Glasgow. Its report, People Make Places, described the history and evolution of modern Glasgow across four eras of development and the role that Glasgow now has within Scotland. Through the lenses of an international, metropolitan and everyday city, it describes the concept and complexities of place, a stocktaking of place in contemporary Glasgow, the results of engagement, and concluding with recommendations about what Glasgow might do better to combine place thinking and climate awareness.

2.2.8 Additional recent commentaries that describe the Glasgow City Council Area Profile include one-off reports as well as regularly updated commentaries:

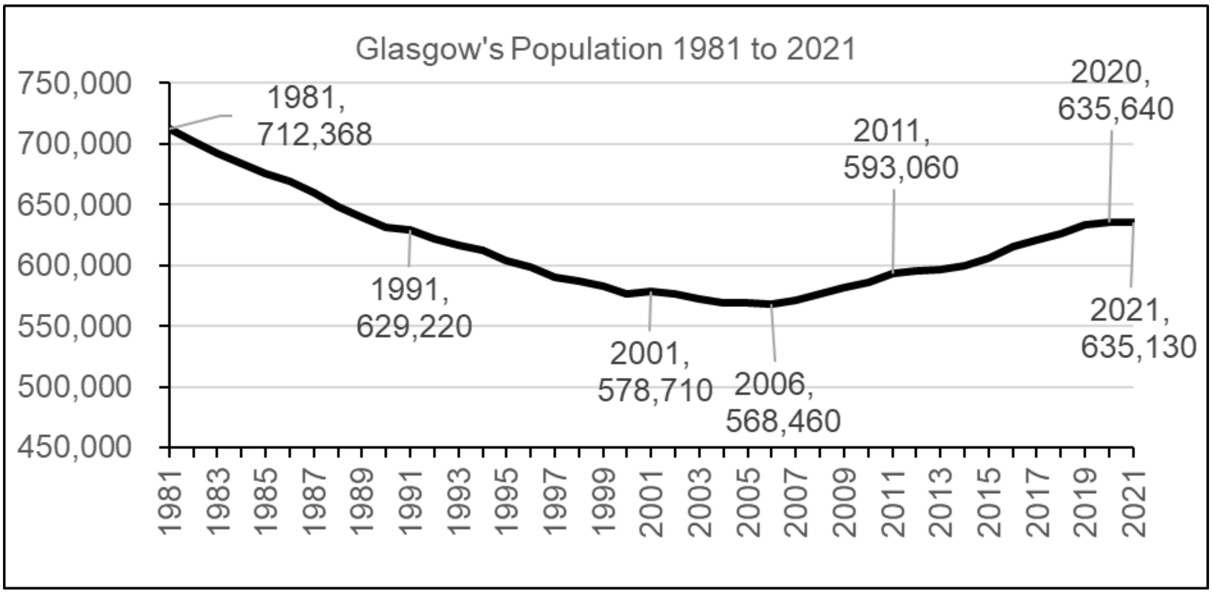
- Avison Young (February 2024) Drivers of Change 2024
- Brodies (July 2023) Housing in Scotland: challenges and opportunities in 2023
- CBRE (June 2023) Which City? Which Sector?
- CBRE (December 2023) UK Real Estate Market Outlook 2024
- Homes for Scotland (Jan 2024) Existing Housing Need in Scotland by Rettie and Diffley Partnership
- Homes for Scotland (Jan 2024) Existing Housing Need in Glasgow by Rettie and Diffley Partnership
- Rettie (December 2023) Braving the weather: the Scottish housing market in 2023
- RICS (December 2023) December 2023 UK Residential Market Survey
- Ryden (February 2024) Scottish Property Review 2024
- Savills (December 2022) Home Truths: Glasgow
- Savills (September 2023) What are the ingredients to innovate Glasgow’s real estate?
- Savills (August 2023) Workstream 1: Increasing Residential Capacity
- Seven Cities Summary Report
- Scottish Government (March 2021) A Scotland for the future: opportunities and challenges of Scotland's changing population

2.3 Population characteristics

Population Estimates

2.3.1 The National Records of Scotland typically publish mid-year population estimates each year that, in combination, allow for the monitoring of population change between censuses. The next publication, for mid-2022, is expected to be published in the Spring of 2024.

2.3.2 The methodology broadly involves taking the previous year's population as a starting point and then removing the previous year's armed forces and prison population. The resulting population is then aged on 1 year. Births are added and deaths removed. Finally, adjustments are made for net migration (which may be positive or negative) and new prisoner and armed forces populations are added.



Source: National Records of Scotland Mid-Year Population estimates

2.3.3 From a post-war peak of over 1,000,000 people in 1951, Glasgow's population decreased by around 40% over the course of the next 55 years. The graph above shows Glasgow's population begin to increase again during the mid 2000's. From the years 2006 to 2011 the population increased, it plateaued between 2012 and 2014 before increasing again until 2019. Most recently it has recorded a small decrease of 510 residents from 2020 to 2021.

2.3.4 At 2021, the National Records for Scotland estimated that Glasgow had around 635,000 people living in it. This is the most people of any Local Authority in Scotland and roughly equivalent to the population that Glasgow had between 1989 and 1990.

2.3.5 Taking only the period of population growth from 2006 onwards, this indicates there has been an increase of 66,670 residents, which averages to **4,445 additional residents** a year.

2.3.6 The main Census 2022 data collection was undertaken on 20 March 2022 with initial outputs published 14 September 2023. The bulk of the remaining census outputs are expected to be published in the summer of 2024 with analytical findings in 2025.

2.3.7 The methodology broadly involves a combination of a main census data collection, a census coverage survey (CCS), and administrative data to produce robust statistical estimates and outputs.

2.3.8 At 20 March 2022, the Census 2022 returned an initial rounded population estimate for Glasgow of 620,700 residents.

2.3.9 The initial outputs from the Census 2022 indicate Glasgow's population at 2022 was considerably lower than the National Records of Scotland had estimated it was at 2021. The difference was 14,430 fewer residents in 2022 than 2021 (620,700 compared with 635,130 residents). The lower response rate for the Census suggests more caution should be exercised in relation to these figures and the NRS have committed to reviewing its own publications in tandem with the upcoming Census publication proper over the summer of 2024.

2.3.10 The initial outputs from the Census 2022, while lower than the population estimates, would still represent population growth of 27,455 residents since 2011 at about **2,496 additional residents** each year on average.

Population changes at Ward level

2.3.11 The National Records of Scotland published [Electoral Ward Population Estimates (2011 Data Zone based)] information on 1 September 2022. These provided an indication of population change by city ward.

2.3.12 Populations for electoral wards are based on data zone population estimates, where each data zone has been assigned to a particular electoral ward. These estimates were produced using the 2022 Electoral Ward boundaries.

2.3.13 While the city's population has generally increased since 2006, the city-wide increase has not necessarily impacted each ward equally. This is evident from an examination of the population of wards between 2001 and 2021.

Ward No	Electoral Ward 2022 Name	2001	2011	2021
01	Linn	30,001	29,891	29,208
02	Newlands/Auldburn	24,737	23,617	23,416
03	Greater Pollok	26,569	29,938	33,274
04	Cardonald	31,304	30,251	29,082
05	Govan	25,083	24,967	28,278
06	Pollokshields	26,820	27,930	28,508
07	Langside	28,936	28,443	30,528
08	Southside Central	23,480	24,310	27,935
09	Calton	21,496	24,312	31,563
10	Anderston/City/Yorkhill	20,111	26,899	34,926
11	Hillhead	23,043	24,238	25,371
12	Victoria Park	17,522	20,127	21,597
13	Garscadden/Scotstounhill	29,867	30,796	30,908
14	Drumchapel/Anniesland	28,968	29,477	29,680
15	Maryhill	21,595	20,952	22,448
16	Canal	24,584	25,008	25,989
17	Springburn/Robroyston	30,034	27,498	28,865
18	East Centre	27,724	27,622	29,594
19	Shettleston	26,866	25,823	26,627
20	Baillieston	21,317	21,357	22,916
21	North East	21,088	19,686	21,080
22	Dennistoun	21,239	21,948	21,722
23	Partick East/Kelvindale	26,326	27,970	31,615
-	**Glasgow-wide Ward Total**	**578,710**	**593,060**	**635,130**

Source: National Records of Scotland, Electoral Ward Population Estimates (2011 Data Zone based)

2.3.14 The table above shows that central parts of Glasgow have experienced significant increases in their resident population across the past two decades. Ward 9 Calton and Ward 10 Anderston/City/Yorkhill have added around 10,000 and around 14,000 residents respectively since 2001.

2.3.15 There are a range of reasons for the population in wards to have changed in different ways over the past two decades, including natural change and net migration impacting areas disproportionately, as well as new housebuilding and demolition programmes.

2.3.16 Nationally important interventions like Clyde Gateway's development of the Commonwealth Games Village in Ward 9, Calton, along with large-scale purpose-built student accommodation developments being developed in Ward 10 over the past decade, may go some way to explaining the large increases in the population of those wards.

2.3.17 In other parts of the city, the population grew more gradually across the two decades including in Wards 3, Greater Pollok; 6, Pollokshields; 8, Southside Central; 11, Hillhead; 12, Victoria Park; 13, Garscadden/Scotstounhill; 14, Drumchapel/Anniesland; 16, Canal; 20 Baillieston; and 23 Partick East/Kelvindale.

2.3.18 Physical interventions in the built environment will likely have played a role in population change in these areas – mainly in the form of additional homes that have drawn more people to the area.

2.3.19 In that regard, the New Neighbourhood Initiatives at Garthamlock,(ward 21) and Oatlands (ward 8) and the Community Growth Areas at Baillieston (ward 20) and Robroyston (ward 17) may explain population increases in these wards, as they have generated significant numbers of new homes aimed at attracting families to the city.

2.3.20 Some areas experienced an initial decline to 2011, and then, in line with the city's overall population, growth between 2011 and 2021. This includes Wards 5, Govan; 7, Langside; 15, Maryhill; 17, Springburn/Robroyston; 18, East Centre; 19, Shettleston; and 21, North East.

2.3.21 The Transformational Regeneration Areas (TRA) are an example of partnership housing delivery using long-term physical interventions in the built environment. Where they have progressed to new homes on the ground, for example at Maryhill, North Toryglen and Laurieston, they appear to have impacted on the populations of Maryhill (ward 15), Langside (ward 7) and Southside Central (ward 8). These wards have experienced large-scale demolition of substandard homes, followed by the delivery of new homes. The ward level changes have not necessarily impacted on the population of Glasgow overall, because residents are likely to have moved elsewhere in Glasgow while redevelopment was undertaken.

2.3.22 Ward 22, Dennistoun stands alone as an area that appears to have experienced population growth from 2001 to 2011 and then a decline to 2021. The later decline might be attributed to large-scale demolition of sub-standard homes associated with the Sighthill Transformational Regeneration Area, the first new homes of which were yet to be delivered in ward 22 at 2021.

2.3.23 Three wards south of the River Clyde: 1, Linn; 2, Newland/Auldburn; and 4, Cardonald have recorded slight population decline over both the 2001 to 2011 and 2011 to 2021 periods. However, ward 4, Cardonald was the most populous ward in Glasgow at 2001, and ward 1, Linn was the third most populous so while population decline has been recorded across both decades, they remained in the top 10 most populous wards in Glasgow at 2021.

2.3.24 The population decline of Ward 2, Newlands/Auldburn reflects the redevelopment associated with the Pollokshaws Transformational Regeneration Area, which involved the demolition of higher density sub-standard homes during the period 2011 to 2021, but not recording its redevelopment since the first new lower density homes completed after 2021.

2.3.25 It may also be the result of the methodology of this dataset, where a datazone crosses a ward boundary, but the datazone is assigned to a single electoral ward. This appears to be the case for the Persimmon development of Cowglen, on the western boundary of Ward 2. The datazone that the Cowglen site lies within straddles both Ward 2, Newlands/Auldburn and Ward 3, Greater Pollok. It is possible that the methodology has resulted in the 500 or so homes built at Cowglen in Ward 2 being allocated instead to Ward 3.

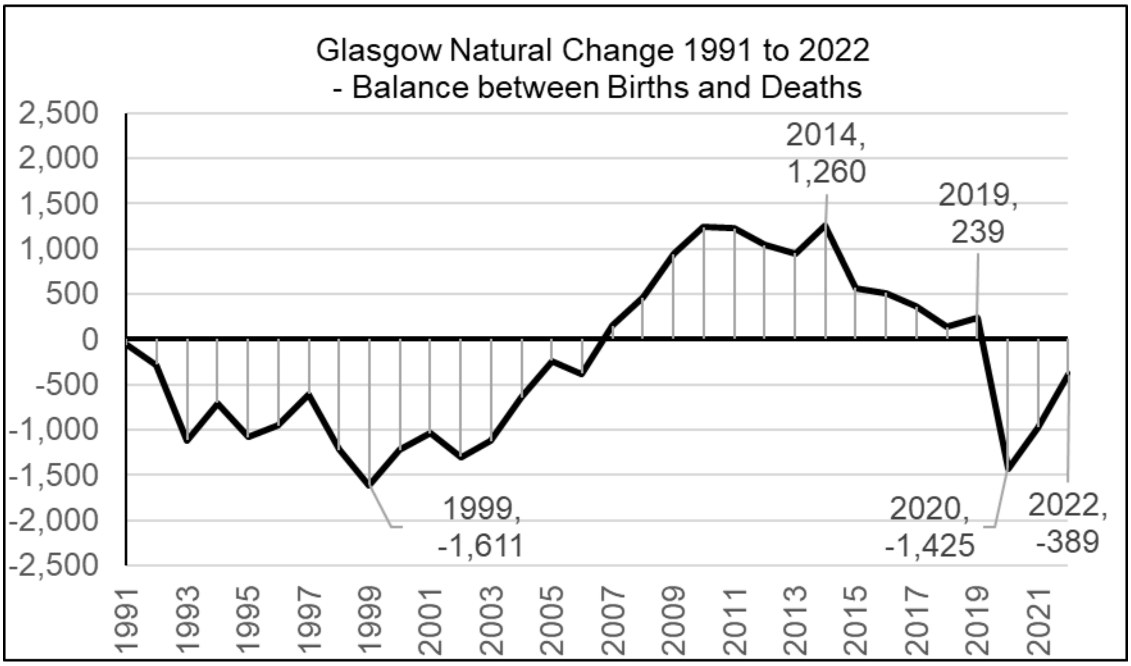
Natural Change

2.3.26 Growth in the population each year is based on four dynamic factors, the number of births, the number of deaths, the number of people who come to the city to live from elsewhere and the number of people who leave to live elsewhere.

2.3.27 These factors are typically paired up. Natural change is the balance between births and deaths and net migration is the balance between the number of people arriving and the number leaving.

2.3.28 The National Records of Scotland publish annual updates on births and deaths via their ‘vital events’ publication. The latest of which, for 2022, was published 20 July 2023. The next update is expected in June 2024.

2.3.29 In absolute terms, Glasgow gained a total of 2,675 more residents via natural change (more births than deaths) than it lost over the 10 years, 2012 to 2021. However since 2020 the city has recorded a negative natural change (more deaths than births) each year.



Source: National Records of Scotland time series data, births net deaths

2.3.30 The graph above shows the negative impact of natural change on the city population from 1991 to 2006. However, the city benefited from positive natural change between 2006 and 2020, before the negative impact that the Covid-19 pandemic had on births and deaths. This resulted in a return to negative natural change.

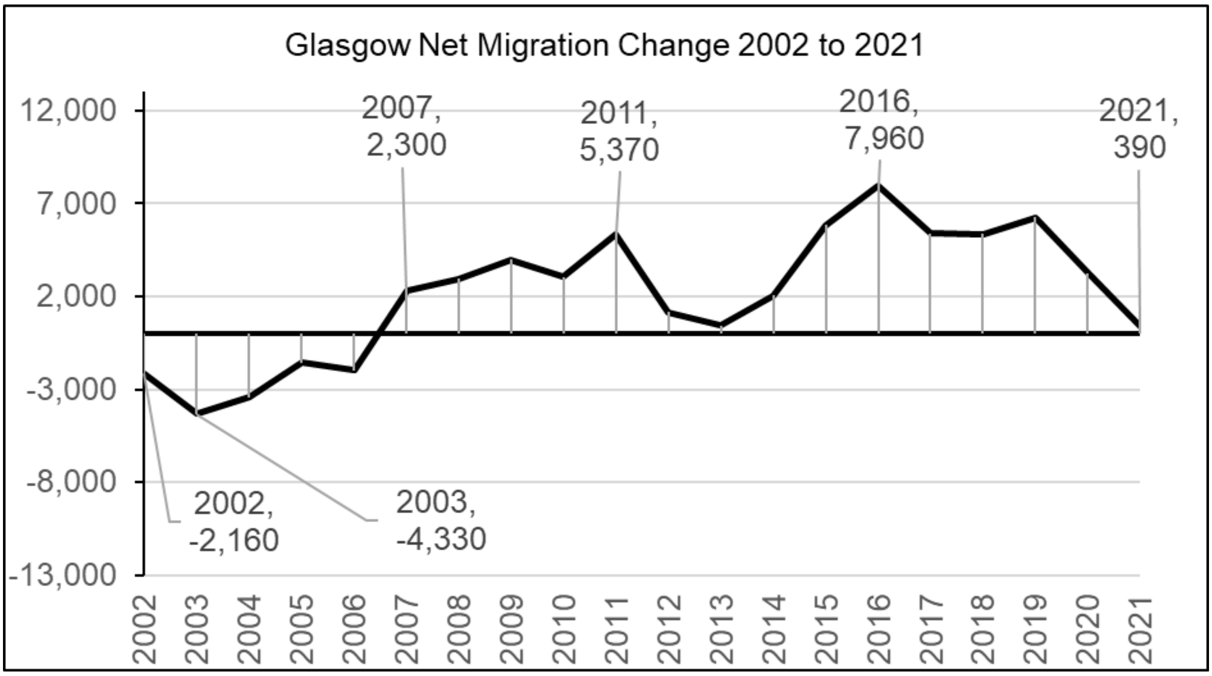
2.3.31 During 2020, deaths increased by 978, from 6,314 in 2019 to 7,292. This was the highest annual total of deaths recorded in Glasgow since 2003.

2.3.32 Perhaps a more surprising aspect of 2020 was the decline in births. Births in Glasgow were 10.5% lower in 2020 (686 births) than 2019, down from 6,553 to 5,867. This was the fewest births recorded in the period 1991 to 2022. This is perhaps an indirect impact of Covid-19 via the associated restrictions on personal movement and physical interaction.

Migration

2.3.33 The National Records of Scotland publishes data about migration via their Local Area Migration publications. The methodology brings together various migration-related indicators for council areas, from different sources. The latest publication is for 2021, and was published on 1 August 2022. The date of the next update has yet to be confirmed.

2.3.34 Broadly, net migration has been positive (more people have arrived than left) from 2006 onwards. In absolute terms, Glasgow attracted 38,100 more residents via migration than it has lost over the 10 years, 2012 to 2021.



Source: National Records of Scotland, Local Area Migration

2.3.35 Net Migration for Glasgow has been positive since 2006, coinciding with the year the city's population began to increase after a prolonged decline. In 2021, the most recent data available, it remained positive contributing 390 additional people to the city's population.

2.3.36 Typically the city has experienced in-migration of around 30,000 people each year (peaking at 35,620 people in 2019, with a low of 26,610 in 2004). Out-migration has been around 28,500 people each year (peaking at 36,010 in 2022 with a low of 23,950 in 2011).

2.3.37 Migration flows are recorded by the National Records of Scotland as three sources: people from within Scotland, people from the rest of UK, and people from international destinations.

2.3.38 The in-migration sources describe Glasgow's important role in attracting international residents to Scotland. Over the decade 2012 to 2021, around 48% of in-migrants to Glasgow were from Scotland, 20% were from the rest of the UK and 31% were from international destinations. Similar proportions are identifiable for the 10 previous years. This is a far higher proportion of new international residents than other parts of the city region, which ranged from 4% to 12%.

2.3.39 The out-migration sources describe the interactivity of Glasgow with its City Region and Scotland. Over the decade 2012 to 2021, around 64% of out-migrants went to other parts of Scotland, 20% went to the rest of the UK and 16% went to international destinations. This is slightly different to the 10 previous years when 59% went to other parts of Scotland, 22% went to the rest of the UK and 20% went to international designations.

2.3.40 Between 2012 and 2021, net migration has been driven by international migration. Glasgow attracted 54,740 more residents from international locations than it lost to them during this period. It also attracted 9,860 more residents from UK locations outside Scotland, but it lost a balance of 26,490 residents to Scottish locations.

2.3.41 Between 2021 and 2022, the most common destination for former Glasgow residents that left the city to live elsewhere in Scotland was South Lanarkshire (3,580). The top 5 Scottish destinations for former Glasgow residents were all local authorities in the Glasgow City Region, demonstrating the interconnectivity of the metropolitan city and Glasgow City's role in attracting residents to it whilst existing residents moved to adjacent authorities in the city region.

2.3.42 Most new residents arriving in the city between 2021 and 2022 from other parts of Scotland were from Edinburgh (2,090) and while 1,660 Glasgow residents moved to Edinburgh, the net result is an increase of around 430 residents to Glasgow as the City drew people westwards across Scotland from the capital.

2.3.43 The National Records of Scotland data does not appear to show any impact on recent international migration arising from the global events such as the Covid-19 pandemic or from broader UK-wide changes like Brexit, that might have been expected to give rise to some change. This contrasts with more recent ONS analysis for UK international migration patterns, which suggests that international events have led to substantial changes in migration patterns and scale.

2.3.44 The ONS Long-term international migration data for the period ending June 2023, published on 23 November 2023, shows that international in-migration to the UK has changed following the impacts of Covid-19 and the end of the EU transition period associated with Brexit. Broadly falling from 800,000 to 600,000 during the lockdowns of 2020, before increasing to around 1 million by the beginning of 2023.

2.3.45 It indicates 3 main changes: British national's movements contributed a net gain to the UK population, where previously they had contributed a net loss, EU-based migrants contributed a net loss whereas previously this group had contributed a net gain, and non-EU migrants movements resulted in a larger net increase than previously. In summary, that migration patterns have been significantly impacted by recent international events.

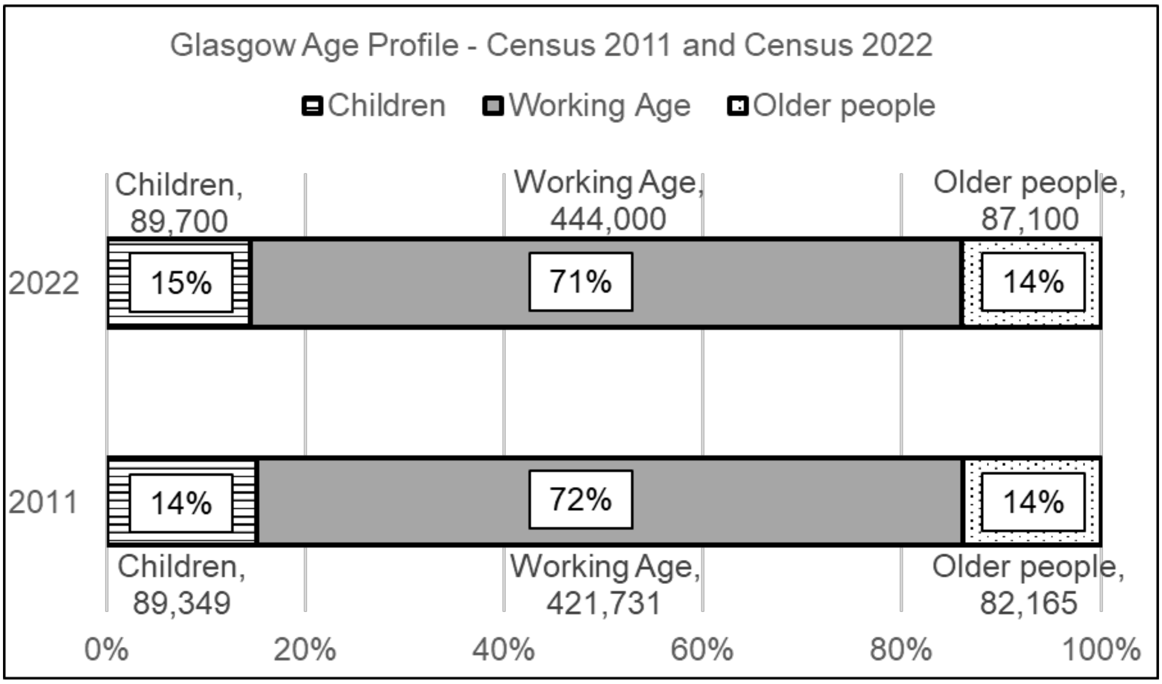
2.3.46 With respect to alternative sources for migration evidence, the National Records of Scotland have collated a list of Other Migration Statistics and Useful Information.

2.3.47 Other sources include the ONS, who have published their own migration-related data sources at local authority level based on their own methodology. Outputs include migration flow, non-UK-born and non-British populations, National insurance number registrations, GP registrations, and births to non-UK -born mothers. The latest publication is from 17 September 2021, and no further updates are programmed.

Age Profile of Residents

2.3.48 The age profile of the city is an important indicator of the types of residential options that will be in demand. In particular, this is useful in identifying the potential scale of the housing needs of residents who are currently children but who will potentially need a home within the plan period in 5 to 10 years time, and of older people, a requirement of the new 2019 Planning Act.

2.3.49 Age profiles are typically described as three broad cohorts of people. Those aged 0 to 14 (children), aged 15 to 64 years (working age), and 65 years or over (older people).



Source: Census 2011 and initial outputs of Census 2022

Working Age Cohort

2.3.50 The initial Census 2022 outputs reported that 71.5% of Glasgow's population were of working age (444,000 people). This is a higher proportion than the 64.6% of people in Scotland who are of working age, and a higher proportion than any other local authority in Scotland. Glasgow accounted for 12.6% of all working age people in Scotland.

2.3.51 There were 22,269 more working age people in Glasgow in 2022 than there were in 2011 (421,731) an increase of 0.5% since 2011.

2.3.52 The other Glasgow City Region local authorities all had lower proportions of working age people. This ranged from 59.4% in East Dunbartonshire to 65.7% in North Lanarkshire

2.3.53 Part of the working age cohort are recognised as students in tertiary education. Data from Higher Education Statistics Agency shows that the number of students enrolled in Glasgow City Region institutions has increased by almost 40% over the past 8 years.

HE provider	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22
Glasgow Caledonian University	16,930	16,580	16,415	16,450	16,860	17,540	19,030	20,050
Glasgow School of Art	1,840	2,060	2,195	2,300	2,285	2,380	2,365	2,440
University of Glasgow	26,815	27,220	28,615	29,725	30,805	32,465	37,145	42,980
Royal Conservatoire of Scotland	985	1,080	1,155	1,210	1,280	1,220	1,330	1,245
University of Strathclyde	21,210	21,470	22,955	22,295	22,640	24,330	24,450	25,715
University of the West of Scotland	14,730	15,555	15,955	16,435	17,025	16,105	17,935	20,070
Glasgow Total	82,510	83,965	87,290	88,415	90,895	94,040	102,255	112,500

Source: https://www.hesa.ac.uk/data-and-analysis/students/where-study

2.3.54 While not all additional students will become residents of the city, the 29,900 additional enrolled students recorded between 2014/15 and 2021/22 has likely contributed to the 35,490 residents the city added over the same period. A recent study by Centres for Cities suggested that Glasgow is particularly good at retaining graduates.

Children

2.3.55 The Census 2022 reported that 14,5% of Glasgow's population were children (89,700 people). This is a lower proportion than the 15.3% of people in Scotland who are children, but there are more children in Glasgow than any other local authority in Scotland, and they account for 11% of all children living in Scotland.

2.3.56 Compared with the Census 2011 position, when 89,349 children lived in Glasgow, the Census 2022 reported an additional 351 children. This represents an absolute increase, but a proportional decrease of 0.5%, in terms of the proportion of the city's residents who are children since 2011.

2.3.57 The other Glasgow City Region local authorities all had higher proportions of their populations that were children. This ranged from 17.9% in North Lanarkshire to 24% in East Dunbartonshire. Despite this, there were more children in Glasgow alone than East Dunbartonshire, West Dunbartonshire, Renfrewshire, East Renfrewshire and Inverclyde combined (89,700 compared with 88,800).

2.3.58 Glasgow's Local Child Poverty Action Report 2021/22 and its associated report Child Poverty: Understanding the Impact of the Covid-19 Pandemic by the Centre for Civic Innovation uses a wider age bracket than 0 to 14 years to describe 'children' but their finding indicates that 27,995 children, accounting for at least 26% of children in Glasgow, were living in relative poverty at November 2021. The Council have now published their Child Poverty in Glasgow Report 2023 that and a dashboard that provides an update on the situation.

Older people

2.3.59 The new planning system places a specific requirement on Local Development Plans to consider the housing needs for older people, in part to reflect the population trends at a national level commonly referred to as the ‘aging population’.

2.3.60 The Census 2011 was the first time that older people outnumbered children in Scotland (16.8% compared with 16.1%). The Census 2022 shows that this gap has widened (20.1% compared with 15.3%). This is attributable to the population boom after the second world war reaching old age, people living longer than before, and/or there being fewer births.

2.3.61 The initial Census 2022 outputs indicate that Glasgow was the only local authority in Scotland where children still outnumbered older people at 2022.

2.3.62 The Census 2022 reported that 14% of city’s total residents were over 65 years of age. Older people accounted for 87,100 Glasgow residents in 2022.

2.3.63 This is an increase of 4,935 older people, compared with the 82,165 that were resident in 2011, and aligns with the Scotland-wide trend for a growth in this cohort, although it is not yet sufficient to change the proportion of older people in the city. Importantly, Glasgow’s population of older people are the largest group of older people in Scotland accounting for 8% of all Scottish older people.

2.3.64 The other Glasgow City Region local authorities all had higher proportions of older people than Glasgow. This ranged from 17.9% in North Lanarkshire to 24% in East Dunbartonshire. Despite this there were more older people in Glasgow than East Dunbartonshire, West Dunbartonshire, East Renfrewshire and Inverclyde combined (87,100 compared with 82,300).

Life Expectancy

	Scotland (yrs) Female	Scotland (yrs) Male	Glasgow (yrs) Female	Glasgow (yrs) Male	Difference (yrs) Female	Difference (yrs) Male
Newborn Life expectancy	80.7	76.5	78.2	72.9	-2.5	-3.6
65 year old Life expectancy	84.6	82.3	82.7	80	-1.9	-2.3
Newborn Healthy life expectancy	61.1	60.4	56	54.8	-5.6	-5.6
65 year old Healthy life expectancy	76	74.9	74.3	71.6	-1.7	-3.3

Source: National Records of Scotland life expectancy and healthy life expectancy of new-borns and residents aged 65 or over for Scotland and Glasgow

2.3.65 Life expectancy is the average number of years that a new-born baby is expected to live, depending on its birthplace. Life expectancy had been increasing in Scotland before 2012, it then plateaued until 2018, and has since been in decline.

2.3.66 The National Records of Scotland publish estimates on the life expectancy of residents regularly, using a standard methodology based on mid-year population estimates. The most recent provisional figures were published on 26 September 2023, using 2020-based population projections and 2018-based sub-national projections for council life expectancy. The next publication is expected in September 2024.

2.3.67 In Glasgow, the life expectancy of a baby born between 2020 to 2022 was 78.2 years for females and 72.9 years for males. This was the lowest new-born life expectancy of any local authority area in 2022, and it was notably lower than the Scottish average of 80.7 years for a female and 76.5 years for a male.

Life Expectancy at Older Ages

2.3.68 Life expectancy at older ages is the number of additional years a 65 year old can be expected to live. In Glasgow, a 65 year old female can be expected to live a further 17.7 years on average (i.e. to 82.7 years old) while a male can be expected to live a further 15 years (i.e. to 80 years old). Both have lower life expectancy at older ages than the Scottish average by around 2 years.

Healthy Life Expectancy

2.3.69 Healthy life expectancy, is the average number of years of life that people spend in good health. Good health is based on how people rate their own health in the annual population survey.

2.3.70 The National Records of Scotland publish estimates of the healthy life expectancy of residents via their annual Healthy Life Expectancy in Scotland publication. The most recent version, for the period 2019 to 2021, was published 14 December 2022. There is currently no scheduled update before December 2024.

2.3.71 In Glasgow, the healthy life expectancy for new-born females was 56 years and 54.8 years for males. The healthy life expectancy for 65 year old females was a further 9.3 years (i.e. 74.3 years old) and 6.6 years for a male (i.e. 71.6 years old). In both cases this is lower healthy life expectancy than the Scottish average, with a new-born male baby from Glasgow expected, on average, to stay healthy for 5 fewer years than a new-born baby boy from elsewhere in Scotland

2.3.72 Two key points arise from these estimates, first, Glasgow's life expectancy figures are low in comparison to elsewhere in Scotland, and second, that there is clear scope for these to improve as they have elsewhere. The scale of potential improvement is such that it could in itself contribute to the challenge of accommodating the specialist housing needs of an aging population, since there would be more older people.

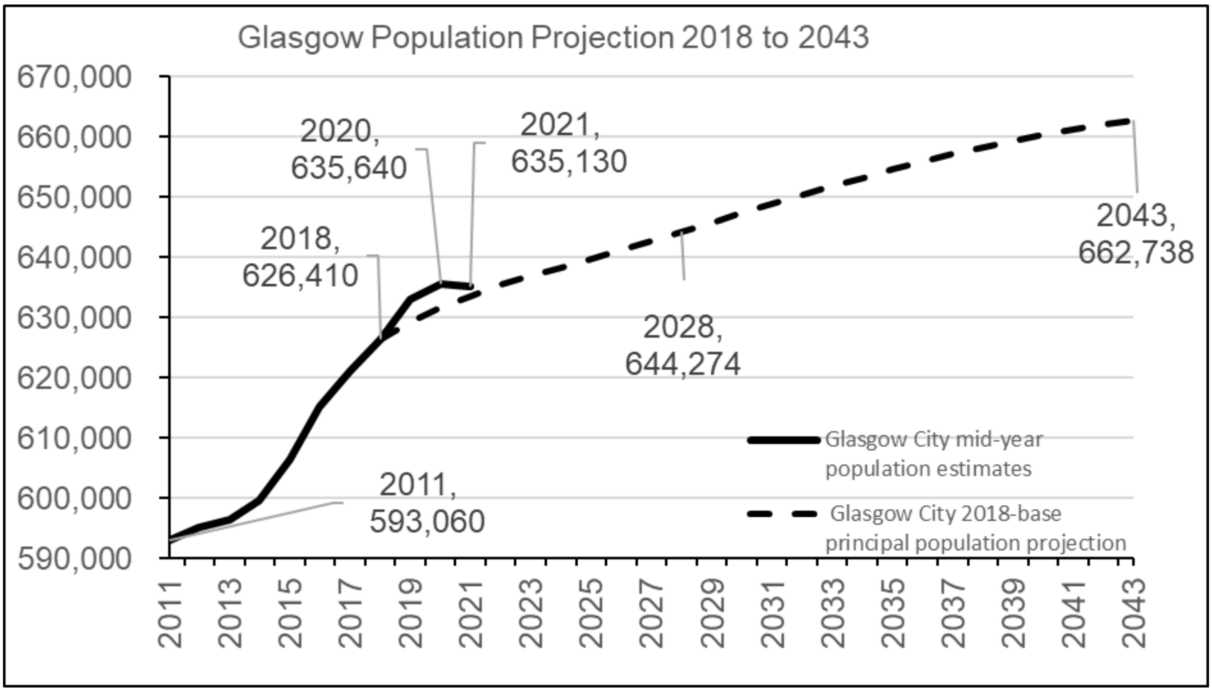
Population Projections

2.3.73 The National Records of Scotland typically publish population projections for Scottish Areas every two years. They help inform the context within which a Housing Need and Demand Assessment of additional housing need is prepared alongside the associated household projections.

2.3.74 The methodology starts with the National Record of Scotland's own mid-year population estimates for 2018, and then makes assumptions about future levels of fertility, mortality, and migration, based on levels observed in the recent past. They are typically considered a 'policy off' projection, meaning that the outcomes are not inevitable, and can be influenced by policy decisions and global events. The NRS projection provides for such decisions or events by the inclusion of variant scenarios.

2.3.75 The next population projection for Scottish Areas publication is expected to be published in early 2025. It is not expected to include variants.

2.3.76 The principal projection indicates that, over the course of the 25 years between 2018 and 2043, the population of Glasgow would increase by around 36,328 people to 662,738 residents by 2043. An average annual increase of around **1,453 additional residents** a year.



Source: National Records of Scotland mid-year estimates time series (July 2022) and 2018-based principal population projection (March 2020)

2.3.77 The graph above shows the National Records of Scotland mid-year estimates to 2021 (solid line) alongside the 2018-based principal projection (dashed line). They indicate that the city's population has grown slightly more than expected between 2018 and 2021.

2.3.78 It also shows Glasgow's projected population change over the course of the next 22 years as steady and resilient, at around **1,255 additional residents** each year from 2021 to 2043. This would be considerably slower than the rate it has grown at since 2006 (4,445 additional people each year).

2.3.79 The National Records of Scotland also prepared variants of the principal projection which use different assumptions about key aspects that impact on growth or decline of the population, including migration, fertility and life expectancy.

Data Comparison- 2018 to 2043 NRS Variant Population Projections 2018-based	~Additional Residents per year
Zero outwith Scotland migration	-2,743
Low migration	666
Low fertility	771
Low life expectancy	1,174
Principal	**1,453**
High life expectancy	1,660
High fertility	1,827
High migration	2,277

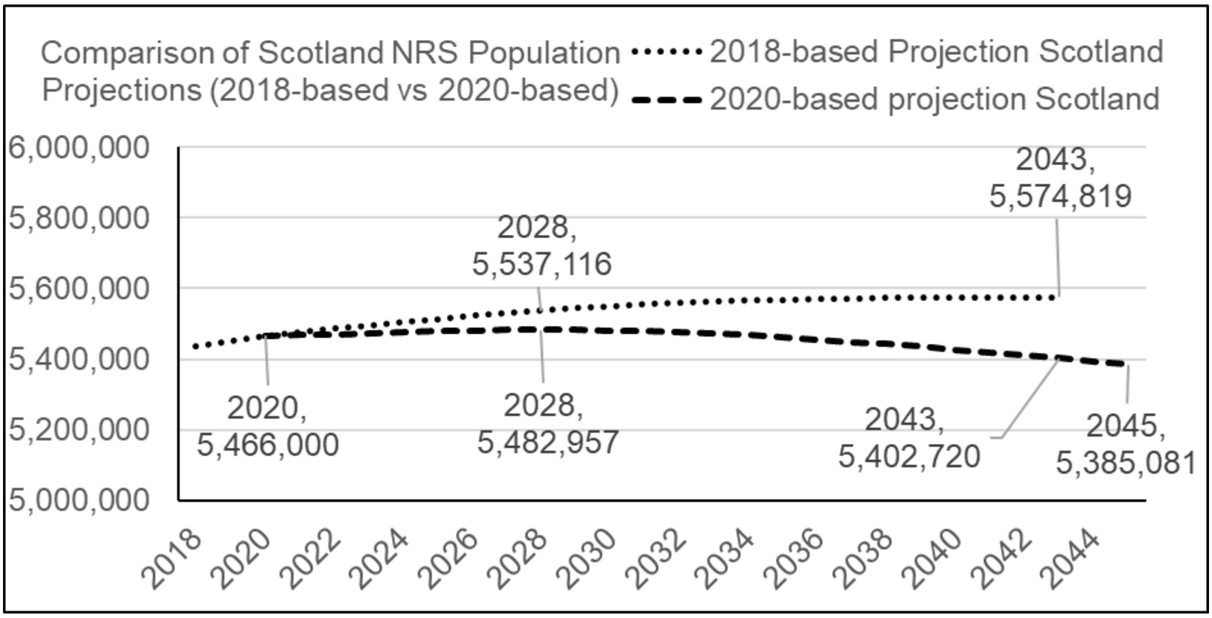
Source: National Records of Scotland

2.3.80 The outcomes of the variants ranged from a decrease in population of 11% (68,597 people using the 'zero outwith Scotland migration' variant) to an increase of 9% (56,915 people using the high migration variant). None of the projections indicate population growth at the rate experienced between 2006 and 2021 (~4,445 additional residents per year according to NRS estimates).

2.3.81 While the 'zero outwith Scotland migration' variant was a blunt attempt to factor in the potential impact of Brexit, it should be noted that the variants were prepared *prior* to Brexit and the subsequent Covid-19 pandemic.

2.3.82 A more recent national population projection for Scotland has been prepared by the National Records of Scotland. The Projected Population of Scotland (2020-based) publication indicates potentially lower projections than that presented using the 2018-based data.

2.3.83 The graph below shows a comparison of the 2018-based projection for Scotland with the 2020-based projection and shows the population of Scotland peaking in 2028, before declining through to 2045. This compares unfavourably with the previously anticipated population growth, albeit gradually slowing, across the period to 2043.



Source: National Records of Scotland

2.3.84 While Glasgow's population trends do not necessarily operate in line with the trends that affect the rest of Scotland, the change in the national population outlook for Scotland shown in the 2020-based population projection above, is likely to have implications for any future population projection for Glasgow.

2.3.85 Considered in tandem with the initial outputs of the Census 2022, which indicated a lower population at 2022 than the 2018-base NRS population projection for Glasgow anticipated, the 2020-based national population projections add weight to the conclusion that the 2018-based principal population projection may be presenting higher population outcomes over the long-term than future projections will.

Population

1. The city has experienced population growth over the past 15 years although this **growth has not been distributed evenly across the city**. Significant growth has been experienced in central parts of the city (Calton and Anderston/City/Yorkhill) but decline has been recorded in some parts south of the river (Linn, Newlands/Auldburn and Cardonald).

2. The city's population is projected to continue to grow over the next 20 years but at a slower rate than in the past. **Growth of around 1,453 residents a year** may be higher than more recent national projections, recent population estimates, and the Census 2022 population returns suggest.

3. Recent population growth has been driven by both positive natural change and positive net migration, but recent negative natural change (fewer births and more deaths), and an increase in the number of older people compared with children, places more emphasis on **migration as the main source of future population growth.**

4. A third of in-migrants to Glasgow each year come from international locations, and it seems likely that many of them were attracted to the city to become students given the similar increases in student enrolment figures and evidence that Glasgow is good at retaining students. T**he city's ability to attract international migrants in the future will be dependent on a supportive UK government migration policy** both in terms of economic and academic migrants.

5. Glasgow has the largest number of children and the largest number of older people of any Local Authority in Scotland and while it continues to be the only Local Authority where children outnumber older people (65 and over) **the number of older people has grown over the past 10 years**.

6. Life expectancy and healthy life expectancy is lower in Glasgow than elsewhere in Scotland emphasising **the importance of considering health benefits from good quality housing**.

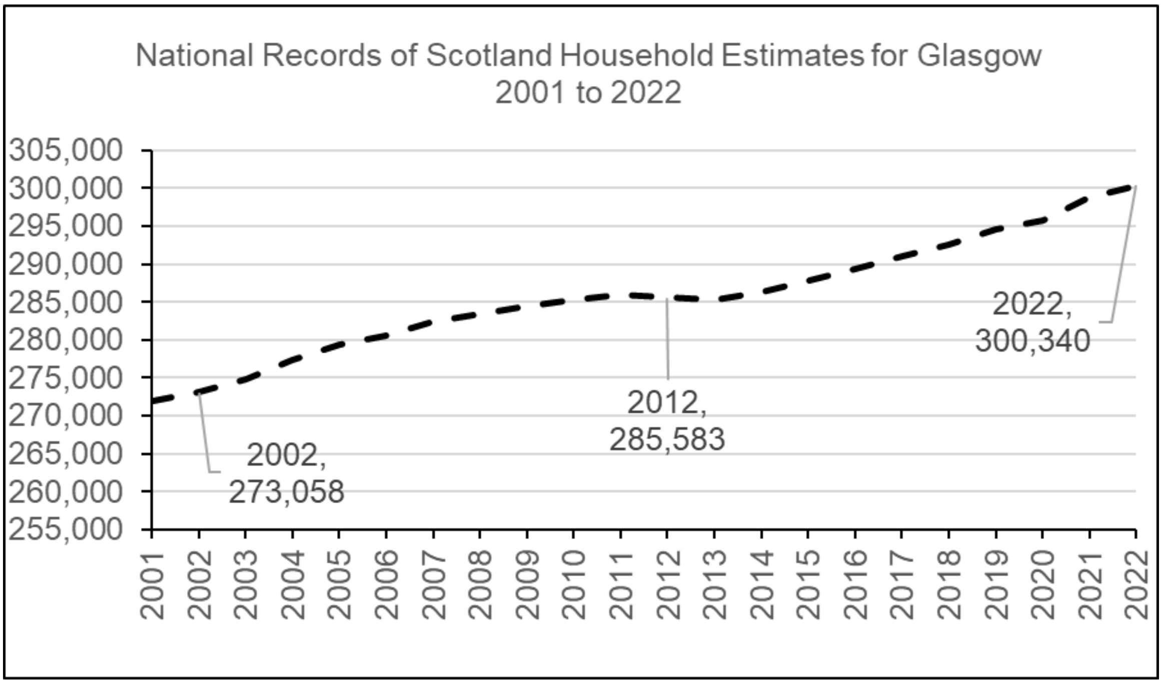
2.4 Household characteristics

Households Estimates

2.4.1 The National Records of Scotland typically publish mid-year household estimates each year that, in combination, allow for the monitoring of change between Censuses. The mid-year publication includes estimates of households, dwellings, household size, vacant dwellings, second homes, council tax band, and dwellings per hectare.

2.4.2 The most recent Households and Dwellings in Scotland, 2022 publication was published 22 June 2023. The next publication, for mid-2023, is expected to be published in June 2024.

2.4.3 The methodology broadly involves taking Council Tax records as a starting point, and then adjusting for dwellings with multiple households and communal establishments.



Source: National Records of Scotland Households and Dwellings in Scotland 2022

2.4.4 Unlike the past population trends, the number of households has increased, broadly, year-on-year since at least 2001. The graph above shows the number of households in Glasgow has increased by around 27,282 between 2002 and 2022 equating to a 10% increase at around **1,364 additional households a year.**

2.4.5 At June 2022, Glasgow had an estimated 300,340 households according to the National Records of Scotland 2022 mid-year estimates. This is at around 22.5% more than any other Local Authority in Scotland (Edinburgh 244,738 households).

2.4.6 Homes for Scotland commissioned Rettie and the Diffley Partnership to undertake primary research about the housing needs of Scotland. It published Existing Housing Need in Scotland in January 2024. The report identifies that 693,000 households across Scotland with housing need of some kind including homeless households and households in temporary accommodation; households in unfit properties; households in need of specialist adaptation that don't have it; households living in overcrowded accommodation; financially struggling households and concealed households.

- 37,000 households have at least one concealed household (7,500 are households with concealed families).
- 29,000 households are living in properties that they were struggling to afford.
- 19,000 households in the area are overcrowded.
- 16,000 households were living in properties with very poor conditions.
- 13,000 households are living in properties where they do not have the specialised adaptations or support they require.

Source: Diffley Partnership/Rettie/Homes for Scotland (January 2024) Existing Housing Need in Glasgow

2.4.7 Homes for Scotland also submitted a bespoke version of the report: Existing Housing Need in Glasgow in January 2024. It identified that 83,000 households have at least one element of need, with 19,500 of these households having multiple elements of need. The Report concludes that the net housing need for Glasgow is 65,000 households of which 44,000 require affordable housing and the remaining 21,000 are able to afford a market housing solution.

Household changes at Ward Level

2.4.8 The National Records of Scotland have published Electoral Ward Household and Dwelling Estimates (2011 Data Zone based) that allows consideration of the changes to these aspects at a 2022 Electoral ward level across the city.

2.4.9 The electoral estimates noted above are underpinned by data from the Small Area Statistics on Households and Dwellings published on 22 June 2023 using a methodology that amalgamates smaller datazones geographies into an approximation of ward boundaries. The next update to these datasets is June 2024.

2.4.10 The table below sets out the number of households in each ward at 2014, 2018 and 2022 and shows that all wards had more households in 2022 than 2018.

Electoral Ward 2022 Name	Ward No	2014	2018	2022
Linn	01	13,477	13,796	14,349
Newlands/Auldburn	02	11,367	11,256	11,570
Greater Pollok	03	12,459	13,321	14,328
Cardonald	04	13,815	13,508	13,742
Govan	05	14,140	14,375	14,894
Pollokshields	06	13,089	13,054	13,371
Langside	07	15,711	15,807	16,214
Southside Central	08	13,540	14,038	14,934
Calton	09	14,526	15,469	16,610
Anderston/City/Yorkhill	10	17,024	20,396	21,415
Hillhead	11	12,876	13,253	13,565
Victoria Park	12	11,015	11,107	11,329
Garscadden/Scotstounhill	13	14,898	14,962	15,120
Drumchapel/Anniesland	14	14,393	14,389	14,706
Maryhill	15	11,542	11,689	11,835
Canal	16	12,620	12,850	13,254
Springburn/Robroyston	17	13,087	13,006	13,551
East Centre	18	13,415	13,909	14,302
Shettleston	19	13,125	13,239	13,514
Baillieston	20	9,105	9,692	10,301
North East	21	9,493	9,576	9,948
Dennistoun	22	11,639	11,123	11,219
Partick East/Kelvindale	23	15,533	17,635	18,305
Glasgow Ward total	**-**	**301,889**	**311,450**	**322,376**

Source: NRS Electoral Ward household and Dwelling Estimates

2.4.11 There are a range of reasons for the number of households in wards to have grown at different rates over the past decade including that some areas will have experienced large-scale demolition of former homes, some areas will have experienced very little housebuilding, and others will have experienced high density development of new homes.

2.4.12 Overall, Ward 10, Anderston/City/Yorkhill had the most households in 2014 (17,024), 2018 (20,396) and 2022 (21,415). The increase in households coincides with a growth in the population of this ward.

2.4.13 Ward 20, Baillieston had the fewest households in 2014 (9,105) but it has since increased to have more households than Ward 21, North East. The increase in households in Baillieston coincides with a small increase in population over the same period.

2.4.14 Ward 21, North East had the fewest households in 2018 (9,576) and 2022 (9,948). While it has grown over the period 2014 to 2022, it had fewer than half the number of households (9,498) than Ward 10, Anderston/City/Yorkhill (21,415) at 2022.

2.4.15 There are a great range of reasons for the number of households in wards to have changed in different ways over the past two decades including natural change in household composition (children growing up and leaving the parental home for example) as well as the impact of migration (including movement between wards as well as to and from elsewhere outside Glasgow) but these can generally only form as a discrete household unit if there are homes to occupy and, in general, household growth would broadly be expected to reflect where more homes have been built, repurposed, and previously empty homes occupied.

2.4.16 Planned interventions appear to have had an impact in some locations in this regard. For example, the development of the greenfield release site at Crookston (ward 3, Greater Pollok) and the Community Growth Area in ward 20, Baillieston appear to have resulted in increases to households numbers in those wards in recent years.

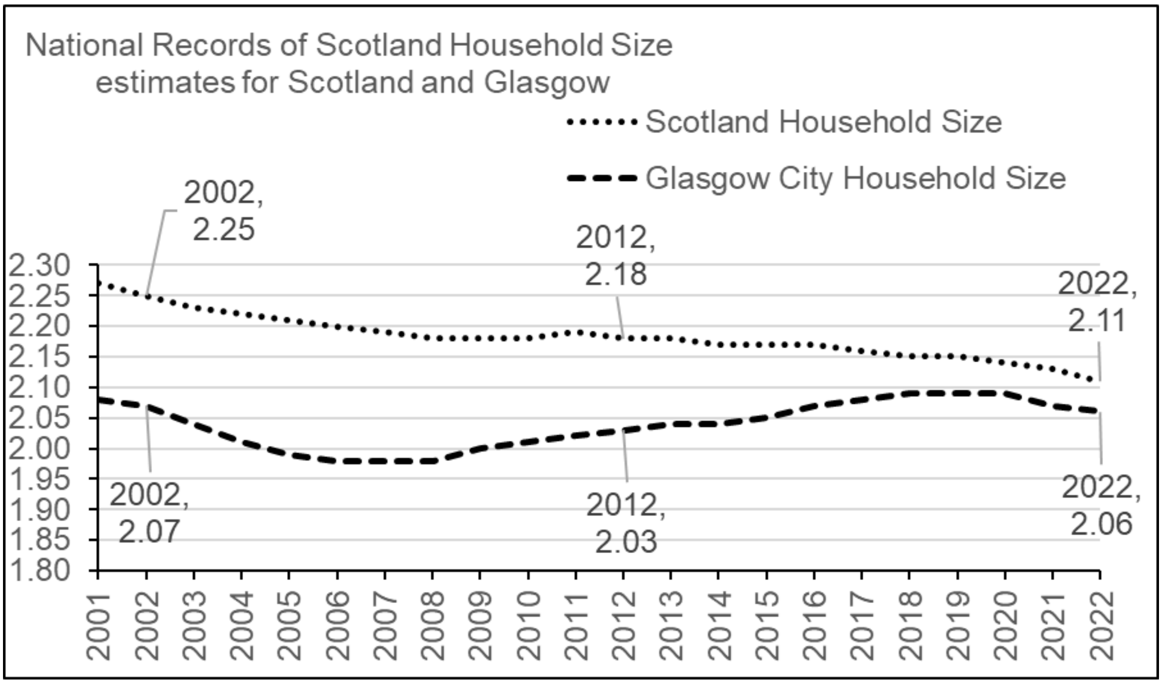
2.4.17 Demolitions are potentially another factor. There were 5,913 demolitions recorded by the Scottish Government over the 10 years 2011 to 2021. These were mainly in the registered social landlord sector and were largely in the period 2011 to 2015 reflecting the bulk of the demolitions associated with the eight Transformational Regeneration Areas across the city. In the 5 years to 2021 there were around 270 homes demolished per year.

2.4.18 Other factors that may have impacted household change are the increases in the number of students in the city. This may explain some of the household change in areas around the University campuses across the city, namely: Ward 10, Anderston/City/Yorkhill and 23, Partick East/Kelvindale.

Household Size

2.4.19 Household size provides an estimate of how many people live in each home on average. This is important for planning the types of new homes that will be needed because it is difficult to change the size/capacity of homes once they have been built. Where household size is increasing, larger homes might be needed, where household size is declining, smaller homes may be in demand.

2.4.20 The National Records of Scotland include their methodology and household size estimates in their mid-year household estimates. The most recent Households and Dwellings in Scotland, 2022 publication was published 22 June 2023. The next publication, for mid-2023, is expected to be published in June 2024.



Source: National Records of Scotland Households and Dwellings in Scotland 2022

2.4.21 The graph above shows that average household size in the city in 2002 was smaller than the national figure (2.07 people compared to 2.25) but both followed a declining trend between 2002 and 2012. While this decline has continued in Scotland as a whole in the next decade to 2.11 people, average household size has increased in Glasgow, effectively returning it to its 2002 position. The data suggests that from 2006 onwards, average household sizes in Glasgow have been gradually rising, in contrast to the significant reduction across Scotland.

2.4.22 At 2022, the average household size in Glasgow was 2.06. This is a decrease from the peak of 2.09 but remains higher than the 20-year average of 2.04.

Homeless Households

2.4.23 Glasgow Health and Social Care Partnership assesses applications from households presenting as homeless in Glasgow. The Council then works with the Health and Social Care Partnership and local registered social landlords to find homes for those assessed as homeless. Part II of the Housing (Scotland) Act 1987 sets out the statutory duties on Local Authorities to assist those who are homeless or threatened with homelessness (potentially homeless) including providing accommodation in certain circumstances.

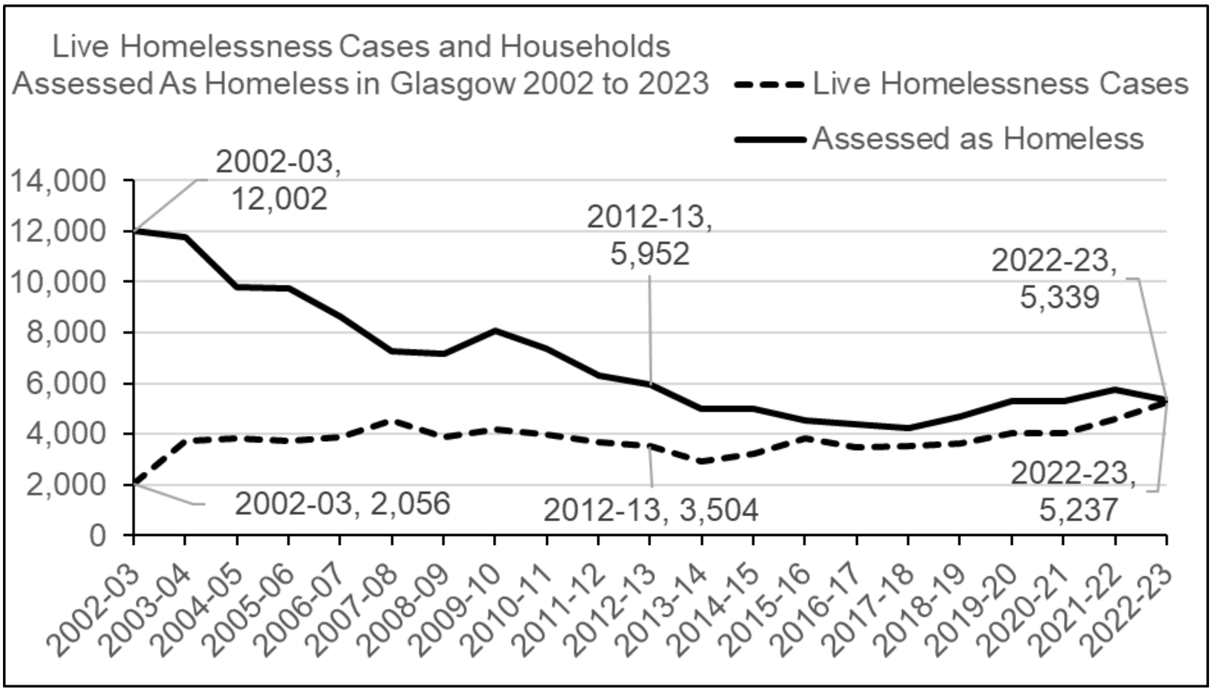
2.4.24 A household is homeless if they have no accommodation in the UK or elsewhere, or if they have accommodation but cannot reasonably occupy it. A household is threatened with homelessness if it is likely they will become homeless within two months.

2.4.25 The Scottish Government publish annual information relating to homelessness via a time series dataset. The latest was published on 29 August 2023 alongside an annual report entitled Homelessness in Scotland: 2022-23.

2.4.26 The report covers homelessness applications, assessments, temporary accommodation and outcomes. It includes information on rough sleeping, support needs, number of children affected, and property type from which household became homeless.

2.4.27 The report indicated that, in Scotland, homelessness applications and households assessed as homeless have been increasing, and have surpassed pre-pandemic figures. Open homelessness applications and households in temporary accommodation were the highest in the time series.

2.4.28 It noted that Glasgow remains the local authority with the largest number of homeless households, although, in contrast to most other local authorities, has experienced a 7% decrease compared to the previous year.



Source: Scottish Government data

2.4.29 The chart above shows that the number of households assessed as homeless in Glasgow has decreased since 2002-03 and that, in 2022-23, 5,339 households were assessed as homeless. However, the number of live homelessness cases presenting to Glasgow for assessment has increased in recent years, and, in 2022/23, Glasgow received approximately 20% of all presentations in Scotland.

2.4.30 It is important to note that the context has changed over time. Prior to 2012, a 'priority need' test applied. A single person (often male) might be assessed as unintentionally homeless, however, the duty to make a reasonable offer of settled accommodation was not enshrined fully in law. Another important change has been the introduction of the Private Residential Tenancy (PRT) after 2017. This removed 'no fault' evictions so private tenants can only be evicted by landlords on specified grounds, and these are able to be challenged at tribunal.

2.4.31 The Council's own figures suggest that around 13,870 homeless households were provided with settled homes over the five years between 2017 and 2022, according to a review of the Glasgow's Housing Strategy 2017 to 2022, accounting for around **2,744 households a year**.

Years	2017/18	2018/19	2019/20	2020/21	2021/22	5-yr total	2022/23
Lets	~2,537	2,322	2,412	3,288	3,311	~13,870	2,700 (projected)

Source: GCC Housing data

2.4.32 The table above shows the annual lets by Registered Social Landlords to Homeless Households for the period 2017 to 2022 and a projection for the year 2022/23.

2.4.33 The projected reduction of lets by RSLs to homeless households in 2022/23 is a reflection of fewer vacancies arising in social housing stock, as a lower turnover of their properties reduce opportunities for new tenants. Several factors, including fewer existing tenants moving out to other tenures due to the cost-of-living crisis, as well as the successful impact of tenancy sustainment measures, were mentioned in the review.

2.4.34 Glasgow's Rapid Rehousing Transition Plan (RRTP) 2019-2024 identifies that recent inflation and cost of living increases make it more likely that people in Glasgow will find themselves in a vulnerable housing situation, and that the challenges of preventing, reducing and alleviating homelessness remain high.

2.4.35 For the purposes of forward planning, the Scottish Government's Centre for Housing Market Analysis publishes an estimate of the existing level of homeless households and households that are both concealed and overcrowded – commonly referred to as HOToC. This underpins the Housing Need and Demand Tool that they also produce to assist Local Authorities with their Housing Need and Demand Assessments. For Glasgow, the Housing Need and Demand Assessment estimated the **HOToC to be 3,410 households** at 2022.

2.4.36 Homes for Scotland commissioned Rettie and the Diffley Partnership to undertake primary research about the housing needs of Scotland. It published Existing Housing Need in Glasgow in January 2024. The report records that 23 Glasgow respondents identified as both overcrowded and concealed, accounting for 1.88% of responses (5,640 households). The report rounds up the proportion to 1.9% and extrapolates this to **5,700 households in Glasgow that are both overcrowded and concealed.**

Temporary accommodation

2.4.37 Each household that is assessed as homeless has its own housing requirements, and it is not always possible to match those requirements with settled accommodation straight away. In these cases, households are offered temporary accommodation arrangements. From 1 April 2022 to 31 March 2023, 4,588 households entered temporary accommodation in Glasgow, while 3,791 exited. This resulted in a net increase of 797 households in temporary accommodation.

	Households entered	Households exited	Net difference
Number of households entering and exiting temporary accommodation, in Glasgow: 2022-23	4,588	3,791	797

Source: GCC Housing/Scottish Government data

2.4.38 Over the past 5 years, the number of households in temporary accommodation has been increasing across Glasgow, from 2,191 in 2018-19 to 3,207 in 2022-23. There has also been an increase in the number of homeless households with children that are using temporary accommodation.

	2018-19	**2019-20**	**2020-21**	**2021-22**	**2022-23**
Households in Temporary Accommodation	**2,191**	**2,557**	**2,668**	**3,009**	**3,207**
Households with children in Temporary Accommodation	**875**	**985**	**925**	**1,090**	**1,175**

Source: GCC Housing/Scottish Government data

2.4.39 The bulk of temporary accommodation in Glasgow is provided by Housing Associations, but bed and breakfast and hostels accounted for around 32% of temporary accommodation placements during 2022/23.

Type of Accommodation	No. of households in temp accommodation	% of temp accommodation
Housing Association	1,775	55%
Local Authority Hostel	90	3%
Other Hostel	260	8%
Bed and Breakfast	665	21%
Women's Refuge	5	0%
Other	410	13%
Total	3,205	100%

Source: GCC Housing/Scottish Government data

2.4.40 The situation is dynamic, most recently covered in the Council's November 2023 report to the City Administration Committee.

2.4.41 A summary of the supporting legislation relating to homelessness has been collated by the Scottish Government, and includes recent changes which have the potential to impact on future demand in Glasgow.

2.4.42 Other potential new impacts include the Homelessness Persons (Suspension of Referrals between Local Authorities) (Scotland) Order 2022, which came into effect on 29 November 2022, and removed the need for a person to have a local connection to an area to present as homeless. This is intended to provide a wider choice about where people who become homeless want to live, but, in practice, it means that homelessness occurring elsewhere in Scotland can now present in Glasgow, making it very difficult to predict and plan for future demand.

Asylum Seekers

2.4.43 Glasgow has been a dispersal city for asylum seekers for more than two decades, providing a place to stay while applications to remain in the UK are assessed and processed by the Home Office. The Council has a well-established process of accommodating those that have been given leave to remain in the UK.

2.4.44 There are generally around 5,000 asylum seekers accommodated in the city and, over the past 5 years on average, around 800 refugees presented as homeless each year following a decision from the Home Office to allow them to stay.

2.4.45 However, on 30 November 2023, Glasgow City Council announced a 'housing emergency' via a report titled Home Office Decisions via Streamlined Asylum Process Update. It acknowledges plans by the Home Office to make a single batch decision about approximately 2,500 asylum seekers in Glasgow by the end of 2023, effectively making many of the current asylum seekers homeless and passing responsibility for accommodating them to the City Council.

2.4.46 This compares with the city receiving around 1,000 referrals (including 259 families) from Mears, the company responsible for temporarily housing asylum seekers between January 2023 and November 2023.

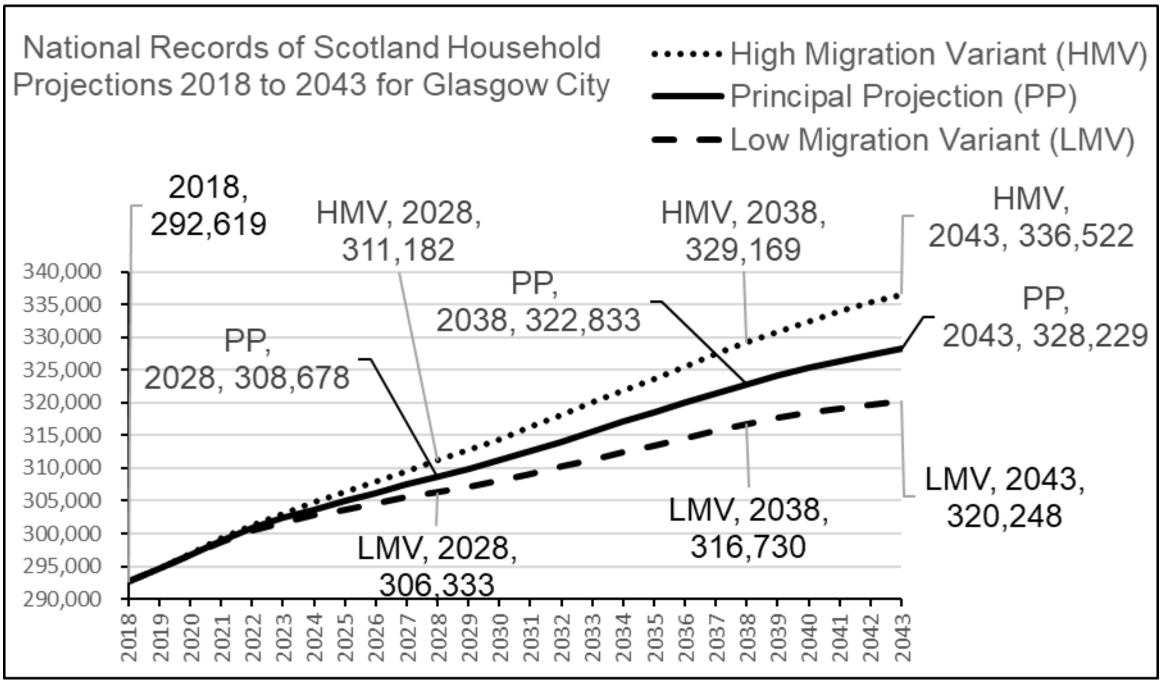
2.4.47 The housing emergency announcement recognises the potential for the decision to overwhelmingly increase applications for homelessness, and potentially result in an increase in people presenting as rough sleepers. The statement also sets out the Council's concerns about the impact of continuing rounds of batch decisions on its ability to manage and find suitable permanent accommodation for such large numbers of households presenting en-masse to the Council, without adequate additional funding even to attempt to temporarily accommodate them.

Household Projections

2.4.48 The National Records of Scotland typically publish Household Projections every two years. They underpin the formation of new need and demand for housing that, along with an assessment of existing need, formed a crucial part of the Housing Need and Demand Assessment. The most recent was 2018-based, and was published on 29 September 2020.

2.4.49 The methodology broadly involves the headship rates method. Headship rates are calculated by projecting forward household formation from the 1991 to 2001 Censuses. They are typically considered a ‘policy off’ projection, meaning that the outcomes are not inevitable and can be influenced by policy decisions and global events. To capture this uncertainty the National Records of Scotland often publish high migration and low migration variants of the principal projection.

2.4.50 There have been no household projection updates published by the National Records of Scotland beyond 2020, and there is currently no indication from their publication schedule that new household projections will be published before 2025.



Source: National Records of Scotland

2.4.51 The principal projection is the National Records of Scotland's main household projection, based on assumptions about fertility, mortality, and migration which are thought to be the most likely to occur over the next 25 years. It indicates that the number of households in Glasgow will increase by 35,610 between 2018 and 2043 from 292,619 households to 328,229 households. This would be an increase of around **1,424 additional households** per year.

Variant projections

2.4.52 The high migration and low migration variants provide an indication of the future households in Glasgow under a range of alternative migration assumptions of the number of households moving to and from Scotland. They retain the same assumptions about fertility and mortality as the principal projection.

2.4.53 The National Records of Scotland's summary report for the 2018-based projection advise that "The variant projections tend to have the biggest impact on the areas which have relatively high levels of in- and out-migration, in particular for the four city Council areas" and "The use of low or high migration population projections has little effect on the projected type of households that the population is living in".

2.4.54 For Glasgow, the low migration variant indicates that the number of households will increase by 27,629 between 2018 and 2043 from 292,619 households to 320,248 households. This would be an increase of around **1,105 additional households** per year.

2.4.55 Alternatively, the high migration variant indicates that the number of households in Glasgow will increase by 43,903 between 2018 and 2043 from 292,619 households to 336,522 households. This would be an increase of around **1,756 additional households** per year.

2.4.56 Given the age of the projections, the subsequent National Records of Scotland's household estimates and the Census 2022 can provide a yardstick of how accurate each projection has been so far.

2.4.57 The housing estimates for mid-year 2022 indicate that there were 300,340 households in Glasgow at 2022 compared with 300,431, 300,830 and 301,325 for the low, principle and high migration projections respectively. Almost exactly matching the low migration variant at around **1,105 additional households** per year.

2.4.58 The Census 2022 indicates that there were 293,800 households in Glasgow in March 2022. This is a difference of 6,540 households from the household estimates noted above, and well below any of the projection variants at around **295 additional households** per year.

Projected Household composition

2.4.59 The household projections also provide information about the composition of households in terms of whether they are a one-person household, one adult and at least one child, two adults, two or more adults and at least one child or 3 or more adults with no children, and how that is anticipated to change over time.

Household Composition	2018	%	2028	%	2038	%	2043	%
1 person	128,264	44	138,090	45	145,350	45	148,437	45
1 adult,1+ children	21,402	7	21,684	7	21,819	7	21,461	7
2 adults	78,889	27	83,157	27	87,190	27	89,027	27
2+ adults, 1+ children	40,654	14	42,612	14	43,713	14	43,455	13
3+ adults	23,411	8	23,134	7	24,758	8	25,854	8

Source: National Records of Scotland

2.4.60 The projection indicates that 44% of all households in Glasgow in 2018 were one-person households accounting for 128,264 households. It anticipates that by 2043 there will be 148,437 one-person households accounting for 45% of the total number of households. This would be an increase of **807 single person households** each year.

2.4.61 Broadly the composition of households is anticipated to stay the same. Each household type increases at similar proportions as were estimated in 2018.

Age of Head of Household

2.4.62 The household projections also provide information about the age of the head of the household alongside the household type that they are anticipated to belong to

Household Composition	2018	%	2028	%	2038	%	2043	%
16-64 Adult only households	172,150	59	176,674	57	177,490	55	182,210	56
Households with 1+ child(ren)	62,056	21	64,296	21	65,532	20	64,916	20
Households (65+)	58,414	20	67,707	22	79,808	25	81,108	25

Source: National Records of Scotland

2.4.63 The projection indicates that 21% of households in Glasgow, accounting for 62,056 households, included at least one child at 2018. By 2043, the number of households with children would increase by 2,860 to 64,916 households. This would be an increase of around **115 households with children** per year**.**

2.4.64 The projection indicates that, in 2018, 20% of households in Glasgow, accounting for 58,414 households, were headed by a resident over the age of 65+ and had no children living with them. By 2043, the number of households of this kind is projected to increase by 19,052 to 81,108 households. This would be an increase of around **762 older households** per year**.**

2.4.65 The projection indicates that, in 2018, 59% of households in Glasgow, accounting for 172,150 households, were headed by a resident aged between 16 and 64 years of age (working age) and had no children living with them. By 2043, the number of households of this kind is projected to increase by 10,060 to 182,210 households. This would be an increase of around **402 working age households without children** per year**.**

2.4.66 Broadly there will be an increase, and therefore demand, for homes for all ages of households. The change in the age profile of households described by the projection, is one that shifts from working age households (although remaining by far the largest household type) into older people households.

Households

1. The city has experienced a 10% growth in the number of households over the past 20 years - at **around 1,364 additional households a year**. Household numbers are projected to continue to grow over the next 20 years, at around a similar level – **1,424 additional households a year**.

2. **Growth in the number of households has not occurred evenly across the city** with significant growth in central wards (Calton and Anderston/City/Yorkhill) coinciding with population growth and purpose-built student accommodation development in those wards.

3. Generally, **changes in household numbers appear to coincide with planned interventions** such as the Transformational Regeneration Areas and Community Growth Areas. **as well as being reflective of wider policy commitments**, for example, to support rapid large-scale population growth in the city centre.

4. Average **household size in the city is larger than it was around a decade ago**, and is now closer to the Scottish average, which has declined significantly in size. However, **in recent years, Glasgow's figure has been falling again**.

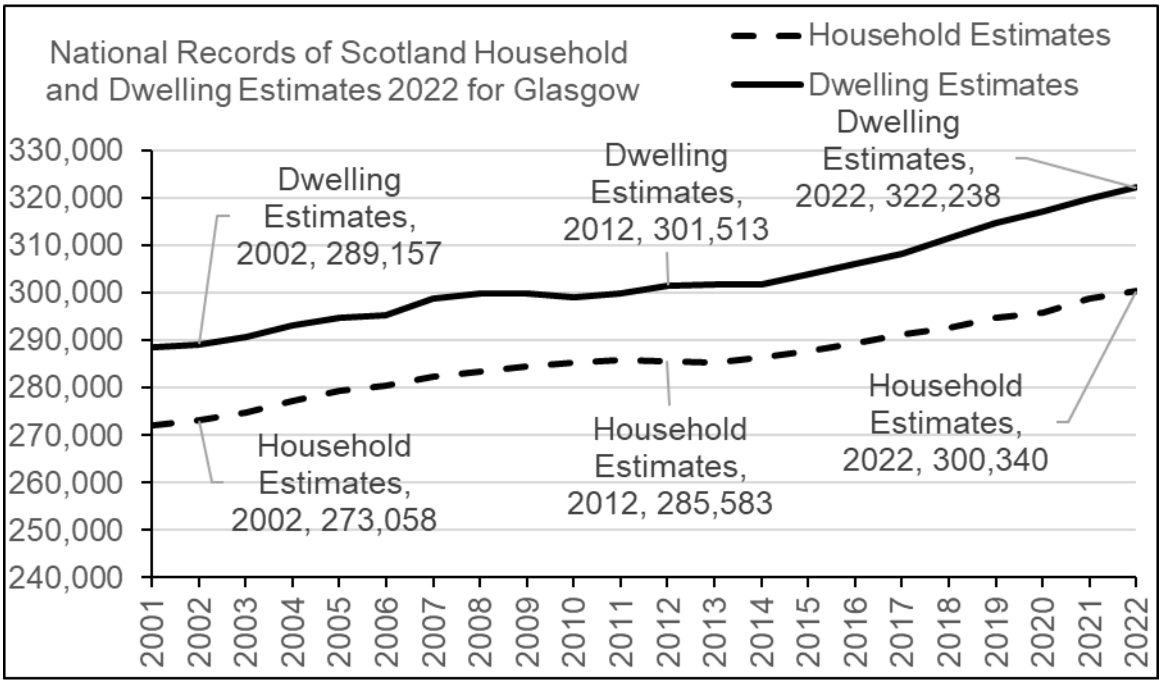
5. **Glasgow has one of the largest number of homeless households in Scotland**. Changes to legislation to make it easier to present as homeless in Glasgow and changes to UK Government policy to batch process asylum applications have impacted on the number of homeless applications the Council has received recently. It announced a Housing Emergency that acknowledges the challenge it faces to carry out its statutory duties.

6. Recent national household projections and initial outputs from the Census 2022 indicate **a potentially different outcome** to that based on the National Records of Scotland estimates and projections. Notably, the census shows fewer people and households in Glasgow than the estimates, and the more recent national population projection indicates fewer people in Scotland from 2028 onwards.

2.5 Housing Stock characteristics

Dwellings

2.5.1 The National Records of Scotland provided recent dwelling estimates via their [Households and Dwellings in Scotland, 2022,] using the [methodology] as described in the Household Characteristics section.



Source: National Records of Scotland Households and Dwellings in Scotland 2022

2.5.2 The graph above shows that the number of dwellings in the city has increased more sharply than households. The city has 33,081 more homes in 2022 than it did in 2002. This represents an increase of 11.4%, at around **1,654 additional dwellings a year,** compared with 1,364 *households* a year over the same period.

2.5.3 At 2022, Glasgow had an estimated 322,238 dwellings. This is at least 22.5% more than any other Local Authority in Scotland. The National Records of Scotland estimate that there were around 21,898 more dwellings than households in Glasgow. Not all dwellings are occupied, however, as the table below summarises.

	Total dwellings	Occupied dwellings	Vacant dwellings	Second homes
Glasgow City 2022	322,238	314,536	7,172	530

Source: National Records of Scotland Households and Dwellings in Scotland 2022

2.5.4 **Broadly, Glasgow has added more people than homes, and more homes than households, over the past two decades**.

2.5.5 The interplay between these aspects is complex and a key example of the indirect nature of the interplay between population, households and homes would be when household growth is driven by decreases in household size. This can manifest either by the disaggregation of larger family units into multiple smaller family units, or the out-migration of larger families and the in-migration of more, but smaller, households from elsewhere. It means that the number of households can increase at the same time as the population is stable or decreasing.

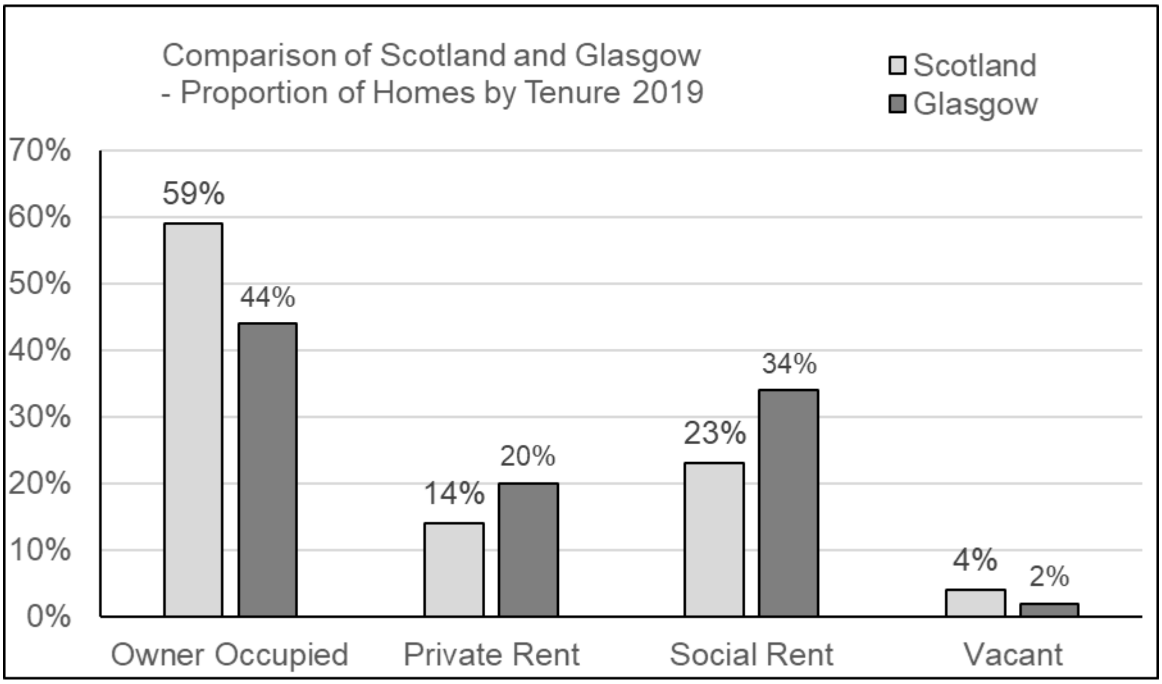
2.5.6 This was experienced in Glasgow between 2002 and 2006, where the city added households at the same time as experiencing population decline. At the time this was attributed in City Plan 1 (2004) and City Plan 2 (2009) to the loss of families from Glasgow. Interventions such as the new neighbourhood initiative, community growth areas and formal greenbelt releases were introduced to encourage the development of family housing that would have the potential to retain and potentially attract back larger households to the city. The continued demand for family housing is set out in Glasgow's Local Housing Strategy 2023 to 2028.

Housing tenure

2.5.7 The housing tenure of homes is typically described as owner occupied (where a home is owned by the occupier including via a mortgage); private rent (where the home is owned by a private landlord and let to the resident at market value); and social rent (where the home is owned by a housing association and let to the resident using an allocations policy).

2.5.8 There are other emerging tenures summarised in SPICe briefing paper Alternative Housing Tenures (Nov 2019) but the bulk of the Scottish Government published data focusses on the three main types. The most recent data shows changes in housing stock by tenure and local authority for the period 2013 to 2020. The latest publication is from 6 July 2022, and includes a break down by tenure for 2019 and before.

2.5.9 The methodology is based on an update of National Records of Scotland dwelling counts each year, using information on housing association stock and Scottish Household Survey data. Further updates have been delayed by the impact of the Covid-19 pandemic on data collection.

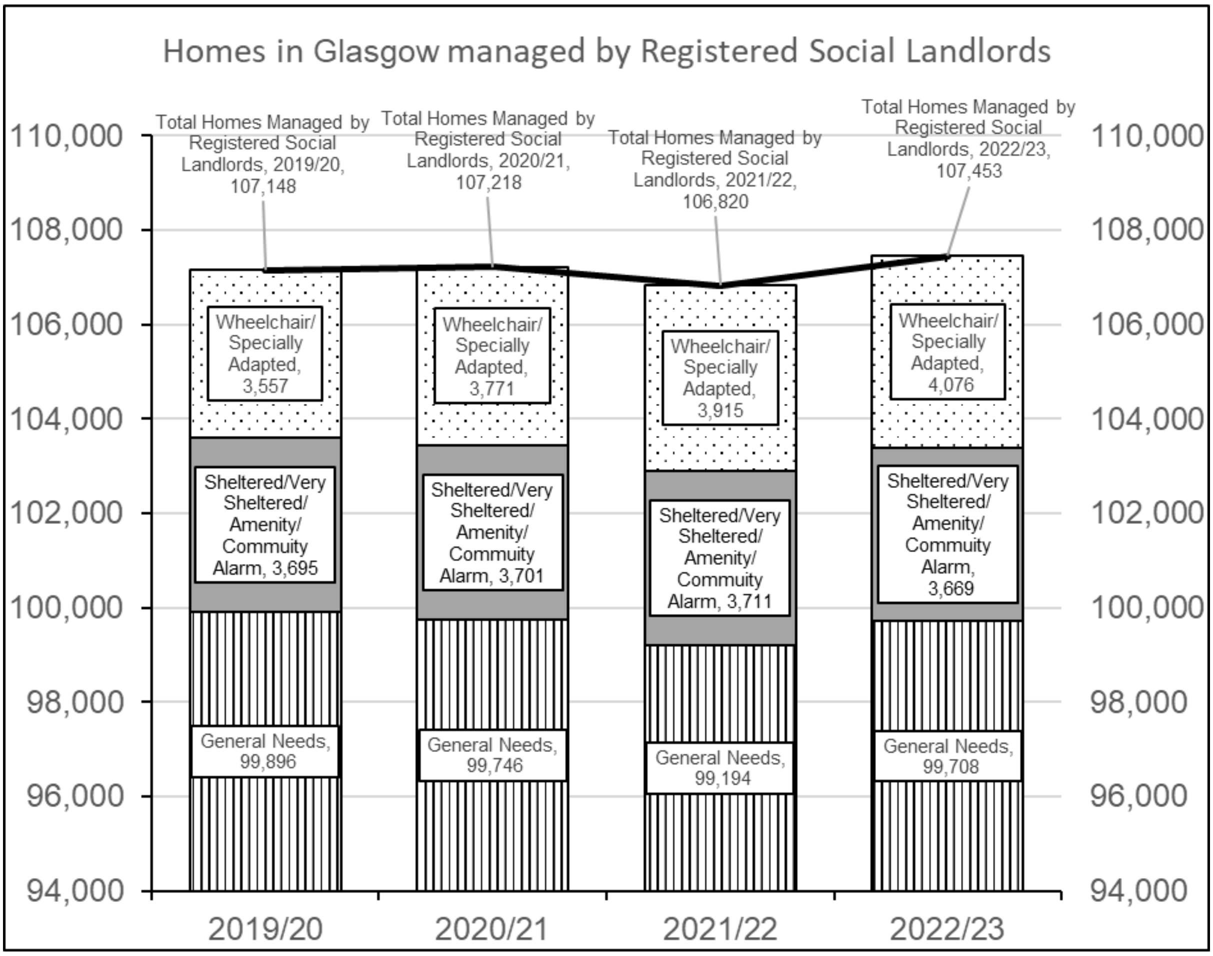


Source: Scottish Government housing statistics

2.5.10 At 2019, around 44% of all homes in Glasgow City, accounting for 138,000 dwellings, were owned by the occupier, either outright or via a mortgage. Glasgow had a much lower proportion of owner occupation than that recorded across Scotland, where 59% of homes were owner occupied.

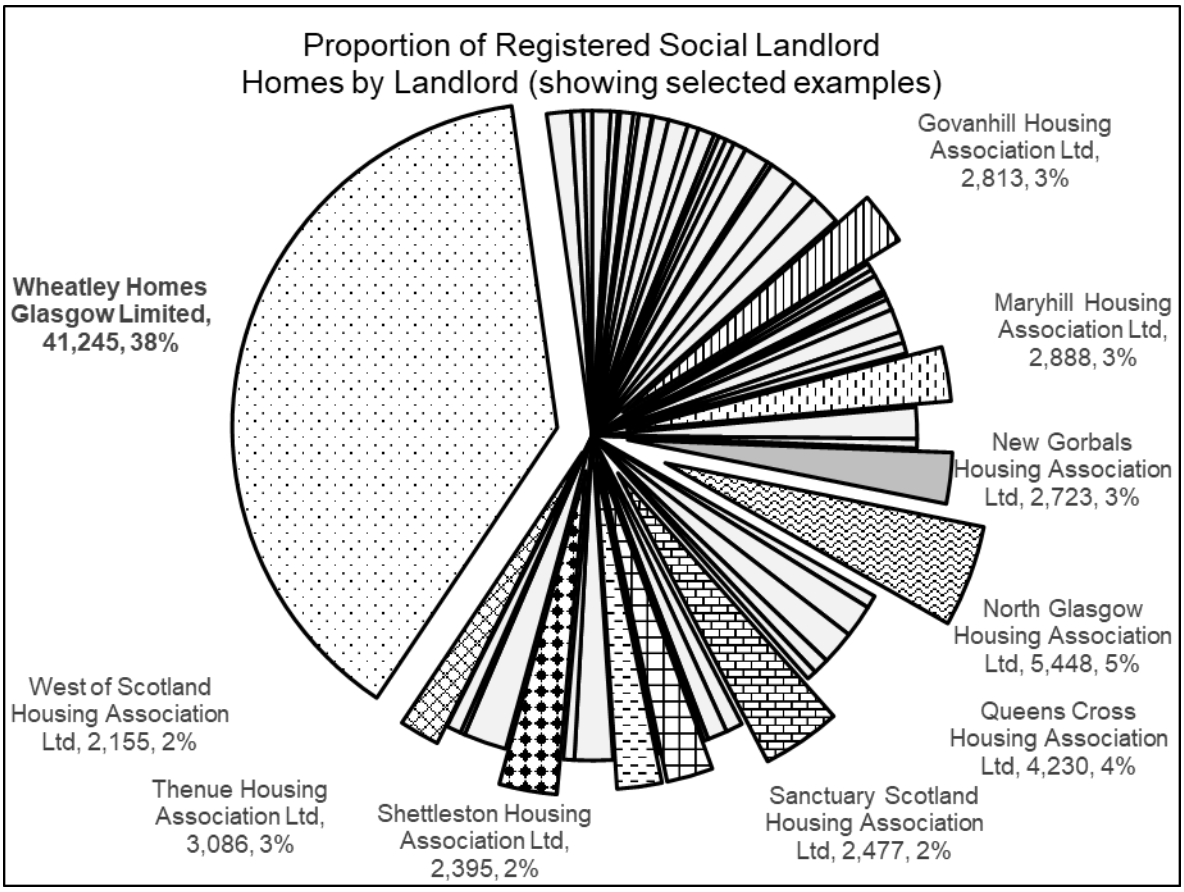
2.5.11 At the same time, there were around 62.000 private rented properties in the city. This accounts for 20% of Glasgow's homes, which is a higher proportion than the 14% recorded for Scotland.

2.5.12 Around 34% of all homes in Glasgow City were social rent, accounting for around 107,000 social rented homes, a higher proportion than the 23% recorded for Scotland as a whole. There are around 143 Registered Social Landlords operating in Scotland according to Scottish Housing Regulator's latest National Report on the Scottish Social Housing Charter - 2022 -2023. It reports that there are 62 operating in Glasgow City at March 2023 although the Council's Housing service records only 59 following mergers.



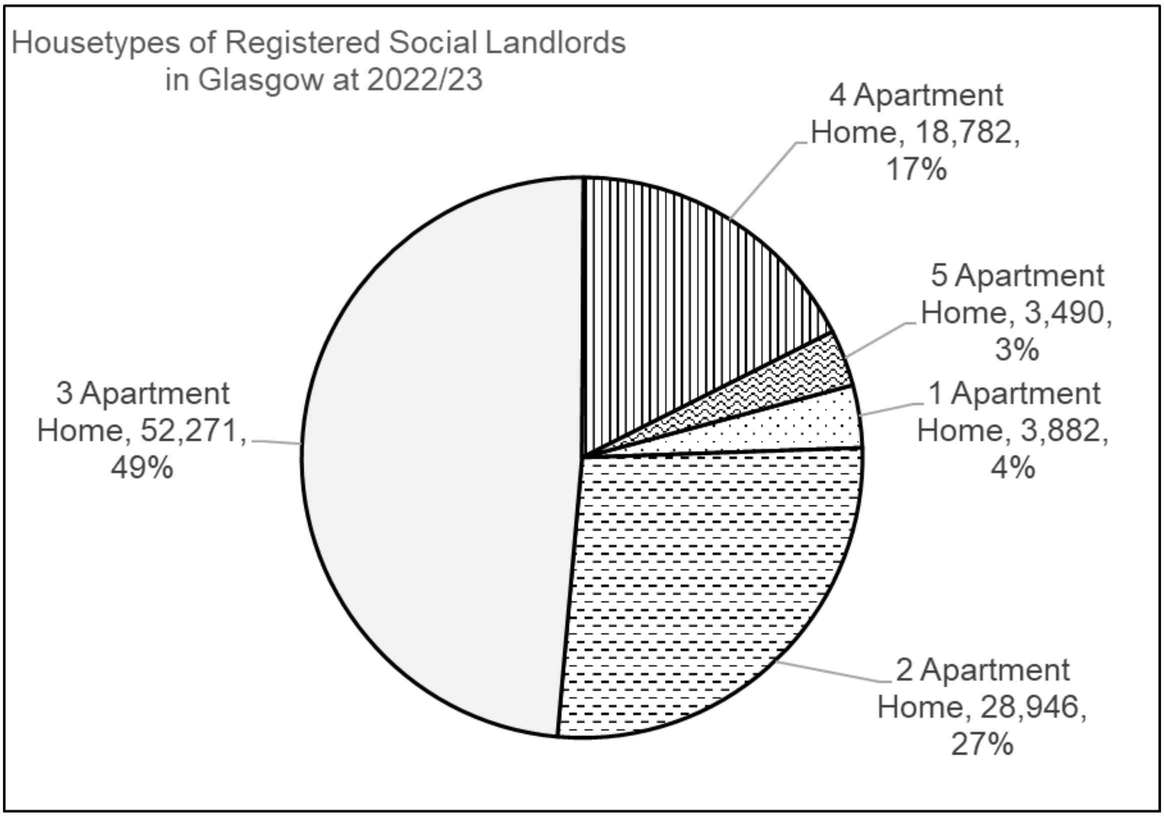
Source: Scottish Housing Regulator

2.5.13 Around 37% of the Register Social Landlord stock (around 40,000 homes) is managed by Wheatley Homes Glasgow Limited (formerly Glasgow Housing Association) with the next largest stock (5,391 homes) held by North Glasgow Housing Association, and this accounts for 5% of the Registered Social Landlord stock in the city. Taken as a whole, Glasgow has the largest social rented sector in Scotland.



Source: Scottish Housing Regulator

2.5.14 Data from the Scottish Housing Regulator also provides an indication of the breadth of the house sizes within the housing stock managed by Register Social Landlords in Glasgow. The most common house size managed by Registered Social Landlords in Glasgow are homes with 3 apartments/rooms (49%), over 20% of the stock has 4 or more apartments/rooms, just over a quarter (27%) have 2 apartments/rooms, with the remaining stock 1 apartment, studio-type homes (4%).



Source: Housing Regulator

2.5.15 Again, the picture varies across providers so, for example, the most common house size for 29% of the Registered Social Landlords' that operate in Glasgow was homes with 2 apartments/rooms rather than homes with 3 apartments/rooms.

2.5.16 Returning to the Scottish government data for housing tenure, and grouping social rent together with private rent, provides a picture of the scale of the rental sector in Glasgow. It accounted for 168,000 homes, over 54% of the supply, making this an important part of Glasgow's housing system.

2.5.17 An alternative grouping of owner occupied and private rent tenures is commonly known as market tenure housing. It accounted for 200,000 homes, 64% of the supply, compared with 73% for Scotland overall.

2.5.18 Broadly, Glasgow has a noticeably different mix of tenures than Scotland as a whole, with more rental properties than homes that are owned by the resident, and a larger proportion of homes for social rented.

2.5.19 Over the period 2013 to 2019, there were 11,000 additional homes added to the supply in Glasgow, according to the housing stock by tenure estimates. This comprises around 8,000 more owner-occupied, and 10,000 more private rented properties, but 1,000 fewer social rented homes and 4,000 fewer vacant homes. Broadly this is an increase of around **1,833 additional homes** a year.

2.5.20 This resulted in a 1% increase in owner occupation, and a 3% increase in private rent homes. Conversely the proportion of social rented homes decreased by 2% to 34% of dwellings, while the proportion of vacant dwellings fell from 4% to 2%.

2.5.21 The proportion of each tenure has broadly remained the same, with a small shift from social rent and vacant properties to market tenures – bringing Glasgow more in line with Scotland as a whole in that regard.

2.5.22 The tenure landscape has shown indication of diversification, with models such as large scale build-to-rent, co-living, self-build and purpose-built student accommodation growing in interest. Further information is provided in section 4 Specialist Housing and additional sources of information are noted below.

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Build-to-Rent additional resources
UKAA (April 2022) Preventing planning practices stifling BTR
British Property Federation (website accessed 6 February 2024) Build-to-Rent Map
British Property Federation/Savills (Jan 2024) Build-to-Rent Q4 2023
Cushman and Wakefield (February 2024) Build-to-Rent Q4 2023 The Investor Survey
Rettie (August 2023) Build to Rent – Scottish Market Review Summer 2023
Savills (Jan 2024) UK Build to Rent Market Update – Q4 2023
Savills (Jan 2024) The Future of Build to Rent Houses – Summary Report
Savills (Sept 2021) Suburban Build to Rent
Savills (Jan 2024) The Future of Build to Rent Houses
Co-Housing additional resources
Clachan Co-Housing (November 2020) Knowetap Feasibility - Maryhill Glasgow
Co-Housing Scotland (website accessed 6 February 2024) What is Cohousing?
Redcurrent housing Coop (website accessed 6 February 2024) What is a Housing Coop? – Oatlands, Glasgow
Radical Routes (Oct 2015) How to set up a Housing Co-operative
UKCohousing (website accessed 6 February 2024) News from Penington Cohousing Scotland
Vivarium (2018) Co-housing: future homes for older Scots
Co-Living additional sources
British Property Federation (October 2023) The New Kid on the Block: BPF Co-Living Report
CBRE (May 2022) Spotlight: UK Co-living – A market poised for huge growth
Co-Living Group (webpage accessed 6 February 2024) What is Co-Living?
Cushman & Wakefield (October 2023) Build to Rent Report: A closer look at Co-Living
GCC (Nov 2023) Large-Scale Co-Living Draft Planning Guidance
KosyLiving (website accessed 6 February 2024) Glasgow becoming a Hotspot for Co Living and Build to Rent Developments
Ryden (Dec 2023) How Co-Living could get a foothold in Scotland

Housing tenure by Ward

2.5.23 Glasgow City Council publishes occasional papers covering population and housing matters that include dwelling estimates by ward. The most recent was published on the 31 July 2019, and describes the situation at 2018.

2.5.24 The methodology involved attributing tenure to dwelling stock estimates for data zones amalgamated up to 2011 ward geographies, primarily using information from the Council Tax Register, but also supplemented by data from the Scottish Housing Regulator's Annual Return on the Charter, Glasgow Housing Association (now known as Wheatley Homes) and the Statutory Register of Private Landlords.

2011 Ward Name	Ward No	Owner Occupied	Private Rented	Social Rent	Total
Linn	01	6,654	1,665	5,581	**13,900**
Newlands/Auldburn	02	5,416	1,341	4,328	**11,085**
Greater Pollok	03	7,873	1,229	4,295	**13,397**
Craigton	04	7,694	1,732	4,185	**13,611**
Govan	05	4,554	3,493	6,320	**14,367**
Pollokshields	06	7,787	3,305	2,068	**13,160**
Langside	07	8,938	4,441	2,381	**15,760**
Southside Central	08	4,710	3,805	5,534	**14,049**
Calton	09	3,660	3,382	7,659	**14,701**
Anderston/City/Yorkhill	10	4,469	5,763	3,841	**14,073**
Hillhead	11	4,730	4,345	3,415	**12,490**
Partick West	12	5,924	2,889	2,314	**11,127**
Garscadden/Scotstounhill	13	6,984	1,898	6,165	**15,047**
Drumchapel/Anniesland	14	5,994	1,748	6,690	**14,432**
Maryhill	15	4,715	1,865	5,064	**11,644**
Canal	16	3,717	1,296	7,484	**12,497**
Springburn/Robroyston	17	5,671	1,474	5,943	**13,088**
East Centre	18	5,789	1,708	6,440	**13,937**
Shettleston	19	6,170	1,944	5,232	**13,346**
Baillieston	20	6,793	881	2,099	**9,773**
North East	21	3,788	1,053	4,815	**9,656**
Dennistoun	22	3,516	3,091	4,502	**11,109**
Dowanhill	23	8,741	4,673	1,582	**14,996**
Glasgow-wide 2011 Ward total	**-**	**134,287**	**59,021**	**107,937**	**301,245**

Source: Glasgow City Council

2.5.25 The table above shows that the tenure balance of the city was 45%/20%/36% - owner occupied, private rented and social rented respectively. Owner occupied homes were the most common house tenure but, unlike in Scotland overall where most homes were owner occupied, in Glasgow it is below 50%.

2.5.26 Most wards (13 of 23) had a similar balance to the city-wide proportions, in that they did not have a single tenure account for more than 50% of homes. However, there were some places where the majority of homes were owner occupied, and others wards where the majority of homes were for social rent.

2.5.27 Owner occupied homes were in the majority in seven of the twenty-three wards in the city. They accounted for 70% of the homes in Ward 20, Baillieston, and this was the only ward that exceeded the Scottish average of 59% of homes being owner occupied.

2.5.28 There were six wards where owner occupied homes were above 50% of stock, without exceeding the Scottish average. These included ward 3, Greater Pollok; 4, Craigton; 6, Pollokshields; 7, Langside; 12, Partick West; and 23, Dowanhill where between 53% and 59% of homes were owner occupied.

2.5.29 It is notable that at 2018 half of the wards south of the river (4 of 8) had a majority of owner occupied homes, whereas only 3 of the 15 north of the river had a majority of homes owned by the resident. Taken together, the wards south of the river had a tenure balance of 49%/19%/32%, whereas north of the river it was 42%/20%/38%.

2.5.30 There are two wards where social rented homes were above 50% of total stock: wards 16, Canal and 9, Calton. In these wards social rented homes formed 60% and 52% of homes respectively. Ward 21, North East had almost 50% of homes recorded as social rent, making it the most common tenure in that ward, while it was also the most common tenure in wards 5, Govan; 8, Southside Central; 14, Drumchapel/Anniesland; 15, Maryhill; 17, Springburn/Robroyston; 18, East Centre; and 22, Dennistoun.

2.5.31 There were no wards where private rented tenure dwellings formed the majority of homes, however they were the most common tenure in Ward 10, Anderston/City/Yorkhill, where they formed 41% of homes - compared with 32% that were owner occupied and 27% that were social rented.

2.5.32 With regards to the wider market sector in Glasgow, i.e. owner occupied and private rented, the market accounted for 64% of homes compared with 36% for social rent. All wards, apart from Canal and Calton as noted above, recorded a majority of market sector homes including wards, 6, Pollokshields; 7, Langside; 12, Partick West; 20, Baillieston and 23, Dowanhill where market tenure homes accounted for more than the Scottish average of 73%.

2.5.33 With regards to the wider rental sector, private rented and social rented, which forms 37% of Scottish homes, there is a notable difference in the figures for Glasgow. The Glasgow rental sector accounted for 55% of homes, compared with 45% being owned by the resident. The rental market formed the majority of homes in most wards (16 of 23). It formed 75% of homes in Ward 9, Calton and only ward 20, Baillieston, had a smaller proportion of homes in the rental sector than the Scottish average.

House Condition

2.5.34 The Scottish Government publish the Scottish Household Survey, an annual, cross-sectional survey that provides robust evidence on the composition, characteristics, attitudes and behaviour of private households and individuals. It also includes a section known as the Scottish House Condition Survey, that provides information about a range of house condition characteristics,

2.5.35 The methodology normally consists of an interview with householders, and a physical inspection of the dwelling they occupy. It covers all types of households and dwellings across the country - whether owned or rented, flats or houses.

2.5.36 The most recent Scottish House Condition Survey was based on 3,174 surveyed properties, and was published on 30 May 2023 to describe the national position in 2021. It faced a range of challenges arising due to the pandemic, and adopted additional methodological approaches to address sampling bias. Analysis at a local authority level has not yet been published. The next iteration is expected in early 2026.

2.5.37 The Scottish House Condition Survey: Local Authority Analysis 2017-2019 published 23 February 2021 remains the most up-to-date information at local authority geography. It reported that 41% of homes in Glasgow were built before 1945, accounting for around 119,000 homes. The Local Housing Strategy 2023 to 2028 reports that there are just under 10,000 pre-1919 tenement buildings within the city, accounting for about 70,000 homes.

2.5.38 The Local Authority Analysis reports that 35% of Glasgow homes fail the Scottish Housing Quality Standard, accounting for 104,000 homes. The issue of substandard housing impacts homes differently, depending on tenure. 46% of private rental homes (24,000), 39% of owner occupied homes (54,000), and 25% of social rented homes (25,000) fail the Scottish Housing Quality Standard. This issue is **much more significant in the market sector,** where almost half of all private rented homes fail, and where over double the number of owner-occupied homes than social rented homes fail the standard.

2.5.39 The survey offers more detail of specific reasons for failure, including identifying that around 57,000 homes in Glasgow fail due to the Scottish Housing Quality Standard “Energy Efficient” criterion. This accounts for 19% of all homes in Glasgow.

2.5.40 However, the survey also reports that 56% of homes, accounting for 165,000 homes in Glasgow, have a ‘high’ Energy Efficiency according to The Government’s Standard Assessment Procedure for Energy Rating of Dwellings known as “SAP2012”. 51% of private rented homes (27,000), 48% of owner occupied homes (68,000) and 70% of social rented homes (70,000) – again highlighting that social rented homes appear to be much more energy efficient, even at the higher end of the standards.

2.5.41 The survey also provides estimates about how homes are heated and kept warm. It reports that 3% of homes in Glasgow have no central heating, 6% of homes are not connected to the gas grid, 7% have less than 100mm of loft insulation, and 40% have no wall insulation.

2.5.42 Returns by Registered Social landlords to the Scottish Housing Regulator provide information about how much of their stock is in a condition to be ‘lettable’ as well as how many are ‘unlettable’.

2.5.43 The returns indicate that, compared to around 108,000 lettable social rented homes, 1,371 homes were unlettable, 3,141 were in low demand, and 124 were being used as temporary accommodation.

2.5.44 Homes for Scotland commissioned Rettie and the Diffley Partnership to undertake primary research about the housing needs of Scotland. It published Existing Housing Need in Scotland in January 2024. The report identifies that 85,000 people across Scotland were living in properties with very poor conditions. The methodology involves extrapolating survey findings to the national totals. A supplementary report: Existing Housing Need in Glasgow extrapolates the findings at a Glasgow level and indicates **that 16,000 of the 300,000 households in Glasgow were living in very poor conditions**.

2.5.45 **A key challenge for residents in the future will be identifying and securing the investment required to maintain and improve their older properties**, particularly market sector properties. Planning policy should aim to strike a balance between conserving the city’s heritage, and the need to work towards net zero through the upgrading of **older properties to liveable standards, as well as the financial implications of any such alterations.**

2.5.46 While the scale and range of housing conditions that will need to be addressed to bring homes up to standard will be a challenge, the introduction of the National Planning Framework 4 position that demolition will be regarded as the least preferred option for bringing a site back into productive use, is another facet that will need to be considered.

House Prices

Affordability

2.5.47 The Scottish Government publish Scottish Housing Market Reviews on a quarterly basis with the most recent published in January 2024. These include information about sales, house prices, mortgage lending, homelessness, housing supply, housebuilding material prices and the private rental sector at a Scotland-wide level. Nevertheless, they provide a wider lens within which local data can be considered.

2.5.48 Looking at the data in more detail, the Registers of Scotland contribute to the UK House Price Index: Scotland November 2023 using an agreed methodology across all nations of the UK. The latest was published on 17 December 2023 and updates are typically published every month.

2.5.49 The UK House Price Index Scotland reports on the average house prices of a home in Scotland (£194,006), the annual price change (up 2.2%), the monthly price change (up1.1%) and the index figure compared with January 2015 (143.8 compared with 100).

2.5.50 The annual price change for Glasgow was up 0.8% from £174,252 to £175,655. Meaning that the average house price in Glasgow is almost £20,000 less expensive than the average house price in Scotland. The average house price in Glasgow is almost half that of City of Edinburgh - about £169,459 less expensive.

2.5.51 A dashboard that allows the dynamic generation of time series information is hosted by the Land Registry. It showed at August 2023 that the overall average house price in Glasgow masks significant differences in the prices of different types of home and it masks different past trends in house price growth

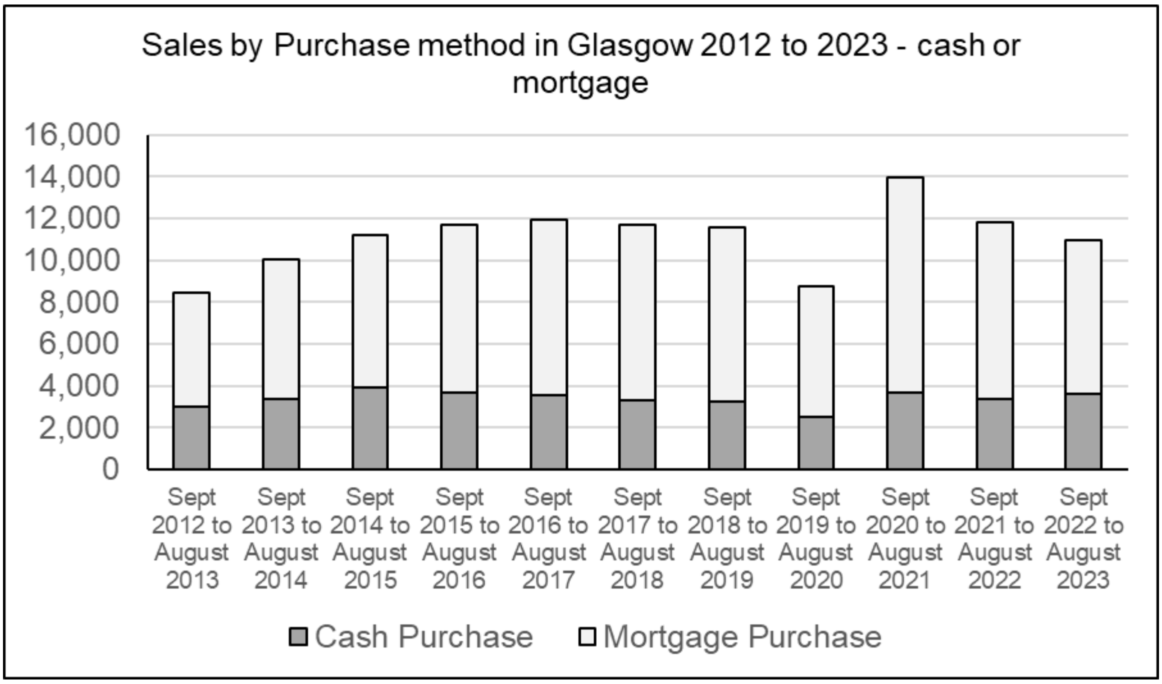
Housetype/Average price	August 2004	August 2014	August 2023	% increase 2004 to 2023
Detached	£224,454	£261,054	£471,033	110%
Semi-detached	£124,851	£149,419	£261,852	110%
Terraced	£101,953	£130,171	£222,918	119%
Flatted	£84,960	£96,748	£149,400	76%
All House Types	**£94,804**	**£111,021**	**£178,213**	**188%**

Source: Registers of Scotland

2.5.52 All types of houses; detached, semi-detached and terraced houses, have more than doubled in price between 2004 and 2023 (increased by between 110 to 119%). The average price of flatted properties, the most common house type in Glasgow, has increased by 76%.

2.5.53 At August 2014 the average price of a home purchased by a first-time buyer in Glasgow was £100,445, by August 2023 it had increased to £160,162. Whereas, the average price of a home purchased by an existing owner-occupier was £129,830 at August 2013 (around £30,000 more than the first time buyer). At August 2023 existing householders purchased a home at an average value of £210,818 (the gap between first-time buyers and existing householders widening to £50,000). Access to finance is currently more expensive than it has been and these figures represent 60% price increases for both first time buyers and existing home owners.

2.5.54 Over the past 11 years, the number of transactions and the nature of payment for owner occupied housing has also fluctuated. Between September 2012 and August 2013 there were 8,416 transactions in Glasgow, 36% of which were cash purchases (3,016 purchases) while 64% were purchased with a mortgage (5,400 sales).



Source: Registers of Scotland

2.5.55 The number of cash purchases has broadly remained stable at around 3,400 each year while the number of mortgage purchases has been recorded below 6,000 (in 2012 to 2013) to above 10,000 (2020 to 2021).

2.5.56 The impact of new build housing on the average house price in the city is also derivable from the House Price index data. It shows that in Glasgow at August 2023 the average price of a new build home was £281,327 while the average price of an existing property was £173,239. **New build homes were on average £108,000 more expensive than an existing home in Glasgow**, although this will be affected by house type.

2.5.57 Of the 113,539 transactions from September 2013 to August 2023, 10,476 sales were for new build properties compared with 103,063 sales of existing properties. The increase in the premium on new-build house prices in Glasgow may go some way to explaining why only 9% of transactions were the purchases of new homes (as well there simply being more existing homes than new ones being delivered by the housebuilding industry).

2.5.58 Another source of information about housing affordability comes from the Scottish House Condition Survey: Local Authority Analysis 2017-2019. It reports on average reported household income, providing an indication of the financial challenges for different types of households.

2.5.59 For Glasgow, the Survey identified an average reported household income of £25,400. For older households the figure was £18,800, for families it was £32,700 and for other households it was £25,300, indicating a much lower household income in older households than for other kinds, many of which may be single households relying on pension income.

2.5.60 It also identified that 25% of all households in Glasgow were fuel poor in 2019, accounting for 73,000 homes. 12% were in extreme fuel poverty accounting for 34,000 households.

2.5.61 Homes for Scotland commissioned Retties and the Diffley Partnership to undertake primary research about the housing needs of Scotland. It published Existing Housing Need in Scotland in January 2024. The report identifies that 185,000 people across Scotland were living in properties they were struggling to afford. The methodology involves extrapolating survey findings to the national totals. A supplementary report: Existing Housing Need in Glasgow extrapolates the findings at a Glasgow level and indicates **that 29,000 of the 300,000 households in Glasgow were living in properties they were struggling to afford.**

2.5.62 Solace Scotland, in collaboration with the Association of Local Authority Chief Housing Officers (ALACHO) have published a report 'Housing in Scotland: Current Context and Preparing for the Future' which details their assessment of the housing emergency in Scotland. It sets out the unsustainable pressure on local authority housing, the challenges and barriers that are limiting the supply of new homes and social rent tenancies, and recommends action needed to implement change at pace and scale.

2.5.63 Further commentary about affordability is included in RICS (May 2023) Affordable housing Challenges and solutions.

Social Rent

2.5.64 The Scottish Housing Regulator (SHR) identified the social landlords that operated across Glasgow for the period from 2017 to 2023. It publishes statistical data for each Register Social Landlord from their audited financial statements, including about stock data, energy efficiency, and weekly rent.

2.5.65 It reports that average social rent varies across Glasgow because of the range of Registered Social Landlords, and due to the array of property types, size and condition across the city. It shows that, at 2022/23, the average weekly social rent in Glasgow was £95, **or an equivalent average monthly social rent of £412** (up from £381 in 2019/20).

2.5.66 Over the past 4 years, rents have increased by around £7 per week (around 8% over the period) with smaller absolute increases (£5 per week) for homes with 1 apartment/room, and larger increases (£8 per week) for homes with 5 apartments/rooms.

Average Weekly Rent in Glasgow 2022/23	2019/20	2020/21	2021/22	2022/23
1 Apt self-contained units	£69	£68	£70	£74
2 Apt self-contained units	£81	£82	£84	£88
3 Apt self-contained units	£84	£86	£87	£90
4 Apt self-contained units	£93	£95	£96	£100
5 Apt self-contained units	£103	£107	£107	£111
Total self-contained units	£88	£89	£91	£95

Source: Scottish Housing Regulator

2.5.67 The annual average rent of Register Social Landlords in Glasgow was £4,940 for 2022/23. Taken against the average reported household income of £25,400 in the Scottish Household Survey, this would be around 19% of the household income.

2.5.68 For older households, the income figure was £18,800. Based on the annual rent of £4,940, that would account for 26% of income. A home with 5 apartments/rooms for families would be £5,772 per year, accounting for 17.6% of average income of families in Glasgow (£32,700 according to the Scottish Household Survey).

2.5.69 In September 2022, the Scottish Housing Regulator published a report 'Rent increases by Scottish social landlords a Thematic Review', that indicated an average annual rent increase in Glasgow of 3.43% for 2022/23.

2.5.70 The Local Housing Strategy 2023 to 2028 notes that, at 2023, waiting-list estimates indicated that, for every RSL home let, there were the equivalent of 10 applicants seeking an affordable home.

Private Rent

2.5.71 Engagement with the public via our developer survey identified City Lets as an important source of information about private rental levels. It collects information and updates charts via its Datahub, and while it does not record every transaction, the sample size is considered wide enough to give an indication of the trends in the private rented sector market in the city.

2.5.72 At quarter 4 of 2023, City Lets reported that the **average private rent in Glasgow was £1,179 per month** (up from £845 per month at quarter 4 2020), indicating the average weekly private rent in Glasgow was £272**.**

2.5.73 Similar to the social rented sector over the previous 4 years, monthly private rents have increased. However, the size of those increases is much larger than in the social rented sector. For all private rented properties, the increase between quarter 4 of 2020 and the same period in 2023 was around £77 per week (around 39% over the period) with a smaller absolute increase (£55 per week) for homes with 1 bedroom but a larger increase (of around £123) for homes with 3 bedrooms, equating to a 49% increase in just 4 years.

Average Weekly Rent in Glasgow 2022/23	Q4 2020	Q4 2021	Q4 2022	Q4 2023
1 bed lets	£149	£170	£189	£204
2 bed lets	£204	£227	£266	£284
3 bed lets	£253	£333	£345	£376
4 bed lets	£392	£530	£484	£453
All lets	£195	£225	£256	£272

Source: CityLets - https://www.citylets.co.uk/research/datahub/

2.5.74 Examining the longer-term data shows that the average monthly private rent in Glasgow has increased by 91.7%, from £615 at quarter 4, 2013. In effect, **the average private rent in Glasgow has doubled in just over 10 years**.

2.5.75 Mid-Market Rent (MMR) housing is provided by RSL partners in Glasgow, and is suitable for households that have incomes between £20,000 and £40,000 (considered low to moderate incomes). In theory, mid-market rent levels are set between social and private rented sector rents, and are at similar levels to the Local Housing Allowance (which at 2023 was £648 per month for a 2-bedroom property). At 2023, there were 1,535 MMR homes in Glasgow, provided by 10 RSLs.

2.5.76 City Lets also published a summary outlook of the private rental sector at quarter 4 of 2023: It noted that:

"*Demand in the Glasgow rental market remains strong….On supply side, affordable housing providers have built insufficient numbers for decades, the percentage of housing in the private sector has stayed static for over a decade, and the past 12 months of government legislation has discouraged new landlords. On the demand side, increasing interest rates have discouraged new buyers from starting their home ownership journey, and universities need foreign students to augment their incomes. In short, the elements of demand outstripping supply have been compounded by government policy, driving up rents further.*"

Rent Control

2.5.77 The Scottish Government introduced rent control via the Cost of Living (Tenant Protection) (Scotland) Act 2022 in October 2023. It was presented as a temporary emergency response to the impact of the cost-of-living crisis on people who rent their home in Scotland. It introduced a cap on rent increases of 3% until 1 April 2024. The Scottish Government have indicated their intention to replace the temporary measures with another form of rent protection.

2.5.78 The longer-term impacts of rent control by the Scottish Government are yet to be understood, but, in Glasgow, the uncertainty about future rent-setting has impacted on the delivery of some build-to-rent schemes, and has the potential to undermine the ongoing viability of others. The UK Collaborative Centre for Housing Evidence outlined some of the possible issues in their Reflecting on the New Scottish Rent Control Proposals November 2023 blog and reference papers therein.

2.5.79 Glasgow recognised an emerging 'rent crisis' in December 2020, and resolved to set up a tenant-led commission to make recommendations on reforms needed to address this crisis, including action to limit rent increases in the private rented sector. The subsequent engagement led to the publication of the Tenant-led Housing Commission Report (August 2022).

2.5.80 The report recommended prioritisation of affordable social housing development across all sites via local planning policy, consideration of students as part of the rental sector, upskilling of landlords, additional resources for enforcement, improved engagement opportunities between tenants and the local authority, a register of adapted, accessible and approved private rental properties; and the introduction of a points-based system of rent controls, based on property standard and/or condition, to incentivise landlords to invest in their properties, as a means of justifying rent levels, while also improving the quality of private rental housing.

Housing Stock

1. The city has experienced growth in the number of homes over the past 20 years - at **around 1,654 additional homes a year** compared with 1,364 additional *households* a year over the same period. Broadly, Glasgow has added more people than homes, and more homes than households, over the past two decades.

2. **Glasgow has a different mix of tenures than Scotland as a whole,** but it has more rental properties than homes that are owned by the resident, and it has more market homes than social rented properties. From 2013, there have been absolute increases in the stock of each tenure, but these have resulted in a small proportional shift of the supply to private rented (3%) and owner occupied (1%).

3. **Many of the city's homes are old, and their current condition is a concern**. For example, the Scottish Housing Condition Survey estimates that 19% of all homes would not meet the Energy Efficient standard. A key challenge for residents in the future will be identifying and securing the investment required to maintain and improve their older properties. Careful consideration is required to ensure that policy on the adaptation of homes, including the use of new technologies to meet net zero targets, is balanced with preserving the city's built heritage, and takes account of any financial implications.

4. **House prices have doubled since 2004**. Flatted property prices have also increased significantly. New build homes were on average £108,000 more expensive than an existing home in Glasgow up from £29,835 in 2014, in part reflecting the different mix of house types between new build and existing homes. New build prices make it much more challenging for this part of the market to support access to home ownership.

5. **Rent has also significantly increased** over the past 4 years, up from £381 to £412 per month in the social rent sector and up from £845 to £1,179 per month in the private rental sector. Over a longer period of 10 years, the average private rent in the city has doubled.. Notwithstanding the impact of the emergency rent control measures applied during 2023 and beyond, the ability for the rental sector to accommodate acute need due to rental levels (rather than stock levels) is a major concern. The fact that rent levels are exceeding Local Housing Allowance contributes to the conclusion that affordability in the private rented is worsening.

2.6 Glasgow's Policy Commitments

2.6.1 The Scottish Government has laid out the national challenges in terms of population growth, in Scotland's first population strategy A Scotland for the future: opportunities and challenges of Scotland's changing population (March 2021), and in terms of land use in Scotland's third Land Use Strategy 2021-2026: Getting the best from our land (March 2021).

2.6.2 It has set out the challenges in terms of housing and funding in its Programme of Government 2023 to 2024 and its Housing to 2040 strategy (March 2021) including a commitment to deliver 110,000 new affordable homes by 2032, 70% of which are to be for social rent. In October 2022, it also introduced the Cost of Living (Tenant Protection)(Scotland) Act. Amongst other actions it set a temporary cap of 3% on rent increases during private tenancies until 31 March 2024. From 1 April 2024, a replacement system will be introduced, with a higher cap on rent increases.

2.6.3 The suite of national strategies are incorporated into the National Planning Framework 4 (February 2023). It committed Glasgow to the allocation of land with the capacity to accommodate a minimum of 21,350 homes, and placed an obligation to create a 'deliverable housing land pipeline' for a 10 year period from plan adoption. It also sets out a policy intent 'To encourage, promote and facilitate the reuse of brownfield, vacant and derelict land and empty buildings, and to help reduce the need for greenfield development'.

2.6.4 The Glasgow Strategic Plan 2022 to 2027 commits Glasgow to "Deliver around 6,500 new affordable homes for the city, meeting the needs of social housing, accessibility and sustainability needs, and the needs of people including larger and multi-generational households." It is also commits to "Continue work to reduce Vacant and Derelict Land, prioritising brownfield sites for development and ensuring adequate protection for Green Belt and designated Open Space".

2.6.5 The Local Housing Strategy 2023 to 2028 (LHS) commits Glasgow to supporting the delivery of 13,000 homes over the next five years (2023 to 2028). Of these 6,500 would be for market tenure homes and 6,500 would be for affordable tenure homes.

2.6.6 The Strategy prioritises the delivery of social rented tenure homes and family homes (3 and 4 bedroom) and does that through the Affordable Housing Supply Programme.

2.6.7 It commits to a review of the Glasgow Standard; the 10% target for wheelchair accessible housing (in the context of a national review of the housing for varying need standards). The Strategy also commits to considering the efficacy of introducing an affordable housing policy. This could include the requirement for private sector developers to deliver affordable housing within developments, prioritising public land for affordable housing, and increasing affordable housing in higher land-value areas.

2.6.8 The Local Housing Strategy was informed by an LHS Supporting Information Paper (Jan 2023), Glasgow's Housing Contribution Statement 2019-2022 (Nov 2022), and the draft Glasgow City Region Housing Need and Demand Assessment. The Local Housing Strategy engaged extensively as part of its preparation, as detailed in the associated Consultation and Engagement Report.

2.6.9 Glasgow's Strategic Housing Investment Plan (SHIP) is updated regularly and sets out how the Council will increase affordable housing supply year on year, as part of meeting the longer-term housing needs and growth ambitions set out in the Glasgow Local Housing Strategy, Glasgow City Council Strategic Plan and the Glasgow City Region Economic Strategy, and Glasgow Economic Strategy 2022-2030.

2.6.10 The City Centre Living Strategy 2018 to 2035 (June 2020) is another strand of the Local Housing Strategy, and commits Glasgow to doubling the population of the City Centre from 20,233 to 40,000 by 2035, as well as committing to a range of bespoke city centre focussed design guidance, including on tall buildings.

2.6.11 Glasgow's Digital Housing Strategy 2022-2028 is another strand of work relating to the modernisation of housing provision in Glasgow.

2.6.12 In November 2023, the Council announced a Housing Emergency, due to the Home Office's decision to batch and then streamline around 2,500 asylum applications in Glasgow by the end of 2023, and thereafter.

Summary of Population, Households and Housing Stock

1. A recent House of Lords Built Environment Committee report on Meeting Housing Demand outlined the main issues for the UK housing market which also apply to Glasgow. Broadly a lack of affordable housing, a lack of specialist housing to accommodate the increase in older people, poor conditions in the private rental sector, poor design of new homes, lack of SME sector and slow build-out.

2. The key additional issues for Glasgow are:

   - Glasgow has added more people than homes, and more homes than households, over the past two decades and much of the growth has been concentrated in a few centrally located wards. **Future population growth** is projected to be at a rate of 1,453 residents per year and **is expected to be mainly generated by net in-migration** from international destinations.

   - **Glasgow has more older people in 2022 than it had in 2011**, but life expectancy and healthy life expectancy continue to lag behind the Scottish average and, unlike elsewhere in Scotland, children continue to outnumber older people.

   - Glasgow experienced a 10% increase in the number of households over the past 20 years, and **the number of additional households is expected to increase by between 1,105 and 1,756 households per year**, although recent national population projections and the initial Census 2022 outputs may present different outlooks for the city.

   - Glasgow's housing stock has increased by around 1,654 homes a year over the past 20 years, and it has a different mix of tenures compared to Scotland with lower owner-occupation, and higher social and private renting than nationally. **Affordability is a significant concern with all tenures experiencing notable price and rent increases in recent years, placing a larger burden on affordable housing providers than might otherwise have been expected.**

3 Delivery Trends in Housebuilding in Glasgow

3.1 Performance of the market in Glasgow

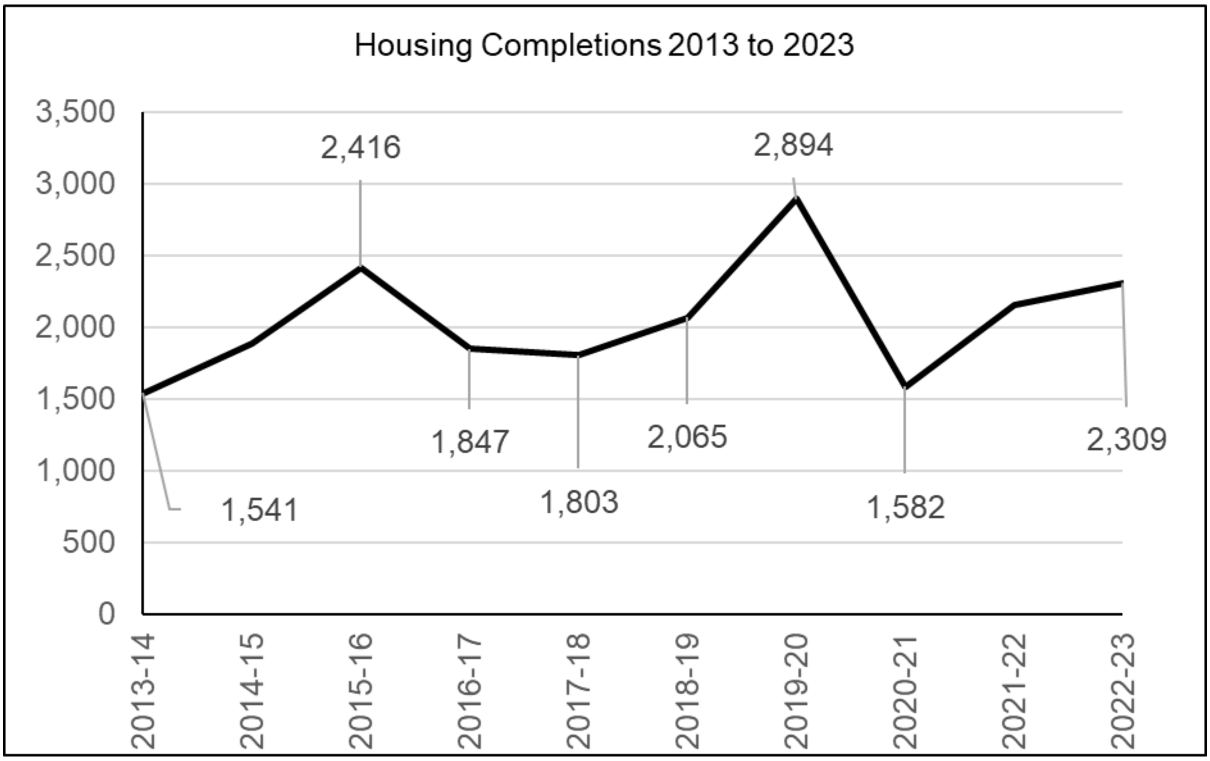
3.1.1 The Glasgow housing market is large, dynamic and diverse. Broadly, the capacity of the established land supply has been maintained above 30,000 homes over the plan period since 2017, while delivery rates have recovered to around 2,000 homes a year following the global financial crash of 2008. This section sets out the past performance of the housing land supply using information from annual Housing Land Audits.

3.1.2 The Housing Land Audit process is undertaken annually by the Council, and involves monitoring of planning applications, site visits, and stakeholder engagement. Taken together the process allows tracking of delivery of new homes by geographies, tenures, house types. It also allows evaluation of the City Development Plan Action Programme, and other longer-term planned interventions.

3.1.3 The most recent Housing Land Audit 2023 was published in November 2023. The methodology follows PAN 2/2010 and collectively agreed guidance with other Glasgow City Region planning authorities. Survey work is typically undertaken in April and May each year, with further written and face-to-face consultation over the summer period June to August. Stakeholders include Homes for Scotland, the Strathclyde Housebuilders Committee (Homes for Scotland), Wheatley Homes, City Property, and Glasgow City Council Housing Services. Each year, agreement about future programming of the next 7 years is sought with the housebuilding industry body Homes for Scotland. The Housing Land Audit 2023 was agreed and published, with no disputes about the 5-year effective programme, in November 2023.

Housing delivery in Glasgow over the past 10 years

3.1.4 Over the 10 years between 2013 and 2023, there were 20,498 homes completed and occupied on sites recorded in the City's annual Housing Land Audits. Taken together and averaged, this accounts for approximately **2,050 new homes per year.**

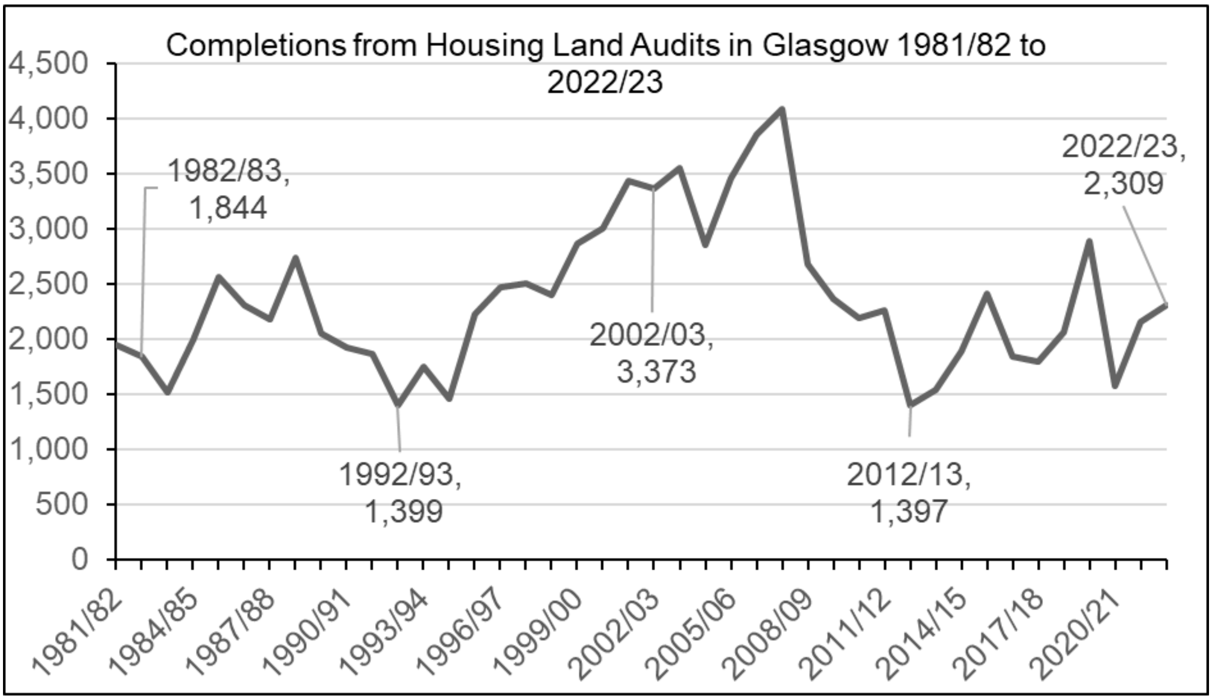


Source: GCC, Housing Land Audits

3.1.5 Broadly, the most recent 5 years have been more productive (~2,201 new homes per year) than the earlier five years (~1,898 new homes per year). The lowest production was in 2013/14, in the wake of the global financial crash, and then in 2020/21, coinciding with the impact of the global Covid-19 pandemic.

Longer-term housing delivery in Glasgow

3.1.6 In order to understand recent delivery in context, the graph below shows completions recorded in the Housing Land Audit from 1981 to 2023. The average annual completions for this longer period **was around 2,382 new homes per year**.



Source: GCC, Housing Land Audits

3.1.7 The graph shows that delivery rates have fluctuated across the past four decades, with lower delivery in the past 10 years than in the previous 20. Considered in this longer context, the 20,498 homes completed over the past decade are typical of this 40 year period, with the exception of a peak in delivery in the mid-2000s.

Housing delivery by ward

3.1.8 The Housing Land Audit records the number of homes built in each ward over the past 10 years and the data is summarised in the following table:

Name	2013 -14	2014 -15	2015 -16	2016 -17	2017 -18	2018 -19	2019 -20	2020 -21	2021 -22	2022 -23	10 Year Total	%
Anderston/ City/Yorkhill	162	140	83	16	141	87	63	59	125	23	899	4
Baillieston	66	86	204	143	167	166	130	122	171	147	1,402	7
Calton	123	479	390	224	146	86	410	61	306	248	2,473	12
Canal	54	5	170	97	113	136	214	49	14	63	915	4
Cardonald	3	1	60	21	1	122	5	7	5	32	257	1
Dennistoun	46	0	199	42	0	0	0	0	74	41	402	2
Drumchapel/ Anniesland	38	54	53	4	0	61	147	84	0	0	441	2
East Centre	45	178	75	89	102	140	84	31	20	6	770	4
Garscadden/ Scotstounhill	0	0	50	112	54	42	0	0	44	92	394	2
Govan	166	10	108	40	105	94	210	25	102	409	1,269	6
Greater Pollok	136	73	197	217	148	156	190	66	107	86	1,376	7
Hillhead	118	57	23	88	63	17	25	30	37	33	491	2
Langside	84	52	137	87	20	92	159	166	41	16	854	4
Linn	0	65	7	29	165	28	110	152	133	121	810	4
Maryhill	58	100	4	23	43	52	47	36	23	34	420	2
Newlands/ Auldburn	81	6	6	95	117	249	200	159	291	162	1,366	7
North East	176	135	188	107	57	67	81	99	39	191	1,140	6
Partick East/ Kelvindale	25	29	29	53	22	28	24	42	128	108	488	2
Pollokshields	0	0	0	0	16	29	219	75	17	52	408	2
Shettleston	56	71	85	29	9	52	140	27	16	46	531	3
Southside Central	77	273	191	194	130	209	259	171	171	175	1,850	9
Springburn/ Robroyston	25	72	157	57	149	120	161	63	235	169	1,208	6
Victoria Park	2	0	0	80	35	32	16	58	56	55	334	2
City Total	**1,541**	**1,886**	**2,416**	**1,847**	**1,803**	**2,065**	**2,894**	**1,582**	**2,155**	**2,309**	**20,498**	

Source: GCC, Housing Land Audits

3.1.9 The table shows that delivery has not been evenly spread across the city, confirming national data from the Glasgow profile section of this report.

3.1.10 Some places have delivered more than others, with Baillieston, Calton, Govan, Greater Pollok, Newlands/Auldburn, North East, Southside Central, and Springburn/Robroyston all having averaged over 100 new homes per year over the decade.

3.1.11 The most productive ward has been Ward 9 Calton where 2,473 new homes (12% of all homes completed) have been built and occupied.

3.1.12 Calton includes the Gallowgate Transformation Regeneration Area. It was also the home of the Commonwealth Games in 2014, and the area around Dalmarnock and Bridgeton has been subject to a significant, and ongoing, regeneration effort led by Clyde Gateway, leading to around 247 new homes a year being built within the ward over the past decade.

Clyde Gateway	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	20 year Target
Derived Annual Completion	n/a	405	821	120	176	198	245	294	57	108	209	198	n/a
Compound Completion Total	736	1,141	1,962	2,082	2,258	2,456	2,701	2,995	3,052	3,160	3,369	3,567	10,000

Source: Key Performance Indicators – 2022/23 Report, Clyde Gateway Board Meeting 30 June 2023

3.1.13 In contrast, some wards have experienced far fewer new homes being built. Less than 50 per year were recorded in Cardonald, Dennistoun, Drumchapel, Garscadden/Scotstounhill, Hillhead, Maryhill, Partick East/Kelvindale, Pollokshields and Victoria Park. Indeed the total for Cardonald was just 257 new homes or the equivalent of 26 new homes a year.

Has the tenure balance of new homes provided choice in each ward?

3.1.14 A key aim of the City Development Plan was that the City's growing and diverse population has **access to a choice** of housing of appropriate quality and affordability **across all tenures.** An aim carried forward in the Local Housing Strategy's Housing Supply Targets which set a 50/50 split of market and affordable tenure housing. In that respect the table below shows the balance of tenure delivered for each ward.

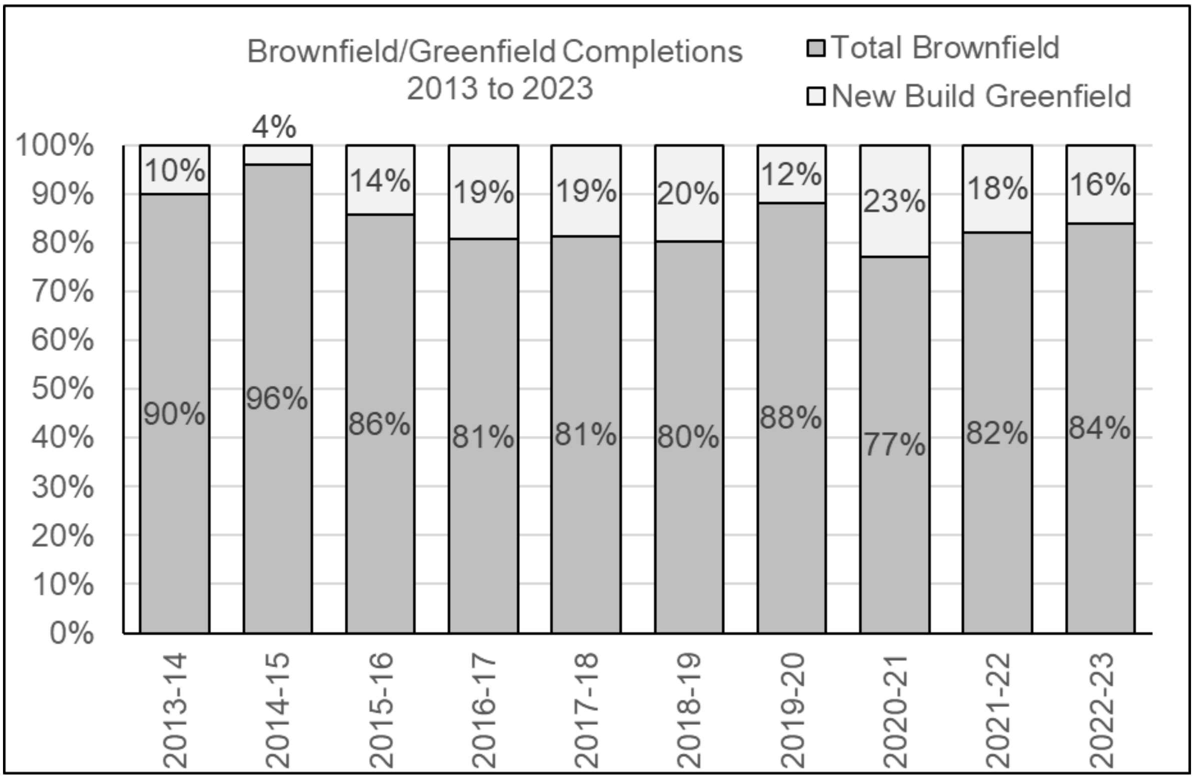
% Tenure of Completions 2013-2023	Affordable	Market
Anderston/City/Yorkhill	50%	50%
Baillieston	6%	94%
Calton	64%	36%
Canal	86%	14%
Cardonald	85%	15%
Dennistoun	85%	15%
Drumchapel/Anniesland	73%	27%
East Centre	40%	60%
Garscadden/Scotstounhill	100%	0%
Govan	58%	42%
Greater Pollok	24%	76%
Hillhead	9%	91%
Langside	32%	68%
Linn	56%	44%
Maryhill	47%	53%
Newlands/Auldburn	29%	71%
North East	30%	70%
Partick East/Kelvindale	15%	85%
Pollokshields	47%	53%
Shettleston	92%	8%
Southside Central	47%	53%
Springburn/Robroyston	44%	56%
Victoria Park	31%	69%
City Total	**47%**	**53%**

Source: GCC, Housing Land Audits

Where have the new homes been built – brownfield/greenfield?

3.1.15 The City Development Plan's spatial strategy set out a clear preference for the development of sites that have previously been built on (brownfield locations), ahead of development of agricultural land or other undeveloped locations (greenfield locations) or protected open space.

3.1.16 Overall, brownfield locations accounted for 84.7% of homes built in Glasgow between 2013 and 2023 (17,358 homes) while greenfield locations accounted for 15.3% of completions (3,140 homes).



Source: GCC, Housing Land Audits

3.1.17 While brownfield development is prioritised, the City Development Plan recognises the role that greenfield locations have in servicing particular housing needs (for example large, detached homes for families) and therefore included three greenfield sites at Darnley, Robroyston and Carmunnock for around 130 homes. It also supported earlier large-scale greenfield releases in the form of Community Growth Areas at Robroyston, Easterhouse and around Baillieston, Broomhouse and Carmyle, accounting for almost 4,000 homes. The Housing Land Audit monitors where new homes are delivered in terms of the land's brownfield/greenfield status at the proposal stage.

3.1.18 The contributions of these greenfield ‘releases’ appears to have had an impact. There have been more than 300 new homes built in greenfield locations over each of the past 8 years, with a peak of 406 built in 2018/19.

3.1.19 In 2020/21 – the year of the most acute impacts of Covid-19 – there was a decline in total completions from 2,894 to 1,582, but this decline was entirely absorbed by brownfield locations, as greenfield completions actually increased from 345 to 362 over the same period, accounting for almost a quarter of homes complete and occupied that year.

New Build/Conversions

3.1.20 The Housing Land Audit allows a further split of brownfield developments into new-build and conversions. The monitoring of this aspect will likely increase in importance as the impact of National Planning Framework 4 sets in. It sets out a clear preference for the re-use of buildings where possible, rather than the creation of brownfield sites for new-build redevelopment.

3.1.21 New build was the most common brownfield development over the past 10 years accounting for 80.3% of all new homes built between 2013 and 2023. Only 4.4% of new homes came from the conversion of an existing building.

Tenure/Site Type	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	**10 year Total**	%
Private Sector												
New Build Brownfield	495	573	956	656	679	657	837	640	871	1079	7,443	36.3%
Conversion	143	12	25	102	70	32	105	59	75	38	661	3.2%
Total Brownfield	638	585	981	758	749	689	942	699	946	1,117	8,104	39.5%
New Build Greenfield	91	70	281	326	336	339	345	313	384	370	2,855	13.9%
Private Sector Total	**729**	**655**	**1,262**	**1,084**	**1,085**	**1,028**	**1,287**	**1,012**	**1,330**	**1,487**	**10,959**	**53.5%**
Affordable Sector												
New Build Brownfield	730	1,227	1,083	731	694	970	1,493	482	811	797	9,018	44.0%
Conversion	16	0	4	0	24	0	114	39	14	25	236	1.2%
Total Brownfield	746	1,227	1,087	731	718	970	1,607	521	825	822	9,254	45.1%
New Build Greenfield	66	4	67	32	0	67	0	49	0	0	285	1.4%
Affordable Sector Total	**812**	**1,231**	**1,154**	**763**	**718**	**1,037**	**1,607**	**570**	**825**	**822**	**9,539**	**46.5%**
All tenures												
New Build Brownfield	1,225	1,800	2,039	1,387	1,373	1,627	2,330	1,122	1,682	1,876	16,461	80.3%
Conversion	159	12	29	102	94	32	219	98	89	63	897	4.4%
Total Brownfield	1,384	1,812	2,068	1,489	1,467	1,659	2,549	1,220	1,771	1,939	17,358	84.7%
New Build Greenfield	157	74	348	358	336	406	345	362	384	370	3,140	15.3%
All-Tenure Total	**1,541**	**1,886**	**2,416**	**1,847**	**1,803**	**2,065**	**2,894**	**1,582**	**2,155**	**2,309**	**20,498**	**100%**

Source: GCC, Housing Land Audits

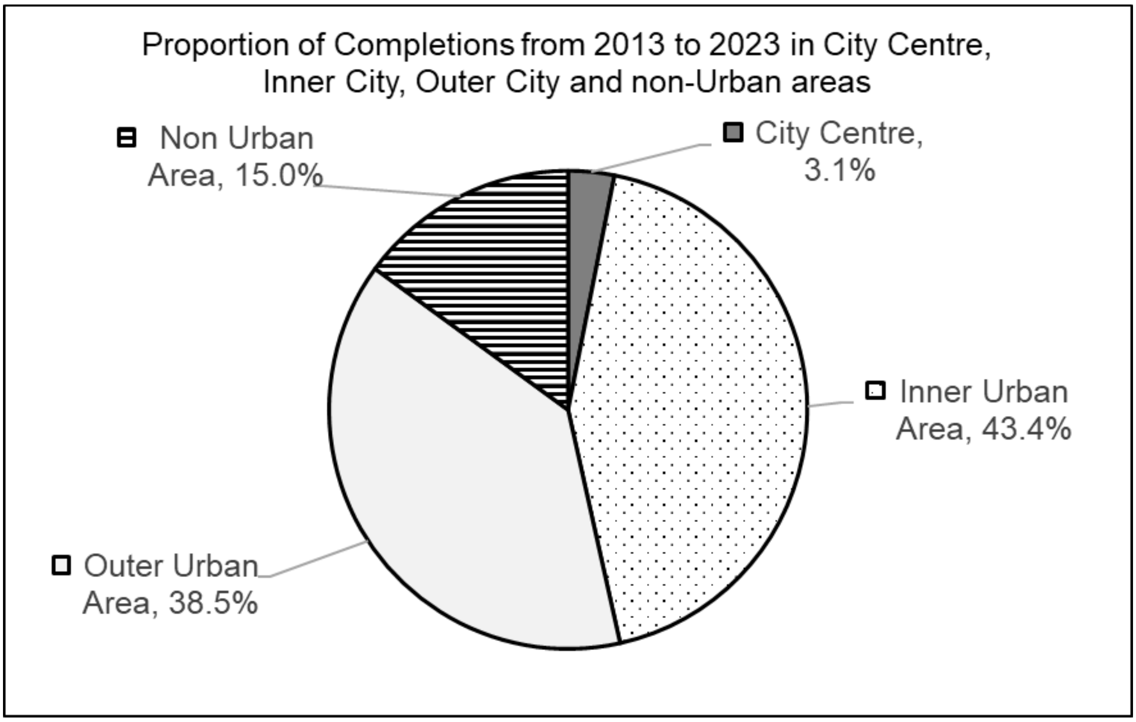
Affordable/Market Brownfield contribution

3.1.22 Most new homes built in brownfield locations over the past decade have been for an affordable tenure (53.3%). The other 46.7% have been for market tenures. Demonstrating a balanced spread of tenures in the re-development of brownfield locations.

3.1.23 Contrastingly, most new homes built in greenfield locations were for a market tenure (90.9%). The other 9.1% were for affordable tenure demonstrating the market sector – homes for sale - as the driving force behind greenfield developments in the past decade.

Where have the new homes been built – city centre, inner urban, outer urban or non-urban areas?

3.1.24 The City Development Plan identifies four location 'types' within the city according to housing typology: city centre (very high density), inner urban area (tenemental/medium density), outer urban area (suburban/low density) and non-urban area (very low density). These location types are shown in the CDP2 Mapping Hub. The Housing Land Audit reports annually on delivery in each location via table 12 and 13.



Source: GCC, Housing Land Audits

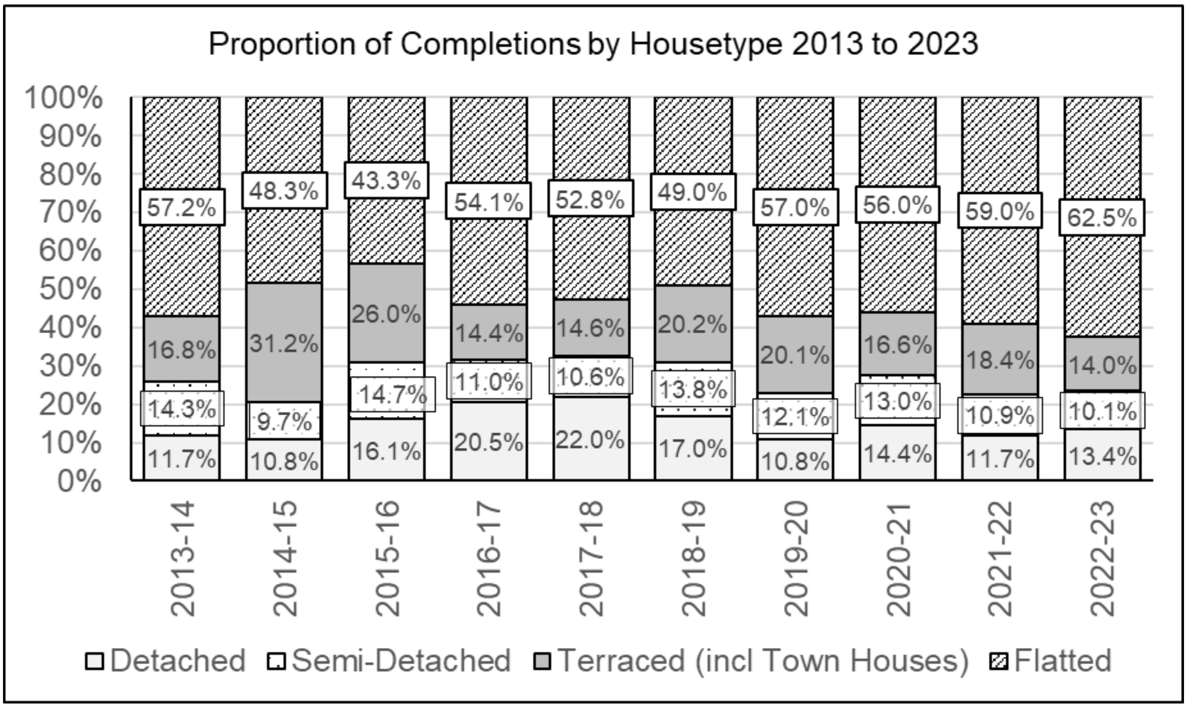
3.1.25 Over the past 10 years, 3.1% of new homes were built in the city centre (637 homes), 43.4% were built in the inner urban area (8,892 homes), 38.5% were built in the outer urban area (7,895 homes), and 15% were built in non-urban areas (3,063 homes), including the greenfield community growth areas.

3.1.26 Of note is that most new development has occurred in the city's tenemental and suburban areas. While almost 5 times more homes have been built in non-urban locations over the past decade than within the city centre.

Housetypes - How many new homes were flats, detached, semi-detached or terraced homes?

3.1.27 According to a Glasgow City Council stock estimate from 2018, the majority of dwellings in Glasgow were flats (71.3% of dwellings). Houses or bungalows comprised only 28.4% of dwellings. That is in contrast to Scotland overall, where 36.4% of dwellings are flats and 63.4% are houses or bungalows.

3.1.28 According to the Housing Land Audits, between 2013 and 2023, 53.9% of new homes that were built and occupied in Glasgow were flats (11,044 homes), 19.4% were terraced (3,982 homes), 14.6% were detached (2,999 homes), and 15% were semi-detached (2,462 homes).



Source: GCC, Housing Land Audits

3.1.29 Flats were the single most productive house type, accounting for between 43.3% to 59% of new homes each year across the decade. However, in 3 out of the past 10 years, a combination of detached, semi-detached and terraced homes have formed the majority of new homes built (2014/15, 15/16 and 2018/19). The proportion of flats has steadily increased since 2019, after a period of decline.

House types - How many new homes in the city centre, inner urban, outer urban and non-urban areas were flats, detached, semi-detached or terraced homes?

3.1.30 The headline data shows that homes were not distributed evenly across the city centre, inner urban, outer urban and non-urban areas, and further locational distinction can be identified via the recording of house types.

3.1.31 Flats accounted for all new homes built in the city centre (637 homes), and they accounted for 79.5% of new homes in the inner urban area (7,068 homes), 41.9% in the outer urban area (3,310 homes) and 0.9% in the non-urban area (29 homes).

3.1.32 In the outer urban area the most common house type built was flats (41.9%) but 27.1% of new homes built over the past decade were terraced properties, 21.5% were semi-detached homes and 9.5% were detached properties.

3.1.33 In non-urban areas, 72.1% of new homes were detached properties (2,209 homes), 18.1% were semi-detached properties (552 homes), 1.3% terraced properties (272 homes) and 0.9% were flats (29 homes).

3.1.34 The heavy focus on detached properties in the non-urban areas can be recognised as a successful implementation of the community growth areas and other greenbelt releases, and their goal to encourage the development of large family housing.

Performance of the Market in Glasgow

1. The Housing Land Audit data shows that after a difficult period, following the global financial crash of 2008, the completion rate of new homes has recovered to around **2,000 homes per year.**

2. It would appear that the City Development Plan policy CDP10 Meeting Housing Needs aim "to ensure that the City's growing and diverse population has access to a choice of housing or appropriate quality and affordability across all tenures" has broadly been successful. **All wards have experienced some development over the past decade, albeit some places more than others**.

3. **A range of detached, semi-detached, terraced, and flatted homes have been delivered across the past decade** in line with the policy aim to provide a choice of housing types. Around 54% were flats compared with 46% houses. Further, the balance of tenure across the city was 47% affordable to 53% market, suggesting tenure choice in this regard, insofar as similar amounts of new homes have been built for each tenure, albeit in some places more of one tenure or the other was experienced.

4. It would appear that good progress on the City Development Plans aims of supporting the re-use of brownfield land has been made. Most new homes were new build (rather than conversions) but the balance of greenfield to brownfield has remained about 20/80 across the past 5 years. **Most new homes have been built on brownfield land, with 47% for market tenure and 53% for affordable.**

5. The spatial strategy aims to support the development of a compact city, meaning broadly, that it will support more homes in urban locations. The Housing Land Audit shows that **over the past decade most homes were built in the inner and outer urban areas**.

6. Flats accounted for all new homes in the city centre and were the most common new home in both the inner and outer urban area**. Detached houses were the most common new home in non-urban areas, reflecting the success of the Community Growth Areas at delivering larger, family-size housing within the City boundaries.**

3.2 City Development Plan – Delivery of Sites

Introduction

3.2.1 This section reports on the delivery of planned and other sites with reference to the City Development Plan Action Programme (planned sites) and historic planning permission sites (consented sites) and windfall completions (sites without planning permission during preparation of the City Development Plan and not included in the City Development Plan Action Programme).

Action Programmed Sites

3.2.2 The City Development Plan Action Programme was updated in June 2023. It details the progress of 120 referenced housing sites that had an original indicative capacity of 18,492 homes at City Development Plan adoption in 2017.

3.2.3 3,798 new homes have been completed and occupied via the Action Programme, equivalent to **around 633 planned homes per year.** At 2023, there were 96 sites in the Action Programme with potential for 13,423 further homes to be delivered.

3.2.4 The update records 24 of the 120 sites as ‘complete’ at 2023, 27 sites as ‘partially complete’ or ‘under construction’, 7 have experienced some planning progress (masterplans, PANS, planning applications etc) while just over half (62) have yet to progress beyond site allocation stage at 2023.

3.2.5 Three greenfield allocations were made by the City Development Plan accounting for a maximum of 129 homes. Progress has been made on two of these greenfield allocations at Carmunnock and Darnley, accounting for 103 new homes (54 new homes for sale and 49 homes for sale respectively). A proposal at the Robroyston greenfield allocation for a larger site was granted planning permission in August 2023 after a committee decision to approve the proposals in June 2021. This was for an indicative capacity of 300 new homes.

Sites with Historic Planning Permission and Windfall additions

3.2.6 Glasgow’s spatial strategy relied upon consented housing sites, that already had planning permission at 2012, to produce new homes during the course of the City Development Plan. These sites did not require Action Programming as they had already navigated the planning system, and included large masterplan sites like Glasgow Harbour and Gartloch Village.

3.2.7 These are summarised in the table below into the broad intervention types – New Neighbourhoods Initiatives (NNI), Transformational Regeneration Areas (TRA), Clyde Gateway, Masterplan areas (including Glasgow Harbour and Gartloch Village), notable large-scale urban developments and planned greenfield releases (including Community Growth Areas (CGA)).

Strategic Planning	Number of Interventions	Capacity	Delivered				Total Built	Remaining Capacity	% of Established Supply
			Pre-2012/13	2012-2017	2017-22	2023			
New Neighbourhood Initiative (NNI) areas	4	6,570	1,049	1,088	919	43	3,099	3,471	10%
Transformational Regeneration Areas (TRA)	8	5,563	389	1,280	845	176	2,690	2,873	8%
Clyde Gateway*	4	3,524	677	918	439	71	2,105	1,419	4%
Masterplan areas	2	4,296	1,299	52	65	45	1,461	2,835	8%
Notable large-scale Urban Developments	14	6,296	1,122	865	1,418	205	3,610	2,686	8%
Planned Greenfield Releases (including CGAs)	13	8,350	1,265	702	1,298	256	3,521	4,829	14%
Totals	45	34,599	5,801	4,905	4,984	796	16,486	18,113	52%

Established Supply at 2023	34,832

Source: GCC, Housing Land Audits

3.2.8 The brownfield-first strategy of the City Development Plan emphasised the importance of supporting the re-development of land as it became available throughout the course of the plan period. An indicative contribution of 300 homes per year was factored into the City Development Plan as windfall.

3.2.9 Based on the Action Programme sites accounting for 3,798 new homes for the period 2017 to 2023, and the Housing Land Audit accounting for 12,808 new homes being complete and occupied over that period, it can be calculated that sites with historic planning permission and/or windfall additions have contributed 9,010 homes from 2017 to 2023. Equivalent to **around 1,500 homes per year** generated on sites that did not require City Development Plan Action Programming.

Historic Spatial Interventions.

3.2.10 The City Development Plan is the latest in a series of city-wide land use plans for Glasgow that introduced and maintained major spatial interventions. The table above summarises the progress of these major interventions to 31 March 2023.

3.2.11 Many of these interventions pre-date the City Development Plan and have taken many years to deliver because of their scale, complexity and viability.

3.2.12 The New Neighbourhoods Initiatives were a City Plan (2004) intervention and have had mixed fortunes. The projects at Oatlands and Garthamlock attracted market partners including Avant and Persimmon respectively and both were nearing completion at 2023. The project at Ruchil/Keppoch had only recently begun with Bellway, Queen Cross Housing Association and Robertson Living developing. The Drumchapel project has delivered some homes for Wheatley but much of it was undeveloped at 2023.

3.2.13 The Transformational Regeneration Areas were eight City Plan 2 (2009) interventions based on a partnership between Glasgow Housing Association, Glasgow City Council and the Scottish Government to redevelop substandard housing in areas dominated by social housing and to introduce alternative tenures. Broadly, the projects at North Toryglen (Cruden), Pollokshaws (Urban Union), Laurieston (Urban Union), Sighthill (Keepmoat), Gallowgate (Wheatley), and Maryhill (Bigg Regeneration) have seen progress. The two projects at Barmulloch and East Govan/Ibrox have not attracted development following demolition.

3.2.14 Clyde Gateway is an area around Bridgeton and Dalmarnock within which the Clyde Gateway Urban Regeneration Company operates. The company was set up prior to the 2014 Commonwealth Games to co-ordinate redevelopment of the area. Keepmoat, Link, Thenue, West of Scotland Housing Association, and McTaggart Construction all had an interest in sites at 2023. The success of the venture is recognised in National Planning Framework 4.

3.2.15 The two masterplan areas at Glasgow Harbour (led by Peel Ports) and at Gartloch Hospital (promoted by the NHS and redevelopment led by New City Vision) have been long-term projects that have developed over the past 20 years. At 2023, phases of both were still actively being developed.

3.2.16 Each plan has included planned greenfield releases and generally these have been developed. The three Community Growth Areas are the newest large-scale interventions. The sites at Robroyston and Broomhouse/Baillieston have been successful in attracting a range of market housebuilders (Avant, Bellway, Briar, Miller, Persimmon, Taylor Wimpey) and delivering family housing. Both are nearing completion. Sites remain at Carmyle (New City Vision) and Easterhouse.

3.2.17 The other notable large-scale urban developments include Blackhill Regeneration Area, Calton Village, Cowglen, Darnley Mains, Jordanhill, East Balornock, Meat Market, Myreside, Port Dundas, Lambhill Masterplan Area, Wardhill, Victoria Hospital, Cathcart House, and Yoker Ferry Road. Generally these have involved Masterplanning brownfield sites within the city.

Demolitions and Empty Homes

3.2.18 There were 5,913 demolitions recorded by the Scottish Government over the 10 years 2011 to 2021, annualised that would account for almost 600 homes a year, however, in the 5 years to 2021 there were around 270 homes demolished per year indicating far fewer demolitions in recent years.

3.2.19 Given NPF4's preference for re-use of buildings and the mature demolition programme within the city it seems unlikely that demolitions will exceed 270 homes a year although some demolition will should still be factored in with examples at Wyndford and Oatlands demonstrating the continued impact of such interventions.

3.2.20 The National Records of Scotland estimated that there were 7,172 empty homes in Glasgow and 530 second homes. These have the potential to accommodate households in need.

Additions to the Land Supply

3.2.21 For the two years 2021/22 to 2022/23, land with the potential capacity for 5,160 homes has been added to the established land supply via the granting of planning permission on unallocated sites or via the allocation of funding through the Affordable Housing Supply Programme.

Potential Upstream Additions to the Land Supply

3.2.22 The potential for additional capacity to be added to the supply in the future - the 'upstream supply' - can be quantified by monitoring pending planning applications for new homes.

3.2.23 At January 2024, there were 106 pending planning applications involving new homes in Glasgow. These had a combined capacity of 10,929 homes. Of these, 44 sites, with a potential capacity of 4,081 homes, were not identified in the Housing Land Audit 2023. Proposed capacity changes to sites already identified in the Housing Land Audit 2023 have the potential to increase the established supply by 429 (netting proposed increases and decreases). This would result in the addition of 4,510 homes to the supply if all proposals were approved.

3.2.24 The upstream supply is dynamic and changes, as new applications are submitted and pending applications are determined. Typically, the capacity of these sites does not appear in the Housing Land Audit until they have planning permission. Density is a factor with some central areas like the City Centre having the potential to generate more homes (via taller buildings) than elsewhere.

3.2.25 It should be acknowledged that while many proposals will be granted planning permission because the majority are on land that has previously been developed and would, in principle, be supportive of the CDPs brownfield-first strategy, some will inevitably be refused or withdrawn and therefore will not feature in the land supply in the future.

Performance of Policy Interventions in Glasgow

1. 3,798 new homes have been completed and occupied via the Action Programme, equivalent to **around 633 planned homes per year.** At 2023, there were 96 sites in the Action Programme with potential for 13,423 further homes to be delivered.

2. 9,010 new homes have been completed and occupied on sites that did not require City Development Plan Action Programming, equivalent to **around 1,500 homes per year**.

3. Large-scale interventions, either via a masterplan, strategic partnership, or urban development company have generally been successful, albeit there are exceptions, and they generally take many years before delivering the first new homes. Many of these have involved support for the demolition of substandard housing. Where repair and improvement of substandard homes are not economic, demolition as a meaningful tool for making better places and delivering new homes, remains part of housing solutions in the city.

3.3 Housing Land Supply at 2023

3.3.1 The Housing Land Audit 2023 was published in November 2023. It is a snapshot of the established land supply at 31 March each year.

3.3.2 At 31 March 2023, it consisted of land with the capacity to develop 34,832 homes. Land with planning permission for residential developments where more than 3 homes would be built, land identified for housing in the Local Development Plan, and other land where the Council have made a decision to approve housing (normally via the Affordable Housing Supply Programme).

Housing Supply	Completions	Programme							Un-programmed Supply	Full Period
Year	2022-23 completions	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030 to 2040	2022 to 2040
A- Owner Occupied	1,163	738	654	703	656	615	515	454	11,553	15,888
B- Private Rent	324	307	344	500	530	531	460	403	7,907	10,982
C- Mid Market Rent and Shared Equity	143	532	451	338	342	387	363	264	648	3,325
D- Social Rent	679	372	570	450	543	573	520	396	1,213	4,637
E- Market (A+B)	1,487	1,045	998	1,203	1,186	1,146	975	857	19,460	26,870
F- Affordable (C+D)	822	904	1021	788	885	960	883	660	1,861	7,962
G – All Tenure Established Supply (E+F)	2,309	1,949	2,019	1,991	2,071	2,106	1,858	1,517	21,321	34,832

Source: Glasgow City Council, Housing Land Audit 2023

3.3.3 8,030 homes are anticipated to be delivered before City Development Plan 2 is expected to be adopted in 2027. If delivered as currently programmed, with no further additions or deletions, the **established supply at 2027 would have a remaining capacity of 26,802 homes.** The Housing Land Audit 2023 included land with the capacity for 21,321 as being available beyond 2030. Glasgow's land supply is, however, subject to considerable change at each Audit.

Market/Affordable

3.3.4 The Housing Land Audit attributes a tenure to each site, in terms of whether it is anticipated that the homes will be for either owner occupation or private rent (both market tenure); or for social rent, mid-market rent and shared equity homes (collectively regarded as affordable tenures).

3.3.5 The 7-year programme of 13,511 homes identifies **45% affordable tenure (6,101 homes) and 55% market tenure homes (7,410).** Broadly in line with the balance of delivery experienced by the City over the past decade. More detailed analysis indicates that of the 7-year market tenure supply, around 32% are anticipated to be for homes for sale (4,335 homes) while 23% are likely to be for build-to-rent (3,075 homes). Far more private rental homes are anticipated than have recently been built.

3.3.6 In the longer-term, the established supply shows that 23% (7,962 homes) are anticipated to be developed for affordable housing, while 77% (26,870 homes) are recorded as likely to be developed for market tenure housing. The tilt is partly due to longer-term sites being considered likely to be market tenure as a default tenure rather than affordable because funding for affordable homes is not known in the longer term and so it is more difficult to identify a long-term delivery mechanism for that tenure.

3.3.7 A key aim of the City Development Plan was that the City's growing and diverse population has **access to a choice** of housing of appropriate quality and affordability **across all tenures.** An aim carried forward in the Local Housing Strategy's Housing Supply Targets which set a 50/50 split of market and affordable tenure housing. In that respect the table below shows the established supply and programming for each tenure in each ward.

Percentage of Land in Ward by whether it is anticipated to generate affordable tenure or market tenure homes.	Ward no.	Supply	Affordable	Market
Anderston/City/Yorkhill	10	7,368	1%	99%
Baillieston	20	514	38%	62%
Calton	9	4,211	48%	52%
Canal	16	3,468	29%	71%
Cardonald	4	73	59%	41%
Dennistoun	22	1,040	29%	71%
Drumchapel/Anniesland	14	1,141	18%	82%
East Centre	18	517	37%	63%
Garscadden/Scotstounhill	13	642	31%	69%
Govan	5	1,818	42%	58%
Greater Pollok	3	256	39%	61%
Hillhead	11	375	15%	85%
Langside	7	749	37%	63%
Linn	1	122	85%	15%
Maryhill	15	556	78%	22%
Newlands/Auldburn	2	472	41%	59%
North East	21	3,901	9%	91%
Partick East/Kelvindale	23	465	0%	100%
Pollokshields	6	1,035	40%	60%
Shettleston	19	700	15%	85%
Southside Central	8	1,593	37%	63%
Springburn/Robroyston	17	1,759	19%	81%
Victoria Park	12	2,057	0%	100%
City Total		34,832	22.9%	77.1%

Source: Glasgow City Council, Housing Land Audit 2023

3.3.8 The table above summarises the contents of the Housing Land Audit 2023, and highlights the balance of the supply in terms of its capacity for affordable and market tenure homes. It demonstrates that in three wards the land supply is tilted towards affordable while the remainder are tilted towards market tenure including three (Wards 10, 12, and 23) where the land supply is almost all market tenure.

Brownfield/Greenfield

3.3.9 The City Development Plan’s spatial strategy sets out a preference for the redevelopment of brownfield sites compared with greenfield locations, but it does include the opportunity for strategic interventions in greenfield locations.

TABLE 5 **2023 Effective Housing Land Supply by Site Type**

Site Type	Private Sector No.	Private Sector %	Affordable Sector No.	Affordable Sector %	All Tenures No.	All Tenures %
New Build Brownfield	5,941	80.2%	5,530	90.6%	11,471	84.9%
Conversion	463	6.2%	156	2.6%	619	4.6%
Total Brownfield	6,404	86.4%	5,686	93.2%	12,090	89.5%
New Build Greenfield	1,006	13.6%	415	6.8%	1,421	10.5%
Total	7,410	100.0%	6,101	100.0%	13,511	100.0%

Note1: Private Sector comprises owner occupied & private rented.
Note2: Affordable Sector comprises social rented, mid-market rented, shared equity and shared ownership.
Note3: Conversions include rehabilitation involving a change of tenure.
Note3: Excludes sites with a capacity of less than 4 units

Source: Glasgow City Council, Housing Land Audit 2023 – table 5

3.3.10 The Housing Land Audit's table 5 indicates that **89.5% of homes programmed to be built over the next 7 years will be in brownfield locations.**

3.3.11 The programme shows that 12,090 homes are anticipated to be delivered on brownfield locations comprising 84.9% (11,471 homes) in newly completed buildings and 4.6% (619 homes) in conversions of existing buildings.

3.3.12 It also anticipates that 10.5% of new homes (1,421 homes) to be built over the next 7 years would be in greenfield locations.

3.3.13 A more nuanced picture emerges if these figures are considered by their expected tenure, with most (71%) of new homes in greenfield locations expected to be for market tenure (1,006 homes) accounting for 13.6% of the total number of market homes expected to be built over the next 7 years.

3.3.14 Contrastingly, 93.2% of affordable tenure homes (5,530 homes) are expected to be built in brownfield locations with just 6.8% (415 homes) expected in greenfield locations.

Land Supply Distribution by Ward

Ward Name	2023 Established Land Supply in ward	Percentage of the Glasgow Established Land Supply in ward	2023 to 2028 5-year Effective Land Supply in ward	Percentage of the Glasgow 5-year Effective Land Supply in ward	2028 and beyond Longer-term Land Supply in ward	Percentage of the Glasgow 2028 and beyond Longer-term Land Supply in ward
Anderston/City/Yorkhill	7,368	21%	1,513	15%	5,855	24%
Baillieston	514	1%	154	2%	360	1%
Calton	4,211	12%	1,497	15%	2,714	11%
Canal	3,468	10%	970	10%	2,498	10%
Cardonald	73	0%	54	1%	19	0%
Dennistoun	1,040	3%	408	4%	632	3%
Drumchapel/Anniesland	1,141	3%	141	1%	1,000	4%
East Centre	517	1%	204	2%	313	1%
Garscadden/Scotstounhill	642	2%	156	2%	486	2%
Govan	1,818	5%	485	5%	1,333	5%
Greater Pollok	256	1%	207	2%	49	0%
Hillhead	375	1%	149	1%	226	1%
Langside	749	2%	617	6%	132	1%
Linn	122	0%	90	1%	32	0%
Maryhill	556	2%	271	3%	285	1%
Newlands/Auldburn	472	1%	249	2%	223	1%
North East	3,901	11%	201	2%	3,700	15%
Partick East/Kelvindale	465	1%	218	2%	247	1%
Pollokshields	1,035	3%	433	4%	602	2%
Shettleston	700	2%	96	1%	604	2%
Southside Central	1,593	5%	819	8%	774	3%
Springburn/Robroyston	1,759	5%	577	6%	1,182	5%
Victoria Park	2,057	6%	627	6%	1,430	6%
City Total	**34,832**	**100%**	**10,136**	**100%**	**24,696**	**100%**

Source: Glasgow City Council, Housing Land Audit 2023

3.3.15 The **established land supply is not evenly distributed across wards** with the majority (54%) accommodated in just four wards. Namely, Ward 10 Anderston/City/Yorkhill, which accounted for 21% of the total established supply for Glasgow at 2023. Ward 9 Calton accounted for 12%, Ward 21 North East accounted for 11%, and Ward 16 Canal accounted for 10%.

3.3.16 Of the remaining 19 wards, six have a supply with a capacity of fewer than 500 homes, six have a supply with a capacity between 500 and 1,000 homes, seven have a capacity of between 1,000 and 2,500.

3.3.17 In the short-term, Ward 9 Calton and Ward 10 Anderston/City/Yorkhill together account for 30% of programmed completions in Glasgow over the next 5 years (15% ~1,500 homes each).

3.3.18 In the longer-term, beyond the next 5 years to 2028, four wards stand out as accounting for 60% of the land supply according to the Housing Land Audit 2023. Ward 10 Anderston/City/Yorkhill (mainly Build-to-Rent schemes) accounted for 24% of the remaining supply at 2028 while Ward 21 North East (mainly the Easterhouse CGAs) accounted for 15%. Also of note is Ward 9 Calton (across several large regeneration sites including Clyde Gateway) that accounted for 11% and Ward 16 Canal (across several large regeneration sites including Port Dundas, Cowlairs/Hamiltonhill/Ruchill New Neighbourhood) that accounted for 10% of the land supply.

3.3.19 Of the 10,136 homes anticipated to deliver within the first 5 years from 2023 onwards, 45% are anticipated to be for affordable tenures, 33% are for owner occupied tenure and 22% are for private rent tenure.

Current Pipeline

3.3.20 The Housing Land Audit records the 'status' of each site in the land supply using a broad categorisation which reflects their position in the planning system. The status runs as a pipeline from 'under construction', through 'planning permission' (bracketing both detailed and in principle consents together) and then sites with the 'potential' for residential development.

3.3.21 The inclusion of the first two categories in the housing land supply are self-evident while the sites with 'potential' that are included are generally those in the City Development Plan delivery programme, the Affordable Housing Supply Programme or another recognised planning intervention such as the Transformational Regeneration Areas, New Neighbourhoods or Community Growth Areas but which have not yet gained planning permission.

3.3.22 At March 2023, 23% of the established supply was on a site 'under construction', a further 36% were on sites with planning permission, 10% were on greenfield release sites without planning consent yet and the remaining 31% on brownfield land with Development Plan support such as allocations or opportunities in major regeneration interventions like the Transformational Regeneration Areas and New Neighbourhood initiatives.

3.3.23 At August 2023, a snapshot of the potential capacity of pending planning applications was taken. It showed that **there were 4,005 homes pending detailed planning permission, and a further 243 pending planning permission in principle**.

Other Pipeline – VDLS, Urban Capacity Study and Green Belt Review

3.3.24 The vacant and derelict land survey for Glasgow identifies previously developed brownfield land that is not currently being used for its intended end use. Derelict sites also have a constraint that would need to be dealt with before re-development could commence, including levelling, clearing and removal of foundations, removal of contamination and the removal of rubble and former mineworkings.

3.3.25 Re-use of vacant and derelict land within Glasgow is a policy priority for Glasgow, and the Council has had a longstanding approach of supporting a compact city region. National Planning Framework 4 also identifies the need to re-use brownfield land to reduce the need for greenfield land. Vacant and derelict land will therefore remain a supply of new sites and the Council receives funding from the Scottish Government for the remediation of this land.

3.3.26 An Urban Capacity Study is required to identify other potential sources of sites for development within the urban area. Early work has started on this through the Development Survey as part of the Early Engagement. The Report of Engagement provides further detail. A Green Belt Review is being carried out to provide baseline information about land use in the green belt. Given the support in NPF 4 for brownfield development, the need to build in the green belt will have to be carefully considered in producing the Deliverable Housing Land Pipeline for CDP2.

Glasgow's Established Housing Land Supply

1. *Scale of Supply:* 8,030 homes are anticipated to be delivered before City Development Plan 2 is expected to be adopted in 2027. If there are no further additions or deletions, the established supply at 2027 would have a remaining capacity of 26,802 homes. Glasgow's land supply is, however, subject to considerable change at each Audit.

2. *Tenure balance of Supply:* At 2023, the established supply consisted of 22.5% affordable and 77.5% market tenure homes although in the shorter term the tenure balance is more even (45% affordable, 55% market).

3. *Distribution of the Supply – by ward*: The established supply is concentrated in four key wards – namely Ward 9 Calton, Ward 10 Anderston/City/Yorkhill, Ward 16 Canal and Ward 21 North East accounting for 54% the supply at 2023. Beyond 2028 the proportion of the established supply in these wards increases from 54% to 60%.

4. *Distribution of the Supply – by greenfield/brownfield*. The established supply is mainly in brownfield locations. 89.5% of homes programmed to be built over the next 7 years will be in brownfield locations.

5. *Current Pipeline*. Around 41% of the established supply at 2023 has no planning consent. There were proposals for 4,005 homes pending detailed planning permission and a further 243 pending planning permission in principle at August 2023.

6. Vacant and Derelict Land and Urban Capacity sites will have a role in identifying future land supply.

4 Specialist needs

4.1 Introduction to Section

4.1.1 The Planning (Scotland) Act introduced a number of housing-focussed legislative requirements for the Evidence Report relating to housing for specialist needs.

4.1.2 It set out that the Evidence Report should summarise the action taken by the planning authority to support and promote the construction and adaptation of housing to meet the housing needs of **older people** and **disabled people** in the authority's area, and to provide a summary of the actions taken by the planning authority to meet the accommodation needs of **Gypsies and Travellers** in the authority's area. In all three cases, it should also provide an analysis of the extent to which the action has helped to meet those needs.

4.1.3 The legislation also requires the Development Plan to set out the planning authority's view on the housing needs of "**persons undertaking further and higher education" i.e. students.**

4.1.4 The following sections provide background to each of these specialist needs, and in doing so, satisfies the specific legislative requirements of the Evidence report.

4.2 Housing for persons undertaking further and higher education

16B Evidence report for preparation of local development plan (3) The evidence report is to— "…"(b) set out the planning authority's view on the matters listed in section 15(5) — [namely]… 15(5)(ca) the housing needs of the population of the area, including, in particular, **the needs of persons undertaking further and higher education**

Source: Town and Country Planning (Scotland) Act 1997 as amended by the Planning (Scotland) Act 2019

Student Accommodation Scottish Context

4.2.1 In December 2022, the UK Collaborative Centre for Housing Evidence's (CACHE) published '[Research Purpose-built student accommodation (PBSA) and student housing in Scotland](#)'.

4.2.2 The research found that:

a) Student numbers and **accommodation demand are rising**.
b) New PBSA developments continue to move upmarket.
c) There is limited data on variations in student housing affordability.
d) **Private sector PBSA is market-driven, and evokes divergent perspectives**.

4.2.3 The report acknowledged that there is considerable variety in the accommodation options available to students including HMO private renting, university-owned PBSA (student halls) and the growing PBSA sector, and that while student experiences therefore varied across options, because there is more existing stock than new stock coming onto the market, any incremental improvements affected by new additions are small.

4.2.4 The report concluded that student accommodation in Scotland is a complex, interdependent system, interacting with local housing systems and communities, but that the sector should:

a) Work together to deliver more mid-range, lower cost PBSA.
b) Approach PBSA in a joined-up way so that compromises might be sought on divergent views.
c) Seek robust and regular data on students' economic circumstances, and the affordability of different types of accommodation.

4.2.5 A March 2024 report on student homelessness in Glasgow by the UK Collaborative Centre for Housing Evidence (CACHE) noted that, in Autumn 2022, there was insufficient accommodation to meet the requirements of incoming undergraduate and postgraduate students in Glasgow.

4.2.6 The report sought feedback from students, professionals and other perspectives to record the experiences of those affected, and to identify reasons for the issue. It describes responses, and makes ten recommendations for future actions, including some that involve the planning system.

4.2.7 The report acknowledges that for the 2023-24 session, the situation is different. Student numbers were around 2,000 less than were planned for, reducing demand pressure in the system. At the same time, there was a stronger degree of preparedness, and the University reserved an additional 2,000 PBSA bedspace nominations as counter-measures to the situation faced in 2022. These actions resulted in 700 voids (vacancies) in the PBSA market.

4.2.8 The report concludes that while there appears to be generally adverse headwinds across the sector regarding international student demand, 2023-24 may only be a respite from continuing structural imbalances in supply and demand that will need to be addressed.

A summary of the action taken by the planning authority to meet the accommodation needs of Students in the authority's area

4.2.9 The National Planning Framework 4 (Feb 2023) sets out support for 'homes for people undertaking further and higher education' in Policy 16(c)). It references affordability and 'identified gaps in provision', but does not cover the scale of demand or the context for what this would mean for Glasgow, or the relative importance of this sector to the national economy.

4.2.10 The City Development Plan (2017) set out statutory planning guidance for student accommodation that broadly supports the development of student accommodation close to campus or close to public transport hubs with good access to the campus. However, following adoption of the City Development Plan, and in the wake of several years of large-scale windfall proposals for student accommodation in the city (see table), the Council commissioned research into the student accommodation market in Glasgow.

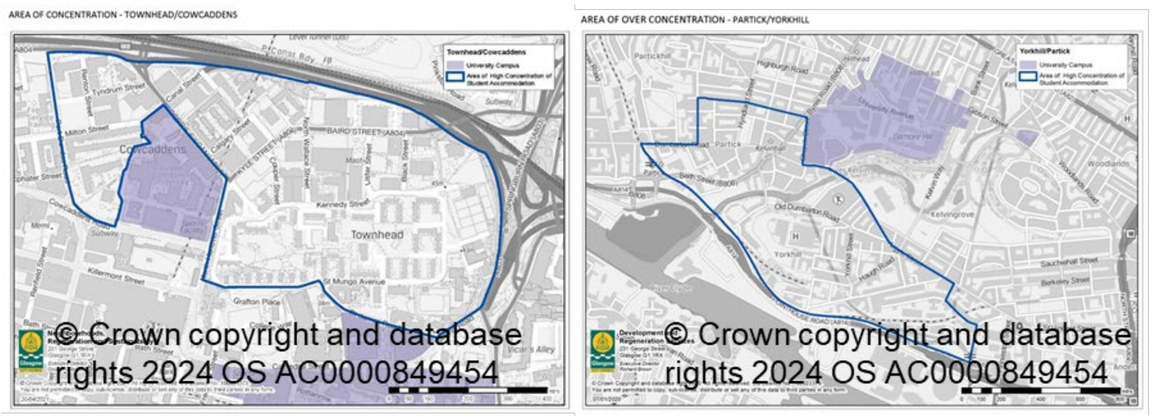
Year Received	Applications	Pending at August 2023	Granted	Withdrawn	Refused
2014	23	1	21	1	0
2015	19	0	14	4	1
2016	21	0	17	1	3
2017	19	0	13	5	1
2018	9	0	8	1	0
2019	12	1	8	2	1
2020	6	0	3	1	2
2021	6	1	3	2	0
2022	4	0	3	0	1
2023*	12	11	1	0	0
Total	**131**	**14**	**91**	**17**	**9**

Source: derived from Online Planning website
*Jan to August 2023

4.2.11 The subsequent findings of an unpublished report by Savills were presented to committee in March 2018. The committee recognised the potential negative impact caused by the introduction of large numbers of students to an area (especially one close to the existing University campus' or around public transport hubs), and instructed that a report be prepared that considered: the over-concentration of purpose-built student accommodation in certain areas; locational criteria in areas with a high proportion of purpose-built student accommodation; and the option of requiring PBSA proposals to include 50% of general housing by floor area be produced.

4.2.12 A subsequent consultation resulted in changes to section 2 of Supplementary Planning Guidance SG10, and identified areas in Townhead and Partick where there were clusters of existing and proposed student accommodation.

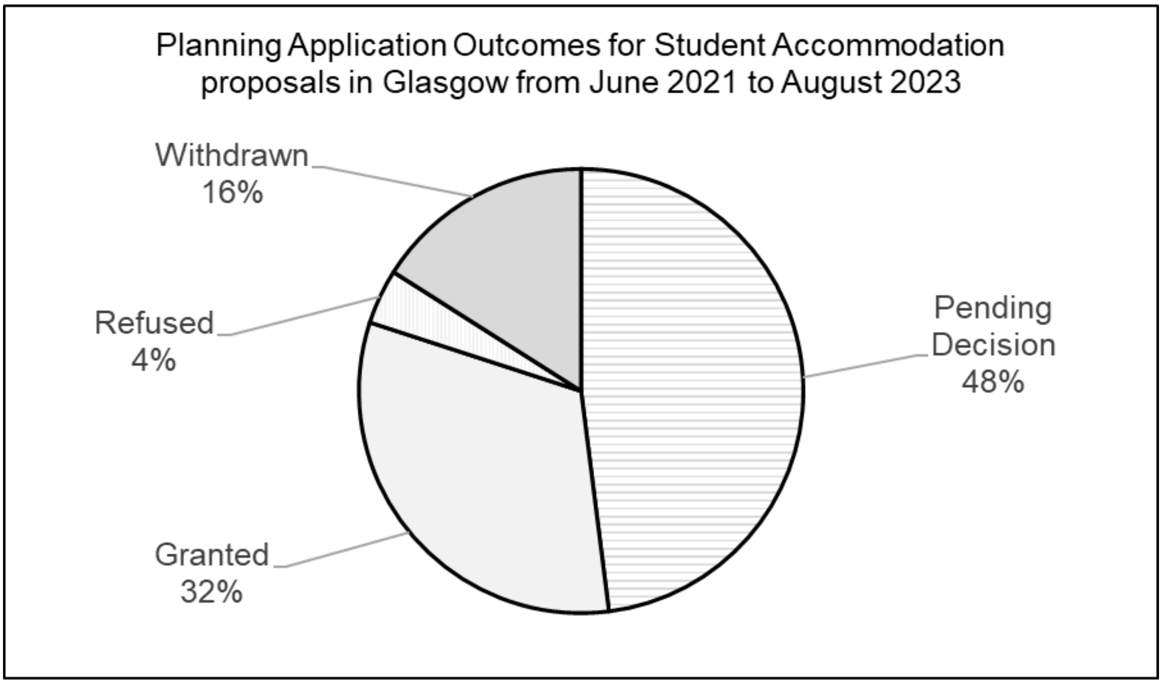
4.2.13 The revised Supplementary Planning Guidance set out a moratorium on student accommodation developments in two areas (Townhead and Partick as shown in following maps) and described additional criteria for new PBSA development in other parts of the city. Most notably it introduced a requirement for the inclusion of 'mainstream' accommodation within student accommodation developments as per committee's instruction to do so.



Source: GCC (June 2021) Supplementary Planning Guidance SG10 Meeting Housing Needs – Student Accommodation revision

4.2.14 The changes were approved by the City Administration Committee on 17th June 2021.

4.2.15 As of August 2023, there has been an uptick in planning applications again, with 25 subsequent applications or decisions since the revised Supplementary Guidance was adopted, the majority of which were received in 2023 and remained pending at August 2023.



Source: derived from Online Planning website

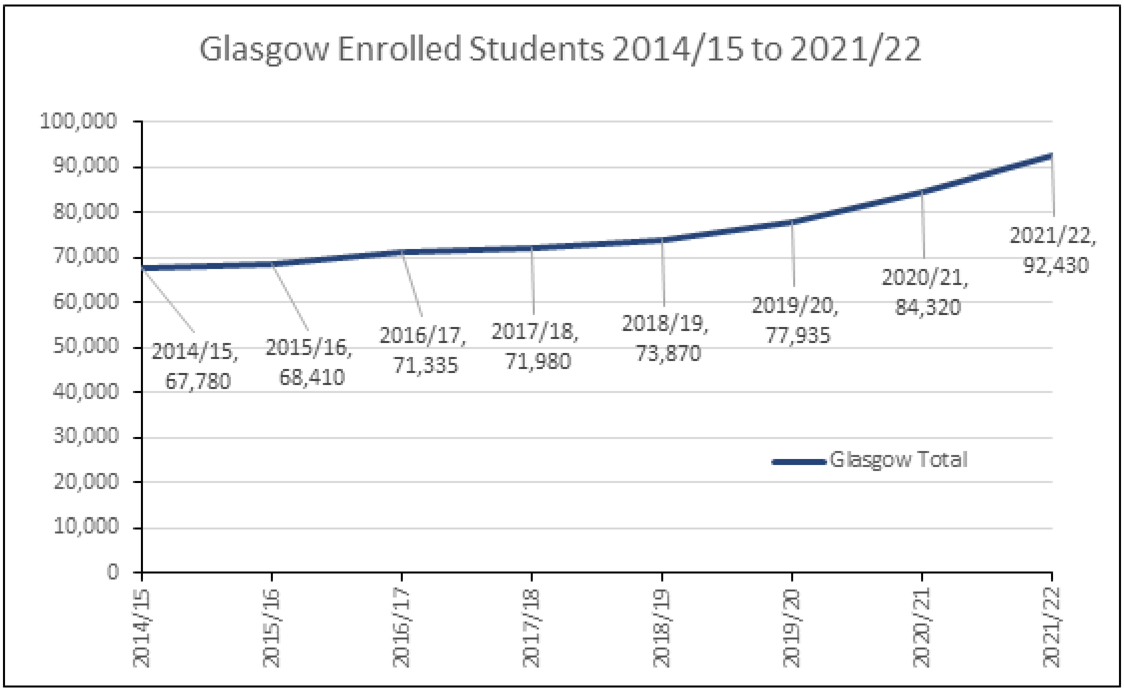
4.2.16 The City Centre Living Strategy (2020) recognised that students make a significant positive contribution to the city centre’s economy, population growth and sense of community. It committed to doubling the population of the city centre by 2035 to around 40,000 residents including via continued growth in the student population.

4.2.17 The Local Housing Strategy 2023 to 2028 acknowledges that student accommodation provision is interwoven with other housing provision, and that its need and demand fluctuates year-on-year, reflecting the evolving needs of the various cohorts of students.

4.2.18 It identifies that a broad approach to accommodation provision would allow the sector to grow and contract as the market evolves. For instance, consideration of the wider benefits of the re-use of existing vacant properties in accessible locations for student accommodation, as well as supporting well-located new buildings that incorporate more than just residential accommodation, would potentially reduce travel costs and therefore improve affordability for students. Other models such as bespoke student hotels and standardised modular student developments may make developments more viable, while partnerships with new Build to Rent operators and education providers would potentially offer flexibility in the short term,

An analysis of the extent to which the action has helped to meet those needs

4.2.19 Glasgow is the location for 5 of the 19 higher education institutions across Scotland. At 2021/22, it was estimated that 92,430 students were enrolled at a one of the Glasgow institutions.



Source: https://www.hesa.ac.uk/data-and-analysis/students/where-study

4.2.20 Information available from the Higher Education Statistics Agency (HESA) shows that there was a 10% increase in enrolment, accounting for 8,110 additional students, across Glasgow from 2020/21 to 2021/22. This generated negative media reports about the lack of student accommodation in the City.

4.2.21 The latest increase in enrolments was a continuation of a longer-term upward trend, which shows that enrolments have increased by 36% (24,650 additional student enrolments) since 2014/15.

4.2.22 All Glasgow higher education Institutions have recorded an increase in enrolments (as shown on following table) over the past 7 years, with the University of Glasgow recording a 60% increase between 2014/15 and 2021/22. This was the largest increase, and accounted for 16,165 additional enrolments. The University of Strathclyde recorded the smallest proportional increase at 21%, but this still accounted for an additional 4,505 student enrolments between 2014/15 and 2021/22

Higher Education provider	2014/15	2015/16	2016/17	2017/18	2018/19	2019 20	2020/21	2021/22
Glasgow Caledonian University	16,930	16,580	16,415	16,450	16,860	17,540	19,030	20,050
Glasgow School of Art	1,840	2,060	2,195	2,300	2,285	2,380	2,365	2,440
The University of Glasgow	26,815	27,220	28,615	29,725	30,805	32,465	37,145	42,980
Royal Conservatoire of Scotland	985	1,080	1,155	1,210	1,280	1,220	1,330	1,245
The University of Strathclyde	21,210	21,470	22,955	22,295	22,640	24,330	24,450	25,715
Glasgow Total	**67,780**	**68,410**	**71,335**	**71,980**	**73,870**	**77,935**	**84,320**	**92,430**

Source: https://www.hesa.ac.uk/data-and-analysis/students/where-study

4.2.23 It is worth noting that it typically takes 4 years for students to graduate, so most of the enrolled students studying in 2014/15 will not be enrolled in 2021/22. However analysis by Centre for Cities (Feb 2019) The Great British Brain Drain – Graduate gain and loss in Glasgow, indicates that historically Glasgow has had one of the highest retention rates of graduates of all UK cities. 46% of those graduating in 2013/14 or 2014/15 stayed for work.

4.2.24 Another point to note is that the figures published by HESA are for enrolments *overall*. There is evidence from University of Glasgow, using a refined methodology, that HESA may over-estimate the number of students *attending* the institution. The University of Glasgow's alternative headcount figure recorded that there were 37,690 students *attending* in March 2022, compared with 42,980 HESA enrolments for 2021/22. Nevertheless, the headcount of attendees has **increased by 45%** from 24,432 in 2013/14 to 35,525 in 2022/23.

4.2.25 An increase in the number of international students enrolled in Glasgow appears to be contributing to the growth overall. Erudera, using data from the Higher Education Statistics Agency, has published summary information about the origin of students by institutions, it reports that at 2022, University of Glasgow had the **highest number of Non-EU postgraduate** students (11,675) in the UK, and the **most Non-EU students** (14,975) in Scotland. It also had the **second highest number of international students** (17,390) in Scotland, and the **second highest number of EU students** (2,595) in Scotland.

4.2.26 The benefits and costs of international higher education students to the UK economy are outlined in a recent report by London Economics and the Higher Education Policy Institute in May 2023. Broadly, they concluded that international students attract significant inward investment to the area in which they choose to reside, acknowledging that this can also contribute to increased rents and market sales values. For example, they estimated that, **in the Glasgow Central constituency, first year international students generated £292 million to the UK economy,** equivalent to £2,720 per local resident. Other estimates for Glasgow constituencies are detailed in the table below.

Table 26 Continued

#	Parliamentary constituency	Region	# of 1st-year students	Net impact
601	Glasgow Central	Scotland	3,060	£292.4m
602	Glasgow East	Scotland	600	£57.2m
603	Glasgow North	Scotland	2,365	£225.8m
604	Glasgow North East	Scotland	890	£84.8m
605	Glasgow North West	Scotland	875	£83.6m
606	Glasgow South	Scotland	675	£64.7m
607	Glasgow South West	Scotland	630	£60.0m

Source: LE/HEPI (May 2023) The benefits and costs of international higher education students to the UK economy.

4.2.27 The Higher Education Statistics Agency also report on student accommodation arrangements for full-time and sandwich course students in Glasgow, as shown in the table below:

Full-time and sandwich HE student enrolments by HE provider and term-time accommodation

Accommodation type	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
Provider maintained property	11%	12%	11%	10%	11%	11%	10%	10%
Private-sector halls	4%	4%	5%	5%	6%	5%	6%	7%
Parental/guardian home	23%	22%	23%	33%	34%	34%	35%	33%
Own residence	12%	11%	24%	25%	17%	17%	17%	18%
Other rented accommodation	20%	19%	16%	19%	24%	25%	24%	24%
Other	2%	2%	2%	3%	3%	3%	3%	3%
Not in attendance at the provider	0%	0%	1%	1%	0%	0%	0%	0%
Not known	28%	29%	19%	5%	4%	4%	6%	5%
Total	100%	100%	100%	100%	100%	100%	100%	100%
total recorded	55,110	56,185	57,890	59,965	61,735	64,550	70,845	77,640

Source: https://www.hesa.ac.uk/data-and-analysis/students/where-study – table 57

4.2.28 The table shows that between 2014/15 and 2021/22, the most common place of residence for Glasgow students is their parental/guardian's home.

4.2.29 In 2014/15, 23% of students reported staying in the parental home, 20% in 'other' rental accommodation and 12% in their own residence. 28% of accommodation arrangements were unknown. The latest return (2021/22) indicates that the unknown element has fallen to just 5%, with re-attribution mainly applying to parental/guardian home (+10%), own residence (+6%), private-sector halls (+4%) and 'other' rented accommodation (+4%).

4.2.30 The proportion of 'provider-maintained property' has fallen by almost 2% from 2014/15 to 2021/22, but the absolute provision in this category has increased from 6,240 to 7,580 students. In essence, the increase in provision has not kept pace with the provision of other accommodation, nor the increase in students overall.

4.2.31 HESA data was not available for the period 2022/23, but early reports, including from the University of Glasgow head count publication noted above, and via data from UCAS, indicate that student numbers are down for 2023/24.

4.2.32 A Cushman and Wakefield market report in September 2023 reported only 30 of 38 PBSA schemes in Glasgow were sold out (79% occupancy overall), noting that:

"despite structural levels of undersupply, students appear unwilling to pay for a 'bed at any price', with unfilled beds in even the most constrained markets [Glasgow] due to the impacts of changing demand profiles and affordability issues" Cushman and Wakefield, UK Student Accommodation Report, Sept 2023

4.2.33 Savills report that the student accommodation market in Glasgow is significantly undersupplied, and thousands of new bedrooms are required to address current demand and future student population growth. It reports that around 2,000 beds will be completed over the course of 2024.

4.2.34 It cites the success of Solestra, which created a new residential population of over 400 people in only 5 months and is one of the best performing Build-to-Rent schemes in the UK, as evidence of the applicability of large-scale rental models (including those involving PBSA) in Glasgow.

4.2.35 Recent changes to funding and approach at UK and Scottish Government levels have been reported in the media. The Guardian recently reported on Scottish Ministers decision to cut spending on free university places in December 2023. Indicating a £48.5 million cut to free university places for Scottish-based students. The same paper reported on the UK Government's decision to limit overseas students bringing family to the UK in 2023. Both decisions have the potential to reduce the number of students available to Glasgow's higher education institutions in future years.

4.2.36 The HESA data does not cover all students across Glasgow, but does take account of those enrolled in one of Glasgow's 5 higher education establishments. The latest publicly available data on further education students enrolled in Glasgow *colleges* is available from Advanced HE. It indicates that there were 67,005 enrolled during 2016/17, down from 103,940 in 2008/09.

4.2.37 Additional sources of information on higher and further education have been collated by the Scottish Government and the University of Glasgow. They include other links to sources about further education in Scotland, as well as international publications and comparisons.

Engagement: Working group findings: Future Demand for Student Accommodation

4.2.38 Purpose-built student accommodation provision has evolved in Glasgow over the years from University-built and run sites off-campus (at Murano Street and Wolfston Halls for example) to new buildings and conversions of offices in the city centre (at Bath Street for example) to being a component part of very large, mixed-use, development (Get Living at Collegelands for example).

4.2.39 In Glasgow, HESA data indicates there has been an increase of over 15,000 additional students staying in rented sector accommodation over the past 7 years. This is broadly equivalent to the increase in the number of enrolled overseas (non-UK) students from 2014/15, which has increased from 20.9% to 29.8% of all enrolled students in higher education.

4.2.40 In March 2023, a Student Accommodation steering group was established to address the recommendations of the CACHE report from December 2022. It established a working group in June 2023, to ascertain future demand for student accommodation across the city.

4.2.41 The working group consisted of representatives from Glasgow Caledonia University, Glasgow's School of Art, University of Glasgow, and University of Strathclyde, as well as Glasgow City Council representatives from the Housing and Planning Services. The group was chaired by the Head of Infrastructure Planning at Glasgow City Council.

4.2.42 The working group's brief was to collate the numbers, types of accommodation (affordable/family/others), agree definitions, and identify criteria that constituted a 'good' location for future student accommodation (travel time, access to schools, neighbourhood environment) and report this to the steering group.

4.2.43 The working group met 23 June 2023, 21 July 2023, 15 September 2023 and 20 October 2023.

4.2.44 The group anticipated that around 6,000 additional student beds would be required over the next 10 years – almost exclusively at the affordable end of the market (being between £140 and £160 per week at 2023).

4.2.45 There was broad consensus of a need for more cluster space (flexible enough for a family of five or 5 adult students) rather than additional studios. This stands in contrast to the pipeline mix as StuRents reports, that 70% of the PBSA pipeline in Glasgow is for studio apartments (compared with 48% UK-wide). StuRents reported that UK-domiciled students typically search for 4,5,6 bed clusters, not studios. This preference for communal living was re-enforced in the UPP Community Youth Forum survey by UPP, showing that 39.7% of respondents reported frequent loneliness, while only 14% of respondents would ideally like to live alone.

4.2.46 The group also reported that students **preferred accommodation that was close to campus**. The UPP Wellbeing Youth Forum survey found that students valued accessibility in terms of cycle lanes, sporting activities, the library, and walking space. So being located on or near campus was important. It also reported that a choice to flex where they can work, and having an alternative location nearby to participate in group study or time out with other students, were important locational qualities for student accommodation.

4.2.47 The group reported their **major concerns about affordability** of student accommodation. This echoed the findings of the UPP Cost of Living Youth Forum survey that reported 64% of respondents were struggling financially, and that 54% of them reported that accommodation costs were their highest concern. In this regard, the Unipol/HEPI report, Student accommodation costs across 10 cities in the UK (October 2023) highlighted the annual average rent for PBSA in Glasgow for the academic year 2023/24 was £7,548, and had increased by 20.4% in the two years since 2021/22.

4.2.48 Other stakeholders have suggested several other innovations, and provided examples of good practice such as novel partnerships between investors, providers and Higher Education Institutions (including the institutions paying for private accommodation over the course of the next 5 years), mixed Build-to-Rent models (like those being developed by Dandara Living at Anderson Quay) and student hotels (like that being developed by Drum at Candleriggs Square).

4.2.49 The group anticipates that future student accommodation demand from domestic students will include increasing numbers of lower income students over the next decade or more, as part of their commitment to widen access to higher education. There was much interest in, and claims of, underlying substantial demand for budget accommodation. However, the sector needs to better understand why developers and investors are not filling this gap, and what needs to be done to encourage that investment.

4.2.50 The group highlighted a range of student preferences and concerns in relation to the design and layout of accommodation, including proximity to neighbouring buildings, internal design and suitability for students with disabilities, access to natural light and outdoor space, and provision of common spaces. These aspects of accommodation have a significant impact on student experiences, and should be borne in mind during the planning and (re)development of new PBSA, considering the density and design of new-builds and suitability of accommodation that might be refurbished to increase supply. Regulation is also an important dimension in protecting standards and quality.

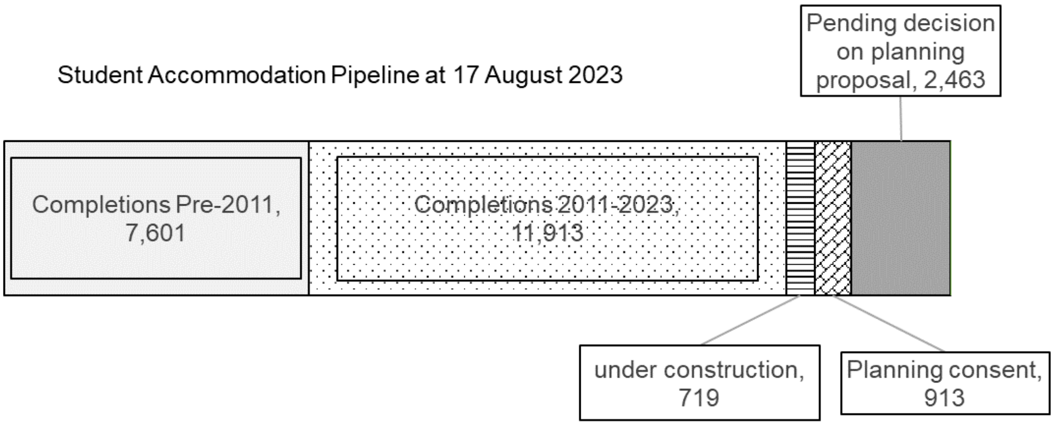
4.2.51 Given the significant changes that have impacted the higher education sector over the past couple of decades, and the uncertainty over funding, the group recommended that the next City Development Plan's approach should continue to be pragmatic and flexible. There was no support, for example, for an arbitrary cap on overall numbers to be introduced.

4.2.52 The University of Glasgow reported it "has **plans for managed growth** for the foreseeable future, in both staff and student numbers. The continued success of the University in attracting a diverse and dynamic student and staff population **will see a requirement for additional supply of good quality accommodation**, primarily student."

4.2.53 "The **key focus for new accommodation** will be on sites which are **easily accessible**, helping to support our ambitious targets for active travel, and **to ensure students are close to other key support services**. We would be seeking to bring forward proposals for new student accommodation that are near our campus and other essential facilities, including libraries, sports and leisure facilities, transport hubs, retail, food, and drink etc all of which are important factors for student wellbeing and their experience whilst studying in Glasgow."

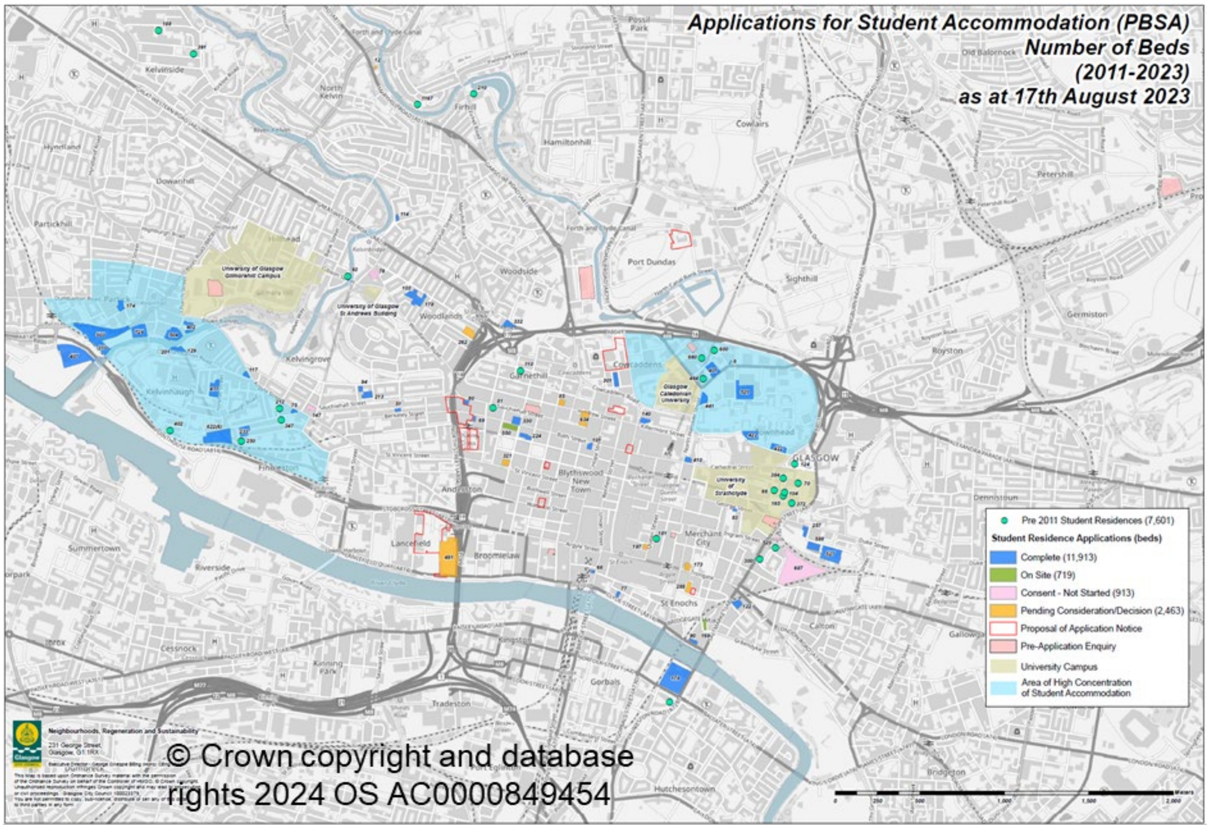
4.2.54 "It is anticipated that the University will also invest and **seek to modernise some of our existing student residences to meet current standards, and improve the efficiency of older building stock**".

Pipeline



Source: derived from [Online Planning website]()

4.2.55 The working group prepared a map showing the pipeline of student accommodation across the city, in terms of planning consents and applications:



Source: derived from [Online Planning website]()

4.2.56 The map shows potential capacity for 23,609 beds. Since 2011, 11,913 beds have been delivered, and, at 17 August 2023, there were 719 beds under construction, with a further 913 beds with planning consent, 2,463 beds pending consideration, and further indications of market interest in other locations via Proposal of Application Notices (PANS) and pre-application enquiries.

Author, report date, report name, proposal site (applicant)	Need identified (beds)
Cushman & Wakefield (March 2024) Student Need Assessment, India Street (Vita Students)	27,279
Cushman & Wakefield (February 2024) Student Need Assessment, Sauchiehall Street (Fusion Students)	27,279
Cushman & Wakefield (November 2023) Student Need Assessment, The Old Wynd (Dominus Glasgow Ltd)	27,279
Icini (February 2023) Student Need and Demand Assessment, Trongate (Caledon properties)	4,000
Icini (October 2023) Student Need and Demand Assessment, West George Street (Clourie Investments Ltd)	4,000
Jeremy Leach (June 2023) Study of Need, St Georges Road (Alumno Group)	30,000 to 40,000
JLL (March 2023) Need and Demand Assessment, St Vincent Street (Artisan Blythswood Quarter Ltd)	57,000
Knight Frank (November 2023) Glasgow Student Property Market Analysis, Portcullis House (Watkins Jones)	6,000
Ryden (Feb 2024) Statement of Need, Port Dundas, 99 Borron St (Bigg Regeneration)	51,470 (inferred)
Savills (Feb 2024) PBSA Need Assessment, 40 Edrington Street (Scottish Opera)	22,400
Savills (Feb 2024) PBSA Need Assessment, Charing Cross Gateway South (CXG Glasgow Ltd)	22,400
Savills (Jan 2024) Glasgow PBSA Market Report	58,346
Savills (Dec 2023) PBSA Need Assessment, 10 Kelbourne Street (Kelvin Properties)	20,285
Savills (Dec 2023) PBSA Need Assessment, City Wharf (Dandara Living)	20,285
Savills (Oct 2023) PBSA Need Assessment, Broadway 2 (ES Renfield Ltd)	20,285
Savills (Apr 2023) PBSA Need Assessment, Osbourne Street (Ambassador Group)	20,285
Turley (Aug 2023) Statement of Need, Central Quay (Summix)	5,488 (UoG vicinity)

Student Accommodation

1. The complexity of the student accommodation market in Glasgow is not reflected in the NPF4 policy suite. A bespoke policy approach is likely to continue to be beneficial.

2. The city has experienced a significant growth in student numbers in recent years, at least in part, fuelled by additional international students.

3. The city has also experienced recent and significant rent increases in student accommodation.

4. The market's interest in building additional Purpose-built Student Accommodation in the city has increased again after a few years of only a few applications. According to market reports, unlike the UK overall (42%), most pipeline PBSA are of a studio type rather than cluster flats.

5. Our working group identified that:

    - Affordability is a major concern for most students;
    - There is clear student preference for on-campus accommodation;
    - There is an existing demand for cluster flats rather than studios to lower rental costs and lessen the impacts of loneliness; and
    - Around 600 beds a year will be required to enable growth aspirations, but market reports indicate investor appetite for far more.

4.2.57 Housing for Multiple Occupancy (HMOs) / Co-Living

Introduction

4.2.58 Housing for Multiple Occupancy (HMOs) is an established and flexible form of housing for many people living within the city – including many students.

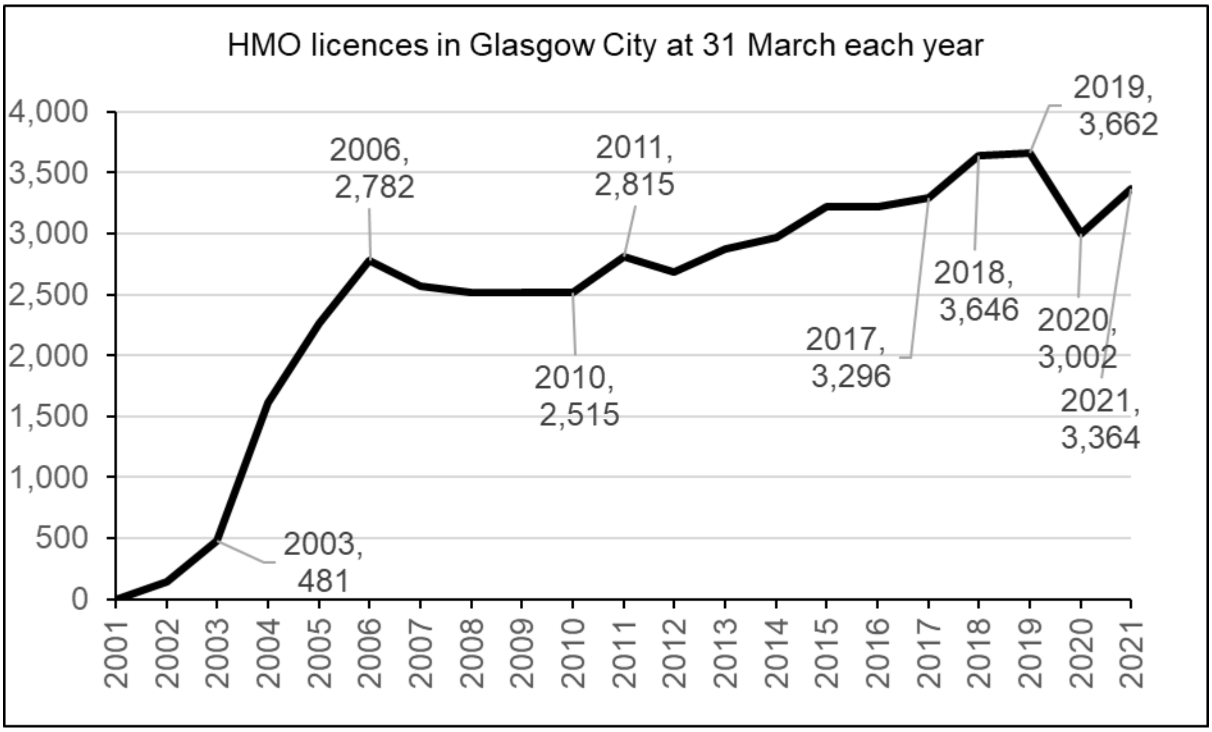
Definition

4.2.59 An HMO is defined within, and requires to be licensed under, the terms of the Civic Government (Scotland) Act (Licensing of Houses of Multiple Occupation) Order 2000. In essence, it includes any accommodation with shared basic amenities that is used by three of more families as their main residence. Commonly this would include three students living together in a flat for example.

4.2.60 The Scottish Government consulted on the Act's definition in April 2019, via the Houses in Multiple Occupation (Scotland) Order 2019. In essence, it sought to add new categories to the definition of a house in multiple occupation, in order to capture developments where three of more contract and transient workers were living together. The Order has not yet been enacted.

Key evidence

4.2.61 The Scottish Government publish annual housing statistics that include information about HMO licences. It indicates from the following annual returns that there were 3,364 HMO licences in Glasgow at 2021:



Source: Scottish Government HMO statistics

4.2.62 Over the City Development Plan period April 2017 to August 2023, a total of 66 applications that involved “HMO” or “Housing for Multiple Occupation” were received by the planning authority, with the outcomes summarised in the table below.

Proposals/Outcomes	Applications
New HMO proposed	**49**
Granted Subject to Conditions	9
Lawful	20
Pending	3
Refuse	12
Withdrawn	1
Withdrawn after Validation	4
HMO removal proposed	**17**
Granted	3
Granted Subject to Conditions	12
Pending	1
Withdrawn after Validation	1
Grand Total	**66**

Source: derived from Online Planning website

Analysis of HMO evidence

4.2.63 The licencing data suggests that, during the City Development Plan period from 2017 to 2021, there was a sizeable demand for Housing for Multiple Occupation in the City, with over 3,000 valid licences operating each year. However, it is not clear that demand has been either growing or declining at any significant or consistent rate year-on-year across Glasgow.

4.2.64 The fluctuation of the number of valid licenses suggests that the HMO housing offer could be sensitive to external market factors, but also that the City's stock of existing properties is flexible enough to adapt very quickly to increases in demand, demonstrated by the 11% growth of around 400 HMO licences from 2017 to 2018, and the 18% reduction of around 600 licences in 2019 to 2020.

4.2.65 The planning application information shows that around a third of all HMO planning applications were lawful – meaning that they had been operating without planning permission for a long period. For those proposals that required planning permission, most were refused.

4.2.66 Also of note is the support for changes away from HMOs, with no refusals in this regard during the City Development Plan period from April 2017 to August 2023.

National policy context

4.2.67 The Scottish Government's Planning Advice Note 2/2012 recognises that this kind of accommodation can give rise to amenity impacts for neighbouring residents, and sets out guidance on the provision and management of houses in multiple occupation through the planning system.

4.2.68 It highlights that planning authorities may wish to adopt policies to limit HMO concentrations, where the residential amenity of a community is already adversely affected by high concentrations of HMOs, or in areas where it is likely that this may happen in the future.

4.2.69 The National Planning Framework Policy 16c includes general support for 'Development proposals for new homes that improve affordability and choice by being adaptable to changing and diverse needs, and which address identified gaps in provision' which appears applicable to HMOs without specifically mentioning them, or adding any amenity caveats to their support for them as per their earlier planning advice note.

A summary of the action taken by the planning authority to meet the accommodation needs of Students in HMOs in the authority's area

4.2.70 The City Development Plan's Supplementary Guidance note SG10 identifies parts of Ward 11 Hillhead (called 'Hillhead' and 'Woodlands' in the guidance) as areas with a high concentration of HMOs where no further HMO applications will be supported. It also applies a 5% threshold for HMOs to streets, blocks or 'other identifiable units' across the rest of the city.

4.2.71 The following table summarises the outcomes of planning applications in the HMO areas of high concentration between March 2017 and August 2023. It shows that 13 decisions following the adoption of SG10.

Proposals/Outcomes	Decisions
New HMO proposed	**10**
Lawful	8
Refuse	2
HMO removal proposed	**5**
Granted Subject to Conditions	3
Pending	1
Withdrawn after Validation	1
Grand Total	**15**

Source: derived from Online Planning website

4.2.72 This indicates that the policy has had a strong impact with no approvals of new HMOs in the area since plan adoption.

4.2.73 It is also possible to monitor whether a high concentration of HMOs persist within the ward. The Council maintains a Public register of HMO licences that indicates information for 5,990 historic licences. It also publishes information about current HMO Licences, and this includes information about 4,247 properties at August 2023 (1,005 pending and 3,242 granted an HMO licence).

4.2.74 The table below shows the distribution of HMO pending and granted licences across the city at August 2023.

Ward	Ward Name	% of HMO licences
10	Anderston/City/Yorkhill	43%
11	Hillhead	17%
23	Partick East/Kelvindale	13%
09	Calton	7%
16	Canal	6%
	Others combined	14%

Source: Scottish Government HMO statistics

4.2.75 Most HMO licence applications were for properties in Ward 10, 11 and 23. These three wards include the main campuses for the University of Strathclyde, Glasgow Caledonian University, the Glasgow School of Art and the University of Glasgow.

4.2.76 The HMO registers also include information about bedroom and occupant capacity of HMO properties. The table below shows that, at August 2023, there were over 17,000 licenced HMO bedrooms. 74% of the licenced HMO capacity was located in Ward 10, 23 and 11.

Ward Number and Ward Name	**Licences**	**Bedrooms**	**Occupant Capacity**	**% of Glasgow Occupant Capacity**	**Average Number of Bedrooms per licence**
01 Linn	5	18	16	0%	3.6
02 Newlands/Auldburn	5	20	18	0%	4.0
03 Greater Pollok	4	10	10	0%	2.5
04 Cardonald	2	10	9	0%	5.0
05 Govan	27	145	159	1%	5.4
06 Pollokshields	18	107	114	1%	5.9
07 Langside	10	112	116	1%	11.2
08 Southside Central	94	479	501	3%	5.1
09 Calton	185	1,085	1,072	6%	5.9
10 Anderston/City/Yorkhill	1,337	7,062	7,115	**41%**	5.3
11 Hillhead	628	2,702	2,782	**16%**	4.3
12 Victoria Park	57	259	259	2%	4.5
13 Garscadden/Scotstounhill	2	10	9	0%	5.0
14 Drumchapel/Anniesland	14	48	48	0%	3.4
15 Maryhill	37	422	427	2%	11.4
16 Canal	247	1,619	1,619	9%	6.6

17 Springburn/Robroyston	8	32	32	0%	4
18 East Centre	3	12	14	0%	4.0
19 Shettleston	8	38	36	0%	4.8
20 Baillieston	2	8	7	0%	4.0
21 North East	1	3	3	0%	3.0
22 Dennistoun	22	119	115	1%	5.4
23 Partick East/Kelvinside	534	2,841	2,849	**17%**	5.3
Glasgow Total	**3,242**	**17,129**	**17,298**	100%	5.3

Source: Scottish Government HMO statistics and GCC HMO registers

4.2.77 The average bedroom number of licenced HMOs was 5.3 bedrooms. In Hillhead (where the concentration was previously identified by SG10) the average bedroom number is 4.3. This comparison may become relevant, with the potential for the emergence of large scale co-living proposals.

An analysis of the extent to which the action has helped to meet those needs

4.2.78 Housing for Multiple Occupation remains a key component of the housing offer in Glasgow. The existing controls in parts of the city, typically those close to, and with historic links to, the Universities, remain relevant, and will require a bespoke Glasgow City Development Plan policy framework, if they are to continue to be managed in the same way.

4.2.79 While a supply of unauthorised HMOs is recognised (via enforcement cases) the scale of this issue is difficult to quantify, given that not all HMOs require planning permission.

4.2.80 Market interest has been shown in large scale co-living and purpose-built multiple occupation accommodation recently, as described in the following market reports:
What is Co-Living, Co-Living group website accessed, August 2023
Spotlight: UK Co-living – A market poised for huge growth, May 2022, CBRE

4.2.81 Broadly, the market for these large-scale schemes, namely transient and contract workers, were the groups of concern to the Scottish Housing for Multiple Occupation Network Group that Glasgow engaged with the Government about for the draft Order in 2019.

4.2.82 The planning authority have prepared non-statutory Planning Guidance for Large Scale Co-Living developments, limiting support to city centre locations and setting space and distinct amenity standards.

Engagement: Recent politics/working group findings

4.2.83 The Council has engaged with the Scottish Government via the Scottish Housing for Multiple Occupancy Network Group. This group has raised concerns about the growth and impact of transient and contract workers.

4.2.84 The Council, through the enforcement and development management services, engage with the public, both those seeking to introduce new Housing for Multiple Occupation, and those seeking action against the unauthorised introduction of it.

4.2.85 The Council has consulted internally about the potential impact of large-scale co-living developments in advance of producing Large Scale Co-Living Planning Guidance.

HMO / Co-Living

1. The complexity of the HMO / Co-Living market in Glasgow is not reflected in the NPF4 policy suite. A bespoke policy approach is likely to continue to be beneficial.

2. The licencing data suggests that during the City Development Plan period from 2017 to 2021, there was a sizeable demand for Housing for Multiple Occupation in the City, with over 3,000 valid licences operating each year.

3. Applications for HMOs between 2017 and 2023 were in the main either lawful or refused where they required planning permission. Applications for HMO removal were approved.

4. City Development Plan SG10 restricts HMOs in areas of high concentration. Key areas of concentration relate to the main university campuses.

5. HMOs remain a key component of the city’s housing offer, and Co-Living is emerging as a model for large scale schemes.

4.3 Housing for older people

16B Evidence report for preparation of local development plan (3) The evidence report is to— "…"(b) **set out—** **(i) a summary of the action taken** by the planning authority to support and promote the construction and adaptation of housing **to meet the housing needs of older people** and disabled people in the authority's area, (ii) **an analysis of the extent to which the action has helped to meet those needs**"

Source: Town and Country Planning (Scotland) Act 1997 as amended by the Planning (Scotland) Act 2019

Introduction

4.3.1 A March 2024 report on Housing for older people in Scotland by the UK Collaborative Centre for Housing Evidence (CACHE) noted that Scotland is ageing faster than other parts of the UK, and lack of planning for housing in terms of availability and accessibility will lead to people living in non-decent and unsupportive housing that negatively affects health, quality of life and wellbeing. It highlighted older people's needs and aspirations, the consequences of not planning for aging and disability, and identified the role that Scotland's demographics, the planning system and the private sector has in improving housing choice for older people.

4.3.2 Further market reports on senior living and housing for older people have been prepared by Savills, Retirement Living (June 2019), Spotlight: UK Senior Living (February 2022) and Cushman and Wakefield, Housing for and Ageing Population (June 2023) and Elderly Care Sector: What the data tells us about the pandemic's impact on occupancy rates (November 2022)

Data Sources

4.3.3 The Health and Social Care Partnership in Glasgow publish a Demographic and Needs Profile annually which has been used to populate this section.

4.3.4 It indicates that Glasgow has 85,623 (13.5%) older people aged 65 and over. This is lower than the NRS estimate of 87,100 people. Glasgow has the lowest percentage of older people in Scotland and the highest percentage (and number) of working age people.

4.3.5 It indicates that 3,222 people aged 65 or over living in long stay residential care, and 5,120 people aged 65 or over are in receipt of care at home. Notwithstanding that HSCP use an alternative estimate for the number of residents 65 or over, it would appear around **9.7% of Glasgow residents who are 65 and over, are either receiving care at home or are living in a care home**.

4.3.6 Almost all (96.7%) of those receiving personal care at home qualify for free provision.

Care Homes

4.3.7 Public Health Scotland publish an annual Care Home Census. It includes information about all care homes for adults aged 18 years and over in Scotland, including care homes for older people (65 years and over) and, separately, for those with learning disabilities, mental health problems, physical and sensory impairment, alcohol and drug misuse, and blood borne virus (such as HIV/AIDS).

4.3.8 On 31 March 2022, the census indicates that there were an estimated 29,465 long stay residents in care homes for older people in Scotland. Of these, an estimated 18,405 (62%) had dementia (either medically or non-medically diagnosed).

4.3.9 The census published in September 2022 suggests that there were 1,052 care homes in Scotland, and that this had decreased by 20% since 2012. It also indicated that the overall capacity of care home provision had decreased by 5%, and the number of residents had decreased by 11% as part of an intentional policy shift from residential care to care at home.

4.3.10 The PHS census also indicates that most care home provision is delivered by the private sector in Scotland. The estimated number of residents in private sector care homes for older people decreased by 1,167 (4%) between 31 March 2012 and 31 March 2022. Over the same time period, the estimated number of residents decreased by 868 (27%) in the voluntary or not for profit sector, and by 1,049 (25%) in the Local Authority/Health Board sector.

4.3.11 In Glasgow the total number of care homes has decreased 21% from 81 in 2012 to 64 in 2022. The decrease has mainly been to local authority and voluntary care homes, which have decreased by 10 and 6 respectively over the decade as part of an intentional policy shift in how care is provided by the Health and Social Care Partnership.

Glasgow City	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Care Homes	81	81	82	79	75	72	70	71	n/a	67	64
Registered Places	4,341	4,365	4,400	4,297	4,297	4,147	4,140	4,253	n/a	4,150	4,123
Percentage Occupancy	89%	83%	84%	82%	82%	84%	79%	85%	n/a	81%	83%

Source: Health and Social Care Partnership

4.3.12 The overall care home capacity in Glasgow was 4,123 in 2022. This is a decrease of 5% since 2012. Despite the reduction in overall capacity, the occupancy rate has decreased from 89% in 2012 to 83% in 2022.

4.3.13 The decrease in provision is reflected in planning applications involving "care homes". A significant proportion of applications were for changes of use away from care homes, or related to minor extensions or alteration works rather than new care homes.

Year Received	Pending	Refused	Withdrawn	Granted	Annual Total
2015	0	1	0	12	**13**
2016	0	1	0	8	**9**
2017	0	0	0	8	**8**
2018	0	1	0	9	**10**
2019	0	2	0	4	**6**
2020	0	0	1	8	**9**
2021	1	2	1	3	**7**
2022	0	1	0	4	**5**
2023	2	0	0	0	**2**
Total	**3**	**8**	**2**	**56**	**69**

Source: derived from Online Planning website

Care at Home

4.3.14 At 2022, 42.8% of Glasgow's older people aged 65 and over who have high levels of care needs, live at home rather than in a care home. This is higher than the 35.0% for Scotland overall.

Table 27c. Social Care - Older People, by Area

Indicator		Area: Glasgow City	Area: Scotland	Other information/notes
People aged 65+ with high levels of care needs at home (percentage of all people 65+ with high levels of care needs)[1]		42.8%	35.0%	
People aged 65+ in long stay residential care (number of people)[2]		3,222	29,317	Glasgow number is 11.0% of Scottish total compared to Glasgow's 8.1% share of Scotland's 65+ population.
People aged 65+ receiving home care (number of people)[3]		5,120	49,560	Glasgow number is 10.3% of Scottish total compared to Glasgow's 8.2% share of Scotland's 65+ population.
People aged 65+ receiving free personal care at home[3]	no.	4,950	47,070	Glasgow number is 10.5% of Scottish total compared to Glasgow's 8.2% share of Scotland's 65+ population.
	%	96.7%	95.0%	

Source: 1. Scottish Public Health Observatory (ScotPHO) - Scottish Government Community Care Statistics 2018/19. 2. Scottish Care Homes Census as at 31 March 2021. 3. Scottish Government Free Personal and Nursing Care Statistics 2017-18

Source: Scottish Public Health Observatory

4.3.15 Local Authorities provide social care services to enable people to live independently, and at home or in a homely setting in their community. This includes people who are frail, have long term conditions or disabilities.

4.3.16 Public Health Scotland also publish information about demand for care at home information. The number of people estimated to be waiting on a social care assessment to enable them to live independently at home or in the community was just over 6,200 on 3 July 2023 of which 1,039 were in Glasgow.

4.3.17 The estimated number of people assessed and waiting for a care at home package was just under 4,000 on 3 July 2023, 257 of which were in Glasgow including 54 in hospital care during assessment.

Sheltered Housing

4.3.18 Sometimes referred to as retirement housing, this offers a well-designed home of your own, plus communal facilities and some services. Most schemes comprise flats, and typically the scheme will have a full- or part-time manager, whose job includes providing support and advice to residents.

Retirement Homes

4.3.19 There are projected to be more older people, aged 65 and over, living in Glasgow in coming years. As part of a focus on ‘maximising independence’, the Local Housing Strategy aims to identify alternative ways of supporting more older people to live independently at home, or in a homely setting within the community.

4.3.20 This means looking at new models, and considering where existing supported housing (such as sheltered and very sheltered homes) can be redesigned.

4.3.21 There are opportunities for greater use of new smart technologies, which are outlined in Glasgow's Digital Housing Strategy. The Local Housing Strategy sets out a joint target between housing, health and social care, to deliver 90 homes within specialist housing developments for older people (by 2028). These will be for older people at risk of admission to, or long-stay within, hospital or residential care. The model will include clustered Supported Living developments across the city, and will aim to support people moving on from a range of settings: Care Homes; Hospital; Intermediate Care; and mainstream general needs housing.

Housing for Older People

1. The Glasgow HSCP indicates that Glasgow has 85,623 (13.5%) older people aged 65 and over. This is lower than the NRS estimate of 87,100 people. 9.7% of Glasgow residents who are 65 and over are either receiving care at home, or are living in a care home.

2. In Glasgow the total number of care homes has decreased 21% from 81 in 2012 to 64 in 2022. The overall care home capacity in Glasgow was 4,123 in 2022. This is a decrease of 5% since 2012. Despite the reduction in overall capacity, the occupancy rate has decreased from 89% in 2012 to 83% in 2022.

3. 42.8% of Glasgow's older people aged 65 and over who have high levels of care needs live at home, rather than in a care home (2022). This is higher than the 35.0% for Scotland overall.

4. The LHS sets out a joint target between housing, health and social care, to deliver 90 homes within specialist housing developments for older people (by 2028). These will be for older people at risk of admission to or long-stay within to hospital or residential care.

4.4 Housing for disabled people

> **16B Evidence report for preparation of local development plan**
>
> (3) The evidence report is to— "…"(b) **set out—**
>
> **(i) a summary of the action taken** by the planning authority to support and promote the construction and adaptation of housing **to meet the housing needs of** older people and **disabled people** in the authority's area,
>
> (ii) **an analysis of the extent to which the action has helped to meet those needs**"

Source: Town and Country Planning (Scotland) Act 1997 as amended by the Planning (Scotland) Act 2019

Introduction

4.4.1 In terms of housing need, the challenges facing disabled people are acute, wide-ranging and numerous.

Data Sources

4.4.2 The Glasgow City Health and Social Care Partnership (GCHSCP) publish an annual Demographic and Needs Profile (August 2023) that includes a range of relevant indicators collated from other sources. It highlights that 31% of residents in Glasgow have at least one long-term health condition, based on data from the Census 2011.This is a slightly higher proportion for Glasgow than Scotland. Three long-term health conditions stand out in Glasgow - mental health conditions are 48% higher, learning disability 20% higher, and physical disability 16% higher.

4.4.3 The Profile also identifies distinct positions within Glasgow, namely the North East locality has the highest rate of all people with one or more condition (33.7%) followed by South (30.8%) and North West (29.0%).

4.4.4 For pragmatic purposes, this section broadly groups those with housing need into three types of people who share characteristics in terms of the challenge in finding a suitable home – people with learning difficulties, people with mental health issues and people with physical disabilities.

"'**disabled person**' means a person who is a disabled person for the purposes of the Equality Act 2010,", Planning (Scotland) Act 2019.

Equality Act 2010

"6 Disability (1) A person (P) has a disability if— (a) P has a physical or mental impairment, and (b) the impairment has a substantial and long-term adverse effect on P's ability to carry out normal day-to-day activities.

(2) A reference to a disabled person is a reference to a person who has a disability.

(3) In relation to the protected characteristic of disability— (a) a reference to a person who has a particular protected characteristic is a reference to a person who has a particular disability; Equality Act 2010 (c. 15) Part 2 — Equality: key concepts Chapter 1 — Protected characteristics 5 (b) a reference to persons who share a protected characteristic is a reference to persons who have the same disability."

Source: Town and Country Planning (Scotland) Act 1997 as amended by the Planning (Scotland) Act 2019 and Equality Act 2010

Learning Disability

4.4.5 The Fraser of Allander Institute at University of Strathclyde published a report on learning difficulties in 2023: Data on the lives of people with learning disabilities in Scotland. It refers to data from the Learning Disability Statistics Scotland, 2019 collated by Learning Disability Statistics Scotland for the Scottish Commission for Learning Disabilities.

4.4.6 In line with the Profile noted above, the Glasgow City Health and Social Care Partnership (2023) draft Strategic Plan for Health and Social Care 2023 – 2026 estimated that around 0.6% of residents in Glasgow have a learning disability and about 2.1% have a learning difficulty accounting for 3,700 and 13,600 people respectively.

4.4.7 In 2017, there were around 2,200 adults with learning disability identified by Glasgow City Health and Social Care Partnership Services. Around 440 were known to be on the autistic spectrum, and about 66% (290) were known to live in mainstream housing, half of whom (145) with identified support services. About 21% were known to live in specialist housing, most of whom are in supported accommodation. Fewer than 5% are known to live in adult residential care homes (see Scottish Commission for People with Learning Disabilities Improving outcomes for people with learning disabilities: Opportunities and challenges for housing (Oct 2017)).

4.4.8 As outlined in the Glasgow City Health and Social Care Partnership (2023) draft Strategic Plan for Health and Social Care 2023 – 2026, Glasgow City Health and Social Care partners forecast that there will be a significant increase in the number of young people with learning disabilities requiring high levels of support. In most instances, these needs will not be easily met by mainstream housing (either social rented or owner occupied). There is an identified need and commitment within the Glasgow City Integration Joint Board's Strategic Plan for developing specialist housing, which would be designed to meet the needs of young people with a range of complex social, health/nursing needs and severe mobility problems.

4.4.9 The type of development is a Core and Cluster model, which involves individual homes with a 24/7 Care & Support Service delivered on site, and to individual homes including overnight support. The individual homes should be designed as fully adapted, barrier free, and have enhanced features to allow for more space and privacy, such as heavy-duty wall materials, safety glass and noise cancelling insulation.

Mental health

4.4.10 The proportion of people with mental health needs is estimated to be about 50% higher in Glasgow than for all of Scotland. Current demand for accommodation based Mental Health services in Glasgow outstrips supply. For many people with acute mental health needs, this leads to extended stays in psychiatric hospital settings. Glasgow's key aim is to move away from hospital wards to community alternatives for people requiring longer term, 24/7 care. There is an identified need for single person Supported Living service models with on-site staff support 24/7. This would be accommodation-based services for individuals with severe and enduring Mental Health issues. Supported Living services can be stand alone with a 24-hour staff presence, or clustered properties close to a staff base.

Physical disability

4.4.11 Based on the Horizon Housing Study, Still Minding the Step (2018), the Housing Need and Demand Assessment for Glasgow City Region estimated that there may be demand for between 10,000 and 12,400 wheelchair accessible and adaptable homes across the Glasgow City Region, with about 30% of this in Glasgow (3,000 to 3,720 homes).

Policy Commitments

4.4.12 There were 372 planning applications where the fee was waived, because the proposal was part of an adaptation to allow a disabled person to continue to live in their home between March 2017 (when the City Development Plan was adopted) and August 2023. There does not appear to have been an upward trend in these types of applications.

Year Received	Pending	Refused	Withdrawn	Granted	Annual Total
2015	0	0	0	0	**0**
2016	0	0	1	54	**55**
2017	0	0	1	57	**58**
2018	0	1	2	59	**62**
2019	1	0	1	44	**46**
2020	2	1	0	22	**25**
2021	0	2	5	45	**52**
2022	0	0	2	37	**39**
2023	7	0	1	27	**35**
Total	**10**	**4**	**13**	**345**	**372**

Source: derived from Online Planning website

4.4.13 The Local Housing Strategy 2023 to 2028 identified that adaptation is a key aspect in supporting people to live in the homes they have chosen. Glasgow waives fees for adaptations that require planning permission, but which are associated with changes to a home to help accommodate a disability – including for example ramps, ground floor bedroom extensions.

4.4.14 The Local Housing Strategy also set a target for 10% of all homes within new affordable housing developments of 20 homes or home to be fully wheelchair adaptable.

4.4.15 Glasgow Health and Social Care Partnership work with Housing Services to set out Social Care Housing Investment Priorities (SCHIP). These identify the key priorities for developing additional specialist housing options to meet the needs of five main social care groups:

Core Care Group	4.4.16 Priority Needs
Learning disability	Young people becoming adults People moving after long-stays in hospital People within the autistic spectrum
Physical disability	People who are wheelchair users
Mental Health	People moving after long-stays in hospital
Older People	People with frailty People with dementia
Children and Families	Children and Young People looked after moving on from residential care Children and Young People looked after who are young parents

Source: LHS Supporting Information Paper

4.4.17 Further information on core care group needs are set out in the LHS Supporting Information Paper.

4.4.18 Homes for Scotland commissioned Rettie and the Diffley Partnership to undertake primary research about the housing needs of Scotland. It published Existing Housing Need in Glasgow in January 2024. The report records that 52 Glasgow respondents identified that they were in properties that required specialised housing adaptation or support but did not have them, accounting for 4.26% of responses (12,787 households). The report rounds up the proportion to 4.3% and extrapolates this to **13,000 households in Glasgow** that identified that they **were in properties that required specialised housing adaptation or support but did not have them**.

Housing for Disabled People

1. The Glasgow HSCP highlights that 31% of residents in Glasgow have at least one long-term health condition based on data from the Census 2011. This varies across Glasgow, with the North East Locality being 33.7%.

2. Learning Disability – The Glasgow HSCP estimated that around 0.6% of residents in Glasgow have a learning disability, and about 2.1% have a learning difficulty accounting for 3,700 and 13,600 people respectively.

3. There is an identified need and commitment within the Glasgow City Integration Joint Board's Strategic Plan for developing specialist housing, which would be designed to meet the needs of young people with a range of complex social, health/nursing needs and severe mobility problems.

4. Mental Health – The proportion of people with mental health needs is estimated to be about 50% higher in Glasgow than for all of Scotland. Current demand for accommodation based Mental Health services in Glasgow outstrips supply.

5. There is an identified need for single person Supported Living service models with on-site staff support 24/7. This would be accommodation-based services for individuals with severe and enduring Mental Health issues.

6. Physical Disability – The HNDA estimated there may be demand for between 3,000 and 3,720 wheelchair accessible and adaptable homes in Glasgow.

7. The Local Housing Strategy 2023 to 2028 set a target for 10% of all homes within new affordable housing developments of 20 homes or home to be fully wheelchair adaptable.

4.5 Housing for Gypsies and Travellers

Context

4.5.1 The term 'Gypsies and Travellers' is difficult to define as it does not constitute a single, homogenous group, but encompasses a range of groups with different histories, cultures and beliefs.

4.5.2 For planning purposes. the Scottish Government have defined "Gypsies and Travellers" as:

"*persons, whatever their race or origin, who are— or from, a nomadic cultural tradition including— (i) members of Gypsy, Romany and Traveller ethnic groups including Roma Gypsies, Scottish Gypsy Travellers and Irish Travellers,*
(ii) persons who have ceased to travel temporarily or permanently, (b) members of an organised group of Travelling Showpeople or circus people (whether or not travelling together as such)."

4.5.3 The description therefore remains loosely defined into three groups which potentially have very different housing needs – those who travel as part of their ethnicity or culture (bringing their home within them) those who travel as part of their occupation (and who have a settled home base but who travel for events) and those who do not travel but who associate with one of the other groups. This is a challenge in terms of evidence collection.

Gypsy/Travellers

4.5.4 The negative impacts of legislation, rhetoric and sanctioned action on the Gypsy/Traveller community is set out in Gypsy Traveller history in Scotland (June 2017). It cites the negative impacts of clamping down on roadside camping, prohibition of quarries as camping grounds, and the introduction of street trader and scrap metal licensing (among many other interventions) as having direct, negative impacts on Gypsy/Travellers, and their ability to find suitable accommodation and make a living.

4.5.5 In October 2020 the Scottish Government published their Evidence Review: Accommodation Needs of Gypsy/Travellers report. It identifies three barriers to accessing culturally appropriate accommodation. They are: barriers to site development, inadequacy of current site and stopping place provision, and lack of access to services.

4.5.6 It concludes that "*The literature on the accommodation needs of Gypsy/Travellers is largely made up of quantitative research, focusing on demographics and the quantification of sites and encampments. Some studies adopt a mixed methods approach to assessing need, using qualitative methods to gain insight into the accommodation preferences and aspirations of Gypsy/Travellers. The body of literature using a solely qualitative approach, particularly in Scotland, is relatively small.*"

4.5.7 The 2011 Census was the first to include an option for Gypsy/Travellers in the ethnicity category. Census responses indicated there were just over 4,200 people in Scotland identifying as 'White: Gypsy/Traveller', of which 10% resided in Glasgow. Organisations that work with Gypsy/Travellers believe Scotland's community comprises 15,000 to 20,000 people.

4.5.8 Within the Glasgow City Council area, there are no dedicated local authority owned sites for Gypsy / Travellers suggesting that on Census day 2011 around 400 Gypsy/Travellers had been accommodated within the city, either on private sites, unauthorised pitches or in another type of accommodation.

4.5.9 The Glasgow City Region Housing Need and Demand Assessment (2023) did not identify evidence of existing or projected unmet need for sites for the gypsy/traveller community within the Glasgow City area, however, Glasgow City Council are aware, via enforcement investigations, of occasional temporary roadside encampments in the area, which indicates some unmet demand at certain times.

4.5.10 The Gypsy/Travellers action plan: 2023 (June 2023) identified the need within Scotland for the upgrade of a gypsy/traveller site that did not meet the minimum standards, but this was not within Glasgow. It also set out commitments in terms of further engagement, standardisation of approaches and additional funding for Gypsy/Traveller sites across Scotland.

Travelling Showpeople

4.5.11 Travelling Showpeople are a distinct community in Glasgow that have a long association with the city. Around 80% of the Scottish Travelling Showpeople community is estimated to be located in Glasgow, often co-located with their vehicles in shared yards, as they are in the Dalmarnock and Shettleston areas of the city, following displacement as part of the Clyde Gateway redevelopment of that part of the city.

4.5.12 Historically, Showpeople stayed on established regularly leased sites in the winter months, vacating these to travel during the summer season. As the travelling pattern has changed and as land availability in the city has reduced, Travelling Showpeople now tend to occupy sites on a permanent, year-round basis travelling to events with their businesses and then returning home after an event is over.

Engagement

4.5.13 We engaged with a multi-generational family who were looking to build a bricks and mortar house in the east end, and discussed the issues facing them and other Showpeople.

4.5.14 The discussions suggest that personal circumstances can be very different for members of the community, but that identifying new places to live is generally difficult and expensive. They had personally experienced several displacements, including from Dalmarnock before the Commonwealth Games, and generally felt it had been difficult to put down roots until now. They were broadly supportive of the policy context in NPF4, whereby support for new homes was recognised, but felt the community was still wary of ‘regeneration’ leading to their future displacement.

4.5.15 When asked about whether to identify Showpeople sites in order to protect them from alternative uses, stakeholders were less keen citing security concerns. They were also aware of actions within the community to identify more sites and create more places where Showpeople can choose to live. They indicated this process was opportunistic and uncommon.

4.5.16 Further engagement with representatives of the Showman's Guild at our equalities engagement indicated concerns about security and encroachment of other residential uses on established yards. Demand for additional sites particularly in Partick, where the Showpeople have a history of residing, was raised.

4.5.17 The LHS has committed to undertake research engaging with the Travelling Showpeople community to establish a robust quantitative estimate of the number of sites and type of accommodation that may be required in Glasgow and keep under review as needs change.

Housing for Gypsies and Travellers

1. Gypsies and Travellers encompass a range of groups with different histories, cultures and beliefs. The Scottish Government has provided a definition of Gypsies and Travellers for planning purposes.

2. The number of Gypsy/Travellers in Scotland is unclear. The 2011 census suggests that there are approximately 420 Gypsy/Travellers in Glasgow.

3. Within the Glasgow City Council area, there are no dedicated local authority owned sites for Gypsy / Travellers. The Glasgow City Region Housing Need and Demand Assessment (2023) did not identify evidence of existing or projected unmet need for sites for the gypsy/traveller community within the Glasgow City area. However, occasional temporary roadside encampments could indicate unmet demand.

4. Travelling Showpeople are a distinct community in Glasgow. Around 80% of the Scottish Travelling Showpeople community is estimated to be located in Glasgow often co-located with their vehicles in shared yards.

5. The LHS has committed to undertake research engaging with the Travelling Showpeople community to establish a robust quantitative estimate of the number of sites and type of accommodation that may be required in Glasgow and keep under review as needs change.

4.6 Self-Build

Scale of the Register

4.6.1 The Council has and maintains a Self-Build Register that allows people to notify the Council of their potential interest in opportunities for self-build, and to help shape future Housing Strategy. At May 2023, there were over 400 people registered.

4.6.2 The Local Housing Strategy 2023 to 2028 acknowledges that there is potential to scale up people-led housing development in Glasgow, to meet the needs and demands for self-build housing, particularly for new affordable homes. It commits the Council to examining options to develop new policy that could boost supply and delivery of custom and self-build opportunities in the city.

Maryhill showcase

4.6.3 Glasgow City Council is one of the first local authorities across Scotland to promote self and custom build as an affordable housing option. The Council has established an award-winning and popular pilot scheme at Bantaskin Street, within the Maryhill Transformational Regeneration Area (TRA)

4.6.4 Glasgow City Council sought to tackle the three main barriers: land availability, finance and planning.

4.6.5 The Council released six fully serviced plots at a very affordable fixed price. It encouraged lenders to provide a savings approach to help people raise the money required for deposits. It simplified the planning process, introducing a Design Code and Plot Passport.

Self Build

1. At May 2023 there were over 400 people registered on the Self-Build Register.
2. The Maryhill showcase has allowed the Council to implement a scheme that can be learnt from.
3. The Council has committed in the LHS to examining options to develop new policy that could boost supply and delivery of custom and self-build opportunities in the city.

5 New interventions

5.1 Short-Term letting areas

5.1.1 Glasgow has maintained its city-wide planning policy that controls changes of use to short-term let while establishing and operating a new licencing scheme. There are currently no proposals to amend the city-wide application of short-term letting control.

5.2 Masterplan consent areas

5.2.1 Masterplanning is a long-established part of housing-led development in Glasgow, and plays an important role in managing the large and long-term projects to re-develop parts of the city. There are many examples of both the public sector (Cowlairs, Dalmarnock) and the private sector (Glasgow Harbour) bringing forward masterplans that shape development and which evolve over time.

5.2.2 Masterplan Consent Areas are a new tool made available through changes from the Planning (Scotland) Act 2019. They are a replacement for Simplified Planning Zones (SPZs) of which Glasgow currently shares one in Hillington with Renfrewshire Council. They are designed to front-load the approval process by setting out strict criteria that, if adhered to, forego the need for planning permission.

5.2.3 In Hillington, the SPZ criteria focuses on commercial development for specific types of uses and scales of buildings. Housing is not one of the uses included in that designation. **There are currently no known proposals for Masterplan Consent Areas elsewhere in the city.**

5.3 25% affordable housing contribution

5.3.1 The City Development Plan set out that housing need for affordable homes would be addressed without requiring a contribution from the market sector. This was to ensure that a balanced supply of tenures was delivered.

5.3.2 The National Planning Framework via Policy 16e introduces an affordable housing contribution of 25% to market sector housing proposals where evidence of need has been established. Both the Council's Strategic Plan and its Local Housing Strategy commit to investigating the implementation of a new approach to affordable housing.

Policy 16 Quality Homes

Proposals for market homes will only be supported where the contribution to the provision of affordable homes on a site will be at least 25% of the total number of homes, unless the LDP sets out locations or circumstances where (i) a higher contribution is justified by evidence of need, or (ii) a lower contribution is justified, for example, by evidence of impact on viability, where proposals are small in scale, or to incentivise particular types of homes that are needed to diversify the supply, such as self-build or wheelchair accessible homes.

The contribution is to be provided in accordance with local policy or guidance.

Source: National Planning Framework 4 (2023)

5.3.3 The Council's approach to affordable housing does not include any current local policy or guidance that would justify or inform how developer contributions would apply to the provision of affordable housing in relation to proposals for market housing.

5.3.4 The following provides a broad summary of information gathered on affordability of housing in the city:

- Glasgow has the highest number and one of the highest proportions of social rented housing in the country.
- The city also has the highest number and proportion of private rented houses, mid-market rented houses and affordable homes for sale in Scotland.
- Between 2013 and 2023, 47% of the homes built were affordable. The percentage varied across the city, but most were in inner and outer urban locations.
- The 7-year land supply shows that 45% of programmed homes will be affordable.

- House prices have doubled since 2004. The average house price in 2023 was £178,123, compared to a Scottish average of £194,006. The average price of a new build home in Glasgow was £281,327.
- The Local Housing Strategy notes that, at 2023, waiting list estimates indicated that for every RSL home let, there was the equivalent of 10 applicants seeking an affordable home.
- The HNDA identifies that the *principal* planning scenario, using the 'prevailing state of the Scottish housing market and economy' assumptions, indicates that 61% of new homes would be needed for households who could only access affordable tenures.
- The cost-of-living crisis (including an increase in mortgage costs and rents), is driving an increased need for affordable housing, and reducing the supply of rented properties.
- The Council announced a housing emergency in November 2023, relating to a recent Home Office decision, and the consequent potential for asylum seekers in the city being made homeless.
- Scottish Government funding for affordable housing was cut significantly in the 2024-25 budget.

5.3.5 In addition to the data above, the Council requires to understand the following, in order to determine if a 25% affordable housing policy is appropriate across the city:

- Housing market transactions - volumes and prices (lower quartile; median; mean). Comparison against dwelling estimates, to consider comparative activity rates at lower level geographies.
- Analysis of the distribution of rents (social / mid-market / private) across Glasgow relative to incomes.
- Analysis of the proportionate listings and turnover of rental properties across Glasgow.
- Analysis of the distribution of incomes across Glasgow.
- Establish indicative Benchmark Land Values by broad area typology (city centre; inner urban; outer urban)
- Establish the key parameters and indicative cost benchmarks for determining residual land values for purposes of an Affordable Housing Policy.

5.3.6 In addition, the deliverability of an affordable housing policy requires consideration. Following the publication of the evidence report, and assuming a need for a developer contributions policy relating to affordable housing, a mechanism for delivery of any such policy or guidance would be required. It is envisaged that this will come through the Proposed Plan. Some options and issues are set out below.

5.3.7 One approach may be to consider an exceptions framework. This would consider NPF4 Policy 16 as applicable across all private residential development proposals *unless* certain criteria are demonstrated to have been met. Key elements may include benchmark land values, and a robust and credible development viability assessment framework.

5.3.8 A developer contribution based affordable housing policy would be required to set out clear definitions for what is determined to be market housing and affordable housing. These will require quantitative cost/value (£) parameters, that are related to local incomes and a mechanism for monitoring and review.

5.3.9 "*Affordable housing*" in NPF4 is defined as: "*Good quality homes that are affordable to people on low incomes. This can include social rented, mid-market rented, shared-ownership, shared-equity, housing sold at discount (including plots for self-build), self-build plots and low-cost housing without subsidy*.

5.3.10 A range of factors affecting the delivery of affordable housing on any given site, including:

- affordable housing need;
- site suitability;
- cost; and
- the availability and timing of public subsidy.

5.3.11 To reflect these variables, the Council's developer contribution based affordable housing policy would require a flexible approach to delivery. In circumstances where on-site is not considered the most effective means of delivery (for example a small number of affordable houses peppered across sites can be difficult to manage), other methods, including off-site, part exchange and commuted sum payment may be required. For any local application of an affordable housing developer contribution that is not on-site, Glasgow City Council would need to define the areas to which it applies.

5.3.12 For housing developers, assessing the financial viability is crucial in deciding whether a project should proceed. Early consideration of the site valuation is important to allow a developer to assess the potential impact of the affordable housing requirement as part of the site appraisal. An agreed approach and methodology for valuation will assist both developers and the Council in forward planning and confirming the appropriate delivery option.

5.3.13 Over half of local planning authorities in Scotland have an existing, operable affordable housing contribution-based policy. The outputs delivered by local planning authorities with affordable housing policies vary depending on local circumstances, though few exceed Glasgow in percentage of total homes delivered, and none in total volume of affordable homes.

5.3.14 Further consideration is required of the resource to administer an affordable housing policy, in comparison with the benefits the policy would bring. Existing practice across local planning authorities indicates that there is a significant resource requirement for administering a developer contribution based affordable housing policy. For Glasgow City Council, this would likely require a dedicated team which includes, but is not limited to: full-time equivalent affordable housing policy planning officer(s); financial services; legal services.

5.4 The Agent of Change Principle

5.4.1 The Planning (Scotland) Act 2019 sets out a new duty on housing proposals requiring developers to demonstrate that future residents would not be subjected to statutory noise nuisance. The purpose of the intervention was to ensure that noise-generating uses, like the many music venues around the City, were not forced to close or change how they operated, because of the introduction of a new residential use. This is addressed by the Infrastructure Audit – Culture, Tourism and Heritage.

Town Centre Housing opportunities

5.4.2 The City Development Plan identified a range of locations as part of its Network of Centres that were to be the focus for local services and employment opportunities. It used the terms: ‘city centre’, ‘major town centres’ and ‘local town centres’ to describe the different roles and functions of groups of these places, and to tailor the different types of development that would improve those places.

> **Policy 27, City, town, local and commercial centres**
>
> LDPS should provide a proportion of their Local Housing Land Requirements in city and town centres and be proactive in identifying opportunities to support residential developments.

Source: National Planning Framework 4 (2023)

5.4.3 The National Planning Framework 4 (2023) identifies a new spatial intervention which it describes as ‘city and town centres’. The goal for these new locations is to develop them as places for people to live, learn, work, enjoy and visit. They are also expected to be accessible by a range of transport modes. Therefore, they may be different from the areas identified by the City Development Plan. As such, the Town Centres and Retail evidence report considers changes that may be required to town centre boundaries and town centre role and function for CDP2.

5.4.4 The National Planning Framework 4 (2023) Policy 27 asks LDPs to provide a proportion of their Local Housing Land Requirement in ‘city and town centre’ locations.

5.4.5 The Town Centre Profiles therefore identify existing and potential opportunities for housing. This will be considered further as work on the Proposed Plan and site identification takes place. It is also noted that many of the traditional CDP town centres already have people living in them because of the typical built-up urban form of many of these locations. As a result, there may not be as many opportunities to identify housing sites in town centres.

5.4.6 In addition, the Council has supported the increase in residential capacity at the major town centre in Shawlands, and the City Centre Living Strategy sets out a commitment to attract around 20,000 additional residents to the city centre between 2018 and 2035.

5.4.7 This commitment could be reached via a range of housing solutions, not least by the attraction of families, the accommodation of students in purpose-built student accommodation, and by drawing short-term let properties back into the mainstream. Much of the recent growth in the city centre has been based on increases in student living in purpose-built student accommodation in and around the city centre. At August 2023, the city had around 19,000 purpose-built student accommodation beds. In terms of mainstream housing, the 2023 Housing Land Audit recorded a remaining capacity of 4,729 for sites within the City Centre SEIL boundary – around 13.6% of the established land supply (34,832 homes).

Rural re-settlement opportunities

16B Evidence report for preparation of local development plan
(3) The evidence report is to— (a) set out the planning authority's view on the matters listed in section 15(5) for land in the part of the authority's district to which the local development plan will relates [including…] **15 (5)** (cc) the desirability of allocating land for the purposes of resettlement.

Source: Town and Country Planning (Scotland) Act 1997 as amended by the Planning (Scotland) Act 2019

5.4.8 The Planning (Scotland) Act 2019 places a requirement on Local Authorities to consider the desirability of allocating land for the purposes of resettlement.

5.4.9 As part of Scotland's only metropolitan region, it is the planning authority's view that there are **no desirable resettlement opportunities within the Glasgow City boundary.** It also takes the view that population dispersal to rural areas would be counter to its established commitment to shaping a compact city region. Selective opportunities for urban expansion would need to be assessed in more detail at the Plan preparation stage.

New Interventions

1. Short term lets – city-wide controls are proposed to remain in place, in part to support the retention of permanent housing stock.

2. Masterplan consent areas – Glasgow City Council currently shares a Simplified Planning Zone (SPZ) in Hillington with Renfrewshire Council.

3. 25% Affordable Housing Contribution – NPF4 introduces a 25% affordable housing contribution. CDP does not provide justification for a policy. This report sets out the evidence base regarding affordable housing in Glasgow.

4. Agent of Change principle - This is addressed by the Infrastructure Audit – Culture, Tourism and Heritage.

5. Town centre housing opportunities – NPF4 sets out the role of city, town and local centres to include opportunities for housing, and requires a proportion of the Local Housing Land Requirement to be delivered in city and town centres. The City Centre Living Strategy sets out a commitment to attract around 20,000 additional residents to the city centre between 2018 and 2035. The Town Centre Evidence Report considers opportunities for housing across all centres.

6. Rural Resettlement opportunities – this is not considered to apply to Glasgow as a metropolitan region.

6 Local Housing Land Requirement

6.1 Introduction

6.1.1 The Planning (Scotland) Act 2019 sets out in Section 15 that Local Development Plans must include targets for meeting the housing needs of people living in the part of the district to which it relates.

6.1.2 The Scottish Government's National Planning Framework 4 (Feb 2023) states that LDPs are expected to identify a Local Housing Land Requirement for the area they cover. This is to meet the duty for a housing target and to represent how much land is required.

6.1.3 NPF4 also states that the Local Housing Land Requirement will *exceed* the 10-year Minimum All-Tenure Housing Land Requirement, as set out in Annex E of the Framework.

6.1.4 The Local Development Planning Guidance (May 2023) provides additional guidance for Evidence Reports. It states that Evidence Reports are expected to include **an *indicative* Local Housing Land Requirement (LHLR)** when setting out what the evidence means and provide a transparent and understandable explanation of how the indicative LHLR has been arrived at.

6.1.5 The next section sets out the *indicative* Local Housing Land Requirement and how it has been arrived at taking into consideration:

- National Records of Scotland Household Projections
- Minimum All-Tenure Housing Land Requirement (MATHLR)
- Housing Need and Demand Assessment (HNDA)
- Updated evidence of existing housing need
- Demolitions and empty homes
- Availability of resources in the affordable sector
- Recent delivery levels and anticipated scale and pace of future delivery

Section 15 Form and content of Local Development Plans

"(1A) The local development plan **must also include targets for meeting the housing needs of people living in the part of the district to which it relates**."

"(5) The matters referred to in subsection (1)(a) are"…

> "(ca) the housing needs of the population of the area, including, in particular, the needs of persons undertaking further and higher education, older people and disabled people, (cb) the availability of land in the district for housing, including for older people and disabled people, (cc) the desirability of allocating land for the purposes of resettlement,"

16B Evidence report for preparation of local development plan

(3) The evidence report is to—

> (a) **set out the planning authority's view on the matters listed in section 15(5) for land in the part of the authority's district to which the local development plan will relate**, [*i.e. (a) the principle purposes for which the land is used; (ca) the housing needs of the population of the area…needs of persons undertaking further and higher education, older people and disabled people; (cb) the availability of land in the district for housing; and the desirability of allocating land for the purposes of resettlement*]
> (b) **set out— (i) a summary of the action taken by the planning authority to support and promote the construction and adaptation of housing to meet the housing needs of older people and disabled people in the authority's area**, (ii) an analysis of the extent to which the action has helped to meet those needs,
> (c) set out— (i) a summary of the action taken by the planning authority to meet the accommodation needs of Gypsies and Travellers in the authority's area, (ii) an analysis of the extent to which the action has helped to meet those needs,

Source: Town and Country Planning (Scotland) Act 1997, as amended by the Planning (Scotland) Act 2019

6.2 National Records of Scotland Household Projections

6.2.1 The National Records of Scotland (NRS) publish household projections at a Local Authority level. The latest available are the 2018-based projections. The principal projection, the one most likely to occur, projects that **the number of households in Glasgow will increase by around 1,424 households a year from 2018 to 2043** although the table below shows that projected growth is not the same across the period.

10-year time period	Additional Households
2018-2028	16,059
2019-2029	15,304
2020-2030	14,355
2021-2031	13,647
2022-2032	13,245
2023 -2033	13,175
2024 – 2034	13,310
2025 - 2035	13,464
2026 - 2036	13,741
2027 -2037	13,997
2028 –2038	14,176
2029 – 2039	14,070
2030 – 2040	13,728
2031 – 2041	13,285
2032 - 2042	12,687
2033 - 2043	12,687

Source: National Records of Scotland, 2018-based Household Projections

6.2.2 It is noteworthy that the growth in the number of additional households that are projected to form in Glasgow each year generally fluctuates over time. So, specific 10-year periods further into the future return lower 10-year totals than those that begin at 2028 and 2029

6.2.3 The NRS also published high and low variants that make different assumptions about future migration patterns and natural change and result in higher and lower 10-year household projection trajectories. If simply annualised, the variants provide a range within which **the number of households in Glasgow will increase by. They project that households will increase by between 11,050 and 17,560 over an annualised 10 year period**.

Glasgow City	2018	2043	Annualised	10-year estimate
NRS 2018-based principal projection	292,619	328,229	1,424	14,240
NRS 2018-based low projection	292,619	320,248	1,105	11,050
NRS 2018-based high projection	292,619	336,522	1,756	17,560

Source: National Records of Scotland, 2018-based Household Projections

6.2.4 While on the face of it, household projections may seem like a simple indicator of how many additional homes will be required over a given period, the reality is much more complex. For example, in Glasgow there are considerably more dwellings than households, some homes are currently empty, some existing homes may be demolished over time and some homes currently have multiple households living in them.

6.3 Minimum All-Tenure Housing Land Requirement (MATHLR)

6.3.1 The MATHLR for Glasgow is 21,350 homes.

6.3.2 The Scottish Government's National Planning Framework 4 (Feb 2023) expects the Local Housing Land Requirement set out in the LDP to exceed the MATHLR. It then expects the Proposed Plan to identify land with a capacity to meet the 10 year Local Housing Land Requirement.

6.3.3 The Scottish Government's Housing Land Requirement Explanatory Report (Nov 2021) and the subsequent National Planning Framework 4 - housing land requirement: report addendum (Nov 2022) provides context to the approach taken by the Scottish Government in setting the MATHLR figures.

Household Projections + Existing Housing Need + Flexibility % = MATHLR

Source: Housing Land Requirement Explanatory Report (Nov 2021)

6.3.4 The approach is a simpler and more transparent approach than the previous housing supply target setting processes, the diagram above summarises a the full process with further local adjustments in many cases.

6.3.5 The initial MATHLR setting process took the National Records of Scotland 2018-based household projections as a starting point and then included several built-in uplifts. Notably via the assumptions that acute existing need will persist to plan adoption rather than be addressed via Local Housing Strategies in the short term. As projected decline in the number of households in a particular area was not considered, the sum of LA totals exceeds the national household projections. The MATHLR also includes a flexibility percentage. This represents a contingency of land to allow for changes in sites coming forward and increased urban area totals by 25% (subsequently described as flexibility in the diagram above).

	Glasgow	Glasgow City Region
NRS Household Projections for 2022 to 2032 (10 years)	**13,245**	**30,215**
Uplift 1. 15 year annualization 2022 to 2037	+500	+441
Uplift 2. Removal of projected decline	0	+1,697
Uplift 3. Assume persistence of existing need	+3,400	+6,350
Uplift 4. Flexibility allowance	+4,305	+9.673
SG initial MATHLR	**21,450**	**48,400**
In-built uplift as proportion of NRS Household Projections 2027 to 2036	+62%	+60%

Source: derived from Scottish Government's MATHLR calculator (February 2021)

6.3.6 Following the publication of the initial MATHLR proposals, the Scottish Government offered Local Authorities an opportunity to make local adjustments.

6.3.7 In Glasgow, the local adjustments focussed on delivering the established spatial strategy for the region, and acknowledging the interconnectedness of the Glasgow City Region Housing Market Area. This involved the re-attribution of the Scottish Government's initial MATHLR outputs, using past house sales from 2013 to 2017 as a guide to re-attribute mobile market demand. This was considered to represent a more realistic distribution across the City Region, without undermining the Scottish Government's MATHLR process and headline figures.

	Glasgow	Glasgow City Region
NRS Household Estimates for 2022 to 2032 (10 years)	13,245	30,215
Built-in uplift	+8,205	+18,161
SG initial MATHLR	**21,450**	**48,400**
Local Adjustments	-100	+1,950
National Planning Framework 4 (2023) MATHLR	**21,350**	**50,350**
Uplift as proportion of NRS Household Projections 2022 to 2032	+61%	+67%

Source: Glasgow City Region MATHLR adjustment submissions/NPF4

6.3.8 The local adjustments in the Glasgow City Region resulted in an uplift of 1,950 on the initial Scottish Government figures, while the local adjustments for Glasgow resulted in a reduction in the initial MATHLR by 100. This resulted in a **Minimum All-Tenure Housing Land Requirement for Glasgow of 21,350** and this was the figure ratified in Parliament through the approval of the National Planning Framework 4 in February 2023.

6.3.9 Ultimately, when existing need is accounted for, and 25% flexibility is applied, the Scottish Government's approach applies a 61% uplift to the National Records of Scotland's trend-based projection for the number of additional households that it projected would emerge over the 10-year period 2022 to 2032.

6.3.10 Taking the specific period 2028 to 2038 (the decade with the fastest projected household growth in Glasgow at 14,176 additional households) the MATHLR represents an **uplift of more than 50%.**

6.4 Housing Need and Demand Assessment (Clydeplan 2024)

6.4.1 The Glasgow City local authority area is a key component of a much wider Glasgow City Region Housing Market Area. Planning for future housing has traditionally been conducted at a regional scale, as part of a collaborative Housing Market Partnership which includes Glasgow and the seven surrounding local authorities.

6.4.2 The Glasgow City Region Housing Market Partnership prepared and published the third Housing Need and Demand Assessment (HNDA) for the Glasgow City Region in March 2024. It was assessed as having 'robust and credible' status by the Centre for Housing Market Analysis in June 2024.

Source: Clydeplan/Housing Need and Demand Assessment March 2024

6.4.3 The Housing Need and Demand Assessment includes a description of the structure and governance of the Housing Market Partnership; how engagement and consultation has been undertaken; the relevant geographies that have been chosen; the methodology; data limitations; and the quality control measures that have been used.

6.5 2022 to 2041 Housing Estimates

6.5.1 The HNDA is underpinned by the National Records of Scotland 2018-based household projections, an estimate of homeless households in temporary accommodation and concealed and overcrowded households (HoTOC). The initial estimates were tenured in the HNDA Tool, using assumptions about income growth, price growth and rental growth.

6.5.2 The process involved the preparation of a range of scenarios that attempted to present realistic economic outcomes, for example, taking into account of the uncertainties introduced by both Brexit and the Covid-19 pandemic. It identified the potential need in Glasgow to deliver between 22,135 and 28,959 additional homes between 2022 and 2041.

Scenario	A. Existing Need at 2022 (HoTOC)	B. Newly Arising Households 2022 to 2041	Total Household Need (A+B)
“Prevailing State” principal scenario	3,410	25,549	28,959
Early Covid-19/Brexit impacts persist	3,410	18,725	22,135
Early Covid-19/Brexit impacts are weathered	3,410	18,725	22,135
Pre Covid-19/Brexit levels anticipated	3,410	18,725	22,135
Economic Recovery	3,410	25,549	28,959

Source: Clydeplan/Housing Need and Demand Assessment March 2024

6.5.3 The *principal* planning scenario considered was the ‘prevailing state of the Scottish housing market and economy’. The scenario maintained the Centre for Housing Market Analysis’s pre-Covid 19 and Brexit assumptions in terms of wage growth, house price growth and rental growth. It identified a requirement for 28,959 new homes between 2022 and 2041 across Glasgow City, consisting of 25,549 newly arising households and 3,410 existing households who currently need a home.

6.6 Tenure

6.6.1 While the indicative Local Housing Land Requirement is not required to include breakdowns by housing tenure the Housing Need and Demand Assessment provides this level of detail. It identified that between 56% and 67% of additional homes in the scenarios were expected to be affordable between 2022 and 2041 in Glasgow.

6.6.2 The *principal* planning scenario, using the 'prevailing state of the Scottish housing market and economy' assumptions indicated that 61% of new homes would be needed for households who could only access affordable tenures.

	A. Market tenures (owner occupation and private rent)	B. Affordable tenures (mid-market and social rent)	Total Household Need 2022 to 2041 (A+B)
'prevailing state' scenario	11,382 (39%)	17,576 (61%)	28,959

Source: Glasgow City Region Housing Need and Demand Assessment 2024

6.7 Calculating a 10-year Local Housing Land Requirement

6.7.1 In order to move from the HNDA outcomes to a Local Housing Land Requirement for Glasgow, the following components require to be calculated:

- An up to date figure for existing need; and
- A 10-year estimate of housing need and demand
- Flexibility to reflect contingency in delivery

Existing Housing Need

6.7.2 The Centre for Housing Market Analysis's HoTOC is the proxy method built into the HNDA Tool to account for existing homeless households in temporary accommodation, and existing households who are both overcrowded and concealed. The latest data available is for 2020, and underpins both the HNDA and MATHLR processes.

	Homeless Households in Temporary Accommodation	Concealed and Overcrowded Households	Total Existing Household Need
Glasgow City	2,557	853	3,410

Source: Centre for Housing Market Analysis HNDA tool

Temporary Accommodation Update

6.7.3 Over the past 5 years, the number of households in temporary accommodation in Glasgow has increased by 46% from 2,191 in 2018-19. **In 2022/23 there were 3,207 homeless households in temporary accommodation** compared with 2,557 that were estimated by HoTOC**.** There has also been an increase in the number of homeless households in temporary accommodation that have children.

	2018-19	2019-20	2020-21	2021-22	2022-23
Households in Temporary Accommodation	2,191	2,557	2,668	3,009	3,207
Households with children in Temporary Accommodation	875	985	925	1,090	1,175

Source: Scottish Government, Homelessness in Scotland full statistical time series

6.7.4 There is a high turnover of households in temporary accommodation, and the table below shows more households entered temporary accommodation during 2022-23 than exited it, resulting in an increase in the backlog.

	Households entered	Households exited	Net difference
Number of households entering and exiting temporary accommodation, in Glasgow: 2022-23	4,588	3,791	797

Source: Scottish Government, Homelessness in Scotland full statistical time series

6.7.5 The increase in households in temporary accommodation is despite 11,333 lets by RSLs being issued to homeless households, equivalent to around 2,833 per year across the four years between 2018 and 2022.

6.7.6 A report to the Glasgow City Integration Joint Board on 25 September 2024 noted an updated figure of 3,755 households in temporary accommodation. This represents the most up to date evidence in relation to this aspect of housing need.

Homes for Scotland Research on Overcrowded and Concealed Households

6.7.7 As part of their engagement with the Glasgow City Region Housing Market Partnership during the preparation of the Glasgow City Region Housing Need & Demand Assessment (HNDA), Homes for Scotland commissioned The Diffley Partnership and Rettie & Co to conduct primary online research, via ScotPulse, that sought to gather primary evidence of existing housing need, as an alternative to the use of the HoTOC method and figures.

6.7.8 A draft was shared with the Glasgow City Region Housing Market Partnership in May 2021, and the HNDA acknowledged that it confirmed the HoTOC estimates of existing need as a minimum. It would be for Local Authorities to individually consider how the survey might be used when setting Local Housing Targets, and subsequent land requirements, beyond the HNDA.

6.7.9 The survey consisted of responses from 1,079 people across the Glasgow City Region and found that 21.6% of the sample had some form of housing need (currently living in overcrowded, concealed, poor condition, or unaffordable homes). This could be extrapolated to around 183,000 households in the Clydeplan area, of which 17,137 were identified as in need for an additional home.

6.7.10 **For Glasgow, this equated to 4,419 overcrowded and concealed households,** compared with the 853 estimated by HoTOC.

	Homeless Households in Temporary Accommodation (from HoTOC)	Overcrowded and Concealed Households	Total Existing Household Need
Glasgow	2,557	4,419	6,976

Source: Diffley Partnership/Rettie and Co, Existing Housing Need in the Clydeplan area - Survey Results draft report (May 2021)

Diffley Partnership/Rettie and Co Scotland Research for Homes for Scotland

6.7.11 Homes for Scotland commissioned Diffley Partnership and Rettie to undertake further research into existing need across Scotland. 13,690 respondents were contacted during August 2023 via online and telephone surveys and asked about their existing housing needs. 4,654 reported at least one housing need.

6.7.12 Homes for Scotland published Existing Housing Need in Scotland in January 2024. While similar to the earlier Clydeplan work in its intent to identify alternative existing need figures, it extended the definition of housing need to 5 categories (from 4 in the earlier research) to include homes that needed adaptation to meet user needs.

6.7.13 The report indicated that 28% of Scottish households, some 693,000 households, currently have some form of need. A higher proportion than the 21.6% indicated in the research undertaken earlier for the Clydeplan area.

6.7.14 The research provides a snapshot of the challenge that households face in terms of their financial ability to attend to their housing needs following the cost-of-living crisis. Importantly, it does not describe net need for an additional home.

6.7.15 The report acknowledges that some of the housing need could be resolved by addressing: under-occupancy of existing homes; promoting available housing in low demand areas; bringing empty homes back into use; and bringing second homes and short-term lets into longer term use. The proportion of need to which these measures would apply is not quantified in the report.

6.7.16 It also does not acknowledge that the majority of the households identifying as having a housing need, also currently live in a home that would become available should the current household move elsewhere to meet their housing need. While concealed households would not leave a home to be used, it is likely that all other housing needs being met by moving home would leave behind a home, which other households without the same specific needs could potentially use.

Diffley Partnership/Rettie and Co Developer Engagement research for Homes for Scotland

6.7.17 As part of the developer engagement for this evidence report, Homes for Scotland submitted a specific analysis of the wider national survey, Existing Housing Need in Glasgow (Jan 2024). This showed that there had been 1,220 responses in Glasgow, and noted that 29%, extrapolated to 86,000 households, had reported some form of housing need.

	Gross current household need	In situ solutions most suitable	% able to buy in the market	Net current household need (backlog)
Glasgow	86,000	20,700	21,500	43,800

Source: Diffley Partnership/Rettie and Co, Existing Housing Need in the Glasgow (January 2024)

6.7.18 The Report refers to more recent Scottish Government estimates for homeless households in temporary accommodation (3,200) and **identifies 5,700 overcrowded and concealed households**, up almost 1,300 from the earlier survey and more than 6.5 times the HoTOC estimate of overcrowded and concealed households.

	Homeless Households in Temporary Accommodation	Overcrowded and Concealed Households	Total Existing Household Need
Glasgow	3,200	5,700	8,900

Source: Diffley Partnership/Rettie and Co, Existing Housing Need in the Glasgow (January 2024)

Total Existing Household Need Update

6.7.19 On 30 November 2023, Glasgow City Council announced a ‘housing emergency’ via a report titled Home Office Decisions via Streamlined Asylum Process Update. It acknowledges the stress being placed on the City’s temporary accommodation infrastructure, and the lack of funding to allow it to build new affordable homes quickly enough to allow it to absorb the new households that are presenting themselves.

6.7.20 Both the primary research and the secondary data indicate that existing need pressures in Glasgow are currently more significant than projected by the HNDA. The asylum changes are one factor, but another factor could be that additional households are presenting themselves far earlier in the projection than anticipated and, due to the cost-of-living crisis (including an increase in mortgage costs and rents), a larger proportion of households are presenting as needing affordable tenure homes rather than market tenure homes.

6.7.21 The Council are committed to meeting their statutory obligations in the short-term, and have been in discussions with both the UK and Scottish Governments about accessing the appropriate funding to accelerate delivery of affordable housing. The aim would be to address the acute need generated by decisions at national government level whilst maintaining delivery of houses in the affordable and private sectors.

Availability of Resources in the Affordable Sector

6.7.22 The Programme of Government 2023 to 2024 sets out the Scottish Government's commitment to deliver 110,000 affordable homes by 2032. The funding for 100,000 of which is to be shared across non-rural local authorities like Glasgow.

6.7.23 This aspiration for new homes should be viewed in the context of the National Records of Scotland's household projections indicating that 93,868 additional households are expected to form between 2022 and 2032.

6.7.24 The affordable homes target (and funding) is not directly linked to the setting of the MATHLR, nor is it linked to a sum of Local Housing Strategy targets for affordable homes across Scotland. Instead, it presents as intent to build additional affordable homes in Scotland, and should therefore be a factor in any target setting in Glasgow.

6.7.25 The Scottish Government provides partial funding to meet its affordable housing target, and, in the 2024-25 budget, that funding was cut significantly, even while higher costs and borrowing had impacted on the viability of committed schemes following the impact of the UK government budget in 2022. The Housing Regulator has recently noted concerns about the sustainability of relying on affordable housing providers taking on debt to deliver new affordable homes at the rate the Scottish Government's target requires. In December 2024, the Scottish Government Budget (Scotland) Bill proposed to restore the affordable housing budget for 2025-26 to broadly the 2023-24 level, allowing the Government to a commit to building over 8,000 houses for social rent, mid-market rent and low cost home ownership across Scotland. It should be recognised that Councils will not have resource planning figures until sometime after the February 2025 budget, so there is no certainty that Glasgow's allocation will be maintained.

6.7.26 Deliverability is a significant concern in setting a Local Housing Land Requirement, and, as such, the availability (or otherwise) of commitments to fully fund the delivery of the affordable housing element of the Local Housing Land Requirement is relevant. Increases in the availability of affordable housing funding would place less reliance on the viability of market sector housing, and would ensure greater certainty in identifying sufficient land to meet the Local Housing Land Requirement.

Assessment of Existing Need

6.7.27 The HNDA output included an existing need figure of 3,410 households. It is recognised, however, that more recent sources of information are available, and they have therefore been considered.

6.7.28 The independent research commissioned by Homes for Scotland, while providing an interesting perspective on overcrowded and concealed households, does not conclude with the identification of a figure for net need for a new house. This issue is highlighted by CHMA, who note its limitations when compared with the HoTOC method.

6.7.29 The recent proposal to restore the affordable housing budget for 2025-26 to broadly the 2023-24 level is welcome, and will allow the delivery of more homes. The pressures on the affordable sector in Glasgow, in part made more acute by the UK Government's approach to processing asylum seeker claims, remain, and this suggests that the ability of local authorities and RSLs to meet housing need in the medium term continue to be challenging. For this reason, the HNDA assumption that existing need could be partly be addressed in advance of the City Development Plan is not carried forward into the calculation of the Local Housing Land Requirement.

6.7.30 This Evidence Report concludes that the most recent figure for existing need, i.e. 3,755 households in temporary accommodation and 853 overcrowded and concealed households, a total of 4,608 households, should be adopted in full for the purposes of calculating the Local Housing Land Requirement.

6.8 Recent delivery levels and anticipated scale and pace of future delivery

6.8.7 The Planning (Scotland) Act 2019 introduces the concept of a 10-year review period for Local Development Plans. It is therefore appropriate to consider figures on a 10-year basis.

6.8.8 The Housing Land Audit records the number of homes complete and occupied on sites over the preceding year. For the period 2014/15 to 2023/24 there were 21,232 completions.

Comparison with past	Period	Total	Annualised
10-year Completions 2014/15 to 2023/24	10 years	21,232 homes	2,123 homes per year

Source: Housing Land Audits

6.8.9 The Housing Land Audit 2024 sets out the anticipated future delivery of new housing over the next 7 years to be around 13,180 houses. Indicative programming for years 8 – 10 would suggest that around 18,100 houses may be achievable over a 10-year period.

Established Supply Programme	Period	Total	Annualised
7-year Programme	7 years	13,180 homes	1,882 homes per year

Established Supply at 2024		32,657 homes	

Source: Housing Land Audit 2024

6.8.10 At 2024, land with capacity for 32,657 homes had been identified. Around one quarter (7,986 homes) are expected to have been developed by plan adoption, leaving land with capacity of around 24,000 homes in the current supply. This information is for illustration only, as each audit identifies more land.

6.8.11 At August 2024, there were proposals for around 5,000 additional units (outwith the land supply) pending planning permission. This follows the addition of around 5,000 units over the preceding two years.

6.9 Calculating a 10-year Estimate of Housing Need and Demand

6.9.1 The following table uses HNDA tool outputs to identify a figure for newly arising households for a 10-year period. The original HNDA output included a figure of 3,410 homeless and concealed households, and it made the assumption that this would partly be addressed in advance of the Development Plan period. An updated figure for existing need is available, and therefore the HNDA figure has been subtracted for the moment for the purposes of the 10-year calculation.

	Newly Arising Households + Existing Need (2022-41) A	**Newly Arising Households (2022-41) B**	**10-Year Newly Arising Households (B divided by 19 and multiplied by 10) C**
Glasgow	**28,959**	**25,549**	**13,447**

6.9.2 To replicate the MATHLR approach, the updated existing need figure of 4,608 households, comprising 3,755 households in temporary accommodation and 853 overcrowded and concealed households, is added to the 10-year newly arising households figure, as follows:

13,447 + 4,608 = 18,055 10-year housing need and demand figure

6.10 Demolitions

6.10.1 The HNDA (2024) (Section 3.3) highlights that Glasgow City Region Housing Market Partnership undertook a high-level review to estimate a range for social housing stock that could be affected by potential long-term effectiveness (LTE) issues. This included consideration of factors of low demand as well as other key drivers, including information regarding: non-traditional construction type; unpopular property type; poor property condition; high turnover/void rates; high void and repair costs, high future investment costs and estate management issues.

6.10.2 As a broad consideration of LTE, this review exercise estimated that potentially up to 10% of all Glasgow City Region housing stock (around 24,000 properties) may be affected by one or more LTE factor which could require an additional response beyond usual management and planned investment.

6.10.3 Scottish Government's February 2024 publication shows that in the past 10 years, there have been around 4,000 demolitions in Glasgow (note that this updates the figure in paragraph 3.2.18) largely in relation to the Transformational Regeneration Area (TRA) programme, but the majority of this was over 5 years ago. It is considered that while this scale of demolition is unlikely to re-emerge, as highlighted in the HNDA (2024), RSL providers will continue to review the effectiveness of their stock as part of standard asset management, business and financial planning processes. Therefore, it is anticipated there will be situations where some stock identified as being ineffective will require a reprovisioning solution. An example of this is at Wyndford in Maryhill where Wheatley are intending to replace around 600 low-demand studio flats with around 300, high-demand, family sized flats.

6.10.4 It should be noted that a demolished house does not necessarily result in a 1-to-1 net need for a new house, as alternative homes will be found for residents before any planned demolition. Often, the reason for demolition is because the building is sub-standard in some way, and typically is in low demand (often long-term empty).

6.10.5 Evidence from the Housing Land Audit indicates that the 9,439 demolished houses in the TRA programme resulted in sites with a housing capacity of 5,563 houses, or a replacement rate of around 60%. Information from the Wheatley Group Business Plan Financial Projection 2024/25, page 15 (see table below) estimates around 382 demolitions between 2027-28 and 2030-31, which are anticipated to overlap with the Plan period. The demolition numbers for 2024-25, 2025-26 and 2026-27 are assumed to be accounted for in the re-provisioning programme. If a replacement rate of 60% is applied to the 2027-28 to 2030-31 period, this would result in a net need of around 230 houses.

Demolitions	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31
Units*	758	70	171	49	45	96	192
Demolition Costs £000s	8,828	3,115	2,602	1,145	1,110	2,072	2,845

**The unit profile indicates the year in which the demolition will occur and not when the properties will be handed over to the contractor, the figure in 24/25 includes the 600 units handed over during 2023/24*

6.10.6 In addition, each demolition area creates new land for housing, so, while it is appropriate to add around 230 houses to the housing need figure, this does not translate to an equivalent housing land requirement. This need figure, arising from demolitions, is over a 10 year period and is a small percentage of the overall need figure. The need arising from demolitions that is not met on site will be addressed by RSLs at the time of demolition within their existing properties or via use of empty homes or other options. It is noted that the overall policy presumption at present is that demolitions are the least preferred option (NPF4 Policy 9d). As CDP2 is produced and specific site allocations are drafted the requirement for demolitions will be monitored.

6.11 Empty Homes

6.11.1 The Evidence Report notes that there were 7,172 vacant dwellings in Glasgow in 2022. The Local Housing Strategy for Glasgow 2023-28 commits to reviewing the Empty Homes Strategy, and to developing an Action Plan. This underused resource is considered to provide an opportunity to meet housing need, subject to the availability of resources, and therefore introduces an element of flexibility within the need figure. There is not considered to be any consequent land requirement implication.

6.12 Student Housing

6.12.1 The MATHLR and HNDA outputs will account for an element of student households, given that students can dwell in their parental home, their own home in the private rental market (including HMOs and more modern build-to-rent developments). However, provision of land for purpose built student accommodation is being considered separately from the LHLR.

6.12.2 Section 4.2 above provides the evidence gathered relating to student accommodation. This includes:

- the requirement set out by the Universities working group - The Universities working group identified that around 600 beds a year will be required to enable their growth aspirations. This would account for 6,000 additional beds over the plan period to accommodate that growth the need identified by the private sector – paragraph 4.2.56 details the student accommodation need figures prepared for 17 market reports submitted as part of recent planning applications. These estimates identified a potential demand for PBSA in Glasgow ranging from 5,488 to 57,000 beds.
- information on Supplementary Guidance 10 relating to the location of student accommodation information on planning applications for student accommodation as at August 2023.

6.12.3 A recent Scottish Government commissioned report by the UK Collaborative Centre for Housing evidence (CACHE (Sept 2024) Student housing options and experiences of homelessness in Scotland: a report by the Cross-Party Group on Housing) identified an existing shortfall of 6,093 purpose-built student accommodation beds for students.

6.12.4 A briefing Note on Student Accommodation in Glasgow (January 2025) provides an audit of the managed student accommodation in Glasgow at January 2025 which found that there were 72 managed student accommodations in Glasgow accounting for 20,218 beds, 5 further sites were under construction with a capacity of 1,539 beds, 13 further sites had planning permission with a capacity of 5,378 beds while there were a further 24 applications with a potential additional capacity of 7,968 pending permission.

6.12.5 Based on this evidence, Glasgow would continue to benefit from a bespoke spatial planning policy approach to supporting the development of purpose-built student accommodation. This may include elements of established policy set out in both CDP10 and Supplementary Guidance 10 to generally support these developments where they are accessible to university campuses and provide affordable accommodation for students while also resisting development in specific areas of over concentration of such uses. Given the scale of the need identified it may also require the identification of land allocations to ensure that the student accommodation needs identified above can be met over the course of the plan while protecting the residential amenity of other residents in areas of high concentration of such uses.

6.13 Local Housing Strategy Housing Supply Target

6.13.1 The Housing Background Report sets out information regarding the Local Housing Strategy throughout its sections. Paragraph 2.6.5 states that the Local Housing Strategy 2023 to 2028 (LHS) commits Glasgow to supporting the delivery of 13,000 homes over the next five years (2023 to 2028). Of these 6,500 would be for market tenure homes and 6,500 would be for affordable tenure homes.

6.13.2 The LHS states (in section 8 Housing Supply Targets) that this target of 13,000 homes is grounded on the Housing Needs and Demand Assessment (HNDA). As such, this is not an additional target but the target identified in the LHS in line with the Scottish Government's LHS Guidance. The LHLR is also based on the HNDA.

6.13.3 The LHS recognises that this is an ambitious and challenging five year target. It is acknowledged that, while these ambitions remain, the context for the housing market in Glasgow is dynamic, and that realising these ambitions will require a wider set of interventions than just land identification. Funding in the affordable sector, greater issues of affordability for households, and a more challenging development environment for the private sector, are all factors which are separate from the provision of land, and, these will impact on the ability of the City to deliver these strategies.

6.13.4 In allocating sites to form the Deliverable Housing Land Pipeline, these sites will work to deliver the LHS housing supply target (including the tenure split of 50/50 affordable and market tenure homes) and LHLR. It is noted that the LHS runs to 2028 and therefore land identified in the adopted CDP and associated Delivery Programme will also be critical. The current land supply is set out from paragraph 3.3.1 onwards.

6.14 City Centre Living Strategy

6.14.1 The figures set out in the City Centre Living Strategy reflect the Council's ambitions for housing in the City as a whole, with a newly deliberate focus on growing the City Centre population. The Housing Background Report (paragraph 2.6.10) states that the City Centre Living Strategy 2018 to 2035 (June 2020) is another strand of the Local Housing Strategy, and commits Glasgow to doubling the population of the City Centre from 20,233 to 40,000 by 2035. This figure relates to the population and not a land requirement. It does not provide an additional requirement for land but sets out Council policy to focus efforts on growing the population in a specific location.

6.14.2 Paragraph 5.4.2 onwards provides information on Town Centre Housing opportunities and notes the requirement of NPF4 Policy 27 to provide a proportion of their LHLR in city and town centres.

6.14.3 Following identification of the LHLR, in producing the Proposed Plan and Proposed Delivery Programme the Council is required to produce a Deliverable Housing Land Pipeline. This Pipeline will include a range of allocations across the city and work will include identifying sites which can deliver on both the City Centre Living Strategy commitment and NPF4 Policy 27. Consideration of density, tall buildings and the reuse of existing buildings will also form part of this work.

6.15 MATHLR Flexibility and the Local Housing Land Requirement

6.15.1 The Local Housing Land Requirement for Glasgow should exceed the MATHLR for Glasgow which is 21,350.

6.15.2 The Housing Needs and Demand Assessment (HNDA) forms the starting point for setting an indicative Local Housing Land Requirement. Outputs from the HNDA identified a 10-year housing estimate of 18,285 additional homes – this is the number of homes needed to meet the projected need and demand during the plan period, and is considered to be achievable, given past performance and current programming (see table below).

6.15.3 The housing need and demand element of the MATHLR of 21,350 equates to 17,080 homes, consisting of additional households arising from the household projections, and existing need. The remainder of the MATHLR figure consists of land for 4,270 homes, added to provide flexibility in delivery.

6.15.4 In order to replicate the MATHLR approach, flexibility of 25% has been added to the 10-year housing estimate figure (with the exception of the 230 house allowance for demolitions). This results in the following calculation for the Local Housing Land Requirement (see table below):

10-year Housing Estimate / Local Housing Land Requirement

	Newly Arising Households	Existing Need	Demolitions	Flexibility	Total
10-year Housing Estimate	**13,447**	**4,608**	**230**		**18,285**
Local Housing Land Requirement	**13,447**	**4,608**		**4,514**	**22,569**

6.15.5 A Deliverable Housing Land Pipeline requires to be identified to meet the Local Housing Land Requirement. The number of homes that could be delivered on this land does not need to be constrained to the Indicative Local Housing Land Requirement. As part of the Proposed Plan preparation stage, a full site appraisal process will be carried out to inform the composition of the Deliverable Housing Land Pipeline.

Local Housing Land Requirement

1. NPF 4 sets a Minimum All-Tenure Housing Land Requirement (MATHLR) of 21,350 for Glasgow. This includes a flexibility allowance to provide a contingency in delivery. The Local Housing Land Requirement should exceed the MATHLR.

2. Outputs from the Housing Need and Demand Assessment on newly arising households, updated information on existing need, and need arising from demolished houses, were used to identify a 10-year housing estimate of 18,285 additional homes. Various other sources of potential sources of need and demand were considered, specifically: a. research commissioned by Homes for Scotland on concealed and overcrowded households, b. need arising from student households, and separate targets for c. the City Centre population and d. the Local Housing Strategy Housing Supply Target.

    a. It was considered that the Homes for Scotland research did not identify a net need figure for additional housing, and that therefore there was not a strong case for a plus adjustment to the 10-year figure.
    b. In terms of student housing, the complexity of this market indicates that a bespoke policy approach would be appropriate, rather than a specific land requirement at this stage. Provision of land for purpose built student accommodation is being considered separately from the Local Housing Land Requirement (LHLR).
    c. The ambition to double the City Centre population by 2035 does not provide an additional requirement for land but sets out Council policy to focus efforts on growing the population in a specific location. The Deliverable Housing Land Pipeline, required to deliver the LHLR, will include a range of allocations across the city and work will include identifying sites which can deliver on both the City Centre Living Strategy commitment and NPF4 Policy 27 requirement to provide a proportion of the LHLR in city and town centres.

d. The Local Housing Strategy 2023-28 includes a Housing Supply Target of 13,000 houses over the next five years (2023 to 2028) grounded on the Housing Needs and Demand Assessment (HNDA). As such, it does not provide an additional target. The LHS recognises that this is an ambitious and challenging five year target. It has been made more challenging by short-term asylum pressures and the declaration of a housing emergency. It is noted that the Council is reliant on the Scottish Government and Registered Social Landlords fully funding the delivery of the affordable homes required to address both the current emergency and future housing need, and that housing land is unlikely to be the main constraint. In allocating sites to form the Deliverable Housing Land Pipeline, these sites will work to deliver the LHS housing supply target (including the tenure split of 50/50 affordable and market tenure homes) and LHLR.

3. Although the 2024 Housing Land Audit will not reflect the position in the adopted City Development Plan (2017), it does provide an indication that the 10-year figure of 18,285 would be achievable.

4. The approach adopted for the MATHLR process has been replicated in order to identify a Local Housing Land Requirement for Glasgow. It is considered, appropriate, therefore, to apply 25% delivery flexibility to the 10-year housing estimate (with the exception of the 230 house figure for demolitions). This results in a **Local Housing Land Requirement for Glasgow of 22,569 homes.**

5. A full site appraisal process will be carried out for the Proposed Plan, in order to identify sites to comprise the Deliverable Housing Land Pipeline.

7 Implications for City Development Plan 2

7.1 The Council is committed to providing housing to meet residents' needs, regenerate neighbourhoods, re-use vacant and derelict land, and maintain a compact city region. This delivery must take place in partnership with affordable housing funders, Registered Social Landlords and private housebuilders. The evidence set out in this report requires to be taken forward in producing CDP2 and the following activities will be required:

- Additional analysis to determine if a 25% affordable housing policy is appropriate across the city, and the implications of including such a policy in CDP2, both in terms of impact on other required policy outcomes, and in practical delivery terms.
- Site Appraisal process to include: assessment of all existing sites, call for sites, Urban Capacity Study and Green Belt Review.

- Development of a Deliverable Housing Land Pipeline to meet the range of needs identified in this report (affordable, specialist needs), deliver on a range of affordable and housing tenures and deliver across the city including in the city centre, town centres and to deliver on regeneration priorities.
- Update CDP policy with regards purpose built student accommodation.
- Development of policy to accompany the Housing Land Pipeline to recognise the role of windfall sites in Glasgow's housing land supply.

7.2 While the Evidence Report is expected to set out the planning authority's view on the availability of land in the district for housing, it is for the Proposed Plan and Proposed Delivery Programme to set out the Deliverable Housing Land Pipeline. Therefore, there is no expectation that the Evidence Report should identify a land supply at this point, or that the MATHLR or indicative Local Housing Land Requirement should act as a ceiling on the total housing capacity of land allocated in any subsequent Proposed Plan.

7.3 The following sections provide relevant information on locations and sites that will form part of the Housing Land Pipeline:

- Paragraph 3.2.7 onwards notes that there are a range of historic regeneration interventions that continue to be built out, and other sites remaining for regeneration. Such planned, long term regeneration initiatives are essential in ensuring improvements to neighbourhoods and the health and wellbeing of residents. The work that has been undertaken for the Evidence Report, future work on site appraisal, and the development of the spatial strategy for CDP2, will determine if further regeneration sites are to be identified.
- Paragraph 3.2.13 notes that greenfield sites remain. The site appraisal work has the potential to identify further greenfield sites if required.
- Section 3.3 details the existing land supply. Work will be undertaken to review these sites, and if considered not to be deliverable, sites may be removed from the land supply.
- Paragraph 3.3.24 onwards notes the role of vacant and derelict land in providing new sites for development, and the requirement to identify further options for development within the urban area through an Urban Capacity Study. It also notes that the Green Belt Review will inform consideration of sites.
- Paragraph 5.4.2 onwards notes that town centres and the city centre will require consideration for housing development, in line with developing centres as places to live as well as learn, work, enjoy and visit.