

South Ayrshire Housing Need and Demand Assessment 2021-2026

Executive Summary

July 2021

Prepared by Corporate and Housing Policy

on behalf of the South Ayrshire Housing Market Partnership

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Executive Summary

1. Introduction

- 1.1 The Housing Need and Demand Assessment (HNDA) is an important document produced every five years to inform the decisions the Council and our partners will make about housing, homelessness, meeting particular needs, and planning for the future housing requirements of South Ayrshire.
- 1.2 The HNDA tries to gather as much evidence as possible about different topics related to housing, and, working with local people, other organisations and the Health and Social Care Partnership, uses this information to come to a number of conclusions.
- 1.3 The topics being considered in the HNDA include:
- Information about our population just now, and how this might change in the future
 - The costs involved with purchasing or renting a home in South Ayrshire, and how affordable this is for people
 - South Ayrshire's economy, how this has changed in recent years and how it might change in the future
 - The types of housing in South Ayrshire, its condition, and whether it is owned, rented or empty
 - The extent to which people in South Ayrshire have to share with others to meet their housing needs, sometimes resulting in homes being overcrowded
 - Information about social housing (properties provided by South Ayrshire Council or a Housing Associations), demand for this stock and the number of properties becoming available in a year
 - The need for special types of accommodation to meet the needs of particular groups, for example, people with disabilities, young people leaving care, and people who require additional support.
- 1.4 An important element of the HNDA involves using the information gathered to produce a range of 'housing estimates' – that is, estimates of the number of new build houses we will need in the future.
- 1.5 In writing this document, we have tried to work with partners and local people to make sure our data, estimates and conclusions are as accurate as possible. In the context of the Coronavirus pandemic, it has not been possible to engage with the wider population as early or as fully as we would have liked, however in publishing this consultative draft we hope to give people the opportunity to comment on our work so far.
- 1.6 The Council is keen to hear people's views on the findings presented here and welcome any comments on this draft version of the HNDA.

2. Executive Summary

Background

- 2.1 South Ayrshire has an estimated population of 112,610¹, representing approximately 2% of the population of Scotland.
- 2.2 The area includes the towns of Ayr, Prestwick, Troon, Maybole and Girvan. A large rural area of 422 square miles (1,222 square km) extends from Troon and Symington in the north to Ballantrae and Loch Ryan in the south. Approximately 27% of the South Ayrshire population live in areas classified as rural.

Population

Slight reduction in total population

- 2.3 In terms of total numbers, South Ayrshire's population has stayed relatively stable over the last twenty years compared to other local authorities in Scotland, decreasing only marginally between 1998 and 2019².
- 2.4 It is expected that South Ayrshire's population will decrease slightly by 2028, a reduction of 1.7% from 2018³. This compares to an overall increase in Scotland's population of about 1.8%.
- 2.5 This change is made up of a decrease in population through natural change of 5.8% (meaning more deaths than births), coupled with an increase in population as a result of net migration of 4.3% (meaning more people migrating to South Ayrshire than those leaving).
- 2.6 The majority of this net migration is from other areas in Scotland, while migration to and from the rest of the UK also contributes significantly to this. Migration from overseas produces a negative figure of net migration, meaning that more people leave South Ayrshire to go overseas than those who come from overseas to South Ayrshire⁴.

An ageing population

- 2.7 South Ayrshire currently has an older population than the rest of Scotland, with the difference being particularly noticeable in reductions to the under 45s age group and increases to the over 65s age group⁵.

¹ NRS *Mid-2019 population estimates by Council area in Scotland, South Ayrshire Council area profile* <https://www.nrscotland.gov.uk/files/statistics/council-area-data-sheets/south-ayrshire-council-profile.html>

² As above

³ NRS *Mid-2018 Population Projections by Council Area in Scotland, South Ayrshire Council Area profile* - <https://www.nrscotland.gov.uk/files/statistics/council-area-data-sheets/south-ayrshire-council-profile.html>

⁴ NRS *Population Projections for Scottish Areas (2018-based)*. <https://www.nrscotland.gov.uk/statistics-and-data/statistics/statistics-by-theme/population/population-projections/sub-national-population-projections/2018-based>

⁵ NRS *Mid-2019 Population Estimates Scotland*, Table 2: Estimated population by sex, single year of age and administrative area, mid-2019 <https://www.nrscotland.gov.uk/statistics-and-data/statistics/statistics-by-theme/population/population-estimates/mid-year-population-estimates/mid-2019>

- 2.8 Recent years have seen a trend towards an ageing population in South Ayrshire⁶, with the 65-74 and 75+ age groups seeing the largest increases between 1998 and 2019.
- 2.9 While this is in-keeping with demographic changes nationally, these changes were more pronounced in South Ayrshire than for Scotland during this period⁷.

Smaller households

- 2.10 South Ayrshire has an estimated 52,588 households⁸.
- 2.11 While the total overall population of South Ayrshire has been decreasing over the last twenty years, the total number of households has been increasing⁹. This tells us that people are tending to live in smaller households.
- 2.12 As would be expected given the information above, South Ayrshire has a significantly higher proportion of 'older smaller' households than the Scottish average, and a lower proportion of 'single adult' and 'small family' households¹⁰.
- 2.13 It is expected that the number of households in South Ayrshire will increase in the years to 2028 by 1.5%¹¹.

Housing in South Ayrshire

Larger properties

- 2.14 There are an estimated 55,668 dwellings in South Ayrshire¹². Most dwellings are houses (72%), with detached and semi-detached properties being most common¹³.
- 2.15 Recent estimates suggested that almost 65% of dwellings in South Ayrshire had four or more rooms, while there were only a small number of properties with one or two rooms (about 11%)¹⁴.
- 2.16 Given the downward trends in average household size seen in recent years and projected to continue in the years to come, this could be interpreted as something of a mismatch in terms of provision.

⁶ NRS *Mid-2019 Population Estimates by Council Area in Scotland, South Ayrshire Council Area profile* – <https://www.nrscotland.gov.uk/files/statistics/council-area-data-sheets/south-ayrshire-council-profile.html>

⁷ As above – Tables derived from population estimate time series data

⁸ NRS *Estimates of Households and Dwellings in Scotland, 2019*. <https://www.nrscotland.gov.uk/statistics-and-data/statistics/statistics-by-theme/households/household-estimates/2019>

⁹ As above

¹⁰ Scottish Household Survey *Scotland's People Local Authority Tables*, 2018.

¹¹ NRS *Household Projections for Scotland, 2018-based*. <https://www.nrscotland.gov.uk/statistics-and-data/statistics/stats-at-a-glance/infographics-and-visualisations#hh-projections>

¹² NRS *Household Estimates, Scotland, 2019*. <https://www.nrscotland.gov.uk/statistics-and-data/statistics/stats-at-a-glance/infographics-and-visualisations#hh-estimates>

¹³ NRS *Dwelling Estimates and Characteristics of Dwellings by 2011 Datazones, 2017*. <https://www.nrscotland.gov.uk/statistics-and-data/statistics/statistics-by-theme/households/household-estimates/small-area-statistics-on-households-and-dwellings>

¹⁴ NRS *Dwelling Estimates and Characteristics of Dwellings by 2011 Datazones, 2017*. Based on data from the Scottish Assessors' Association's Assessors' Portal. <https://www.nrscotland.gov.uk/statistics-and-data/statistics/statistics-by-theme/households/household-estimates/small-area-statistics-on-households-and-dwellings>

Owner occupation is the predominant tenure

- 2.17 The majority (67%) of dwellings in South Ayrshire are in owner-occupation.
- 2.18 The next most common housing tenure is the social rented sector, representing 19% of dwellings (made up of Council housing at 15% of all dwellings and RSL housing at 4%), while the Private Rented Sector (PRS) makes a small but valuable contribution to meeting housing needs in South Ayrshire, accounting for more than 11% of all dwellings.
- 2.19 Almost 2,000 privately-owned properties were estimated to be vacant or used as Second Homes¹⁵.

Under-occupancy is common, particularly amongst older households

- 2.20 About 72% of South Ayrshire's households were defined as under-occupying, meaning their dwelling has 1 or more rooms in addition to the rooms they would require to meet their basic needs. Almost half of South Ayrshire's households were estimated to be under-occupying by two or more rooms¹⁶.
- 2.21 Under-occupancy is most common in owner-occupation, with the issue being far less prevalent in the social rented sector. In addition, older households were more likely to be under-occupying than families¹⁷.
- 2.22 Under-occupancy is not necessarily a negative influence on the housing market, as many households will choose to live in a home that is bigger than their basic needs. Under-occupancy becomes an issue where demand for larger properties greatly exceeds supply.

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

- 2.23 Overcrowding is the opposite of under-occupancy, and refers to occasions where households are living in accommodation that has too few rooms to meet their basic requirements.
- 2.24 It is estimated that 6% of households in South Ayrshire are overcrowded¹⁸, affecting all tenures, but most common in the social rented sector¹⁹.

Small number of concealed households

- 2.25 A related issue to overcrowding is that of 'concealed households', where two or more households are living together in a single dwelling. This can often result in overcrowding.
- 2.26 384 households in South Ayrshire were estimated to be concealed. While this can affect families of all ages, the majority of these in South Ayrshire (61%) had a

¹⁵ Scottish Government, *Housing Statistics for Scotland, Stock by tenure 2018*, <https://www2.gov.scot/Topics/Statistics/Browse/Housing-Regeneration/HSfS/KeyInfoTables>

¹⁶ Scotland's Census 2011, Occupancy rating per room

¹⁷ SHCS Local Authority Analysis Tables 2016-2018 Under-occupied

¹⁸ Scotland's Census 2011 occupancy rating per room

¹⁹ SHCS Local Authority Analysis Tables - % of dwellings which are overcrowded

Family Reference Person (FRP) under the age of 35²⁰, as such this issue has a disproportionate impact on younger households.

The Housing Market

House prices steady but still affordability issues

- 2.27 South Ayrshire's average residential property price was £156,394²¹. This compares to a Scottish average of £182,357.
- 2.28 Prior to the housing market crash of 2007/08, South Ayrshire's average house prices were higher than for Scotland as a whole. Since 2009/10, however, the opposite has been true, and the years since 2016/17 have seen increasing divergence between the South Ayrshire and the Scottish average.
- 2.29 Growth in the value of house sales in South Ayrshire during the period 2010/11 to 2019/20 was around 0.2% per annum. The new build sector has seen greater growth during this time, again increasing by around 5% per year since 2010/11, although this has slowed to some extent in recent years²².
- 2.30 Affordability can be an issue in accessing owner-occupation and given the prevalence of this tenure in South Ayrshire this can make it difficult for some households to find suitable housing.
- 2.31 More than a third of households (36%) would not be able to afford a property at the lower quartile sale price (£86,000), while 57% of households would not be able to afford a property at the median sale price (£135,000)²³.
- 2.32 In addition, recent months have seen a reduction in the number of high loan-to-value mortgage products being offered by banks²⁴, resulting in additional barriers for low income households in accessing this important tenure.

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

- 2.33 The Private Rented Sector (PRS) makes a valued contribution to South Ayrshire's housing market, making up an estimated 11-12% of dwellings locally. The sector offers several benefits to tenants, and new national regulations have further improved its security and the quality of services offered.
- 2.34 The last ten years have seen relatively limited change in average rents in Ayrshire – a 1% increase for two bedroom properties compared to the Scottish average of 24%²⁵.

²⁰ Scotland's Census DC1110SC

²¹ Registers of Scotland *Property Market Report 2019/20*. Table 3: Average residential property price by local authority, Scotland, 2003-04 to 2019-20, financial year data. <https://www.ros.gov.uk/data-and-statistics/house-price-statistics>. Excludes sales under £20,000 and over £1m.

²² Registers of Scotland *Property Market Report 2019/20*. Table 3: Average residential property price by local authority, Scotland, 2003-04 to 2019-20, financial year data and Table 15: Average residential property price for new builds by local authority, Scotland, 2003-04 to 2019-20, financial year data

²³ Centre for Housing Market Analysis *HNDA Datapack 2020*.

²⁴ Scottish Government *Scottish Housing Market Review, October – December 2020*

²⁵ Scottish Government Private Renting Statistics, 2010 to 2020

- 2.35 Nonetheless, some households still find it more difficult to access housing in the PRS than others. Barriers to entry exist in the sector, including credit checks and the need to put down a deposit, while affordability can also be an issue for some.
- 2.36 About a third of households would not be able to affordably access a two bedroom PRS property at the lower quartile rent level (£425 per month), while almost half of all households (47%) would not be able to afford a three bedroom PRS property at the median rent (£550 per month)²⁶.
- 2.37 Furthermore, for households claiming benefits, other barriers to entry can exist, including landlord preferences, as well as restrictions on the amount of rental costs paid to single people under the age of 35.

Social renting meets many needs, but demand exceeds supply

- 2.38 There are more than 10,500 properties provided as social housing in South Ayrshire. The majority of these are provided by South Ayrshire Council (more than 8,000 units), while the remainder are provided by several local and national housing associations, sometimes referred to as Registered Social Landlords (RSLs)²⁷.
- 2.39 Demand for social housing is high, with recent figures showing more than 3,000 people on the Council's housing list²⁸.
- 2.40 At the same time, supply is relatively limited with an average of 770 Council properties becoming available in the five years to 2019/20²⁹ and between 140 and 200 lets per year from the two largest RSLs³⁰.
- 2.41 In terms of South Ayrshire Council's housing stock, there were estimated to be 4 applicants for every let in 2019/20. Most demand is for one and two bedroom properties, and this also represents the majority of the Council's stock.
- 2.42 3 bedroom properties accounted for around a quarter of the Council's housing stock, yet only 10% of all applicants were looking for this size of accommodation³¹. This suggests something of a mismatch between demand and supply and supports the trends towards smaller household sizes shown earlier.

²⁶ Scottish Government *Private Renting Statistics, 2010 to 2020*, Centre for Housing Market Analysis *HNDA Datapack 2020*.

²⁷ Scottish Housing Regulator, *Stock by Provision Type and LA Area, 2019*. Data provided as at 31 March 2019. Issued by Scotland's Housing Network, 6/11/19.

²⁸ South Ayrshire Council, Number of current applications Northgate Report, as at 11 August 2020.

²⁹ Northgate housing system reports used to inform South Ayrshire Council Annual Return on the Charter (Indicator C7), 2015/16 to 2019/20.

³⁰ Data provided by Ayrshire Housing and West of Scotland for re-lets annually between 2015/16 – 2019/20

³¹ South Ayrshire Council, Number of current applications Northgate Report, as at 11 August 2020, compared to average lets 2015/16 to 2019/20. (*) denotes average of less than 1 let per year, (-) denotes no relets during this time period.

Rural housing needs

- 2.43 An estimated 4% of our population live in an area which meets the Scottish Government’s definition of “remote rural”³², while a further 15% of our population live in an area which meets the Scottish Government’s definition of “accessible rural”³³
- 2.44 A recent study of Rural Housing Needs³⁴ was carried out to inform the HNDA and planning for the Strategic Housing Investment Plan (SHIP).
- 2.45 The study found that housing challenges often varied from those in urban areas, and particularly the prevalence of hidden demand for housing.
- 2.46 A high proportion of those who responded to our survey, for instance, noted a need for additional social housing in rural areas (89%), yet a similarly high proportion were not themselves on a social housing waiting list (83%).
- 2.47 High proportions of respondents favoured a house or a bungalow (82%), while more than half of all Council stock is made up of flatted dwellings.
- 2.48 Qualitative responses to consultation on social media highlighted the need for more ‘family homes’, which, given the trend towards more but smaller households, suggests that there may be a number of larger properties being under occupied. Consequently, developing smaller, amenity style accommodation aimed at older people may free up family accommodation and encourage younger families to choose to settle in (or remain) rural areas.
- 2.49 As South Ayrshire is a single Housing Market Area (HMA), our Housing Supply Target (HST) will ensure adequate land supply for South Ayrshire as a whole.
- 2.50 A number of rural developments are currently planned in our Strategic Housing Investment Plan (SHIP), and the Council will ensure rural housing needs are met by working with our RSL and private sector partners to identify further opportunities to develop appropriate accommodation to meet rural housing needs in the years to come.

Meeting particular needs

Housing for people with physical disabilities

- 2.51 7.2% of South Ayrshire’s population has a physical disability, compared with 6.7% of the population of Scotland³⁵. The same source estimates that the physical activities of 11,870 people in South Ayrshire are limited ‘a lot’ by their disability, while a further 12,671 people are estimated to have their physical activities are limited ‘a little’³⁶.

³² Defined as “Settlements of less than 3,000 and with a drive time of over 30 minutes to a settlement of 10,000 people or more”

³³ Defined as “Settlements of less than 3,000 and with a drive time of 30 minutes to a settlement of 10,000 people or more”

³⁴ Report on Rural Housing Needs Study, Members Bulletin, May 2019.

³⁵ Scottish Census 2011 <https://www.scotlandscensus.gov.uk/ods-analyser/jsf/tableView/tableView.xhtml>

³⁶ Scottish Census 2011 <https://www.scotlandscensus.gov.uk/ods-web/area.html>

- 2.52 There are an estimated 1,810 wheelchair user households in South Ayrshire³⁷. In the context of an ageing population, it is anticipated that the proportion of our population requiring accessible or adapted housing will increase over the lifetime of the HNDA.
- 2.53 To address these needs, new build social housing properties are designed to meet the Lifetime Homes standard, making them adaptable by design, with the aim of creating and encouraging better living environments for everyone.
- 2.54 Despite this, anybody at some stage in their life may need additional support to maintain their independence, particularly as they become older or where particular needs develop or become more pronounced. In these instances, we would seek to work with other agencies to consider the options open to the person, including delivering adaptations to support independent living or finding alternative accommodation where appropriate.
- 2.55 Demand for Council-owned ground level accommodation is high, with around 140 lets per year and 4 applicants to every let. Demand is particularly pronounced for two bedroom properties³⁸.
- 2.56 RSLs also contribute to meeting this demand by providing specialist housing options and developing new housing to meet Lifetime Homes/Housing for Varying Needs standards³⁹.
- 2.57 In terms of net existing need, we have estimated that there are currently about 280 households who require ground level or wheelchair accessible accommodation whose needs will not be met by in situ solutions⁴⁰.
- 2.58 We estimate that this figure would rise to about 332 households by 2028 if no new properties were developed to meet this need.

Non-permanent and interim accommodation

- 2.59 While South Ayrshire Council's focus is on providing settled accommodation in the community with appropriate support where required, there are instances where it is more appropriate to provide temporary or interim accommodation until a suitable long-term option is found.

Temporary accommodation for homeless households

- 2.60 One such example is temporary accommodation for people experiencing homelessness. South Ayrshire Council received 845 applications for assistance under homelessness legislation in 2019/20⁴¹.

³⁷ Adapted from Horizon Housing *Still Minding the Step? A new estimation of the housing needs of wheelchair users in Scotland*. <https://www.horizonhousing.org/media/1522/still-minding-the-step-full-report.pdf>

³⁸ Northgate housing system reports used to inform South Ayrshire Council Annual Return on the Charter (Indicator C7), 2015/16 to 2019/20.

³⁹ Annual Return on the Charter information provided by Ayrshire Housing, West of Scotland, Hanover and Link. Information sought from Trust, Blackwood, ANCHO.

⁴⁰ See Appendix 1 for calculation.

⁴¹ Scottish Government *Annual Report for South Ayrshire (HL1), 2019/20*

- 2.61 The Council is required to provide temporary accommodation where we believe the person to be homeless. To achieve this, we utilise accommodation from a variety of sources, including from the Council's own stock, from RSLs, and through arrangements with private landlords. At 31 March 2020, 232 units of stock from these sources were provided as temporary accommodation.
- 2.62 It is difficult to predict future trends in homelessness, however our approach over the years has been to ensure a flexible supply of temporary accommodation is available to meet needs.
- 2.63 In implementing its Rapid Rehousing Transition Plan, the Council is seeking to reduce the length of time people spend in temporary accommodation. In order to achieve this, a number of steps are being taken including the continued roll-out of Housing First to 50 clients by 2024, developing a Social Lettings Agency to support 80 households to access the PRS and exploring options to meet the needs of the 1% of homeless households who would be better served by residential supported accommodation.
- 2.64 If successful it is hoped that these measures would result in a reduction in need for temporary accommodation.

Young people leaving care

- 2.65 Between 1 August 2019 and 31 July 2020, 29 young people over the age of 16 left care in South Ayrshire⁴².
- 2.66 The Council's focus is on providing this group of young people with a range of good quality housing options backed by appropriate support to best meet their individual needs.
- 2.67 While the needs of many care leavers can be met by the provision of good quality accommodation with minimal support, other young people have more significant support requirements, needing a greater degree of support in their transition to interdependence.
- 2.68 South Ayrshire Council currently provides several interim options focussed on supporting this group, including 8 units of supported accommodation, Starter Flats with support in the community, and independent flats within our Children's houses⁴³.
- 2.69 Going forward, there is a recognised need to continue to develop good quality options for young people leaving care, learning from local and national best practice and listening to what young people themselves want. While it is very difficult to

⁴² Scottish Government *Children's Social Work Statistics, 2019/20* - Table 3.4: Percentage of care leavers over 16 years old with a pathway plan and a pathway co-ordinator, by local authority, 2019-20. <https://www.gov.scot/publications/childrens-social-work-statistics-2019-20/pages/9/>

⁴³ A 'Children's house' is a safe and homely environment, staffed by trained residential workers providing residential care for children and young people. South Ayrshire Council has 2 Children's houses. Sundrum in Coylton – accommodating a maximum of 5 children and young people up to the age of 18 years, and Cunningham Place in Ayr – accommodating a maximum of 6 young people between 12 years to 18 years.

accurately say how many young people will leave care over the age of 16 in the future, we believe this level of need is likely to be sustained in the years to come.

2.70 It is estimated that an additional 12 units of specialist accommodation with support would be required to meet the anticipated short-term needs of young people leaving care⁴⁴, while other needs can be met through mainstream housing with appropriate support.

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

Women fleeing violence

2.72 In 2018/19, South Ayrshire saw 95 reported domestic abuse incidents per 10,000 population⁴⁵. A relatively high proportion of households applying as homeless cite domestic abuse as the technical reason for homelessness on their application – 133 households in 2019/20, representing about 16% of cases⁴⁶.

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

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

People fleeing conflict

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

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

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

⁴⁴ Discussion as part of Improving Housing Outcomes for Young Care Leavers group, December 2020 – informed by the report South Ayrshire Health and Social Care Partnership *Improving Outcomes for Young People Leaving Care 2019-2024*.

⁴⁵ Scottish Government, Domestic Abuse Statistics, Table 5: Rate of incidents of domestic abuse recorded by the police per 10,000 population³, by local authority, 2009-10 to 2018-19

⁴⁶ Scottish Government *Annual Report for South Ayrshire (HL1), 2019/20*

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

Supported housing provision

Care homes

- 2.78 Care home provision in South Ayrshire is delivered by private sector providers, voluntary organisations and the local authority. Provision meets a range of needs and care home residents are either Long Stay, Short Stay, or Respite.
- 2.79 The total number of care homes has reduced slightly in South Ayrshire in the last ten years, from 32 care homes in 2007 to 30 care homes in 2017. During the same period, the number of care home places in South Ayrshire has increased, from 980 in 2007 to 1,197 places in 2017⁴⁷.
- 2.80 South Ayrshire differs from Scotland as a whole in that the general national trend has been for fewer adults to reside in care homes, with a reduction of about 5% in the ten years to 2017. In South Ayrshire, this same period saw a general upward trend – an 11% increase from 948 residents in 2007 to 1,056 residents in 2017⁴⁸. This is a result of the particular demographic trends within South Ayrshire rather than the HSCP’s approach to commissioning and designing services.
- 2.81 As at 2018, there were approximately 95 care home places per 1,000 people over the age of 75. For this level of provision to be maintained in the context of an increasing population in this age group and without significant service transformation, an additional 328 care home places would theoretically be required by 2028.
- 2.82 The Health and Social Care Partnership’s LIST team took an alternative approach to reviewing this issue, and used figures of actual residence in Care Homes to estimate what need for care home places will look like in 2029/30.
- 2.83 This research estimated that at least 1,248 spaces would be required by 2028/29. As care homes in South Ayrshire were not at capacity in 2018, this would mean an increase of 37 spaces from the 1,211 spaces recorded in the 2018 care home census.
- 2.84 Consideration should be given to whether increasing the volume of care home spaces is the most appropriate response in the broad national context (e.g. ‘shifting the balance of care’) set out in various recent policy documents⁴⁹, as well as evidence of reducing occupancy rates locally⁵⁰.

⁴⁷ NHS Information Services Division (2018) *Care Home Census for Adults in Scotland, 2007-2017 Data Tables* <https://www.isdscotland.org/Health-Topics/Health-and-Social-Community-Care/Publications/2018-09-11/2018-09-11-CHCensus-Report.pdf>

⁴⁸ As above

⁴⁹ See for instance Scottish Government (2018) *Age, Home and Community – The Next Phase* <https://www.gov.scot/publications/age-home-community-next-phase/pages/1/>

⁵⁰ NHS Information Services Division (2018) *Care Home Census for Adults in Scotland, 2007-2017 Data Tables* <https://www.isdscotland.org/Health-Topics/Health-and-Social-Community-Care/Publications/2018-09-11/2018-09-11-CHCensus-Report.pdf>

2.85 The Council and our partners should work together to set out appropriate strategies to meet this need going forward, while supporting the principles of ‘right advice, right home, right support’⁵¹.

Sheltered housing

2.86 There are 743 units of sheltered and very sheltered accommodation in South Ayrshire, provided by the local authority and RSL partners⁵².

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

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

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

Housing with care

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

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

Long-term supported accommodation

2.92 South Ayrshire Council’s Rapid Rehousing Transition Plan estimated that about 1% of households applying for assistance under homelessness legislation would be best served by a longer-term supported accommodation model offering ‘highly specialist provision within small, shared, supported and trauma informed environments if mainstream housing, including Housing First, is not possible or preferable’⁵³.

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

⁵¹ Scottish Government (2018) *Age, Home and Community – The Next Phase*

⁵² Scottish Housing Regulator (2019) *All stock landlords dataset by provision type and local authority area, as at 31 March 2019*

⁵³ Scottish Government *Rapid Rehousing Transition Plans: Guidance for local authorities and partners*.

Care and support for independent living at home

- 2.94 In addition to the accommodation models described above, many households and individuals require some form of support delivered in their own home, for example, a key worker or warden, with additional support from a community psychiatric nurse, or general nurse, social worker, physiotherapist, care assistant, or housing support officer among others.
- 2.95 There are a wide range of relevant care and support services available across South Ayrshire, to enable residents to live independently in their own, primarily mainstream, home.
- 2.96 This can include general housing support, telehealth and telecare, and home care.
- 2.97 The most recent information available notes that 2,650 households in South Ayrshire had Community Alarms and/or Telecare systems fitted in their home⁵⁴, while 1,330 people aged 65+ were receiving care at home and free personal care⁵⁵.
- 2.98 With regard to people with learning disabilities, 470 adults with learning disabilities were known to South Ayrshire Council in 2019⁵⁶, the majority of whom live in mainstream housing with support⁵⁷.
- 2.99 South Ayrshire IJB's Strategic Plan 2021-2031 sets out a commitment to self-directed support as a mechanism for people to have more choice and control in their lives as well as highlighting our intention to work together to identify housing need and to develop Social Housing specifically for people with Learning Disabilities. 27 properties are currently being developed by an RSL partner to meet the identified specific needs of this population.
- 2.100 SAC and the HSCP have also set out a commitment in the IJB Strategic Plan and Housing Contribution Statement to work in partnership in the years to come to identify opportunities to meet similar specific needs as these arise.

Locational and land needs

Gypsy/Travellers

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

⁵⁴ Scottish Government *Social Care Services Scotland*, 2017
<https://www2.gov.scot/Topics/Statistics/Browse/Health/Data/HomeCare/SocialCareDataSets2017>

⁵⁵ Scottish Government *Social Care Services Scotland*, 2017
<https://www2.gov.scot/Topics/Statistics/Browse/Health/Data/HomeCare/SocialCareDataSets2017>

⁵⁶ Scottish Commission for Learning Disability *Learning Disability Statistics Scotland* 2019.
<https://www.sclid.org.uk/wp-content/uploads/2019/12/Learning-Disability-Statistics-Scotland-2019.pdf>

⁵⁷ Scottish Commission for Learning Disability, *Learning Disability Statistics Scotland 2019*

- 2.102 Scotland's Census 2011 indicated there were 98 households where the household reference person indicated that they were 'White: Gypsy/Traveller' in South Ayrshire⁵⁸.
- 2.103 Evidence shows that the majority of households where a member identifies as belonging to the Gypsy/Traveller community are living in mainstream settled accommodation.
- 2.104 As such, we believe most needs of the Gypsy/Traveller community can be met from within existing projections of need for housing in the area.
- 2.105 In terms of specialist provision, 7 properties were built in 2019, with the Council working closely in partnership with the community. One property is currently vacant. This unit was built to amenity space standards to meet a specific housing need that has subsequently been met elsewhere, and it is our intention to convert this property into two accommodation units, giving a total of 8 units to meet the needs of this community.
- 2.106 At the present time we believe there to be no additional housing need for permanent accommodation for Gypsy/Travellers at this time, given that our specialist accommodation for this group both has the capacity to meet current and future needs, and is not currently at capacity. This will be kept under review during the lifetime of the HNDA.
- 2.107 Thinking about the need for transit sites or 'negotiated stopping', this can be evidenced by the continuing number of unauthorised encampments in South Ayrshire. While this has traditionally been less common in South Ayrshire than in other parts of Scotland⁵⁹, it still suggests unmet need and the last year has seen a substantial increase in the volume of unauthorised encampments in South Ayrshire⁶⁰.
- 2.108 Evidence coupled with officer knowledge suggests a need for up to 6 pitches to meet the needs of this population. A Member/Officer Working Group is currently reviewing options in terms of meeting this need.

Travelling Show People

- 2.109 Travelling Show People are a distinct community from Gypsy/Travellers, are not a minority ethnic group and do not seek this status.
- 2.110 Relatively recent contact between members of the Showman's Guild and the Council suggests that this group are not currently seeking sites to live on in South Ayrshire, but contact will be made with the Showman's Guild – Scottish Section as part of this consultation process to ensure this is accurate.

⁵⁸ 2011 Census Table KS201SC - Ethnic group <http://scotlandscensus.gov.uk/census-results>

⁵⁹ Scottish Government *Gypsy Traveller sites in Scotland, 2018* <https://www.gov.scot/publications/gypsy-traveller-sites-scotland>. *Data not available for LA ** Data on individual encampment locations not available

⁶⁰ Year-to-date data presented at Member Officer Working Group, 23 April 2021. 34 unauthorised encampments compared to average of 9 per year to 2019.

3. Estimating future need and demand (Summary)

3.1 In carrying out the HNDA, one of the most important elements is projecting a range of housing estimates into the future across the various tenures (social housing, owner-occupation, the Private Rented Sector and Mid-Market/Below Market Rent).

3.2 This is to help the Council and our partners make medium and long-term decisions about housing in the area.

3.3 To help us to calculate these estimates, the Scottish Government has developed a computer program called the 'HNDA Tool' for use by local authorities.

3.4 Work on the HNDA is led by a group called the Housing Market Partnership (HMP), involving a range of partners, including representatives from Planning, Housing, Economic Development, the HSCP and Performance.

3.5 It is for the HMP to decide which 'scenarios' are most likely to occur over the lifetime of the HNDA based on the information we have gathered. Consultation on these scenarios has also taken place with a Housing Supply Sub-Group, made up of other social housing providers, Homes for Scotland and private developers.

3.6 The agreed scenarios are input into the HNDA Tool and have an impact on the Housing Estimates produced. The following scenarios were selected based on data available and discussions about likely future directions of travel:

	Demographic	Income Growth	Income Distribution	House price	Rental price
Scenario 1	Principal Projection	No Real Terms Growth	No change	Moderately low	Moderately low
Scenario 2	High Migration	No Real Terms Growth	No change	Moderately low	Moderately low
Scenario 3	Principal Projection	No Real Terms Growth	No change	Moderately low	Low
Scenario 4	High Migration	No Real Terms Growth	No change	Moderately low	Low

3.7 Using these scenarios, the HNDA estimates that there is a need for between 191 and 210 new housing units per year over the next five years, comprising:

- Between 72 and 79 units per year for owner-occupation
- Between 62 and 69 units per year for private let
- Between 50 and 55 units per year for social rent
- Between 6 and 7 units per year for mid-market rent

3.8 Across the projection period to 2040, this would mean a need for between 1,536 and 1,762⁶¹ units of new housing, comprising:

- Between 594 and 683 units for owner-occupation
- Between 503 and 593 units for private let
- Between 388 and 444 units for social rent
- Between 49 and 58 units for mid-market rent

3.9 These Housing Estimates are only the starting point of discussions that will result in the production of the Housing Supply Target in the Local Housing Strategy. They are a mathematical calculation based on a set methodology, and don't factor in demolitions, anticipated specific needs (such as accommodation provided under the Global Resettlement Programme) or the various programmes the Council and our partners intend to take forward to support our population, including the Ayrshire Growth Deal. These issues are considered in full when setting the Housing Supply Target.

⁶¹ Please note, the use of rounding when displaying the Housing Estimate figures results in small discrepancies between the individual units required and totals, as well as totals compared to the Cumulative Total At End of Projection Period figures. Full data is available in the "Estimating Future Housing Need and Demand" chapter and on the HNDA website.