

GLASGOW AND THE CLYDE VALLEY 2006 STRUCTURE PLAN ALTERATION

THE TWENTY YEAR DEVELOPMENT VISION

TECHNICAL REPORT

TR 1/06

Review of Supply and Demand for Housing

April 2006

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1.0 Introduction

- 1.1 The Glasgow and Clyde Valley 2006 Structure Plan Alteration (2006 Plan) provides an assessment of housing land requirements based on comparisons of projected housing demand and housing stock. The purpose of this Technical Report is to describe the methodology in detail and to present the results of each stage of the projection process.
- 1.2 The assessment of the requirement for additional housing land covers two distinct time periods – up to 2011 and 2011 to 2018. This will ensure that, in accordance with Scottish Planning Policy 3 (Planning for Housing) and Planning Advice Note 38 (Housing Land),
 - (a) a 12-year housing land requirement is identified (2006-18), and
 - (b) there is a minimum 5-year effective housing supply (2006-11).
- 1.3 Section 2 sets out the position on population, households, tenure and stock at both the original 2002 base date and the 2004 update.
- 1.4 The estimates of housing demand are based on a set of population, household and tenure projections for 2011 and 2018, the final outcome of which are separate household projections for the private and social rented sectors. The section on tenure explains the revised methodology that has been adopted, including the new split between the private and social rented sectors. The approved 2000 Structure Plan focussed exclusively on the owner-occupied sector, but this Alteration also considers the social rented sector in Section 10.
- 1.5 For the private sector, the geographical framework for the comparison of supply and demand is the Housing Market Area (HMA) system that was developed for the 2000 Structure Plan (2000 Plan). This framework of HMAs has been reviewed using more recent data on house-buying moves, the outcome of which is presented in Appendix 1.
- 1.6 Data availability requires the population, household and tenure projections to be based, initially, on local authority areas. For the private sector the results are then disaggregated to fit the HMA system. Underlying the population (and therefore household and tenure) projections is an implicit set of assumptions on housing-led migration within the Structure Plan Area. If left in this form and without an allowance for demand that can be met over a wider area (mobile demand), the projections would simply perpetuate past trends in housing-led migration and be inconsistent with a planned approach.
- 1.7 For these reasons it is important to view the housing demand projections as a two-stage process, hereafter referred to as Parts A and B. The Technical Report is clearly delineated to reflect this division.

Part A

This part of the process is local authority-based and produces a set of household projections that incorporate assumptions based on past trends in housing-led migration. The relevant sections are 3 to 6 covering the population projections (Section 3), household projections (Section 4), household tenure projections (Section 5) and the process of disaggregating projected private sector households (Section 6). The projections in these sections must be considered as an intermediate stage in the process of estimating demand for the HMA framework. They should not be treated as demand figures for local authority areas as they do not allow for the effect of mobile demand. Section 7 sets out the private sector stock projections for each local authority and the HMA framework.

Part B

In this part of the process, the effect of past housing-led migration is removed from the private sector household projections by making the distinction between local and mobile demand (Section 8). This process only applies to the Sub Market Areas in the wider conurbation HMA. The final stage (Section 9) compares projected supply and demand within the HMA framework.

- 1.8 The General Register Office for Scotland (GROS) published 2004-base population projections for local authorities in December 2005. The latest available household projections, published by the Scottish Executive in April 2004, are the 2002-base projections, based on the earlier 2002-base population projections. In order to assist comparisons with 2006 Plan projections, the Structure Plan projection model has been used to derive household projections from the latest GROS 2004-base population projections. Comparisons between these projections and the population and household projections used in the 2006 Plan are made in, respectively, Sections 3 and 4.

2.0 Position at Base Date – 2002 and 2004 Update

2.1 The initial step in the projection process is to establish the base from which the various elements of the projection are made. There is a need to ensure consistency between data sets so that there is a clear understanding of the relationship between population, households and housing stock at the base date. 2002 was the base year used in the projections presented in the Consultative Draft Structure Plan 2005. Although most of the critical elements have been updated to 2004, it has not been possible to update every aspect of the projection process. While the updated trends in population, households and tenure have been incorporated into the projections, 2002 remains the base date for presenting change over the projection period. For this reason, this section describes the sources and methodology used to determine population, housing stock and households at both 2002 and 2004.

Population

- 2.2 The population base used is the 2002 Mid Year Estimates of Population (MYE) produced by GROS. This is considered to be the most accurate available and is consistent with the approach used in the approved 2000 Structure Plan.
- 2.3 Table 2.1 presents the 2002 and 2004 population figures split by population in households and in institutions. The institutional population figures shown are 2001 estimates based on rates provided by the Scottish Executive (SE), mainly derived from the 2001 Census. Table 2.2 shows the breakdown of the institutional population by age and sex in each local authority. Subtraction of the institutional population from the 2002 and 2004 MYEs gives the population in households.

Housing Stock

- 2.4 The housing stock data does not just provide a base for the stock projections. It is also a source for household estimates, which
- (a) are used to calibrate the household projections (see Section 4), and
 - (b) provide a base for the tenure projections (see Section 5).
- 2.5 The Council Tax Register, as the most reliable, up-to-date source, is used to derive a count of the total stock. However, it is not a reliable source for sub-dividing the stock by tenure, and information on social rented stock is provided directly by Communities Scotland and the eight local authorities in the Structure Plan Area.
- 2.6 Although the Census is not the most reliable source of tenure data, it is the only consistent source of private rented data for all local authorities. Private rented stock is, therefore, derived from the 2001 Census household estimates, but only after the category “households living rent-free” were reallocated to the correct tenure. In recent years additional data on ownership from the Council Tax Register has provided a more accurate count of private rented stock in Glasgow. This alternative source is used for the Glasgow estimates because of its continuing availability on an annual basis. The significant size of the private rented sector in Glasgow, relative to other local authorities, also makes it vital to have the most accurate measurement possible. Owner-occupied stock is then estimated by subtracting all the rented stock (public and private) from the total stock count.
- 2.7 The stock information relates to 31 March, but this has been rolled forward to 30 June to ensure consistency with the population base date. The stock at 30 June 2002 and 2004 is shown in the first column of Tables 2.3 and 2.4 respectively.

Households

- 2.8 Households are derived from total stock by subtracting vacant and other non-effective stock and adding an allowance for sharing households. The calculations are shown in Tables 2.3 (2002) and 2.4 (2004).
- 2.9 As with total stock, Communities Scotland and the local authorities provide information on vacancies in the social rented sector. The Post Census Vacant Property Survey (PCVPS) is the only source of information on vacancies in the private sector, although there is no split between private rented and owner-occupied. A private rented vacancy rate of 5% is assumed for each local authority, with the remaining vacancies identified in the PCVPS allocated to the owner-occupied sector.
- 2.10 The vacancy definition is Census-based and relates to vacancy at a point in time. This definition therefore encompasses very short-term vacancies associated with stock turnover, as well as the longer-term vacancies found particularly in difficult-to-let stock in the social rented sector. Overall, 3% of the total stock in the Structure Plan Area is estimated to be vacant in both 2002 and 2004.
- 2.11 Other non-effective stock comprises second homes and holiday homes. The only source is the 2001 Census and these figures have been used directly in the 2002 and 2004 calculations. Overall, these elements of non-effective stock are relatively insignificant, accounting for less than 0.2% of the total stock.
- 2.12 The final stage in deriving a stock-based household estimate is to add an allowance for those households that are currently sharing and are therefore 'hidden' in the stock count. The only source is the Census and sharing is measured by the difference between the number of household spaces in shared dwellings and the number of shared dwellings. This allowance has always been insignificant outwith the private rented sector in Glasgow, but even there the 2001 Census identified a very low figure. Analysis by Glasgow City Council suggests that the 2001 Census has underestimated the level of sharing and that the 1991 Census position represents a more realistic picture of the current level of sharing in the City. Therefore, 1991 data is used for Glasgow and 2001 data for the remaining local authorities.

Household Types

- 2.13 The household projections are based on a sub-division by household type. The position at 2004 is established by applying potential headship rate data for 2004 to the 2004 population (see Section 4). The results of this initial exercise are then adjusted to ensure that household totals equal the stock-based household estimates for 2004.

Table 2.1 - Population in Households and Institutions, 2002 and 2004

2002	Population in Households	Institutional Population	Total Population
East Dunbartonshire	104,895	2,415	107,310
East Renfrewshire	88,964	666	89,630
Glasgow City	564,876	12,474	577,350
Inverclyde	81,964	1,636	83,600
North Lanarkshire	318,593	2,757	321,350
Renfrewshire	169,650	2,290	171,940
South Lanarkshire	299,419	2,691	302,110
West Dunbartonshire	91,870	960	92,830
Structure Plan Area Total	1,720,231	25,889	1,746,120
2004	Population in Households	Institutional Population	Total Population
East Dunbartonshire	104,135	2,415	106,550
East Renfrewshire	88,944	666	89,610
Glasgow City	565,196	12,474	577,670
Inverclyde	80,794	1,636	82,430
North Lanarkshire	320,033	2,757	322,790
Renfrewshire	168,320	2,290	170,610
South Lanarkshire	302,719	2,691	305,410
West Dunbartonshire	91,010	960	91,970
Structure Plan Area Total	1,721,151	25,889	1,747,040

Table 2.2 - Institutional Population by Age, Sex and Local Authority, 2001

	Age											total
	0-14	15-24	25-29	30-34	35-44	45-54	55-59	60-64	65-74	75-84	85+	
MALES												
East Dunbartonshire	12	51	52	56	165	157	77	52	155	159	62	998
East Renfrewshire	0	4	2	2	4	7	0	2	10	64	43	138
Glasgow City	134	2,658	313	180	353	470	259	247	539	461	195	5809
Inverclyde	18	68	24	16	64	65	34	43	125	141	69	667
North Lanarkshire	29	64	64	63	99	99	48	55	202	283	114	1120
Renfrewshire	20	57	33	38	85	83	50	55	177	261	108	967
South Lanarkshire	39	99	80	79	155	108	34	33	75	171	131	1004
West Dunbartonshire	27	5	5	5	30	14	7	5	34	77	65	274
FEMALES												
East Dunbartonshire	22	29	34	36	136	116	70	84	181	382	327	1417
East Renfrewshire	5	4	0	5	13	11	5	10	43	184	248	528
Glasgow City	75	3,120	251	113	183	114	66	91	384	1,004	1,264	6665
Inverclyde	22	212	11	14	33	44	17	25	65	264	262	969
North Lanarkshire	29	29	15	15	29	50	18	52	218	622	560	1637
Renfrewshire	34	52	24	32	65	39	23	46	153	380	475	1323
South Lanarkshire	42	109	45	39	86	81	20	31	120	509	605	1687
West Dunbartonshire	15	27	12	3	25	25	7	14	64	186	308	686

Table 2.3 - Estimates of Stock, Vacancies and Households, 30 June 2002

Tenure	Total	Non-effective stock		Sharing	Households	Vacancy Rate (%)
	Stock	vacant (-)	other (-)	allowance (+)	(=)	
East Dunbartonshire						
Council	5,705	40	0	0	5,665	0.7
Scottish Homes	0	0	0	0	0	0.0
Housing Association	743	7	0	0	736	0.9
Private Rented	1,292	65	8	1	1,220	5.0
Owner-occupied	35,191	373	36	0	34,782	1.1
Total	42,931	485	44	1	42,403	1.1
East Renfrewshire						
Council	3,944	263	0	0	3,681	6.7
Scottish Homes	0	0	0	0	0	0.0
Housing Association	1,112	11	0	0	1,101	1.0
Private Rented	1,166	58	12	0	1,096	5.0
Owner-occupied	30,098	470	21	0	29,607	1.6
Total	36,320	802	33	0	35,485	2.2
Glasgow City						
Council (now GHA)	82,962	4,325	0	15	78,652	5.2
Scottish Homes	1,700	230	0	0	1,470	13.5
Housing Association	40,825	1,740	0	68	39,153	4.3
Private Rented	23,650	1,183	75	2,339	24,731	5.0
Owner-occupied	137,322	2,032	431	158	135,017	1.5
Total	286,459	9,510	506	2,580	279,023	3.3
Inverclyde						
Council	10,576	918	0	4	9,662	8.7
Scottish Homes	0	0	0	0	0	0.0
Housing Association	3,344	20	0	3	3,327	0.6
Private Rented	2,167	108	27	28	2,060	5.0
Owner-occupied	23,110	412	40	4	22,662	1.8
Total	39,197	1,458	67	39	37,711	3.7
North Lanarkshire						
Council	45,232	778	0	2	44,456	1.7
Scottish Homes	79	0	0	0	79	0.0
Housing Association	7,829	372	0	1	7,458	4.8
Private Rented	3,561	178	15	0	3,368	5.0
Owner-occupied	81,520	1,328	63	0	80,129	1.6
Total	138,221	2,656	78	3	135,490	1.9

Table 2.3 - Estimates of Stock, Vacancies and Households, 30 June 2002

Tenure	Total	Non-effective stock		Sharing	Households	Vacancy Rate
	Stock	vacant (-)	other (-)	allowance (+)	(=)	(%)
Renfrewshire						
Council	19,457	2,184	0	0	17,273	11.2
Scottish Homes	0	0	0	0	0	0.0
Housing Association	6,693	452	0	3	6,244	6.8
Private Rented	3,860	193	31	14	3,650	5.0
Owner-occupied	50,722	1,257	86	2	49,381	2.5
Total	80,732	4,086	117	19	76,548	5.1
South Lanarkshire						
Council	33,041	1,245	0	2	31,798	3.8
Scottish Homes	975	31	0	0	944	3.1
Housing Association	3,993	78	0	3	3,918	2.0
Private Rented	4,653	233	52	6	4,374	5.0
Owner-occupied	89,295	1,709	166	3	87,423	1.9
Total	131,957	3,296	218	14	128,457	2.5
West Dunbartonshire						
Council	13,715	1,306	0	4	12,413	9.5
Scottish Homes	0	0	0	0	0	0.0
Housing Association	5,746	195	0	1	5,552	3.4
Private Rented	1,247	62	8	0	1,177	5.0
Owner-occupied	22,995	344	59	2	22,594	1.5
Total	43,703	1,907	67	7	41,736	4.4
Structure Plan Area						
Council	214,632	11,059	0	27	203,600	5.2
Scottish Homes	2,754	261	0	0	2,493	9.5
Housing Association	70,285	2,875	0	79	67,489	4.1
Private Rented	41,596	2,080	228	2,388	41,676	5.0
Owner-occupied	470,253	7,925	902	169	461,595	1.7
Total	799,520	24,200	1,130	2,663	776,853	3.0

Table 2.4 - Estimates of Stock, Vacancies and Households, 30 June 2004

Tenure	Total	Non-effective stock		Sharing	Households	Vacancy Rate (%)
	Stock	vacant (-)	other (-)	allowance (+)	(=)	
East Dunbartonshire						
Council	4,894	43	0	0	4,851	0.9
Scottish Homes	0	0	0	0	0	0.0
Housing Association	900	9	0	0	891	1.0
Private Rented	1,292	65	8	1	1,220	5.0
Owner-occupied	36,081	381	36	0	35,664	1.1
Total	43,167	498	44	1	42,626	1.2
East Renfrewshire						
Council	3,654	319	0	0	3,335	8.7
Scottish Homes	0	0	0	0	0	0.0
Housing Association	969	27	0	0	942	2.8
Private Rented	1,166	58	12	0	1,096	5.0
Owner-occupied	30,834	477	21	0	30,336	1.5
Total	36,623	881	33	0	35,709	2.4
Glasgow City						
Council (now GHA)	77,862	5,078	0	15	72,799	6.5
Scottish Homes	757	17	0	0	740	2.3
Housing Association	42,326	1,951	0	68	40,443	4.6
Private Rented	26,993	1,350	75	2,339	27,907	5.0
Owner-occupied	141,564	2,075	431	158	139,216	1.5
Total	289,502	10,471	506	2,580	281,105	3.6
Inverclyde						
Council	9,710	1,056	0	4	8,658	10.9
Scottish Homes	0	0	0	0	0	0.0
Housing Association	3,389	111	0	3	3,281	3.3
Private Rented	2,167	108	27	28	2,060	5.0
Owner-occupied	24,108	422	40	4	23,650	1.8
Total	39,374	1,697	67	39	37,649	4.3
North Lanarkshire						
Council	41,996	664	0	2	41,334	1.6
Scottish Homes	11	0	0	0	11	0.0
Housing Association	8,120	155	0	1	7,966	1.9
Private Rented	3,561	178	15	0	3,368	5.0
Owner-occupied	87,318	1,386	63	0	85,869	1.6
Total	141,006	2,383	78	3	138,548	1.7

Table 2.4 - Estimates of Stock, Vacancies and Households, 30 June 2004

Tenure	Total	Non-effective stock		Sharing	Households	Vacancy Rate (%)
	Stock	vacant (-)	other (-)	allowance (+)	(=)	
Renfrewshire						
Council	16,633	1,368	0	0	15,265	8.2
Scottish Homes	0	0	0	0	0	0.0
Housing Association	6,635	245	0	3	6,393	3.7
Private Rented	3,860	193	31	14	3,650	5.0
Owner-occupied	53,475	1,284	86	2	52,107	2.4
Total	80,603	3,090	117	19	77,415	3.8
South Lanarkshire						
Council	30,005	1,137	0	2	28,870	3.8
Scottish Homes	116	5	0	0	111	3.9
Housing Association	5,185	89	0	3	5,099	1.7
Private Rented	4,653	233	52	6	4,374	5.0
Owner-occupied	95,482	1,771	166	3	93,548	1.9
Total	135,441	3,235	218	14	132,002	2.4
West Dunbartonshire						
Council	12,465	1,134	0	4	11,335	9.1
Scottish Homes	0	0	0	0	0	0.0
Housing Association	5,645	265	0	1	5,381	4.7
Private Rented	1,251	63	8	0	1,180	5.0
Owner-occupied	24,230	355	59	2	23,818	1.5
Total	43,591	1,817	67	7	41,714	4.2
Structure Plan Area Total						
Council	59,103	3,639	0	6	55,470	5.5
Scottish Homes	116	5	0	0	111	2.5
Housing Association	17,465	599	0	7	16,873	3.9
Private Rented	9,764	489	91	20	9,204	5.0
Owner-occupied	173,187	3,410	311	7	169,473	1.7
Total	259,635	8,142	402	40	251,131	3.0

PART A

3.0 Population Projections to 2011 and to 2018

- 3.1 The three factors that influence the population level are births, deaths and migration. Assumptions are made about each of these factors in order to project the population to 2011 and 2018.

Use of 2003 and 2004 Mid-Year Population Estimates

- 3.2 During the preparation of the projections for the 2006 Plan, the GROS 2003 and 2004 mid-year population estimates became available. These have been utilised by incorporating the estimated population changes for 2002-03 and 2003-04 due to births, deaths and net-migration (see Table 3.1).

GROS 2004-base Population Projections

- 3.3 On 20th December 2005 GROS published the 2004-base sub-national population projections. These were based on the national projections published by GROS and the Government Actuary's Department (GAD) in October 2005. Given their late availability, it has not been possible to incorporate the more up-to-date assumptions on fertility and mortality contained in these projections in the 2006 Plan projections.

Births and Deaths

- 3.4 Projected births and deaths are obtained by applying single year age-and sex-specific fertility and mortality rates to the population of each authority. The rates are Scotland-wide and require adjustment for variations in fertility and mortality between the authorities. This is done via correction factors, which are given in Table 3.2. These correction factors reflect the difference between actual births and deaths for each authority and the estimated births and deaths based on Scotland-wide fertility and mortality rates. The correction factors for fertility are those used by GROS in their 2002-base population projection. The correction factors for mortality (by sex and age band) are the result of a comparison of the number of actual deaths between 2001 and 2004 with projected deaths for that period. These ratios have been calibrated to the correction factors by sex used by GROS in their 2002-base population projections.
- 3.5 The fertility rate assumption, used by GROS in the 2002-base sub-national population projections, is also used in the 2006 Plan population projections. The GROS assumption is more consistent with recent data on the actual number of births than the "no change in fertility rates" assumption used in the 1996-base projections for the 2000 Plan.
- 3.6 The fertility rates in the GROS projections are based on assumptions about the average completed family size of successive generations of women. For the 1998-base projections GROS assumed a fertility rate of 1.75 children per woman. For the 2000-base, 2002-base and 2004-base projections GROS assume a considerably lower rate of 1.60 children per woman. Current fertility rates are below this level, and, as a result, the assumption implies a rise in the fertility rate over the projection period.
- 3.7 Recent estimates of the number of births in 2003 and 2004 show a small rise in comparison with 2002 figures, for both the Structure Plan Area and the rest of Scotland. Viewed against a consistent trend of falling numbers of births in the past decade, this development is sufficient reason to adopt the GROS fertility rate assumption for the present projection.
- 3.8 The projected numbers of deaths in the 2000 Plan projection have proved to be very close to the actual numbers in recent years. There is, therefore, no need to change the

methodology. The 2006 Plan projection uses the GAD assumption of an improvement in mortality rates also used in the GROS 2002-base sub-national projections.

Migration

Approach used in Consultative Draft Structure Plan

- 3.9 For the Consultative Draft, projected migration reflected the trend derived from migration estimates for the 1993-2003 period. These net migration estimates are from the National Health Service Central Register (NHSCR) provided by GROS. The net migration estimates by Local Authority area from GROS include international migration, whereas the NHSCR estimates of migration do not. Despite this drawback, it was decided, at the time, to use the NHSCR-based migration estimates for reasons set out in the following paragraph.
- 3.10 There is uncertainty with respect to the estimated annual rate of improvement in migration. One factor that creates uncertainty is the adjustment by GROS to the population estimates for Glasgow and other Structure Plan authorities as a result of the 2001 Census. The Census population estimates were lower than the GROS mid-year estimates for the previous years. To provide a consistent time-series, GROS revised downwards the mid year estimates of population for the inter-Censal years (1982-2000) and, by necessity, also the net migration estimates for those years. As a result of the 2001 Census, international out migration during the 1990s was considered to have been higher than previously estimated. Consequently, the sizeable discrepancy between previous mid-year estimates and the 2001 Census was corrected by GROS by adjusting migration for individual years, but particularly between 1991 and 2000. This process could have a significant impact on the estimated migration trend between 1991 and 2001. In addition, the disagreement between GROS and Glasgow City Council (GCC) regarding the population estimates for Glasgow created uncertainty with respect to the size of the migration adjustment to be applied. In view of the above, it was decided to use the NHSCR data, as these had not been affected by the 2001 Census adjustment.
- 3.11 A second factor affecting the uncertainty in the migration trend is the adjustment to the migration estimates for Glasgow City required to correct for the outflow of asylum seekers. Delays in the recording of moves of asylum seekers and refugees out of Glasgow will have an impact on the scale of the positive adjustments required for the 2000-2004 period, and, as a result, on the rate of improvement in migration. The uncertainty about the scale and timing of the adjustments led to the use of a cautious approach to the rate of improvement in migration.
- 3.12 An additional consideration was the relationship between the assumptions used in this projection and those in the GROS 2002-base sub-national population projections. The GROS migration assumptions were based on the average net migration values in the last five years and did not take explicit account of any trends over time. Furthermore, consideration was also given to the wider economic and policy contexts that should be used in determining the most appropriate planning assumption in terms of migration. This was set out in the Future for Glasgow and the Clyde Valley Discussion Document (December 2004) (BR 1/05). This indicates that it is government policy to try and promote a higher rate of economic development in the Structure Plan Area. An improving migration position, as used in the 2006 Plan projections, is consistent with this policy. Some responses to the Discussion document suggested that the migration assumptions used in the Consultative Draft Structure Plan were optimistic. However, it was considered that they represented a feasible rate of improvement in the economic competitiveness of the Glasgow and Clyde Valley area. The trend in the GROS total

migration estimates for 1993-03 shows a migration improvement rate of +527 per year. However, using the estimate derived from the NHSCR-data (+316 per year) was considered prudent in relation to the much less optimistic GROS projections. (Both of these improvement rates exclude the effect of asylum seekers in Glasgow, which are projected separately).

New Considerations.

- 3.13 Since the preparation of the Consultative Draft Structure Plan, there have been some developments that have been taken into account for the migration assumptions used in the Finalised Structure Plan:
- (a) An assessment of the economic case for the Sustained Growth Scenario in the Structure Plan Area has been undertaken by Regional Forecasts Ltd (RSL); (see paragraph 3.14 below)
 - (b) Glasgow City Council has agreed to use the GROS population estimates for operational purposes; (see paragraph 3.15 below)
 - (c) The publication by GROS of the 2004 mid-year estimates of population, together with the components of change for 2003-04 on 27th April 2005; (see paragraph 3.16 below)
 - (d) The publication by GROS of the 2004-base national population projections on 20th October 2005 and of the 2004-base sub-national population projections on 20th December 2005. (See paragraph 3.17 below)
- 3.14 An important conclusion in RSL's assessment of the economic case for the sustained growth scenario is that the Consultative Draft Structure Plan projection of a population about 50,000 above the GROS 2002-base projection for 2017 looks increasingly achievable. RSL's own "upper base" projection gives a population that is 47,000 above the GROS projection.
- 3.15 The agreement by Glasgow City Council to use the GROS population estimates for operational purposes has removed one of the major arguments against the use of the GROS total net migration estimates by Council area. This agreement has also had the effect of increasing estimated migration losses in the years pre 2001. As a result, the estimated annual rate of migration improvement increases from +527 to +604. Data on migration for the Structure Plan Area are available from 1981 onwards. Basing the linear trend on a longer timescale (1981-2003) results in an estimated migration improvement rate of +722 per year.
- 3.16 The estimated population change in 2003-04 shows a considerable increase in net in-migration into Scotland and the Structure Plan Area, from both the 'Rest of the UK' and 'Overseas'. Updating the 10-year base for estimating the trend in migration to 1994-2004 gives significantly higher rates of improvement in migration. Using GROS total net migration data, they increase from +604 to +1,169 per year. For NHSCR data they increase from +316 to +602 per year. This indicates that the 10-year base period method for estimating the trend in net migration can give highly variable results, depending on the base period selected. The estimated migration improvement rate based on a longer time period is less affected: the rate increases from +722 for 1981-2003 to +769 per year for 1981-2004.
- 3.17 The migration assumptions in the 2004-base projections published by GROS take into account the recent improvement in migration. GROS expects the net inflow to reduce from an estimated +3,236 in 2003-04 to +1,650 in 2004-05, to -50 in 2005-06, to -1,350 in 2006-07 and to -2,700 from mid-2007 onwards. The short-term assumptions reflect recent migration data and include an allowance for migrants from the EU A8 Accession

countries. GROS' longer-term assumption of a loss of 2,700 per year is an improvement on the assumed loss of 4,550 per year used in the 2002-base projections.

Approach used in 2006 Plan

- 3.18 GROS assumptions on migration for their latest projections reflect a view that the recent improvement in net migration is only a temporary phenomenon. It is, therefore, not considered appropriate to use the 2003-04 estimates as the basis for a substantial increase in the annual migration improvement rate to be used for the projection. Such an increase would also have to be justified in relation to assumptions on the economy and future employment levels. It should also be noted that uncertainty is greatest with respect to future international migration. For these reasons, and to provide continuity with the Consultative Draft assumptions, it has been decided to continue to base the migration trend on the NHSCR estimates of migration for the 2006 Plan. However, there is one change in the methodology: the trend in migration is now based on three-year moving averages and not on migration estimates for individual years. It makes the estimated trend more robust and less sensitive to the migration estimates for individual years. This gives an estimated migration improvement rate of +385 per year, about half the longer-term (1981-2004) rate of +769 per year.
- 3.19 Table 3.3 shows the NHSCR figures used for estimating the trend in migration. These are based on the 3-year moving average values for the period 1993-2003. The NHSCR estimates are based on Health Board areas only, and include Argyll and Clyde, Greater Glasgow and Lanarkshire Health Boards. As these figures include Argyll and Bute Council area, an adjustment is required. A moving average of GROS estimates for the period 1993-2003 show that Argyll and Bute had an annual net inflow of 294, with no trend value in the data. As a result, the trend in migration for the Structure Plan Area has been reduced by a constant of -294.
- 3.20 The estimated net international migration in 1998-2004, the second half of the twelve-year period, is close to zero. Accordingly, the use of NHSCR net migration data for estimating the trend in **total** migration does not require any further adjustment. Figure 3.1 shows the NHSCR-sourced net migration position for each year between 1992 and 2004 and the straight-line trend through that data (+385 per annum). Figure 3.2 compares that straight-line trend with the estimated **total** net migration for the same period, sourced from GROS.

Figure 3.1 - Comparison of Net Migration and Straight-Line Trend (NHSCR, excluding asylum seekers), 1992-2004

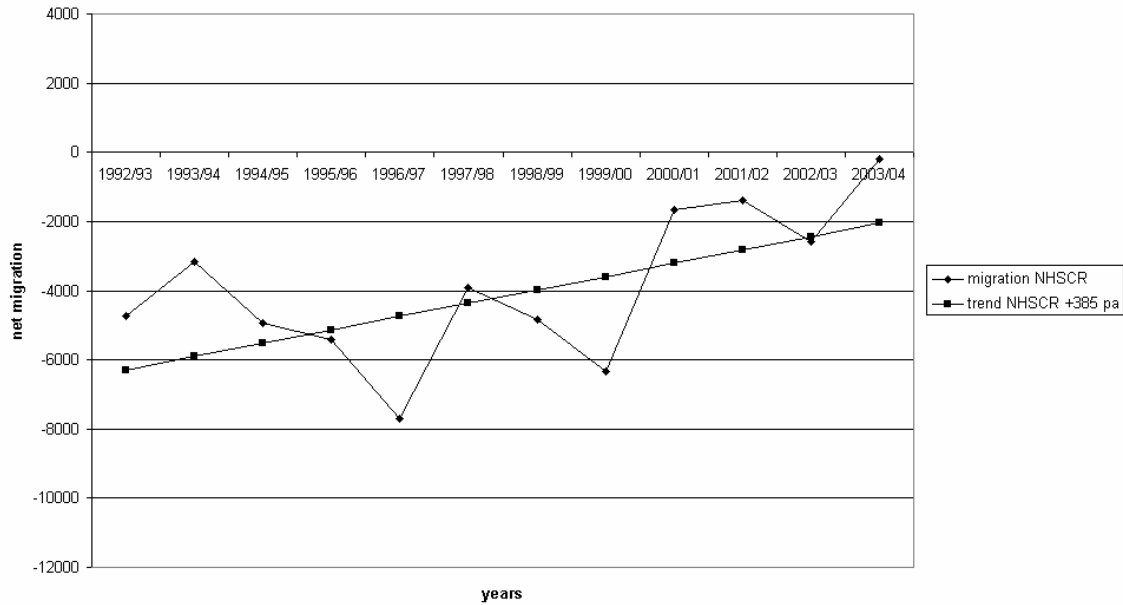
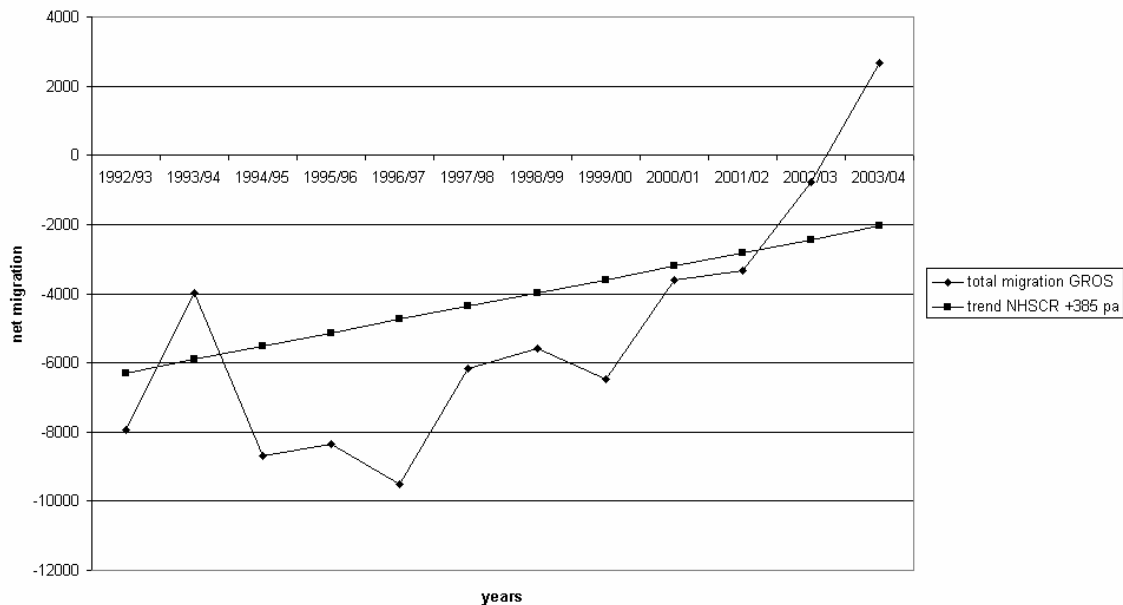


Figure 3.2 - Comparison of GROS Net Total Migration and NHSCR Straight-Line Trend (both excluding asylum seekers), 1992-2004



3.21 A further adjustment to the NHSCR estimates relates to the need to remove the impact of asylum seeker/refugee flows into and out of Glasgow City. GROS makes an adjustment for asylum seeker *inflow* to their estimates and assumes that asylum seeker/refugee *outflow* is included in migration statistics from the Community Health Index (CHI) and NHSCR. It is not possible, however, to estimate the size of the outflow from these data sources alone. However, an estimate of the outflow can be obtained by utilising information on asylum seeker inflow (from GROS) and on the change in the total number of asylum seekers in Glasgow City from the Council's Asylum Seeker Support Service. It must be realised, however, that a degree of uncertainty with respect to

estimated outflow remains. Similarly, there may be delays in the recording of outward moves on the CHI and NHSCR.

3.22 The current asylum seeker contract between GCC and the Home Office-National Asylum Support Service (NASS) has been extended until July 2006. As there has been a reduction in the inflow of asylum seekers to the UK, it appears likely that there will be a reduced need for accommodation under the dispersal scheme in the future. Because of the uncertainty about an extension of the contract beyond July 2006, the assumption is that there will be no asylum seekers arriving in Glasgow after that date. However, processing the applications for asylum seekers still resident at that date will require time, and this can be expected to result in a net outflow of refugees and asylum seekers for a number of years after that date. Prior to July 2006, the NASS contract will continue to have a positive impact on Glasgow's migration. The projected effect on Glasgow's migration has been estimated at:

2004/05	+600
2005/06	+600
2006/07	-2,000
2007/08	-1,400
2008/09	-400

3.23 The annual rate of improvement in migration in the Structure Plan Area is allocated to the eight local authorities on the basis of the 12-year average in net migration over the 1992-2004 period. In the years when the Structure Plan area as a whole is projected to have a net migration loss (2004/05-2008/09), the biggest improvement is applied to those local authority areas with the highest out-migration. This reflects Structure Plan policies focused on the regeneration of "areas of decline". In the years when the Structure Plan Area as a whole is projected to have a net migration gain (2009/10-2017/18), the improvement is applied to each authority on a pro-rata basis related to the population at 2002 (see Table 3.4).

3.24 The projections are based on the age/sex profile data for migrants from the GROS 2002-base sub-national population projections (based on 2001 Census data), but with adjustments for the sex ratio of migrants. Concerns about the sex ratio were raised in relation to the results of the GROS 2002-base projections, particularly for Glasgow City. These results show a considerable change in the projected natural change for Glasgow's population: from a loss of -1,299 in 2002/03 to a gain of +1,757 in 2017/18. This compares with a projected trend towards higher population losses due to natural change over that period in the other local authorities. An examination of the GROS age/sex profile data for migrants shows differences between the sex ratios used for the estimates of population change in recent years in comparison with those used in the 2002-base projections. Accordingly, for the 2006 Plan projections, the sex ratios of the migrant age/sex profiles have been corrected to ensure a closer balance for migrants aged under 50, taken as a whole. This correction brings the profiles more into line with the sex ratios estimated from recent population change.

Population Projection Results

3.25 The results of the projection for 2011 and 2018 are shown in Tables 3.5 and 3.6. The population for the Structure Plan Area is projected to go down from 1,746,120 in 2002 to 1,732,927 in 2011, a fall of more than 13,000. After that, an increase of just under 15,000 to 1,747,682 has been projected for the period 2011 to 2018. Table 3.5 gives a split by authority of the components of the projected population change. Table 3.6 gives a split on a year-by-year basis of these components for the Structure Plan Area as a

whole. It should be noted from the latter table that both the net migration loss and the population loss due to natural change show a steady improvement over time.

- 3.26 The projected populations for 2011 and 2018 are compared with the results of the 2002-base and the 2004-base projections of GROS in Table 3.7A and 3.7B respectively. Although the GROS 2002-base projections are significantly lower than the 2006 Plan projections, the GROS 2004-base projections are much closer. In fact, for 2011, the 2006 Plan projection is slightly lower (-1,834), although by 2018 it is significantly higher (+31,804). This is mainly due to the more optimistic migration assumption in the 2006 Plan projection.
- 3.27 The projected number of adults in the population provides a good indication of the projected number of households, and Tables 3.7A and 3.7B identify the split between adults and children in the respective population projections. This shows that the projected population for 2011 in the GROS 2004-base projection reflects an assumption of higher birth rates, and does not result in a higher projection of adult numbers. It is likely, therefore, that when GROS household projections are published in May 2006, they will be lower than the household projections contained in the 2006 Plan.

Table 3.1 - Population Change by Local Authority, 2002-2003 and 2003-2004

	Population 2002	Natural Change 2002- 2003	Net Migration 2002-2003	Total Change 2002- 2003	Population 2003
East Dunbartonshire	107,310	-94	-246	-340	106,970
East Renfrewshire	89,630	31	19	50	89,680
Glasgow City	577,350	-1,242	982	-260	577,090
Inverclyde	83,600	-255	-295	-550	83,050
North Lanarkshire	321,350	208	262	470	321,820
Renfrewshire	171,940	-349	-611	-960	170,980
South Lanarkshire	302,110	-258	1,158	900	303,010
West Dunbartonshire	92,830	-217	-293	-510	92,320
Structure Plan Area Total	1,746,120	-2,176	976	-1,200	1,744,920

	Population 2003	Natural Change 2003- 2004	Net Migration 2003-2004	Total Change 2003- 2004	Population 2004
East Dunbartonshire	106,970	-80	-340	-420	106,550
East Renfrewshire	89,680	-9	-61	-70	89,610
Glasgow City	577,090	-763	1,343	580	577,670
Inverclyde	83,050	-281	-339	-620	82,430
North Lanarkshire	321,820	449	521	970	322,790
Renfrewshire	170,980	-175	-195	-370	170,610
South Lanarkshire	303,010	-100	2,500	2,400	305,410
West Dunbartonshire	92,320	-157	-193	-350	91,970
Structure Plan Area Total	1,744,920	-1,116	3,236	2,120	1,747,040

Table 3.2 - Local Correction Factors for Fertility and Mortality

	Fertility All Births		Mortality age 0 to 64	Mortality age 65 to 74	Mortality age 75 plus
East Dunbartonshire	1.040	male	0.658	0.771	0.896
		female	0.745	0.724	0.912
East Renfrewshire	1.170	male	0.701	0.836	0.885
		female	0.731	0.666	0.866
Glasgow City	0.906	male	1.596	1.412	1.147
		female	1.424	1.287	1.086
Inverclyde	1.036	male	1.431	1.182	1.172
		female	1.168	1.183	1.081
North Lanarkshire	1.063	male	1.125	1.175	1.141
		female	1.147	1.147	1.076
Renfrewshire	1.074	male	1.115	1.094	1.102
		female	1.059	1.029	1.112
South Lanarkshire	1.033	male	0.920	0.970	1.076
		female	0.974	0.972	1.101
West Dunbartonshire	1.016	male	1.297	1.122	1.062
		female	1.224	1.124	1.091

Table 3.3 - Estimated Net Migration in the Structure Plan Area (based on NHSCR data), 1992 to 2004

	1992/93	1993/94	1994/95	1995/96	1996/97	1997/98	1998/99	1999/00	2000/01	2001/02	2002/03	2003/04
Argyll and Clyde HB area	129	310	-277	-1,290	-943	-660	-1,013	-1,171	-138	-264	-563	55
Greater Glasgow HB area	-4,142	-3,026	-4,324	-3,178	-6,236	-2,290	-3,091	-4,654	-2,694	-4,342	-4,686	-4,122
Lanarkshire HB area	-411	-157	-60	-663	-224	-684	-453	-224	339	959	1,311	2,422
Total	-4,424	-2,873	-4,661	-5,131	-7,403	-3,634	-4,557	-6,049	-2,493	-3,647	-3,938	-1,645
Argyll & Bute adjustment	-294	-294	-294	-294	-294	-294	-294	-294	-294	-294	-294	-294
Change in asylum seekers	0	0	0	0	0	0	0	0	4,372	704	961	-226
Estimated refugees staying	0	0	0	0	0	0	0	0	0	400	800	800
Asylum seeker adjustment	0	0	0	0	0	0	0	0	4,372	1,104	1,761	574
Estimated inflow	0	0	0	0	0	0	0	0	5,505	3,657	3,400	2,300
Asylum seeker adjustment	0	0	0	0	0	0	0	0	4,372	1,104	1,761	574
Estimated outflow	0	0	0	0	0	0	0	0	1,133	2,553	1,639	1,726
Estimated net migration (excluding asylum seekers)	-4,718	-3,167	-4,955	-5,425	-7,697	-3,928	-4,851	-6,343	-1,654	-1,388	-2,593	-213
Three-year moving average used to derive trend in migration		-4,280	-4,516	-6,026	-5,683	-5,492	-5,041	-4,283	-3,128	-1,878	-1,398	
Straight-Line Trend Value	-6,291	-5,906	-5,520	-5,135	-4,750	-4,365	-3,980	-3,595	-3,210	-2,825	-2,439	-2,054

Table 3.4 - Estimated and Projected Net Migration, 1992 to 2018

	1992/93	1993/94	1994/95	1995/96	1996/97	1997/98	1998/99	1999/00	2000/01	2001/02
East Dunbartonshire	-594	-7	66	-817	-104	-424	-482	-19	-385	-949
East Renfrewshire	220	-107	657	-227	308	195	86	413	264	150
Glasgow City	-4849	-3402	-7368	-3770	-7713	-2830	-2445	-4516	2695	-214
Inverclyde	-795	-376	-551	-1378	-421	-370	-363	-383	-240	-186
North Lanarkshire	-2012	-834	-870	-1433	-360	-862	-547	-901	-557	-97
Renfrewshire	-67	109	922	-72	-718	-578	-778	-545	-767	-668
South Lanarkshire	177	913	-547	-191	-447	-1047	-661	-170	197	14
West Dunbartonshire	-29	-277	-1002	-475	-61	-244	-380	-344	-453	-281
Structure Plan Area Total	-7949	-3981	-8693	-8363	-9516	-6160	-5570	-6465	754	-2231
	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12
East Dunbartonshire	-246	-340	-130	-105	-80	-55	-29	-5	18	42
East Renfrewshire	19	-61	160	160	160	160	160	180	200	219
Glasgow City	982	1343	-609	-374	-2740	-1906	-672	-145	-17	110
Inverclyde	-295	-339	-173	-139	-106	-72	-39	-21	-2	16
North Lanarkshire	262	521	-233	-188	-143	-98	-52	19	90	161
Renfrewshire	-611	-195	-120	-97	-74	-50	-27	11	49	87
South Lanarkshire	1158	2500	158	158	158	158	158	225	291	358
West Dunbartonshire	-293	-193	-122	-98	-75	-51	-27	-7	14	34
Structure Plan Area Total	976	3236	-1069	-683	-2900	-1914	-528	257	643	1027
	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18				
East Dunbartonshire	66	89	113	137	160	184				
East Renfrewshire	239	259	279	298	318	338				
Glasgow City	237	364	492	619	747	874				
Inverclyde	35	53	72	90	109	127				
North Lanarkshire	231	302	373	444	515	586				
Renfrewshire	125	163	200	238	276	314				
South Lanarkshire	424	491	558	624	691	758				
West Dunbartonshire	55	75	96	116	137	157				
Structure Plan Area Total	1412	1796	2183	2566	2953	3338				

Table 3.5 - Components of Projected Population Change, 2002 to 2011 and 2011 to 2018

2002-2011	Population 2002	Births 2002-11	Deaths 2002-11	Natural Change 2002-11	Net Migration 2002-11	Population 2011
East Dunbartonshire	107,310	8,189	8,965	-776	-972	105,562
East Renfrewshire	89,630	7,734	7,679	55	1,138	90,823
Glasgow City	577,350	59,331	62,655	-3,323	-4,138	569,889
Inverclyde	83,600	7,007	9,584	-2,577	-1,186	79,837
North Lanarkshire	321,350	31,774	30,353	1,421	178	322,949
Renfrewshire	171,940	15,573	17,618	-2,045	-1,114	168,781
South Lanarkshire	302,110	27,010	29,602	-2,592	4,964	304,482
West Dunbartonshire	92,830	8,399	9,772	-1,373	-852	90,605
Structure Plan Area Total	1,746,120	165,016	176,227	-11,211	-1,982	1,732,927
2011-2018	Population 2011	Births 2011-18	Deaths 2011-18	Natural Change 2011-18	Net Migration 2011-18	Population 2018
East Dunbartonshire	105,562	6,938	7,246	-309	791	106,044
East Renfrewshire	90,823	6,181	6,230	-49	1,950	92,724
Glasgow City	569,889	49,048	42,769	6,279	3,443	579,611
Inverclyde	79,837	5,286	7,054	-1,768	502	78,571
North Lanarkshire	322,949	23,810	23,435	375	2,612	325,937
Renfrewshire	168,781	11,802	13,406	-1,605	1,403	168,579
South Lanarkshire	304,482	20,357	23,385	-3,028	3,904	305,358
West Dunbartonshire	90,605	6,629	7,044	-416	670	90,860
Structure Plan Area Total	1,732,927	130,051	130,571	-520	15,275	1,747,682

Table 3.6 - Components of Projected Population Change, Structure Plan Area Totals

	Population at start	Births	Deaths	Natural Change	Net Migration	Population at end
2002-2003	1,746,120	18,634	20,810	-2,176	976	1,744,920
2003-2004	1,744,920	19,394	20,510	-1,116	3,236	1,747,040
2004-2005	1,747,040	18,408	19,990	-1,582	-1,069	1,744,389
2005-2006	1,744,389	18,227	19,692	-1,465	-683	1,742,241
2006-2007	1,742,241	18,111	19,426	-1,315	-2,900	1,738,027
2007-2008	1,738,027	18,022	19,191	-1,169	-1,914	1,734,944
2008-2009	1,734,944	18,009	18,997	-988	-528	1,733,427
2009-2010	1,733,427	18,060	18,857	-797	257	1,732,887
2010-2011	1,732,887	18,151	18,754	-603	643	1,732,927
2002-11 sub-total		165,016	176,227	-11,211	-1,982	
2011-2012	1,732,927	18,254	18,698	-444	1,027	1,733,510
2012-2013	1,733,510	18,352	18,653	-301	1,412	1,734,622
2013-2014	1,734,622	18,448	18,617	-169	1,796	1,736,249
2014-2015	1,736,249	18,581	18,614	-33	2,183	1,738,399
2015-2016	1,738,399	18,727	18,608	119	2,566	1,741,084
2016-2017	1,741,084	18,821	18,659	163	2,953	1,744,200
2017-2018	1,744,200	18,867	18,722	145	3,338	1,747,682
2011-18 sub-total		130,051	130,571	-520	15,275	

Table 3.7A Comparison of Population Projections (2006 Plan and GROS 2002-base) for Structure Plan Area, 2004, 2011 and 2018

	2006 Plan	GROS 2002-base	Difference
Total population			
2004	1,747,040	1,735,262	11,778
2011	1,732,927	1,697,741	35,186
2018	1,747,682	1,669,282	78,401
Children			
2004	325,395	324,132	1,263
2011	296,870	291,294	5,576
2018	292,426	281,680	10,746
Adults			
2004	1,421,645	1,411,130	10,515
2011	1,436,057	1,406,447	29,610
2018	1,455,256	1,387,602	67,655

Table 3.7B Comparison of Population Projections (2006 Plan and GROS 2004-base) for Structure Plan Area, 2004, 2011 and 2018

	2006 Plan	GROS 2004-base	Difference
Total population			
2004	1,747,040	1,747,040	0
2011	1,732,927	1,734,761	-1,834
2018	1,747,682	1,715,878	31,804
Children			
2004	325,395	325,395	0
2011	296,870	299,809	-2,939
2018	292,426	287,368	5,058
Adults			
2004	1,421,645	1,421,645	0
2011	1,436,057	1,434,952	1,105
2018	1,455,256	1,428,510	26,746

4.0 Household Projections to 2011 and to 2018

- 4.1 The number of households is derived from the projected population via the application of projected headship rates by household type to the population in private households, subdivided by age. The population in private households is derived by subtraction of the projected institutional population from the projected total population (see paragraph 2.3). Headship rates are estimated for the recent period and projected forward.
- 4.2 The Scottish Executive (SE) household projections use headship rates based on trends between 1991 and 2001, according to the “head of household” definition. The 2006 Plan household projections have been prepared according to the “household reference person” definition, using projected headship rates also based on trends in the 1991-2001 period. In the 1991 Census, households were defined in terms of “head of household”, but the 2001 Census used the “household reference person” definition. In the former case the “head of household” was identified, in most cases, as the first adult appearing on the Census form. In the latter case the fact of an adult being economically active has been given priority over the position on the Census form. This has had the effect of increasing the number of middle-aged among the household reference persons and decreasing the number of young adults and elderly (age 75+).
- 4.3 Obtaining headship rates based on the “household reference person” definition from the 2001 Census is straightforward but is more difficult from the 1991 Census, where rates consistent with this definition can only be supplied from the 10% data. The SE initially tried to use headship rates according to the 2001 Census “household reference person” definition, but the projection resulted in some anomalies for some of the smaller authorities, due to the small 1991 Census base (10% data). These anomalies occurred in local authorities outside the Structure Plan Area, and, as a result, there has been no need for the 2006 Plan projections to follow the SE in its decision to revert to the 1991 Census “head of household” definition.
- 4.4 The SE has prepared projections for the following household types:
- 1 adult: male
 - 1 adult: female
 - 2 adults
 - 1 adult + 1 child
 - 3+ adults
 - 1 adult, 2+ children
 - 2+ adults, 1+ children

They differ from the types used in the household projections for England and Wales, which correspond with the main household type distribution in the 2001 Census Tables. These are:

- One person households
- Married couple households
- Cohabiting couple households
- Lone parent households
- Other multi-person households

The latter household type distribution is considered more meaningful, and potentially more useful, as the inclusion of relationship data makes it easier to relate these to demographic events, e.g. marriage and divorce. Headship data is obtained from the 2001 Census, in which the data on relationships within households has been fully coded, and the 1991 Census, in which the data has only been coded for the 10% sample. It has been possible to base the 2006 Plan projections on the latter set of

household types because of the availability of consistent data on headship rates from GROS.

- 4.5 Headship data from the 1991 and 2001 Census form the basis for the projected values. As with the SE projections, these are derived using the modified exponential method. The headship rates for the five household types are projected forward, as is the proportion of the population that are not a “household reference person”. The projected values are scaled upward or downward, on a pro-rata basis, to make the total of headship rates and non-headship rate add-up to one. Projected headship rates by household type for 2004, 2011 and 2018 are shown in Tables 4.2(A-H).
- 4.6 There is a continuing need to calibrate estimated and projected headship rates, in order to accommodate differences between Census-based and dwelling-based household estimates. The household projections prepared for the 2006 Plan are calibrated to the total household estimates for 2004 by local authority. Table 4.1 below shows the calibration factors calculated for 2004, the most recent year for which population, stock and households information is available.

Table 4.1 – Household Calibration Factors by Local Authority

	2004 households based on headship rates	2004 households based on stock and vacancy estimates	Calibration factor
East Dunbartonshire	41,788	42,626	1.0201
East Renfrewshire	35,572	35,709	1.0039
Glasgow City	279,883	281,105	1.0044
Inverclyde	36,711	37,649	1.0256
North Lanarkshire	137,283	138,548	1.0092
Renfrewshire	76,102	77,415	1.0173
South Lanarkshire	131,919	132,002	1.0006
West Dunbartonshire	41,136	41,714	1.0141
Structure Plan area	780,394	786,768	1.0082

- 4.7 Full details of the household projection results are given in Table 4.2(A-H) and a summary (after calibration) is given in Table 4.3. Table 4.3 shows that, for the Structure Plan Area as a whole, the number of households is projected to increase from 776,853 in 2002 to 830,233 in 2011 and 885,508 in 2018. This implies an average growth rate of 5,931 households per year between 2002 and 2011 and 7,896 households per year between 2011 and 2018.
- 4.8 Results from the 2006 Plan household projections are compared with (a) the SE 2002-base projections (to 2016), and (b) the household projections derived from the latest GROS population projections (2004-base) using the Structure Plan model. Tables 4.4A and 4.4B below show comparative figures for 2004, 2011 and 2018. Table 4.4A shows the much higher household projections used in the 2006 Plan in comparison with SE 2002-base projections. This gap is substantially reduced when a comparison is made with the household projections derived from the GROS 2004-base population projections (Table 4.4B).
- 4.9 Table 4.4B shows that, at 2011, household projections derived from the 2004-base GROS population projections are lower than the 2006 Plan projection, despite being based on a higher population projection. As indicated in paragraph 3.27, this reflects the different balance between adults and children in the respective projections. It is likely

that the GROS household projections, due to be published in May 2006, will confirm this.

Table 4.4A Comparison of Household Projections (2006 Plan and SE 2002-base) for Structure Plan Area, 2004, 2011 and 2018

	2006 Plan	Scottish Executive 2002-base	Difference
Households at :			
2004	786,768	773,150	13,618
2011	830,233	796,220	34,013
2018	885,508	818,160	67,348

(Note: For the Scottish Executive 2002-base projection, projected households at 2018 (818,160) have been estimated by extrapolation from the 2016 figure (812,390), using the projected change in 2015/16.)

Table 4.4B - Comparison of Household Projections (2006 Plan and Projection based on GROS 2004-base population projection) for Structure Plan Area, 2004, 2011 and 2018

	2006 Plan	Projection based on GROS 2004-base population projection	Difference
Households at :			
2004	786,768	786,768	0
2011	830,233	827,518	2,715
2018	885,508	866,737	18,771

Table 4.2A Projected Headship Rates and Projected Households, 2004 - East Dunbartonshire

population in households			projected headship rates by age and by household type				
age	male	female	married couple	cohabiting couple	lone parent	other multi-person	one person
0-14	9,979	9,195					
15-24	7,021	6,294	0.0017	0.0079	0.0125	0.0068	0.0206
25-29	2,248	2,116	0.0602	0.0753	0.0518	0.0165	0.1200
30-34	2,453	2,896	0.2109	0.0650	0.0669	0.0290	0.1146
35-44	7,529	8,742	0.3242	0.0420	0.0702	0.0241	0.0884
45-54	7,575	8,181	0.3911	0.0236	0.0550	0.0282	0.0773
55-59	3,519	3,782	0.4059	0.0131	0.0340	0.0272	0.1027
60-64	2,743	3,103	0.3750	0.0064	0.0247	0.0204	0.1317
65-74	4,583	5,335	0.4154	0.0052	0.0327	0.0153	0.2358
75-84	2,251	3,321	0.1593	0.0015	0.0452	0.0087	0.4179
85+	427	840	0.1623	0.0010	0.0966	0.0321	0.5691
total	50,329	53,806					

projected households by age of household reference person and by type of household						
age	total	married couple	cohabiting couple	lone parent	other multi-person	one person
0-14						
15-24	659	22	106	166	91	274
25-29	1,414	263	329	226	72	524
30-34	2,602	1,128	348	358	155	613
35-44	8,930	5,275	683	1,142	391	1,439
45-54	9,063	6,163	372	866	444	1,218
55-59	4,256	2,964	95	248	198	750
60-64	3,264	2,193	37	144	119	770
65-74	6,986	4,120	52	324	152	2,338
75-84	3,525	888	8	252	49	2,328
85+	1,091	206	1	122	41	721
total	41,788	23,220	2,031	3,849	1,713	10,975
calibration factor	1.0201					
total after calibration	42,626	23,686	2,072	3,926	1,747	11,195

Table 4.2A - Projected Headship Rates and Projected Households, 2011 - East Dunbartonshire

population in households			projected headship rates by age and by household type				
age	male	female	married couple	cohabiting couple	lone parent	other multi-person	one person
0-14	8,073	7,922					
15-24	7,153	6,586	0.0006	0.0058	0.0145	0.0084	0.0277
25-29	2,956	2,685	0.0286	0.0922	0.0572	0.0172	0.1502
30-34	2,808	2,769	0.1507	0.0852	0.0777	0.0397	0.1491
35-44	5,493	6,724	0.2814	0.0591	0.0803	0.0302	0.1121
45-54	7,835	9,105	0.3668	0.0330	0.0615	0.0354	0.0923
55-59	3,314	3,722	0.3838	0.0176	0.0351	0.0343	0.1112
60-64	3,378	3,699	0.3666	0.0089	0.0209	0.0227	0.1276
65-74	4,753	5,740	0.4427	0.0061	0.0335	0.0118	0.2237
75-84	2,786	3,599	0.1618	0.0023	0.0369	0.0061	0.3939
85+	694	1,354	0.1951	0.0016	0.1090	0.0300	0.5443
total	49,242	53,905					

projected households by age of household reference person and by type of household						
age	total	married couple	cohabiting couple	lone parent	other multi-person	one person
0-14						
15-24	783	8	80	199	116	380
25-29	1,948	161	520	323	97	847
30-34	2,801	841	475	433	221	832
35-44	6,880	3,438	722	981	369	1,370
45-54	9,977	6,213	559	1,041	600	1,564
55-59	4,095	2,701	124	247	241	782
60-64	3,869	2,595	63	148	161	903
65-74	7,531	4,645	64	352	123	2,347
75-84	3,837	1,033	15	236	39	2,515
85+	1,802	400	3	223	61	1,115
total	43,524	22,034	2,624	4,182	2,029	12,655
calibration factor	1.0201					
total after calibration	44,397	22,476	2,677	4,266	2,069	12,908

Table 4.2A - Projected Headship Rates and Projected Households, 2018 - East Dunbartonshire

population in households			projected headship rates by age and by household type				
age	male	female	married couple	cohabiting couple	lone parent	other multi-person	one person
0-14	7,671	7,716					
15-24	6,004	5,909	0.0002	0.0043	0.0165	0.0099	0.0346
25-29	3,312	3,022	0.0135	0.1057	0.0613	0.0177	0.1737
30-34	3,217	3,247	0.1066	0.1025	0.0866	0.0490	0.1780
35-44	5,666	6,220	0.2433	0.0753	0.0897	0.0361	0.1342
45-54	6,431	7,881	0.3435	0.0422	0.0678	0.0425	0.1069
55-59	3,691	4,425	0.3626	0.0221	0.0362	0.0413	0.1194
60-64	3,362	3,848	0.3581	0.0113	0.0177	0.0251	0.1235
65-74	5,474	6,469	0.4683	0.0069	0.0343	0.0090	0.2121
75-84	3,120	4,149	0.1641	0.0031	0.0301	0.0042	0.3708
85+	1,028	1,766	0.2258	0.0021	0.1210	0.0279	0.5195
total	48,977	54,652					

projected households by age of household reference person and by type of household						
age	total	married couple	cohabiting couple	lone parent	other multi-person	one person
0-14						
15-24	780	2	51	197	118	412
25-29	2,356	85	670	388	112	1,101
30-34	3,379	689	662	560	317	1,151
35-44	6,879	2,893	895	1,067	429	1,595
45-54	8,628	4,915	604	970	608	1,530
55-59	4,720	2,943	179	293	335	969
60-64	3,863	2,582	82	128	181	890
65-74	8,727	5,593	83	410	107	2,533
75-84	4,159	1,193	22	219	31	2,695
85+	2,504	631	6	338	78	1,451
total	45,994	21,527	3,254	4,569	2,317	14,327
calibration factor	1.0201					
total after calibration	46,916	21,959	3,319	4,661	2,363	14,615

Table 4.2B - Projected Headship Rates and Projected Households, 2004 - East Renfrewshire

population in households			projected headship rates by age and by household type				
age	male	female	married couple	cohabiting couple	lone parent	other multi-person	one person
0-14	8,947	8,367					
15-24	5,722	5,220	0.0018	0.0106	0.0120	0.0082	0.0183
25-29	1,680	1,771	0.0844	0.0773	0.0460	0.0233	0.0880
30-34	2,166	2,569	0.2252	0.0655	0.0582	0.0232	0.1053
35-44	6,681	7,806	0.3362	0.0413	0.0589	0.0256	0.0750
45-54	6,498	6,742	0.3886	0.0257	0.0540	0.0280	0.0859
55-59	2,871	3,036	0.3940	0.0170	0.0335	0.0266	0.1107
60-64	2,129	2,508	0.3728	0.0094	0.0237	0.0201	0.1584
65-74	3,605	4,425	0.4036	0.0051	0.0329	0.0203	0.2465
75-84	1,897	3,046	0.1490	0.0006	0.0380	0.0075	0.4608
85+	371	887	0.1439	0.0000	0.0629	0.0193	0.6394
total	42,567	46,377					

projected households by age of household reference person and by type of household						
age	total	married couple	cohabiting couple	lone parent	other multi-person	one person
0-14						
15-24	557	20	116	131	90	200
25-29	1,101	291	267	159	80	304
30-34	2,260	1,066	310	276	110	498
35-44	7,779	4,871	598	853	371	1,086
45-54	7,708	5,145	340	715	371	1,137
55-59	3,437	2,327	101	198	157	654
60-64	2,709	1,729	44	110	93	734
65-74	5,689	3,241	41	265	163	1,980
75-84	3,243	737	3	188	37	2,278
85+	1,089	181	0	79	24	804
total	35,572	19,608	1,818	2,973	1,497	9,675
calibration factor	1.0039					
total after calibration	35,709	19,684	1,825	2,985	1,503	9,713

Table 4.2B - Projected Headship Rates and Projected Households, 2011 - East Renfrewshire

population in households			projected headship rates by age and by household type				
age	male	female	married couple	cohabiting couple	lone parent	other multi-person	one person
0-14	7,856	7,651					
15-24	6,171	5,470	0.0006	0.0117	0.0104	0.0120	0.0196
25-29	2,301	2,066	0.0504	0.0994	0.0511	0.0279	0.0886
30-34	2,064	2,106	0.1674	0.0826	0.0712	0.0310	0.1289
35-44	4,942	6,506	0.2952	0.0547	0.0584	0.0342	0.0958
45-54	7,097	8,021	0.3743	0.0324	0.0587	0.0318	0.1035
55-59	2,917	3,209	0.3689	0.0249	0.0305	0.0350	0.1146
60-64	2,660	3,097	0.3565	0.0143	0.0147	0.0182	0.1742
65-74	3,829	4,675	0.4119	0.0070	0.0362	0.0252	0.2314
75-84	2,148	3,346	0.1461	0.0009	0.0303	0.0042	0.4822
85+	685	1,339	0.1301	0.0000	0.0529	0.0111	0.6847
total	42,670	47,487					

projected households by age of household reference person and by type of household							
age	total	married couple	cohabiting couple	lone parent	other multi-person	one person	
0-14							
15-24	632	7	137	121	140	228	
25-29	1,386	220	434	223	122	387	
30-34	2,006	698	344	297	129	537	
35-44	6,163	3,379	626	669	392	1,096	
45-54	9,082	5,659	490	888	480	1,565	
55-59	3,516	2,260	153	187	215	702	
60-64	3,327	2,053	82	84	105	1,003	
65-74	6,053	3,503	59	308	215	1,968	
75-84	3,646	803	5	166	23	2,649	
85+	1,779	263	0	107	22	1,386	
total	37,589	18,845	2,331	3,050	1,842	11,521	
calibration factor	1.0039						
total after calibration	37,734	18,917	2,340	3,062	1,850	11,566	

Table 4.2B - Projected Headship Rates and Projected Households, 2018 - East Renfrewshire

population in households			projected headship rates by age and by household type				
age	male	female	married couple	cohabiting couple	lone parent	other multi-person	one person
0-14	7,398	7,358					
15-24	5,787	5,285	0.0002	0.0129	0.0090	0.0157	0.0210
25-29	2,715	2,326	0.0298	0.1185	0.0553	0.0318	0.0883
30-34	2,644	2,478	0.1233	0.0974	0.0824	0.0378	0.1490
35-44	4,550	5,338	0.2582	0.0675	0.0577	0.0425	0.1154
45-54	5,876	7,695	0.3603	0.0391	0.0634	0.0355	0.1206
55-59	3,414	3,940	0.3449	0.0327	0.0277	0.0433	0.1182
60-64	2,913	3,395	0.3399	0.0189	0.0091	0.0165	0.1888
65-74	4,489	5,566	0.4198	0.0088	0.0395	0.0301	0.2170
75-84	2,464	3,711	0.1430	0.0012	0.0241	0.0023	0.5013
85+	956	1,762	0.1175	0.0000	0.0445	0.0063	0.7223
total	43,204	48,854					

projected households by age of household reference person and by type of household						
age	total	married couple	cohabiting couple	lone parent	other multi-person	one person
0-14						
15-24	650	2	143	99	174	232
25-29	1,631	150	597	279	160	445
30-34	2,509	631	499	422	194	763
35-44	5,352	2,553	668	570	420	1,141
45-54	8,398	4,889	530	860	481	1,637
55-59	4,168	2,537	240	203	318	870
60-64	3,615	2,144	119	57	104	1,191
65-74	7,191	4,221	89	397	303	2,182
75-84	4,149	883	7	149	14	3,096
85+	2,421	319	0	121	17	1,963
total	40,084	18,330	2,893	3,158	2,186	13,518
calibration factor	1.0039					
total after calibration	40,239	18,400	2,904	3,170	2,195	13,571

Table 4.2C - Projected Headship Rates and Projected Households, 2004 - Glasgow City

population in households			projected headship rates by age and by household type				
age	male	female	married couple	cohabiting couple	lone parent	other multi-person	one person
0-14	47,305	45,299					
15-24	42,346	43,345	0.0030	0.0257	0.0341	0.0864	0.0783
25-29	22,778	23,080	0.0419	0.0984	0.0855	0.0869	0.2219
30-34	22,481	23,293	0.1141	0.0892	0.1270	0.0569	0.2557
35-44	42,875	46,630	0.1820	0.0626	0.1461	0.0567	0.2193
45-54	33,871	35,302	0.2352	0.0351	0.1002	0.0480	0.2601
55-59	14,204	14,589	0.2481	0.0213	0.0608	0.0397	0.3075
60-64	11,518	13,071	0.2485	0.0145	0.0559	0.0327	0.3191
65-74	19,516	27,029	0.2668	0.0093	0.0687	0.0318	0.3861
75-84	10,391	18,583	0.1089	0.0030	0.0906	0.0185	0.5158
85+	1,999	5,691	0.0869	0.0018	0.1255	0.0287	0.6646
total	269,285	295,911					

projected households by age of household reference person and by type of household							
age	total	married couple	cohabiting couple	lone parent	other multi-person	one person	
0-14							
15-24	19,498	258	2,206	2,921	7,400	6,713	
25-29	24,514	1,920	4,514	3,923	3,984	10,174	
30-34	29,427	5,221	4,082	5,815	2,603	11,706	
35-44	59,679	16,288	5,606	13,077	5,079	19,629	
45-54	46,942	16,268	2,427	6,929	3,323	17,995	
55-59	19,505	7,144	614	1,751	1,143	8,853	
60-64	16,492	6,111	357	1,373	805	7,846	
65-74	35,498	12,417	432	3,197	1,482	17,969	
75-84	21,350	3,157	87	2,625	537	14,944	
85+	6,978	668	13	965	221	5,111	
total	279,883	69,451	20,338	42,577	26,577	120,940	
calibration factor	1.0044						
total after calibration	281,105	69,754	20,427	42,763	26,693	121,469	

Table 4.2C - Projected Headship Rates and Projected Households, 2011 - Glasgow City

population in households			projected headship rates by age and by household type				
age	male	female	married couple	cohabiting couple	lone parent	other multi-person	one person
0-14	43,864	42,768					
15-24	37,329	36,190	0.0010	0.0245	0.0265	0.1126	0.0799
25-29	27,079	29,176	0.0199	0.1158	0.0761	0.1074	0.2526
30-34	22,336	24,116	0.0730	0.1105	0.1296	0.0700	0.3026
35-44	38,713	42,264	0.1362	0.0783	0.1609	0.0717	0.2597
45-54	37,369	42,076	0.2029	0.0435	0.1078	0.0546	0.3074
55-59	14,814	16,024	0.2157	0.0290	0.0565	0.0433	0.3543
60-64	12,694	13,895	0.2272	0.0187	0.0520	0.0348	0.3578
65-74	17,664	22,682	0.2517	0.0126	0.0750	0.0312	0.4050
75-84	10,309	17,860	0.1135	0.0044	0.1020	0.0159	0.5109
85+	2,461	5,732	0.0826	0.0027	0.1282	0.0201	0.6947
total	264,632	292,783					

projected households by age of household reference person and by type of household						
age	total	married couple	cohabiting couple	lone parent	other multi-person	one person
0-14						
15-24	17,977	72	1,800	1,946	8,282	5,877
25-29	32,160	1,117	6,516	4,280	6,040	14,208
30-34	31,848	3,392	5,131	6,018	3,250	14,057
35-44	57,232	11,025	6,344	13,028	5,805	21,030
45-54	56,904	16,123	3,458	8,567	4,336	24,420
55-59	21,550	6,652	894	1,742	1,337	10,925
60-64	18,356	6,040	496	1,382	925	9,513
65-74	31,287	10,157	508	3,025	1,257	16,340
75-84	21,032	3,197	125	2,872	447	14,392
85+	7,605	677	22	1,050	165	5,692
total	295,951	58,451	25,293	43,909	31,843	136,454
calibration factor	1.0044					
total after calibration	297,243	58,706	25,403	44,101	31,982	137,050

Table 4.2C - Projected Headship Rates and Projected Households, 2018 - Glasgow City

population in households			projected headship rates by age and by household type				
age	male	female	married couple	cohabiting couple	lone parent	other multi-person	one person
0-14	46,433	45,326					
15-24	30,854	31,157	0.0003	0.0232	0.0205	0.1371	0.0813
25-29	24,552	25,205	0.0094	0.1303	0.0673	0.1246	0.2766
30-34	27,145	29,186	0.0463	0.1285	0.1306	0.0812	0.3391
35-44	39,563	44,236	0.1010	0.0922	0.1730	0.0849	0.2930
45-54	36,292	41,333	0.1744	0.0515	0.1148	0.0607	0.3490
55-59	17,151	20,072	0.1872	0.0365	0.0524	0.0469	0.3965
60-64	13,825	16,303	0.2075	0.0228	0.0483	0.0368	0.3938
65-74	19,095	23,348	0.2374	0.0159	0.0811	0.0305	0.4229
75-84	10,305	16,296	0.1179	0.0058	0.1131	0.0136	0.5058
85+	3,030	6,427	0.0783	0.0036	0.1304	0.0140	0.7182
total	268,246	298,891					

projected households by age of household reference person and by type of household						
age	total	married couple	cohabiting couple	lone parent	other multi-person	one person
0-14						
15-24	16,280	20	1,441	1,272	8,504	5,043
25-29	30,261	466	6,484	3,347	6,201	13,763
30-34	40,876	2,611	7,237	7,355	4,573	19,100
35-44	62,360	8,464	7,726	14,501	7,116	24,553
45-54	58,259	13,539	3,999	8,913	4,712	27,095
55-59	26,776	6,967	1,358	1,949	1,744	14,758
60-64	21,364	6,251	686	1,455	1,109	11,863
65-74	33,434	10,075	673	3,443	1,293	17,950
75-84	20,116	3,137	156	3,008	361	13,454
85+	8,932	740	34	1,233	133	6,793
total	318,658	52,268	29,794	46,477	35,747	154,372
calibration factor	1.0044					
total after calibration	320,050	52,496	29,924	46,680	35,903	155,046

Table 4.2D - Projected Headship Rates and Projected Households, 2004 - Inverclyde

population in households			projected headship rates by age and by household type				
age	male	female	married couple	cohabiting couple	lone parent	other multi-person	one person
0-14	7,248	6,897					
15-24	5,349	4,968	0.0030	0.0251	0.0371	0.0160	0.0650
25-29	2,035	2,109	0.0536	0.1001	0.0988	0.0343	0.1638
30-34	2,390	2,596	0.1668	0.0744	0.1131	0.0389	0.1711
35-44	6,123	6,856	0.2582	0.0463	0.1134	0.0400	0.1368
45-54	5,547	5,830	0.3230	0.0265	0.0709	0.0388	0.1620
55-59	2,577	2,728	0.3428	0.0142	0.0398	0.0328	0.1854
60-64	2,092	2,379	0.3072	0.0112	0.0415	0.0237	0.2357
65-74	3,272	4,295	0.3428	0.0064	0.0474	0.0229	0.3129
75-84	1,624	2,761	0.1231	0.0012	0.0711	0.0101	0.5088
85+	277	840	0.1036	0.0022	0.0794	0.0252	0.7126
total	38,535	42,259					

projected households by age of household reference person and by type of household						
age	total	married couple	cohabiting couple	lone parent	other multi-person	one person
0-14						
15-24	1,509	31	259	383	165	670
25-29	1,868	222	415	410	142	679
30-34	2,814	832	371	564	194	853
35-44	7,719	3,351	601	1,472	519	1,776
45-54	7,067	3,675	301	806	441	1,843
55-59	3,262	1,819	75	211	174	983
60-64	2,768	1,373	50	186	106	1,054
65-74	5,543	2,594	48	359	173	2,368
75-84	3,132	540	5	312	44	2,231
85+	1,031	116	2	89	28	796
total	36,711	14,553	2,129	4,790	1,987	13,253
calibration factor	1.0255					
total after calibration	37,649	14,925	2,183	4,913	2,037	13,592

Table 4.2D - Projected Headship Rates and Projected Households, 2011 - Inverclyde

population in households			projected headship rates by age and by household type				
age	male	female	married couple	cohabiting couple	lone parent	other multi-person	one person
0-14	6,517	5,862					
15-24	5,115	4,898	0.0010	0.0338	0.0332	0.0196	0.0767
25-29	2,222	2,354	0.0246	0.1218	0.1056	0.0454	0.1808
30-34	1,873	1,951	0.1169	0.0946	0.1104	0.0477	0.2164
35-44	4,624	5,544	0.2059	0.0622	0.1317	0.0515	0.1715
45-54	6,199	6,799	0.3102	0.0337	0.0679	0.0453	0.1968
55-59	2,411	2,778	0.3209	0.0177	0.0338	0.0379	0.1960
60-64	2,477	2,798	0.3088	0.0148	0.0312	0.0280	0.2459
65-74	3,554	4,313	0.3528	0.0091	0.0446	0.0199	0.3161
75-84	1,823	2,787	0.1239	0.0018	0.0680	0.0050	0.5118
85+	383	917	0.1258	0.0033	0.0556	0.0164	0.7556
total	37,199	41,001					

projected households by age of household reference person and by type of household						
age	total	married couple	cohabiting couple	lone parent	other multi-person	one person
0-14						
15-24	1,644	10	338	333	196	768
25-29	2,188	113	558	483	208	828
30-34	2,241	447	362	422	183	827
35-44	6,334	2,094	633	1,339	524	1,744
45-54	8,497	4,032	438	882	588	2,558
55-59	3,146	1,665	92	175	197	1,017
60-64	3,316	1,629	78	165	148	1,297
65-74	5,842	2,776	72	351	156	2,487
75-84	3,275	571	8	314	23	2,359
85+	1,244	164	4	72	21	982
total	37,728	13,499	2,582	4,536	2,243	14,867
calibration factor	1.0255					
total after calibration	38,691	13,844	2,648	4,652	2,01	15,246

Table 4.2D - Projected Headship Rates and Projected Households, 2018 - Inverclyde

population in households			projected headship rates by age and by household type				
age	male	female	married couple	cohabiting couple	lone parent	other multi-person	one person
0-14	6,194	5,491					
15-24	4,644	4,309	0.0003	0.0421	0.0297	0.0230	0.0878
25-29	2,280	2,402	0.0112	0.1389	0.1102	0.0545	0.1931
30-34	2,075	2,311	0.0813	0.1123	0.1069	0.0555	0.2540
35-44	3,659	4,263	0.1631	0.0767	0.1478	0.0621	0.2018
45-54	5,472	6,445	0.2973	0.0407	0.0649	0.0516	0.2295
55-59	2,942	3,490	0.2998	0.0210	0.0287	0.0429	0.2060
60-64	2,380	2,901	0.3096	0.0183	0.0234	0.0322	0.2552
65-74	4,074	4,877	0.3624	0.0118	0.0419	0.0172	0.3191
75-84	2,178	2,949	0.1244	0.0024	0.0649	0.0025	0.5134
85+	505	1,095	0.1452	0.0043	0.0388	0.0106	0.7768
total	36,402	40,533					

projected households by age of household reference person and by type of household						
age	total	married couple	cohabiting couple	lone parent	other multi-person	one person
0-14						
15-24	1,638	3	377	266	206	786
25-29	2,378	52	650	516	255	904
30-34	2,675	357	493	469	244	1,114
35-44	5,162	1,292	608	1,171	492	1,599
45-54	8,152	3,543	485	774	614	2,735
55-59	3,849	1,928	135	185	276	1,325
60-64	3,373	1,635	96	124	170	1,348
65-74	6,736	3,244	106	375	154	2,856
75-84	3,627	638	12	333	13	2,632
85+	1,561	232	7	62	17	1,242
total	39,150	12,924	2,970	4,274	2,440	16,541
calibration factor	1.0255					
total after calibration	40,150	13,254	3,046	4,383	2,503	16,964

Table 4.2E - Projected Headship Rates and Projected Households, 2004 - North Lanarkshire

age	population in households		projected headship rates by age and by household type				
	male	female	married couple	cohabiting couple	lone parent	other multi-person	one person
0-14	30,713	29,171					
15-24	21,490	20,893	0.0036	0.0297	0.0403	0.0119	0.0404
25-29	9,066	9,710	0.0767	0.1088	0.0886	0.0302	0.1282
30-34	11,014	12,172	0.2060	0.0744	0.1016	0.0325	0.1330
35-44	24,981	27,092	0.2848	0.0484	0.1078	0.0359	0.1113
45-54	20,755	22,375	0.3334	0.0263	0.0689	0.0369	0.1331
55-59	9,597	10,195	0.3527	0.0150	0.0460	0.0313	0.1665
60-64	7,918	8,790	0.3233	0.0095	0.0424	0.0268	0.2062
65-74	11,934	14,835	0.3478	0.0071	0.0535	0.0212	0.2964
75-84	5,408	8,650	0.1175	0.0029	0.0839	0.0161	0.4926
85+	936	2,340	0.1119	0.0012	0.1087	0.0249	0.6545
total	153,810	166,223					

age	projected households by age of household reference person and by type of household					
	total	married couple	cohabiting couple	lone parent	other multi-person	one person
0-14						
15-24	5,340	153	1,258	1,710	505	1,714
25-29	8,123	1,441	2,043	1,664	568	2,407
30-34	12,695	4,776	1,725	2,357	753	3,084
35-44	30,631	14,832	2,518	5,615	1,868	5,797
45-54	25,819	14,378	1,135	2,972	1,591	5,742
55-59	12,104	6,981	298	910	620	3,296
60-64	10,163	5,401	159	709	448	3,446
65-74	19,433	9,310	189	1,432	568	7,935
75-84	10,024	1,651	41	1,180	227	6,925
85+	2,952	367	4	356	81	2,144
total	137,283	59,290	9,371	18,905	7,228	42,489
calibration factor	1.0092					
total after calibration	138,548	59,836	9,457	19,079	7,295	42,880

Table 4.2E - Projected Headship Rates and Projected Households, 2011 - North Lanarkshire

age	population in households		projected headship rates by age and by household type				
	male	female	married couple	cohabiting couple	lone parent	other multi-person	one person
0-14	28,414	27,361					
15-24	21,191	20,043	0.0010	0.0382	0.0486	0.0131	0.0488
25-29	10,497	10,201	0.0381	0.1398	0.1002	0.0364	0.1550
30-34	9,219	9,805	0.1511	0.0972	0.1169	0.0438	0.1704
35-44	22,016	24,664	0.2428	0.0647	0.1257	0.0476	0.1400
45-54	23,172	25,553	0.3026	0.0349	0.0717	0.0438	0.1601
55-59	9,486	10,648	0.3423	0.0215	0.0424	0.0350	0.1885
60-64	9,113	10,055	0.3118	0.0122	0.0355	0.0299	0.2246
65-74	12,985	15,576	0.3631	0.0095	0.0489	0.0175	0.2898
75-84	6,422	9,488	0.1088	0.0044	0.0881	0.0175	0.5015
85+	1,339	2,946	0.1343	0.0019	0.0948	0.0168	0.6858
total	153,854	166,339					

age	projected households by age of household reference person and by type of household					
	total	married couple	cohabiting couple	lone parent	other multi-person	one person
0-14						
15-24	6,172	41	1,577	2,004	539	2,010
25-29	9,718	788	2,893	2,075	753	3,209
30-34	11,022	2,874	1,850	2,223	833	3,242
35-44	28,981	11,334	3,019	5,868	2,222	6,537
45-54	29,880	14,745	1,702	3,496	2,136	7,801
55-59	12,678	6,892	433	853	705	3,795
60-64	11,768	5,976	234	680	572	4,305
65-74	20,816	10,371	272	1,396	501	8,276
75-84	11,458	1,730	71	1,401	278	7,979
85+	4,000	575	8	406	72	2,939
total	146,494	55,328	12,058	20,402	8,612	50,093
calibration factor	1.0092					
total after calibration	147,844	55,838	12,170	20,590	8,691	50,555

Table 4.2E - Projected Headship Rates and Projected Households, 2018 - North Lanarkshire

age	population in households		projected headship rates by age and by household type				
	male	female	married couple	cohabiting couple	lone parent	other multi-person	one person
0-14	27,261	26,027					
15-24	20,056	19,480	0.0003	0.0463	0.0564	0.0142	0.0566
25-29	10,688	10,178	0.0187	0.1637	0.1090	0.0413	0.1754
30-34	10,568	10,589	0.1098	0.1171	0.1297	0.0539	0.2020
35-44	19,021	20,491	0.2059	0.0799	0.1420	0.0586	0.1662
45-54	23,129	25,975	0.2742	0.0433	0.0744	0.0506	0.1856
55-59	10,805	12,419	0.3320	0.0279	0.0390	0.0386	0.2097
60-64	9,257	10,789	0.3004	0.0148	0.0296	0.0329	0.2422
65-74	14,779	17,379	0.3777	0.0120	0.0446	0.0145	0.2830
75-84	7,729	10,955	0.1006	0.0060	0.0921	0.0188	0.5099
85+	1,927	3,678	0.1541	0.0025	0.0821	0.0113	0.7056
total	155,222	167,959					

age	projected households by age of household reference person and by type of household					
	total	married couple	cohabiting couple	lone parent	other multi-person	one person
0-14						
15-24	6,870	11	1,832	2,229	561	2,237
25-29	10,602	391	3,417	2,274	861	3,660
30-34	12,959	2,323	2,478	2,744	1,140	4,275
35-44	25,789	8,135	3,158	5,612	2,317	6,567
45-54	30,840	13,463	2,126	3,653	2,484	9,115
55-59	15,032	7,711	647	906	897	4,870
60-64	12,426	6,021	298	594	659	4,855
65-74	23,534	12,146	385	1,436	466	9,102
75-84	13,590	1,880	112	1,721	351	9,527
85+	5,356	864	14	460	63	3,955
total	157,000	52,945	14,465	21,628	9,798	58,163
calibration factor	1.0092					
total after calibration	158,447	53,433	14,598	21,828	9,889	58,699

Table 4.2F - Projected Headship Rates and Projected Households, 2004 - Renfrewshire

population in households			projected headship rates by age and by household type				
age	male	female	married couple	cohabiting couple	lone parent	other multi-person	one person
0-14	15,088	14,483					
15-24	10,744	10,400	0.0035	0.0275	0.0315	0.0184	0.0652
25-29	4,389	4,575	0.0677	0.1160	0.0792	0.0318	0.1870
30-34	5,129	5,985	0.1684	0.0872	0.0937	0.0296	0.1808
35-44	13,395	14,686	0.2757	0.0545	0.1012	0.0344	0.1427
45-54	11,361	12,184	0.3295	0.0331	0.0655	0.0309	0.1536
55-59	5,381	5,799	0.3519	0.0193	0.0366	0.0250	0.1798
60-64	4,405	4,795	0.3458	0.0112	0.0295	0.0203	0.2128
65-74	6,712	8,504	0.3580	0.0068	0.0365	0.0249	0.2890
75-84	3,297	5,047	0.1271	0.0006	0.0613	0.0129	0.4893
85+	562	1,401	0.1243	0.0019	0.0950	0.0220	0.6573
total	80,463	87,857					

projected households by age of household reference person and by type of household							
age	total	married couple	cohabiting couple	lone parent	other multi-person	one person	
0-14							
15-24	3,090	73	581	667	390	1,379	
25-29	4,318	607	1,040	710	285	1,676	
30-34	6,221	1,872	969	1,042	328	2,009	
35-44	17,084	7,741	1,530	2,842	965	4,007	
45-54	14,423	7,757	779	1,542	728	3,616	
55-59	6,849	3,935	216	409	279	2,010	
60-64	5,700	3,181	103	271	187	1,958	
65-74	10,881	5,447	103	555	378	4,397	
75-84	5,768	1,061	5	512	108	4,083	
85+	1,767	244	4	186	43	1,290	
total	76,102	31,918	5,331	8,737	3,692	26,425	
calibration factor	1.0173						
total after calibration	77,415	32,468	5,423	8,887	3,755	26,881	

Table 4.2F - Projected Headship Rates and Projected Households, 2011 - Renfrewshire

age	population in households		projected headship rates by age and by household type				
	male	female	married couple	cohabiting couple	lone parent	other multi-person	one person
0-14	13,739	13,342					
15-24	10,780	10,234	0.0012	0.0292	0.0290	0.0222	0.0790
25-29	5,000	4,827	0.0333	0.1462	0.0790	0.0397	0.2255
30-34	4,360	4,895	0.1107	0.1075	0.1035	0.0374	0.2280
35-44	10,570	12,078	0.2338	0.0697	0.1154	0.0467	0.1780
45-54	13,043	14,250	0.2991	0.0438	0.0699	0.0377	0.1808
55-59	5,221	5,627	0.3184	0.0273	0.0320	0.0288	0.2056
60-64	5,183	5,711	0.3575	0.0160	0.0236	0.0226	0.2137
65-74	7,111	8,688	0.3617	0.0093	0.0297	0.0312	0.2764
75-84	3,823	5,451	0.1172	0.0004	0.0659	0.0156	0.4827
85+	897	1,661	0.1551	0.0028	0.0998	0.0154	0.6562
total	79,726	86,765					

age	projected households by age of household reference person and by type of household					
	total	married couple	cohabiting couple	lone parent	other multi-person	one person
0-14						
15-24	3,374	26	613	609	466	1,660
25-29	5,147	328	1,437	776	390	2,216
30-34	5,434	1,024	995	958	347	2,110
35-44	14,575	5,295	1,578	2,613	1,058	4,031
45-54	17,233	8,164	1,197	1,908	1,029	4,935
55-59	6,639	3,454	296	347	312	2,230
60-64	6,901	3,895	174	257	247	2,328
65-74	11,192	5,714	147	470	494	4,367
75-84	6,323	1,086	4	611	145	4,477
85+	2,378	397	7	255	39	1,679
total	79,195	29,384	6,448	8,804	4,527	30,032
calibration factor	1.0173					
total after calibration	80,562	29,891	6,560	8,956	4,605	30,550

Table 4.2F - Projected Headship Rates and Projected Households, 2018 - Renfrewshire

age	population in households		projected headship rates by age and by household type				
	male	female	married couple	cohabiting couple	lone parent	other multi-person	one person
0-14	13,417	12,884					
15-24	9,596	9,483	0.0004	0.0308	0.0266	0.0258	0.0921
25-29	5,345	5,117	0.0163	0.1702	0.0781	0.0462	0.2546
30-34	5,072	5,055	0.0720	0.1244	0.1110	0.0442	0.2651
35-44	8,669	9,766	0.1973	0.0838	0.1282	0.0583	0.2097
45-54	12,119	13,800	0.2710	0.0543	0.0741	0.0443	0.2065
55-59	6,377	6,950	0.2874	0.0350	0.0279	0.0324	0.2297
60-64	5,138	5,722	0.3685	0.0206	0.0189	0.0249	0.2143
65-74	8,195	9,741	0.3648	0.0118	0.0242	0.0375	0.2640
75-84	4,421	6,043	0.1079	0.0003	0.0704	0.0184	0.4759
85+	1,298	2,082	0.1821	0.0037	0.1036	0.0107	0.6501
total	79,647	86,642					

age	projected households by age of household reference person and by type of household					
	total	married couple	cohabiting couple	lone parent	other multi-person	one person
0-14						
15-24	3,353	8	587	508	492	1,757
25-29	5,915	171	1,781	817	484	2,664
30-34	6,246	729	1,260	1,124	447	2,685
35-44	12,486	3,637	1,545	2,364	1,076	3,866
45-54	16,849	7,023	1,406	1,920	1,148	5,351
55-59	8,160	3,830	466	371	432	3,061
60-64	7,029	4,002	224	205	270	2,327
65-74	12,595	6,542	212	434	672	4,735
75-84	7,040	1,129	3	736	192	4,980
85+	3,212	615	13	350	36	2,197
total	82,886	27,686	7,496	8,830	5,249	33,624
calibration factor	1.0173					
total after calibration	84,316	28,164	7,626	8,982	5,340	34,204

Table 4.2G - Projected Headship Rates and Projected Households, 2004 - South Lanarkshire

age	population in households		projected headship rates by age and by household type				
	male	female	married couple	cohabiting couple	lone parent	other multi-person	one person
0-14	27,568	26,617					
15-24	19,586	18,375	0.0036	0.0267	0.0260	0.0133	0.0491
25-29	7,867	8,359	0.0762	0.1045	0.0794	0.0293	0.1453
30-34	9,484	10,645	0.2084	0.0796	0.0906	0.0302	0.1396
35-44	23,134	25,528	0.2875	0.0470	0.0983	0.0300	0.1170
45-54	20,793	22,177	0.3467	0.0285	0.0637	0.0336	0.1251
55-59	9,485	10,214	0.3743	0.0182	0.0331	0.0273	0.1512
60-64	7,689	8,723	0.3458	0.0111	0.0301	0.0212	0.1834
65-74	12,112	14,951	0.3667	0.0064	0.0448	0.0176	0.2933
75-84	6,079	9,624	0.1342	0.0018	0.0730	0.0132	0.4686
85+	1,074	2,634	0.1127	0.0036	0.0970	0.0181	0.6435
total	144,872	157,847					

age	projected households by age of household reference person and by type of household					
	total	married couple	cohabiting couple	lone parent	other multi-person	one person
0-14						
15-24	4,510	135	1,015	988	506	1,865
25-29	7,054	1,237	1,696	1,288	475	2,357
30-34	11,039	4,195	1,602	1,824	607	2,810
35-44	28,216	13,989	2,287	4,784	1,461	5,695
45-54	25,678	14,897	1,225	2,738	1,443	5,375
55-59	11,900	7,374	358	652	538	2,978
60-64	9,710	5,675	182	494	348	3,011
65-74	19,721	9,923	172	1,213	476	7,937
75-84	10,848	2,107	29	1,146	208	7,359
85+	3,243	418	13	360	67	2,386
total	131,919	59,949	8,580	15,487	6,130	41,773
calibration factor	1.0006					
total after calibration	132,002	59,987	8,586	15,497	6,134	41,799

Table 4.2G - Projected Headship Rates and Projected Households, 2011 - South Lanarkshire

age	population in households		projected headship rates by age and by household type				
	male	female	married couple	cohabiting couple	lone parent	other multi-person	one person
0-14	24,555	23,981					
15-24	19,320	17,909	0.0011	0.0339	0.0246	0.0167	0.0618
25-29	9,149	8,726	0.0391	0.1319	0.0898	0.0378	0.1743
30-34	8,196	8,771	0.1562	0.1039	0.1028	0.0400	0.1706
35-44	19,668	22,373	0.2382	0.0617	0.1154	0.0383	0.1496
45-54	22,738	25,229	0.3154	0.0378	0.0704	0.0427	0.1520
55-59	9,900	10,561	0.3640	0.0255	0.0254	0.0306	0.1659
60-64	9,319	10,023	0.3395	0.0160	0.0232	0.0248	0.1875
65-74	13,079	15,661	0.3744	0.0095	0.0447	0.0143	0.2936
75-84	7,143	10,257	0.1386	0.0028	0.0819	0.0116	0.4560
85+	1,713	3,522	0.1119	0.0054	0.1017	0.0097	0.6638
total	144,779	157,012					

age	projected households by age of household reference person and by type of household						
	total	married couple	cohabiting couple	lone parent	other multi-person	one person	
0-14							
15-24	5,143	41	1,262	917	622	2,302	
25-29	8,454	700	2,357	1,605	677	3,116	
30-34	9,733	2,650	1,764	1,745	680	2,895	
35-44	25,358	10,014	2,593	4,850	1,612	6,289	
45-54	29,657	15,127	1,812	3,375	2,050	7,293	
55-59	12,511	7,448	523	519	625	3,395	
60-64	11,431	6,566	309	449	481	3,627	
65-74	21,168	10,761	274	1,285	410	8,439	
75-84	12,022	2,412	49	1,425	201	7,935	
85+	4,672	586	28	532	51	3,474	
total	140,148	56,304	10,970	16,702	7,408	48,764	
calibration factor	1.0006						
total after calibration	140,236	56,339	10,976	16,713	7,412	48,795	

Table 4.2G - Projected Headship Rates and Projected Households, 2018 - South Lanarkshire

age	population in households		projected headship rates by age and by household type				
	male	female	married couple	cohabiting couple	lone parent	other multi-person	one person
0-14	23,480	22,503					
15-24	17,258	16,905	0.0003	0.0407	0.0233	0.0199	0.0738
25-29	9,362	8,836	0.0199	0.1535	0.0978	0.0449	0.1966
30-34	9,461	9,142	0.1161	0.1254	0.1133	0.0489	0.1972
35-44	16,900	18,590	0.1962	0.0753	0.1308	0.0461	0.1789
45-54	21,643	24,718	0.2862	0.0468	0.0767	0.0516	0.1775
55-59	11,215	12,233	0.3535	0.0327	0.0195	0.0337	0.1800
60-64	9,819	10,823	0.3328	0.0207	0.0179	0.0284	0.1912
65-74	15,396	17,611	0.3818	0.0127	0.0445	0.0116	0.2938
75-84	8,459	11,339	0.1430	0.0038	0.0907	0.0101	0.4436
85+	2,450	4,524	0.1109	0.0072	0.1059	0.0052	0.6790
total	145,442	157,225					

age	projected households by age of household reference person and by type of household					
	total	married couple	cohabiting couple	lone parent	other multi-person	one person
0-14						
15-24	5,402	11	1,391	796	681	2,523
25-29	9,330	363	2,793	1,779	818	3,577
30-34	11,177	2,159	2,333	2,107	910	3,668
35-44	22,264	6,964	2,671	4,643	1,636	6,350
45-54	29,612	13,269	2,167	3,556	2,392	8,228
55-59	14,521	8,288	767	456	790	4,221
60-64	12,200	6,870	428	369	586	3,947
65-74	24,567	12,601	418	1,470	382	9,696
75-84	13,684	2,831	76	1,796	200	8,782
85+	6,333	773	50	739	37	4,735
total	149,091	54,129	13,094	17,711	8,431	55,727
calibration factor	1.0006					
total after calibration	149,185	54,163	13,102	17,722	8,436	55,762

Table 4.2H - Projected Headship Rates and Projected Households, 2004 - West Dunbartonshire

age	population in households		projected headship rates by age and by household type				
	male	female	married couple	cohabiting couple	lone parent	other multi-person	one person
0-14	8,257	7,758					
15-24	6,271	6,148	0.0027	0.0279	0.0345	0.0178	0.0568
25-29	2,431	2,595	0.0559	0.0960	0.0973	0.0369	0.1618
30-34	2,780	3,136	0.1793	0.0794	0.1150	0.0356	0.1653
35-44	6,871	7,604	0.2390	0.0619	0.1305	0.0375	0.1439
45-54	6,097	6,521	0.3032	0.0360	0.0730	0.0393	0.1659
55-59	2,899	2,981	0.3318	0.0226	0.0421	0.0363	0.1992
60-64	2,185	2,501	0.2861	0.0147	0.0440	0.0231	0.2566
65-74	3,456	4,555	0.3288	0.0139	0.0556	0.0246	0.3165
75-84	1,763	3,048	0.1201	0.0032	0.0873	0.0173	0.4914
85+	307	844	0.1107	0.0011	0.1305	0.0199	0.6599
total	43,318	47,692					

age	projected households by age of household reference person and by type of household					
	total	married couple	cohabiting couple	lone parent	other multi-person	one person
0-14						
15-24	1,736	34	347	429	221	706
25-29	2,251	281	483	489	185	813
30-34	3,399	1,061	470	680	210	978
35-44	8,871	3,459	897	1,889	543	2,083
45-54	7,791	3,826	454	921	496	2,094
55-59	3,716	1,951	133	247	214	1,171
60-64	2,926	1,341	69	206	108	1,203
65-74	5,924	2,634	112	445	197	2,536
75-84	3,461	578	16	420	83	2,364
85+	1,061	127	1	150	23	759
total	41,136	15,292	2,980	5,877	2,281	14,707
calibration factor	1.0141					
total after calibration	41,714	15,507	3,022	5,960	2,313	14,913

Table 4.2H - Projected Headship Rates and Projected Households, 2011 - West Dunbartonshire

age	population in households		projected headship rates by age and by household type				
	male	female	married couple	cohabiting couple	lone parent	other multi-person	one person
0-14	7,267	7,241					
15-24	6,046	5,453	0.0007	0.0315	0.0261	0.0200	0.0629
25-29	3,092	3,237	0.0249	0.1140	0.0819	0.0471	0.1939
30-34	2,322	2,822	0.1348	0.1051	0.1195	0.0460	0.2161
35-44	5,576	6,514	0.1899	0.0854	0.1498	0.0484	0.1737
45-54	6,442	7,337	0.2697	0.0472	0.0737	0.0447	0.2005
55-59	2,902	3,220	0.3197	0.0242	0.0373	0.0401	0.2232
60-64	2,708	3,050	0.2654	0.0224	0.0349	0.0240	0.2934
65-74	3,773	4,457	0.3409	0.0201	0.0558	0.0248	0.3017
75-84	1,912	3,025	0.1211	0.0050	0.1060	0.0141	0.4962
85+	374	874	0.1184	0.0017	0.1411	0.0103	0.6735
total	42,415	47,230					

age	projected households by age of household reference person and by type of household					
	total	married couple	cohabiting couple	lone parent	other multi-person	one person
0-14						
15-24	1,624	8	362	300	230	723
25-29	2,923	158	722	518	298	1,227
30-34	3,198	694	541	615	236	1,112
35-44	7,823	2,296	1,032	1,811	585	2,100
45-54	8,761	3,716	651	1,016	617	2,762
55-59	3,945	1,957	148	228	246	1,366
60-64	3,686	1,528	129	201	138	1,690
65-74	6,117	2,805	166	459	204	2,483
75-84	3,666	598	25	524	69	2,450
85+	1,179	148	2	176	13	841
total	42,923	13,907	3,777	5,848	2,637	16,753
calibration factor	1.0141					
total after calibration	43,526	14,103	3,830	5,931	2,674	16,989

Table 4.2H - Projected Headship Rates and Projected Households, 2018 - West Dunbartonshire

age	population in households		projected headship rates by age and by household type				
	male	female	married couple	cohabiting couple	lone parent	other multi-person	one person
0-14	7,173	7,227					
15-24	5,141	4,950	0.0002	0.0349	0.0197	0.0222	0.0685
25-29	2,996	2,932	0.0110	0.1279	0.0685	0.0554	0.2179
30-34	3,050	3,317	0.1006	0.1280	0.1228	0.0554	0.2592
35-44	4,735	5,930	0.1498	0.1065	0.1666	0.0582	0.1996
45-54	5,913	7,037	0.2393	0.0581	0.0743	0.0500	0.2326
55-59	3,133	3,663	0.3079	0.0258	0.0330	0.0438	0.2463
60-64	2,811	3,383	0.2458	0.0300	0.0276	0.0249	0.3275
65-74	4,583	5,197	0.3525	0.0263	0.0560	0.0251	0.2874
75-84	2,135	3,068	0.1219	0.0067	0.1240	0.0114	0.5000
85+	486	1,040	0.1247	0.0022	0.1501	0.0053	0.6791
total	42,156	47,744					

age	projected households by age of household reference person and by type of household					
	total	married couple	cohabiting couple	lone parent	other multi-person	one person
0-14						
15-24	1,468	2	352	199	224	691
25-29	2,850	65	758	406	328	1,292
30-34	4,240	641	815	782	352	1,650
35-44	7,259	1,598	1,136	1,777	621	2,129
45-54	8,473	3,099	752	963	647	3,012
55-59	4,464	2,093	175	224	298	1,674
60-64	4,061	1,522	186	171	154	2,028
65-74	7,308	3,447	257	547	245	2,811
75-84	3,975	634	35	645	59	2,602
85+	1,467	190	3	229	8	1,036
total	45,565	13,291	4,469	5,943	2,938	18,925
calibration factor	1.0141					
total after calibration	46,205	13,478	4,532	6,026	2,979	19,190

Table 4.3 - Household Estimates and Projections by Household Type, 2002, 2004, 2011 and 2018

2002	Married Couple	Cohabiting Couple	Lone Parent	Other Multi-Person	One Person	Total Number of Households
East Dunbartonshire	24,141	1,944	3,866	1,668	10,784	42,403
East Renfrewshire	20,027	1,717	2,998	1,412	9,331	35,485
Glasgow City	74,341	19,067	42,501	24,814	118,300	279,023
Inverclyde	15,457	2,052	4,996	1,965	13,241	37,711
North Lanarkshire	60,861	8,648	18,467	6,831	40,683	135,490
Renfrewshire	33,270	5,087	8,817	3,478	25,897	76,548
South Lanarkshire	60,591	7,802	14,914	5,685	39,465	128,457
West Dunbartonshire	16,192	2,826	6,016	2,223	14,479	41,736
Structure Plan Area Total	304,881	49,143	102,574	48,076	272,180	776,853
2004	Married Couple	Cohabiting Couple	Lone Parent	Other Multi-Person	One Person	Total Number of Households
East Dunbartonshire	23,686	2,072	3,926	1,747	11,195	42,626
East Renfrewshire	19,684	1,825	2,985	1,503	9,713	35,709
Glasgow City	69,754	20,427	42,763	26,693	121,469	281,105
Inverclyde	14,925	2,183	4,913	2,037	13,592	37,649
North Lanarkshire	59,836	9,457	19,079	7,295	42,880	138,548
Renfrewshire	32,468	5,423	8,887	3,755	26,881	77,415
South Lanarkshire	59,987	8,586	15,497	6,134	41,799	132,002
West Dunbartonshire	15,507	3,022	5,960	2,313	14,913	41,714
Structure Plan Area Total	295,847	52,994	104,009	51,477	282,441	786,768
2011	Married Couple	Cohabiting Couple	Lone Parent	Other Multi-Person	One Person	Total Number of Households
East Dunbartonshire	22,476	2,677	4,266	2,069	12,908	44,397
East Renfrewshire	18,917	2,340	3,062	1,850	11,566	37,734
Glasgow City	58,706	25,403	44,101	31,982	137,050	297,243
Inverclyde	13,844	2,648	4,652	2,301	15,246	38,691
North Lanarkshire	55,838	12,170	20,590	8,691	50,555	147,844
Renfrewshire	29,891	6,560	8,956	4,605	30,550	80,562
South Lanarkshire	56,339	10,976	16,713	7,412	48,795	140,236
West Dunbartonshire	14,103	3,830	5,931	2,674	16,989	43,526
Structure Plan Area Total	270,114	66,604	108,271	61,585	323,659	830,233
2018	Married Couple	Cohabiting Couple	Lone Parent	Other Multi-Person	One Person	Total Number of Households
East Dunbartonshire	21,959	3,319	4,661	2,363	14,615	46,916
East Renfrewshire	18,400	2,904	3,170	2,195	13,571	40,239
Glasgow City	52,496	29,924	46,680	35,903	155,046	320,050
Inverclyde	13,254	3,046	4,383	2,503	16,964	40,150
North Lanarkshire	53,433	14,598	21,828	9,889	58,699	158,447
Renfrewshire	28,164	7,626	8,982	5,340	34,204	84,316
South Lanarkshire	54,163	13,102	17,722	8,436	55,762	149,185
West Dunbartonshire	13,478	4,532	6,026	2,979	19,190	46,205
Structure Plan Area Total	255,347	79,050	113,452	69,608	368,051	885,508

5.0 Household Tenure Projections to 2011 and to 2018

- 5.1 A methodology that splits the household projections by tenure has been a consistent feature of the Structure Plan process of estimating demand. The methodology used in the 2000 Plan and previous Strathclyde Structure Plans involved estimating the future percentage of households in owner-occupation and applying this to the household projections.
- 5.2 Significant alterations have been made to the methodology for the 2006 Plan following a review that considered two specific issues: (a) the growth of the private rented sector, and (b) economic limits to the growth in owner-occupation.

Growth of the Private Rented Sector

- 5.3 The previous tenure projection methodology was developed at a time when the private rented sector was relatively small and static and the one clear trend in tenure change was from the social rented to the owner-occupied sector. That particular tenure change context allowed the adoption of a methodology based on only two tenure groupings: owner-occupied and rented (both social and private). Growth in owner-occupation could then be projected in terms of the shift from the rented sector as a whole.
- 5.4 The dynamics of tenure change have altered significantly over the last decade. There remains a considerable shift from the social rented sector with most growth in the owner-occupied sector, but there is now also significant growth in the private rented sector: up over 80% between 1991 and 2004. These trends are shown in Table 5.1. The private rented sector has been growing since the introduction of the Business Expansion Scheme in the late-1980s, further boosted by the introduction of 'Buy-to-Let' mortgages. The 1996 Scottish House Condition Survey provided some evidence of growth in this sector, but uncertainties related to sample size precluded the use of the data in the 2000 Plan. As referred to in paragraph 2.6, enhanced Council Tax Register data from 2001 onwards provided evidence of the scale of change in Glasgow. It was not until 2001 Census data was published in 2003 that the scale of growth in the private sector across the Structure Plan area as a whole became evident.
- 5.5 Continuing with the existing bi-tenure split was not, therefore, considered feasible. The recent lower level of shift to owner-occupation reflects a shift from owner-occupation to private renting that would also need to be reflected in the projection. It would be extremely difficult to predict future growth in the private rented sector, particularly when the balance between revenue return and capital appreciation can fluctuate over time, instigating more frequent moves by landlords between the owner-occupied and private rental markets.
- 5.6 The alternative tenure split that has been adopted for the 2006 Plan is the amalgamation of the owner-occupied and private rented sectors. Tenure change is, therefore, assessed and projected in terms of shift from the social rented sector to the private sector as a whole. This has the effect of internalising the shifts between the owner-occupied and private rented sectors, thus removing the need to predict growth in the private rented sector.
- 5.7 A further benefit is that the future monitoring of stock and household change by tenure will be simplified if there is no longer a requirement to identify the private rented sector separately. For private rented sector data the Census is the only consistent source, and monitoring and the roll-forward of projections become more difficult in the inter-Censal period if these tenures are considered separately.

- 5.8 In terms of land supply, there are very few sites identified specifically for the private rented sector. The house-builders are, indirectly, the main providers of new private rented stock. In Glasgow, in particular, an increasing number of properties in 'owner-occupied' developments are being bought for rental purposes. This has the effect of exaggerating the true level of owner-occupied completions in the City. The previous approach results in a situation where private rented stock helps to meet owner-occupied demand - an anomaly that is removed if the private sector were to be considered as a whole.

Economic Limits to the Growth in Owner-Occupation

- 5.9 The concept of economic limits to the growth in owner-occupation was an important aspect of the tenure methodology developed for the 1995 Strathclyde Structure Plan. The methodology was also used in the 2000 Plan, albeit with significant revisions. While the assumption that there are economic limits to the growth in owner-occupation remains valid, it became clear that, in terms of both data availability and some of the fundamental assumptions, the methodology developed for the earlier Structure Plans was no longer sustainable.

Tenure Projection Methodology

- 5.10 The methodology adopted for the 2006 Plan involves projecting the percentage split of households in the private and social rented sectors. Table 5.2 shows how the tenure splits at 2011 and 2018 are calculated. The tenure percentages contained in this table exclude the effect of tenure change through Right-To-Buy (RTB) between 1991 and 2004. RTB sales form a separate heavily subsidised element of tenure change and are added to projected private households at a later stage. RTB is neutral in its effect on the balance between supply and demand because an equal number of households and houses change tenure.
- 5.11 The first two columns in Table 5.2 show the position in 1991 and 2004, the latter excluding the effect of RTB sales between the two dates. For each local authority, a change factor related to the decline in the social rented sector is calculated. This factor, expressed in terms of a cumulative annual change factor, is applied to the 2004 social rented percentage to calculate the position at 2011 and 2018. The use of social rented change factors in the calculation has the effect of reducing the decline in the social rented sector as the percentage approaches zero.
- 5.12 The penultimate stage in the tenure projection process is the application of the projected percentage tenure splits to the projected households at 2011 and 2018. This results in a projected tenure split of households that excludes the effect of all post-1991 RTB sales. The final stage is the addition of RTB sales for the 1991-2011 and 2011-2018 periods, the projection element of which is provided by each local authority. Tables 5.3 and 5.4 show the outcome of these last two stages for 2011 and 2018 respectively. For the Structure Plan Area as a whole, the private sector is projected to rise from 64.8% in 2002 to 73.3% in 2011 and 77.7% in 2018.
- 5.13 Tables 5.5 and 5.6 show the projected changes in tenure over the 2002-11 and 2011-18 periods respectively. In both periods, private sector household growth exceeds the overall growth in households, and there is a continued reduction in social rented households even when the effect of RTB is discounted.

Table 5.1 - Household Tenure Change, 1991-2004

1991	All Tenures	Social Rented Sector	Owner-Occupied Sector	Private Rented Sector	Total Private Sector		Total Private Sector		
					No.	%	No.	%	
East Dunbartonshire	39,300	8,299	30,112	889	31,001	78.88	31,001	78.88	
East Renfrewshire	32,078	5,792	25,554	732	26,286	81.94	26,286	81.94	
Glasgow City	270,787	159,737	95,847	15,203	111,050	41.01	111,050	41.01	
Inverclyde	36,217	19,479	15,455	1,283	16,738	46.22	16,738	46.22	
North Lanarkshire	120,973	72,718	47,004	1,251	48,255	39.89	48,255	39.89	
Renfrewshire	70,531	32,725	36,094	1,712	37,806	53.60	37,806	53.60	
South Lanarkshire	115,644	51,447	61,435	2,762	64,197	55.51	64,197	55.51	
West Dunbartonshire	38,675	22,470	15,694	511	16,205	41.90	16,205	41.90	
Structure Plan Area Total	724,205	372,667	327,195	24,343	351,538	48.54	351,538	48.54	
2004	All Tenures	Social Rented Sector	Owner-Occupied Sector	Private Rented Sector	Total Private Sector		1991-04 RTB sales	Total Private Sector Excluding 1991-04 RTB	
					No.	%		No.	%
East Dunbartonshire	42,626	5,742	35,664	1,220	36,884	86.53	2,681	34,203	80.24
East Renfrewshire	35,709	4,277	30,336	1,096	31,432	88.02	1,740	29,692	83.15
Glasgow City	281,105	113,982	139,216	27,907	167,123	59.45	27,593	139,530	49.64
Inverclyde	37,649	11,939	23,650	2,060	25,710	68.29	5,743	19,967	53.03
North Lanarkshire	138,548	49,311	85,869	3,368	89,237	64.41	23,198	66,039	47.67
Renfrewshire	77,415	21,658	52,107	3,650	55,757	72.02	9,142	46,615	60.21
South Lanarkshire	132,002	34,080	93,548	4,374	97,922	74.18	18,526	79,396	60.15
West Dunbartonshire	41,714	16,716	23,818	1,180	24,998	59.93	4,814	20,184	48.39
Structure Plan Area Total	786,768	257,705	484,208	44,855	529,063	67.25	93,437	435,626	55.37

Table 5.1 - Household Tenure Change, 1991-2004

1991-04 Change	All Tenures	Social Rented	Owner-Occupied	Private Rented	Total Private Sector		1991-04 RTB sales	Total Private Sector Excluding 1991-04 RTB	
		Sector	Sector	Sector	No.	%		No.	%
East Dunbartonshire	3,326	-2,557	5,552	331	5,883	7.65	2,681	3,202	1.36
East Renfrewshire	3,631	-1,515	4,782	364	5,146	6.08	1,740	3,406	1.21
Glasgow City	10,318	-45,755	43,369	12,704	56,073	18.44	27,593	28,480	8.63
Inverclyde	1,432	-7,540	8,195	777	8,972	22.07	5,743	3,229	6.82
North Lanarkshire	17,575	-23,407	38,865	2,117	40,982	24.52	23,198	17,784	7.78
Renfrewshire	6,884	-11,067	16,013	1,938	17,951	18.42	9,142	8,809	6.61
South Lanarkshire	16,358	-17,367	32,113	1,612	33,725	18.67	18,526	15,199	4.63
West Dunbartonshire	3,039	-5,754	8,124	669	8,793	18.03	4,814	3,979	6.49
Structure Plan Area									
Total	62,563	-114,962	157,013	20,512	177,525	18.70	93,437	84,088	6.83

Table 5.2 - Projected Household Tenure (excluding post-1991 RTB), 2011 and 2018

Tenure Change by Local Authority				
East Dunbartonshire	1991	2004	2011	2018
% Private (excluding post-1991 RTB)	78.88	80.24	80.93	81.60
% Social Rented	21.12	19.76	19.07	18.40
1991-04 Social Rented Change Factor		0.9357		
1991-04 Social Rented Annual Change Factor		0.9949		
East Renfrewshire	1991	2004	2011	2018
% Private (excluding post-1991 RTB)	81.94	83.15	83.77	84.36
% Social Rented	18.06	16.85	16.23	15.64
1991-04 Social Rented Change Factor		0.9332		
1991-04 Social Rented Annual Change Factor		0.9947		
Glasgow City	1991	2004	2011	2018
% Private (excluding post-1991 RTB)	41.01	49.64	53.75	57.52
% Social Rented	58.99	50.36	46.25	42.48
1991-04 Social Rented Change Factor		0.8538		
1991-04 Social Rented Annual Change Factor		0.9879		
Inverclyde	1991	2004	2011	2018
% Private (excluding post-1991 RTB)	46.22	53.03	56.34	59.42
% Social Rented	53.78	46.97	43.66	40.58
1991-04 Social Rented Change Factor		0.8732		
1991-04 Social Rented Annual Change Factor		0.9896		
North Lanarkshire	1991	2004	2011	2018
% Private (excluding post-1991 RTB)	39.89	47.67	51.43	54.92
% Social Rented	60.11	52.33	48.57	45.08
1991-04 Social Rented Change Factor		0.8706		
1991-04 Social Rented Annual Change Factor		0.9894		
Renfrewshire	1991	2004	2011	2018
% Private (excluding post-1991 RTB)	53.60	60.21	63.38	66.29
% Social Rented	46.40	39.79	36.62	33.71
1991-04 Social Rented Change Factor		0.8575		
1991-04 Social Rented Annual Change Factor		0.9882		
South Lanarkshire	1991	2004	2011	2018
% Private (excluding post-1991 RTB)	55.51	60.15	62.44	64.60
% Social Rented	44.49	39.85	37.56	35.40
1991-04 Social Rented Change Factor		0.8958		
1991-04 Social Rented Annual Change Factor		0.9916		
West Dunbartonshire	1991	2004	2011	2018
% Private (excluding post-1991 RTB)	41.90	48.39	51.57	54.56
% Social Rented	58.10	51.61	48.43	45.44
1991-04 Social Rented Change Factor		0.8884		
1991-04 Social Rented Annual Change Factor		0.9909		

Table 5.3 - Projected Tenure of Households , 2011

	All Tenures	Private (excl RTB)		RTB		Private (incl RTB)		Social Rented	
		%	No.	1991-02	2002-11	%	No.	No.	%
East Dunbartonshire	44,397	80.93	35,932	2,001	2,050	39,983	90.06	4,414	9.94
East Renfrewshire	37,734	83.77	31,608	1,430	1,121	34,159	90.53	3,575	9.47
Glasgow City	297,243	53.75	159,754	23,775	9,826	193,355	65.05	103,888	34.95
Inverclyde	38,692	56.34	21,800	5,098	1,650	28,548	73.78	10,144	26.22
North Lanarkshire	147,844	51.43	76,032	19,934	11,704	107,670	72.83	40,174	27.17
Renfrewshire	80,561	63.38	51,057	7,746	4,258	63,061	78.28	17,500	21.72
South Lanarkshire	140,236	62.44	87,564	15,677	9,900	113,141	80.68	27,095	19.32
West Dunbartonshire	43,526	51.57	22,447	3,982	2,374	28,803	66.17	14,723	33.83
Structure Plan Area Total	830,233	58.56	486,194	79,643	42,883	608,720	73.32	221,513	26.68

Table 5.4 - Projected Tenure of Households , 2018

	All Tenures	Private (excl RTB)		RTB		Private (incl RTB)		Social Rented	
		%	No.	1991-02	2002-18	%	No.	No.	%
East Dunbartonshire	46,916	81.60	38,286	2,001	3,172	43,459	92.63	3,457	7.37
East Renfrewshire	40,238	84.36	33,944	1,430	1,677	37,051	92.08	3,187	7.92
Glasgow City	320,049	57.52	184,090	23,775	14,726	222,591	69.55	97,458	30.45
Inverclyde	40,150	59.42	23,856	5,098	2,353	31,307	77.97	8,843	22.03
North Lanarkshire	158,447	54.92	87,017	19,934	17,588	124,539	78.60	33,908	21.40
Renfrewshire	84,316	66.29	55,890	7,746	5,813	69,449	82.37	14,867	17.63
South Lanarkshire	149,185	64.60	96,376	15,677	15,104	127,157	85.23	22,028	14.77
West Dunbartonshire	46,205	54.56	25,210	3,982	3,228	32,420	70.17	13,785	29.83
Structure Plan Area Total	885,507	61.51	544,669	79,643	63,661	687,973	77.69	197,534	22.31

Table 5.5 - Projected Change in the Tenure of Households , 2002 to 2011

	2002-2011 Change						2002-2011 Change (excl RTB)			
	All Tenures		Private		Social Rented		Private		Social Rented	
	No.	%	No.	%	No.	%	No.	%	No.	%
East Dunbartonshire	1,994	4.70	3,981	11.06	-1,987	-31.04	1,931	5.36	63	0.98
East Renfrewshire	2,249	6.34	3,456	11.26	-1,207	-25.25	2,335	7.61	-86	-1.80
Glasgow City	18,220	6.53	33,607	21.04	-15,387	-12.90	23,781	14.89	-5,561	-4.66
Inverclyde	981	2.60	3,826	15.48	-2,845	-21.90	2,176	8.80	-1,195	-9.20
North Lanarkshire	12,354	9.12	24,173	28.95	-11,819	-22.73	12,469	14.93	-115	-0.22
Renfrewshire	4,013	5.24	10,030	18.91	-6,017	-25.58	5,772	10.88	-1,759	-7.48
South Lanarkshire	11,779	9.17	21,344	23.25	-9,565	-26.09	11,444	12.47	335	0.91
West Dunbartonshire	1,790	4.29	5,032	21.17	-3,242	-18.05	2,658	11.18	-868	-4.83
Structure Plan Area Total	53,380	6.87	105,449	20.95	-52,069	-19.03	62,566	12.43	-9,186	-3.36

Table 5.6 - Projected Change in the Tenure of Households , 2011 to 2018

	2011-2018 Change						2011-2018 Change (excl RTB)			
	All Tenures		Private		Social Rented		Private		Social Rented	
	No.	%	No.	%	No.	%	No.	%	No.	%
East Dunbartonshire	2,520	5.68	3,476	8.69	-956	-21.67	2,354	5.89	166	3.75
East Renfrewshire	2,505	6.64	2,892	8.47	-387	-10.84	2,336	6.84	169	4.72
Glasgow City	22,806	7.67	29,236	15.12	-6,430	-6.19	24,336	12.59	-1,530	-1.47
Inverclyde	1,458	3.77	2,759	9.66	-1,301	-12.82	2,056	7.20	-598	-5.89
North Lanarkshire	10,603	7.17	16,869	15.67	-6,266	-15.60	10,985	10.20	-382	-0.95
Renfrewshire	3,755	4.66	6,388	10.13	-2,633	-15.05	4,833	7.66	-1,078	-6.16
South Lanarkshire	8,949	6.38	14,016	12.39	-5,067	-18.70	8,812	7.79	137	0.50
West Dunbartonshire	2,679	6.16	3,617	12.56	-938	-6.37	2,763	9.59	-84	-0.57
Structure Plan Area Total	55,274	6.66	79,253	13.02	-23,979	-10.83	58,475	9.61	-3,201	-1.45

6.0 Private Sector Households at 2011 and 2018 - Disaggregation to Housing Market Areas

- 6.1 Up to this stage in the process, local authority boundaries provide the geographical framework for the demand side of the equation. This section describes how demand figures for the Housing Market Area (HMA) framework are derived. In the absence of population, household and tenure projections for each part of the HMA system, the LA-based projections are split between the various HMA building blocks and aggregated to the Sub Market Areas.
- 6.2 The first part of the process involves separately sub-dividing the following three elements of the projection:
- (a) existing private sector households at 2002;
 - (b) 2002-2011 and 2011-2018 growth in private sector households excluding the effect of Right-To-Buy (RTB) sales; and
 - (c) 2002-2011 and 2011-2018 growth in private sector households from RTB.
- 6.3 The outcome of this process is shown in Tables 6.1 (2011) and 6.2 (2018). As with Council-wide data, private sector stock for each of the local authority sub-divisions is estimated by subtracting social rented stock data from estimates of total stock from the Council Tax Register. From this stock base, private sector households are estimated. Projected RTB sales for each sub-division are either provided separately by each local authority or are Council-wide figures split pro-rata based on each sub-division's share of social rented stock. The increase in private sector households excluding RTB (see Tables 5.5 and 5.6) is split on the basis of each sub-division's share of total stock at the 2002 base date.
- 6.4 Table 6.1 identifies a projected total of 606,163 private sector households at 2011 (excluding the allowance for sharing households) whereas the figure shown in Table 6.2 is 601,916. This difference is a result of the approach taken in separating the two periods within which supply and demand are compared. For the second period (2011-2018), a new base position for stock and households at 2011 is established. The 2011 households shown in Table 6.2 therefore have to reflect the stock projections based on the known (2004) housing land supply only. The additional shortfalls in supply at 2011 total 4,247 units (see Table 9.1), but until specific sites to meet these shortfalls are identified, it is not possible to include this additional stock in the revised 2011 estimates for each local authority sub-division. From this section onwards, projected private households at 2018 exclude the 4,247 related to the 2011 shortfall. This does not affect the supply and demand comparison at 2018, as the revised 2011 base contains a set of household estimates that are consistent with the stock projections. This approach also ensures that the two periods can be considered separately – shortfalls at 2018 are additional to those at 2011.
- 6.5 The second part of this process is shown in Tables 6.3 (2011) and 6.4 (2018). Private sector households for the local authority sub-divisions are amalgamated, where necessary, to relate to the Housing Market Areas or Sub Market Areas.
- 6.6 A further adjustment to the projected owner-occupied households is the allowance for sharing households. Household figures in Tables 6.1 – 6.4 show households after the allowance is subtracted, although the effect is minimal.

Table 6.1 - Private Sector Households, 2011 - Local Authority Sub-Division		2002 households (excl allowance for sharing)	2002-11 increase in households from RTB (+)	2002 % share of total stock	2002-11 increase in households excluding RTB (+)	2011 households (excl allowance for sharing) (=)
Local Authority	LA sub-division					
East Dunbartonshire		36,001	2,050		1,931	39,982
	Bearsden & Milngavie	14,799	482	37.9%	731	16,012
	Strathkelvin	21,202	1,568	62.1%	1,200	23,970
East Renfrewshire		30,703	1,121		2,335	34,159
	Eastwood	23,851	411	71.4%	1,668	25,930
	Levern Valley	6,852	710	28.6%	667	8,229
Glasgow City		157,251	9,826		23,781	190,858
	Glasgow North & West	55,779	3,212	33.9%	8,070	67,061
	Glasgow Springburn	7,785	951	7.3%	1,729	10,465
	Glasgow East	30,451	2,420	21.7%	5,152	38,023
	Glasgow South	63,236	3,243	37.1%	8,830	75,309
Inverclyde		24,690	1,650		2,176	28,516
	Kilmacolm	2,046	56	5.6%	122	2,224
	Inverclyde (remainder)	22,644	1,594	94.4%	2,054	26,292
North Lanarkshire		83,497	11,704		12,469	107,670
	Cumbernauld	25,449	1,828	24.7%	3,075	30,352
	Airdrie & Coatbridge	26,414	4,293	32.3%	4,026	34,733
	Motherwell	31,634	5,583	43.1%	5,368	42,585
Renfrewshire		53,015	4,258		5,772	63,045
	Renfrewshire	53,015	4,258	100.0%	5,772	63,045
South Lanarkshire		91,788	9,900		11,444	113,132
	Rutherglen & Cambuslang	16,295	2,100	19.2%	2,195	20,590
	East Kilbride	28,629	1,971	27.3%	3,129	33,729
	Hamilton	29,403	4,001	34.3%	3,923	37,327
	Clydesdale	17,461	1,828	19.2%	2,196	21,485
West Dunbartonshire		23,769	2,374		2,658	28,801
	Dumbarton & Vale of Leven	12,894	969	50.2%	1,335	15,198
	Clydebank & Villages	10,875	1,405	49.8%	1,323	13,603
Structure Plan Area Total		500,714	42,883		62,566	606,163

Table 6.2 - Private Sector Households, 2018 - Local Authority Sub-Division		2011 households (excl allowance for sharing)	2011-18 increase in households from RTB (+)	2002 % share of total stock	2011-18 increase in households excluding RTB (+)	2018 households (excl allowance for sharing) (=)
Local Authority	LA sub-division					
East Dunbartonshire		39,220	1,122		2,354	42,696
	Bearsden & Milngavie	15,810	270	37.9%	891	16,971
	Strathkelvin	23,410	852	62.1%	1,463	25,725
East Renfrewshire		33,502	556		2,336	36,394
	Eastwood	25,463	190	71.4%	1,669	27,322
	Levern Valley	8,039	366	28.6%	667	9,072
Glasgow City		192,617	4,900		24,336	221,853
	Glasgow North & West	70,724	1,575	33.9%	8,258	80,557
	Glasgow Springburn	9,600	497	7.3%	1,769	11,866
	Glasgow East	38,690	1,225	21.7%	5,272	45,187
	Glasgow South	73,603	1,603	37.1%	9,036	84,242
Inverclyde		28,221	703		2,056	30,980
	Kilmacolm	2,198	25	5.6%	115	2,338
	Inverclyde (remainder)	26,023	678	94.4%	1,941	28,642
North Lanarkshire		104,658	5,884		10,985	121,527
	Cumbernauld	30,175	877	24.7%	2,709	33,761
	Airdrie & Coatbridge	33,666	2,185	32.3%	3,546	39,397
	Motherwell	40,817	2,822	43.1%	4,729	48,368
Renfrewshire		62,082	1,555		4,833	68,470
	Renfrewshire	62,082	1,555	100.0%	4,833	68,470
South Lanarkshire		112,543	5,204		8,812	126,559
	Rutherglen & Cambuslang	20,972	1,195	19.2%	1,691	23,858
	East Kilbride	32,707	963	27.3%	2,409	36,079
	Hamilton	37,470	2,062	34.3%	3,021	42,553
	Clydesdale	21,394	984	19.2%	1,691	24,069
West Dunbartonshire		29,073	854		2,763	32,690
	Dumbarton & Vale of Leven	15,198	332	50.2%	1,387	16,917
	Clydebank & Villages	13,875	522	49.8%	1,376	15,773
Structure Plan Area Total		601,916	20,778		58,475	681,169

Table 6.3 - Private Sector Households, 2011 - Aggregation to Housing Market Areas

Local Authority	Housing Market Area / Sub Market Area	2011 households
		(excl allowance for sharing)
West Dunbartonshire	Dumbarton & Vale of Leven HMA	15,198
Inverclyde	Inverclyde HMA	26,292
West Dunbartonshire	Clydebank & Villages	13,603
East Dunbartonshire	Bearsden & Milngavie	16,012
Glasgow City	Glasgow North & West	67,061
	Greater Glasgow North & West SMA	96,676
East Dunbartonshire	Strathkelvin	23,970
Glasgow City	Glasgow Springburn	10,465
	Strathkelvin & Springburn SMA	34,435
Glasgow City	Glasgow East SMA	38,023
North Lanarkshire	Cumbernauld SMA	30,352
Glasgow City	Glasgow South	75,309
East Renfrewshire	Eastwood	25,930
South Lanarkshire	Rutherglen & Cambuslang	20,590
	Greater Glasgow South SMA	121,829
Renfrewshire	Renfrewshire	63,045
East Renfrewshire	Levern Valley	8,229
Inverclyde	Kilmacolm	2,224
	Renfrewshire SMA	73,498
South Lanarkshire	East Kilbride SMA	33,729
North Lanarkshire	Airdrie & Coatbridge SMA	34,733
North Lanarkshire	Motherwell SMA	42,585
South Lanarkshire	Clydesdale SMA	21,485
South Lanarkshire	Hamilton SMA	37,327
	Structure Plan Area Total	606,162

Table 6.4 - Private Sector Households, 2018 - Aggregation to Housing Market Areas

2018 households

(excl allowance

Local Authority	Housing Market Area / Sub Market Area	for sharing)
West Dunbartonshire	Dumbarton & Vale of Leven HMA	16,917
Inverclyde	Inverclyde HMA	28,642
West Dunbartonshire	Clydebank & Villages	15,773
East Dunbartonshire	Bearsden & Milngavie	16,971
Glasgow City	Glasgow North & West	80,557
	Greater Glasgow North & West SMA	113,301
East Dunbartonshire	Strathkelvin	25,725
Glasgow City	Glasgow Springburn	11,866
	Strathkelvin & Springburn SMA	37,591
Glasgow City	Glasgow East SMA	45,187
North Lanarkshire	Cumbernauld SMA	33,761
Glasgow City	Glasgow South	84,242
East Renfrewshire	Eastwood	27,322
South Lanarkshire	Rutherglen & Cambuslang	23,858
	Greater Glasgow South SMA	135,422
Renfrewshire	Renfrewshire	68,470
East Renfrewshire	Levern Valley	9,072
Inverclyde	Kilmacolm	2,338
	Renfrewshire SMA	79,880
South Lanarkshire	East Kilbride SMA	36,079
North Lanarkshire	Airdrie & Coatbridge SMA	39,397
North Lanarkshire	Motherwell SMA	48,368
South Lanarkshire	Clydesdale SMA	24,069
South Lanarkshire	Hamilton SMA	42,553
	Structure Plan Area Total	681,167

7.0 Private Sector Housing Stock Projections to 2011 and 2018

7.1 Projections of private housing stock and vacancies are required to enable the effective housing stock to be compared with projected demand in the private sector. The housing market area system provides the geographical framework for comparing supply and demand and stock projections are required for these areas. Initially the data for the stock projections was collected on a local authority basis (Tables 7.3 and 7.4), but, as with the household projections, it was disaggregated by sub-area for the Housing Market Area framework.

Private Sector Stock Projections for Local Authority Areas

7.2 The most significant component of the increase in private sector stock is the level of new housing completions. For the 2011 projection, this is based on the programmed output from sites in each local authority's finalised 2004 effective housing land supply. Table 7.1 summarises the data for each local authority sub-area.

7.3 For the 2018 projection, possible sources of additional housing are identified in the Urban Capacity Study (see Technical Report 2). Table 7.2 summarises the data for each local authority sub-area, split between sites in the 2004 Established Land Supply (ELS) and potential sites not yet in the supply. The sources of sites in the latter category include, for example, vacant and derelict land, industrial and business areas and public sector housing demolition areas. Sites in the ELS are either part-effective sites, where output is programmed pre- and post-2011, or non-effective sites that are expected to be built in the longer-term.

7.4 In Tables 7.3 and 7.5 the base stock at June 2002 has been reduced by the number of completions between 31 March and 30 June to avoid double counting with the completions data that have a 31 March base date.

7.5 The sale of rented stock to sitting tenants via 'Right-to Buy' (RTB) is also significant in terms of the increase in private sector stock. RTB is, however, completely neutral in its effect on the balance between supply and demand because an equal number of households change tenure. Each local authority has provided RTB projections, which show a falling level of sales.

7.6 It cannot be assumed that all stock is available to satisfy housing demand. Effective stock excludes vacant and other non-effective stock such as second homes and holiday homes. Vacant stock at 2011 has been estimated by adding the vacancies that will arise in the new owner-occupied stock to the number of vacancies in 2002. The additional vacancies have been calculated by applying a 1% 'frictional' vacancy rate to the increase in stock to allow for the short-term vacancies associated with stock turnover. Other non-effective stock is assumed to remain constant.

Private Sector Stock Projections for Housing Market Areas

7.7 Projections of private stock for Housing Market Areas (HMA) are shown in Tables 7.5 (2011) and 7.6 (2018). Within the Central Conurbation and Eastern Conurbation HMAs, projected private sector stock is required for each of the Sub Market Areas (SMA) to allow comparisons with estimated local demand. Where a SMA crosses local authority boundaries, Tables 7.5 and 7.6 show the stock projection for each part of the SMA contained within a local authority. For example, the stock projection for the Renfrewshire SMA shows separate figures for Renfrewshire, Kilmaccolm (Inverclyde) and the Lavern Valley area (East Renfrewshire).

Table 7.1 - Private Sector Housing Land Supply, 2004-2011

	2004/11 Effective Supply		Total Private Sector
	Owner Occupied	Private Rented	
Bearsden & Milngavie	532	0	532
Strathkelvin	481	0	481
East Dunbartonshire	1,013	0	1,013
Eastwood	1,077	0	1,077
Levern Valley	446	0	446
East Renfrewshire	1,523	0	1,523
Glasgow North & West	9,642	147	9,789
Glasgow Springburn	796	0	796
Glasgow East	4,937	39	4,976
Glasgow South	5,909	38	5,947
Glasgow City	21,284	224	21,508
Kilmacolm	54	0	54
Inverclyde (remainder)	1,472	0	1,472
Inverclyde	1,526	0	1,526
Cumbernauld	2,317	0	2,317
Airdrie & Coatbridge	2,178	0	2,178
Motherwell	2,785	0	2,785
North Lanarkshire	7,280	0	7,280
Renfrewshire	4,060	0	4,060
Rutherglen & Cambuslang	1,961	0	1,961
East Kilbride	1,468	0	1,468
Hamilton	2,812	0	2,812
Clydesdale	1,893	0	1,893
South Lanarkshire	8,134	0	8,134
Dumbarton & Vale of Leven	1,791	0	1,791
Clydebank & Villages	1,446	0	1,446
West Dunbartonshire	3,237	0	3,237
Structure Plan Area Total	48,057	224	48,281

Table 7.2 - Private Sector Housing Land Supply, 2011-2018

Urban Capacity Study			
	2004 Established Land Supply	Other non- ELS sites	Total
Bearsden & Milngavie	300	75	375
Strathkelvin	1,814	30	1,844
East Dunbartonshire	2,114	105	2,219
Eastwood	0	464	464
Levern Valley	0	276	276
East Renfrewshire	0	740	740
Glasgow North & West	4,658	4,850	9,508
Glasgow Springburn	334	677	1,011
Glasgow East	2,295	3,634	5,929
Glasgow South	776	4,094	4,870
Glasgow City	8,063	13,255	21,318
Kilmacolm	0	0	0
Inverclyde (remainder)	2,249	442	2,691
Inverclyde	2,249	442	2,691
Cumbernauld	1,110	399	1,509
Airdrie & Coatbridge	1,727	740	2,467
Motherwell	2,216	678	2,894
North Lanarkshire	5,053	1,817	6,870
Renfrewshire	944	2,302	3,246
Rutherglen & Cambuslang	39	562	601
East Kilbride	906	395	1,301
Hamilton	688	685	1,373
Clydesdale	847	682	1,529
South Lanarkshire	2,480	2,324	4,804
Dumbarton & Vale of Leven	153	1,874	2,027
Clydebank & Villages	500	1,045	1,545
West Dunbartonshire	653	2,919	3,572
Structure Plan Area Total	21,556	23,904	45,460

Table 7.3 - Private Sector Housing Stock Projection for Local Authorities, 2002 to 2011

		East Dunbartonshire	East Renfrewshire	Glasgow City	Inverclyde	North Lanarkshire	Renfrewshire	South Lanarkshire	West Dunbartonshire	Structure Plan Area Total
OWNER OCCUPIED STOCK										
June 2002 stock*	=	35,174	30,065	136,720	23,044	81,161	50,611	88,962	22,935	468,672
Actual completions 2002/04	+	211	216	4,745	456	2,750	952	3,263	435	13,028
Programmed completions 2004/2011	+	1,013	1,523	21,284	1,526	7,280	4,060	8,134	3,237	48,057
Additions from RTB sales 2004/2011	+	2,050	1,121	9,826	1,650	11,704	4,258	9,900	2,374	42,883
Demolitions 2002/2011	-	6	0	0	0	0	0	0	20	26
Stock at June 2011	=	38,442	32,925	172,575	26,676	102,895	59,881	110,259	28,961	572,614
2002 vacancies		373	470	2,032	412	1,328	1,257	1,709	344	7,925
2002-2011 increase in vacancies		33	28	353	36	214	92	210	60	1,026
2011 vacancies	-	406	498	2,385	448	1,542	1,349	1,919	404	8,951
Other non-effective stock	-	36	21	431	40	63	86	166	59	902
Effective stock at June 2011	=	38,000	32,406	169,759	26,188	101,290	58,446	108,174	28,498	562,761
PRIVATE RENTED STOCK										
June 2002 stock*	=	1,292	1,166	23,633	2,167	3,561	3,860	4,653	1,246	41,578
Actual completions 2002/04	+	0	0	282	0	0	0	0	5	287
Programmed completions 2004/2011	+	0	0	224	0	0	0	0	0	224
Stock at June 2011	=	1,292	1,166	24,139	2,167	3,561	3,860	4,653	1,251	42,089
2011 vacancy rate		5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	
2011 vacancies	-	65	58	1,207	108	178	193	233	63	2,105
Other non-effective stock	-	8	12	75	27	15	31	52	8	228
Effective stock at June 2011	=	1,219	1,096	22,857	2,032	3,368	3,636	4,368	1,180	39,756

TOTAL PRIVATE SECTOR STOCK		East Dunbartonshire	East Renfrewshire	Glasgow City	Inverclyde	North Lanarkshire	Renfrewshire	South Lanarkshire	West Dunbartonshire	Structure Plan Area Total
June 2002 stock*	=	36,466	31,231	160,353	25,211	84,722	54,471	93,615	24,181	510,250
Actual completions 2002/04	+	211	216	5,027	456	2,750	952	3,263	440	13,315
Programmed completions 2004/2011	+	1,013	1,523	21,508	1,526	7,280	4,060	8,134	3,237	48,281
Additions from RTB sales 2002/2011	-	2,050	1,121	9,826	1,650	11,704	4,258	9,900	2,374	42,883
Demolitions 2002/2011	-	6	0	0	0	0	0	0	20	26
Stock at June 2011	=	39,734	34,091	196,714	28,843	106,456	63,741	114,912	30,212	614,703
2011 vacancies	-	471	556	3,592	556	1,720	1,542	2,152	467	11,056
2011 vacancy rate		1.19	1.63	1.83	1.93	1.62	2.42	1.87	1.55	
Other non-effective stock	-	44	33	506	67	78	117	218	67	1,130
Effective stock at June 2011	=	39,219	33,502	192,616	28,220	104,658	62,082	112,542	29,678	602,517

* excluding 31 March - 30 June completions

Table 7.4 - Private Sector Housing Stock Projection for Local Authorities, 2011 to 2018

		East Dunbartonshire	East Renfrewshire	Glasgow City	Inverclyde	North Lanarkshire	Renfrewshire	South Lanarkshire	West Dunbartonshire	Structure Plan Area Total
OWNER OCCUPIED STOCK										
2011 Stock	=	38,442	32,925	172,575	26,676	102,895	59,881	110,259	28,961	572,614
Programmed completions 2011/2018	+	2,219	740	21,318	2,691	6,870	3,246	4,804	3,572	45,460
Additions from RTB sales 2011/2018	+	1,122	556	4,900	703	5,884	1,555	5,204	854	20,778
Demolitions 2011/2018	-	0	0	0	0	0	0	0	0	0
2018 Stock	=	41,783	34,221	198,793	30,070	115,649	64,682	120,267	33,387	638,852
2011 vacancies		406	498	2,385	448	1,542	1,349	1,919	404	8,951
2011-2018 increase in vacancies		33	13	262	34	128	48	100	44	662
2018 vacancies	-	439	511	2,647	482	1,670	1,397	2,019	448	9,613
Other non-effective stock	-	36	21	431	40	63	86	166	59	902
2018 Effective Stock	=	41,308	33,689	195,715	29,548	113,916	63,199	118,082	32,880	628,337
PRIVATE RENTED										
2011 stock	=	1,292	1,166	24,139	2,167	3,561	3,860	4,653	1,251	42,089
Programmed completions 2011/2018	+	0	0	0	0	0	0	0	0	0
2018 Stock	=	1,292	1,166	24,139	2,167	3,561	3,860	4,653	1,251	42,089
2018 vacancy rate		5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	
2018 vacancies	-	65	58	1,207	108	178	193	233	63	2,105
Other non-effective stock	-	8	12	75	27	15	31	52	8	228
2018 Effective Stock	=	1,219	1,096	22,857	2,032	3,368	3,636	4,368	1,180	39,756

		East Dunbartonshire	East Renfrewshire	Glasgow City	Inverclyde	North Lanarkshire	Renfrewshire	South Lanarkshire	West Dunbartonshire	Structure Plan Area Total
TOTAL PRIVATE SECTOR STOCK										
2011 Stock	=	39,734	34,091	196,714	28,843	106,456	63,741	114,912	30,212	614,703
Programmed completions 2011/2018	+	2,219	740	21,318	2,691	6,870	3,246	4,804	3,572	45,460
Additions from RTB sales 2011/2018	+	1,122	556	4,900	703	5,884	1,555	5,204	854	20,778
Demolitions 2011/2018	-	0	0	0	0	0	0	0	0	0
2018 Stock	=	43,075	35,387	222,932	32,237	119,210	68,542	124,920	34,638	680,941
2018 vacancies	-	504	569	3,854	590	1,848	1,590	2,252	511	11,718
2018 vacancy rate		1.17	1.61	1.73	1.83	1.55	2.32	1.80	1.48	
Other non-effective stock	-	44	33	506	67	78	117	218	67	1,130
2018 Effective Stock	=	42,527	34,785	218,572	31,580	117,284	66,835	122,450	34,060	668,093

Table 7.5 - Private Sector Stock Projection for Housing Market Areas, 2002 to 2011

Local Authority	Housing Market Area / Sub Market Area	June 2002 stock*	2002-04 completions	2004-11 programmed completions	2002-11 RTB	2002-11 Demolitions	2011 projected stock	2002 vacancies	2002-11 increase in vacancies	2011 vacancies	Other non-effective stock	2011 effective stock
			(+)	(+)	(+)		(=)			(-)	(-)	(=)
West Dunbartonshire	Dumbarton & Vale of Leven HMA	13,124	216	1,791	969	10	16,090	221	29	250	36	15,804
Inverclyde	Inverclyde HMA	23,123	407	1,472	1,594	0	26,596	477	34	511	62	26,023
West Dunbartonshire	Clydebank & Villages	11,057	224	1,446	1,405	10	14,122	185	31	216	31	13,875
East Dunbartonshire	Bearsden & Milngavie	14,995	9	532	482	0	16,018	180	10	190	18	15,810
Glasgow City	Glasgow North & West	56,897	2,400	9,789	3,212	0	72,298	1,228	166	1,394	180	70,724
	Greater Glasgow North & West SMA	82,949	2,633	11,767	5,099	10	102,438	1,593	207	1,800	229	100,409
East Dunbartonshire	Strathkelvin	21,471	202	481	1,568	6	23,716	258	22	280	26	23,410
Glasgow City	Glasgow Springburn	7,935	95	796	951	0	9,777	134	18	152	25	9,600
	Strathkelvin & Springburn SMA	29,406	297	1,277	2,519	6	33,493	392	40	432	51	33,010
Glasgow City	Glasgow East SMA	30,984	1,069	4,976	2,420	0	39,449	576	86	662	97	38,690
North Lanarkshire	Cumbernauld SMA	25,833	729	2,317	1,828	0	30,707	460	48	508	24	30,175
Glasgow City	Glasgow South Side	64,537	1,463	5,947	3,243	0	75,190	1,277	106	1,383	204	73,603
East Renfrewshire	Eastwood	24,261	165	1,077	411	0	25,914	410	16	426	25	25,463
South Lanarkshire	Rutherglen & Cambuslang	16,606	734	1,961	2,100	0	21,401	344	47	391	38	20,972
	Greater Glasgow South SMA	105,404	2,362	8,985	5,754	0	122,505	2,031	169	2,200	267	120,038
Renfrewshire	Renfrewshire	54,471	952	4,060	4,258	0	63,741	1,450	92	1,542	117	62,082
East Renfrewshire	Levern Valley	6,970	51	446	710	0	8,177	118	12	130	8	8,039
Inverclyde	Kilmacolm	2,088	49	54	56	0	2,247	43	1	44	5	2,198
	Renfrewshire SMA	63,529	1,052	4,560	5,024	0	74,165	1,611	105	1,716	130	72,319
South Lanarkshire	East Kilbride SMA	29,215	768	1,468	1,971	0	33,422	606	41	647	68	32,707
North Lanarkshire	Airdrie & Coatbridge SMA	26,788	981	2,178	4,293	0	34,240	476	73	549	25	33,666
North Lanarkshire	Motherwell SMA	32,101	1,040	2,785	5,583	0	41,509	570	93	663	29	40,817
South Lanarkshire	Clydesdale SMA	17,849	276	1,893	1,828	0	21,846	370	40	410	42	21,394
South Lanarkshire	Hamilton SMA	29,945	1,485	2,812	4,001	0	38,243	622	81	703	70	37,470
	Structure Plan Area Total	510,250	13,315	48,281	42,883	26	614,703	10,005	1,046	11,051	1,130	602,522

Table 7.6 - Private Sector Stock Projection for Housing Market Areas, 2011 to 2018

Local Authority	Housing Market Area / Sub Market Area	June 2011 stock	2011-18 programmed completions (Urban Capacity Study)	2011-18 RTB	2018 projected stock	2011 vacancies	2011-18 increase in vacancies	2018 vacancies	Other non-effective stock	2018 effective stock
			(+)	(+)	(=)			(-)	(-)	(=)
West Dunbartonshire	Dumbarton & Vale of Leven HMA	16,090	2,027	332	18,449	250	24	274	36	18,139
Inverclyde	Inverclyde HMA	26,596	2,691	678	29,965	511	34	545	62	29,358
West Dunbartonshire	Clydebank & Villages	14,122	1,545	522	16,189	216	21	237	31	15,921
East Dunbartonshire	Bearsden & Milngavie	16,018	375	270	16,663	190	6	196	18	16,449
Glasgow City	Glasgow North & West	72,298	9,508	1,575	83,381	1,394	111	1,505	180	81,696
	Greater Glasgow North & West SMA	102,438	11,428	2,367	116,233	1,800	138	1,938	229	114,066
East Dunbartonshire	Strathkelvin	23,716	1,844	852	26,412	280	27	307	26	26,079
Glasgow City	Glasgow Springburn	9,777	1,011	497	11,285	152	15	167	25	11,093
	Strathkelvin & Springburn SMA	33,493	2,855	1,349	37,697	432	42	474	51	37,172
Glasgow City	Glasgow East SMA	39,449	5,929	1,225	46,603	662	72	734	97	45,772
North Lanarkshire	Cumbernauld SMA	30,707	1,509	877	33,093	508	24	532	24	32,537
Glasgow City	Glasgow South Side	75,190	4,870	1,603	81,663	1,383	65	1,448	204	80,011
East Renfrewshire	Eastwood	25,914	464	190	26,568	426	7	433	25	26,110
South Lanarkshire	Rutherglen & Cambuslang	21,401	601	1,195	23,197	391	18	409	38	22,750
	Greater Glasgow South SMA	122,505	5,935	2,988	131,428	2,200	90	2,290	267	128,871
Renfrewshire	Renfrewshire	63,741	3,246	1,555	68,542	1,542	48	1,590	117	66,835
East Renfrewshire	Levern Valley	8,177	276	366	8,819	130	6	136	8	8,675
Inverclyde	Kilmacolm	2,247	0	25	2,272	44	0	44	5	2,223
	Renfrewshire SMA	74,165	3,522	1,946	79,633	1,716	54	1,770	130	77,733
South Lanarkshire	East Kilbride SMA	33,422	1,301	963	35,686	647	23	670	68	34,948
North Lanarkshire	Airdrie & Coatbridge SMA	34,240	2,467	2,185	38,892	549	47	596	25	38,271
North Lanarkshire	Motherwell SMA	41,509	2,894	2,822	47,225	663	57	720	29	46,476
South Lanarkshire	Clydesdale SMA	21,846	1,529	984	24,359	410	25	435	42	23,882
South Lanarkshire	Hamilton SMA	38,243	1,373	2,062	41,678	703	34	737	70	40,871
	Structure Plan Area Total	614,703	45,460	20,778	680,941	11,051	664	11,715	1,130	668,096

PART B

8.0 Local and Mobile Demand at 2011 and 2018

- 8.1 For most of the Structure Plan Area, the HMA framework is a tiered system that recognises local areas (Sub –Market Areas) that have a degree of self-containment, but which are linked to wider market areas.
- 8.2 Inverclyde (excluding Kilmacolm) and the Dumbarton / Vale of Leven area are identified as discrete HMAs where the concepts of local and mobile demand are not applicable. For these two areas, projected stock and households are compared with no further adjustments.
- 8.3 Mobility is an inherent characteristic of metropolitan housing market areas and this is recognised in SPP 3 and PAN 38. The twin concepts of mobile demand and a tiered system of HMAs have been a feature of the way in which the comparison of supply and demand has been managed in the Conurbation. This approach is based on the premise that while most demand is localised, there is an element that cannot simply be allocated to a particular area and can be considered to be mobile.
- 8.4 Sasines evidence of house-buying moves provides the basis for the calculation of mobile demand. There are two categories of movers that potentially can be considered as mobile:
- (a) incoming households from outside the Structure Plan Area (SPA); and
 - (b) households moving within the SPA between Sub Market Areas.
- 8.5 It cannot be assumed that all such movers are genuinely mobile in the sense that they search in more than one area and that their destination could be influenced by the distribution of housing opportunities. Housing search patterns are crucial in differentiating between mobile and local demand, i.e.
- (a) Local - households whose search area for housing is limited to one particular Sub Market Area;
 - (b) Mobile - households whose search area for housing is wider than any one Sub Market Area.

Raw Sasines data, however, only gives the outcome of housing search patterns.

- 8.6 Projected mobile demand is therefore based on updated Sasines evidence (1996-02) of house-buying moves in conjunction with new evidence of housing search patterns from the 2002 Housing Choice Survey. Each stage in the process of splitting the private sector household projections between local and mobile demand is described below.
- 8.7 Evidence of the number of households moving into each Sub Market Area, either from outside the Structure Plan Area or from other Sub Market Areas, has been derived from Sasines data covering the 1996-02 period. Moves between Sub Market Areas that have a significant link or are contiguous are included. Other moves have been excluded to allow for the possibility that some of the longer-distance moves within the Structure Plan Area are not housing-led. There are no discernible trends in the overall level of cross-boundary moves and it is therefore assumed that the levels of mobility seen in the 1996-02 period would continue in the future.
- 8.8 The 2000 Plan had to rely on a 1990 household survey as a source for the search pattern of movers. For the 2006 Plan, the Housing Choice Survey carried out in 2002 provides a more up-to-date source. The 1990 household survey showed that the search area of 50% of movers was limited to one particular Sub –Market Area. The 2002 survey confirms that, at least for the Eastern Conurbation, that proportion has not changed significantly to warrant revision of the 50% figure assumed in the 2000 Plan. For the

Central Conurbation, however, the 2002 survey identifies a higher proportion of movers between Sub Market Areas (60%) that focus their search on one particular Sub Market Area. As a result, the proportion of movers between Sub Market Areas or from outside the Structure Plan Area that are assumed to be mobile is 40% in the Central Conurbation and 50% in the Eastern Conurbation.

- 8.9 Local demand in each Sub Market Area is calculated by subtracting mobile demand from the projected private sector households. The logic behind this procedure is set out in the following paragraph.
- 8.10 The household projections already implicitly contain a set of assumptions on housing-led migration by virtue of the fact that the underlying population projections have been based on migration trends since 1992. Although the projection assumes an improving migration position overall, the relationship between local authorities is still firmly based on past trends. If no allowance were made for mobile demand, the projection would simply perpetuate past trends in housing-led migration, thereby building in an undesirable policy bias. This would not allow for the possibility that a different distribution of housing opportunities could change the pattern of housing-led migration.
- 8.11 The level of mobile demand is based on an analysis of house-buying moves (Sasines) covering the period 1996 to 2002. This shows a high level of consistency with the mobile demand estimates used in the 2000 Plan, which were based on the period 1991 to 1996. This consistency provides a degree of confidence in the assumption that this level of mobile demand will continue. It can then be reasonably assumed that the pattern of moves identified in the Sasines is, implicitly, included in the population and household projections. Subtracting mobile demand from the projected private sector households thereby provides a neutral estimate of local demand in each Sub Market Area uninfluenced by the past distribution of housing opportunities in the Conurbation.
- 8.12 Tables 8.1 (2011) and 8.2 (2018) show the mobile demand estimates and how these are used to calculate local demand for each Sub Market Area. Three sets of mobile demand figures are shown:
 - (a) moves from outside the Structure Plan Area;
 - (b) moves between Sub Market Areas (origin Central Conurbation); and
 - (c) moves between Sub Market Areas (origin Eastern Conurbation).
- 8.13 The distinction between the latter two enables mobile demand to be calculated separately for each of the two second-tier HMAs (Central Conurbation and Eastern Conurbation) and the first-tier Conurbation HMA. Although total mobile demand in the Conurbation amounts to 23,125 households, only a small proportion (2,450 households) is mobile across the whole Conurbation HMA. The vast majority is mobile solely within either the Central Conurbation (16,899 households) or the Eastern Conurbation (3,776 households).

Table 8.1 - Private Sector Households, 2011 - Mobile and Local Demand

Sub Market Area	Projected Private Sector Households at 2011	Mobile Demand 40% of In-Migrant Households from outside Structure Plan Area (-)	Mobile Demand 40% of In-Migrant Households from Central Conurbation (-)	Mobile Demand 40% of In-Migrant Households from Eastern Conurbation (-)	Local Demand at 2011 (=)
Central Conurbation					
Greater Glasgow North & West	96,676	2,563	1,615	0	92,498
Strathkelvin & Springburn	34,435	287	1,105	0	33,043
Glasgow East	38,023	506	1,294	196	36,027
Cumbernauld	30,352	354	717	90	29,191
Greater Glasgow South	121,829	1,614	3,805	406	116,004
Renfrewshire	73,498	793	1,180	0	71,525
East Kilbride	33,729	309	757	225	32,438
Total	428,542	6,426	10,473	917	410,726
Sub Market Area	Projected Private Sector Households at 2011	Mobile Demand 50% of In-Migrant Households from outside Structure Plan Area (-)	Mobile Demand 50% of In-Migrant Households from Central Conurbation (-)	Mobile Demand 50% of In-Migrant Households from Eastern Conurbation (-)	Local Demand at 2011 (=)
Eastern Conurbation					
Airdrie & Coatbridge	34,733	247	318	246	33,922
Motherwell	42,585	366	335	989	40,895
Clydesdale	21,485	476	110	411	20,488
Hamilton	37,327	353	770	688	35,516
Total	136,130	1,442	1,533	2,334	130,821
Conurbation Total	564,672	7,868	12,006	3,251	541,547
					Mobile Demand at 2011
					Central Conurbation 16,899 (6426 + 10473)
					Eastern Conurbation 3,776 (1442 + 2334)
					Conurbation 2,450 (917 + 1533)
					Total 23,125

Table 8.2 - Private Sector Households, 2018 - Mobile and Local Demand							
Sub Market Area	Projected Private Sector Households at 2018	Mobile Demand 40% of In-Migrant Households from outside Structure Plan Area (-)	Mobile Demand 40% of In-Migrant Households from Central Conurbation (-)	Mobile Demand 40% of In-Migrant Households from Eastern Conurbation (-)	Local Demand at 2018 (=)		
Central Conurbation							
Greater Glasgow North & West	113,301	2,563	1,615	0	109,123		
Strathkelvin & Springburn	37,591	287	1,105	0	36,199		
Glasgow East	45,187	506	1,294	196	43,191		
Cumbernauld	33,761	354	717	90	32,600		
Greater Glasgow South	135,422	1,614	3,805	406	129,597		
Renfrewshire	79,880	793	1,180	0	77,907		
East Kilbride	36,079	309	757	225	34,788		
Total	481,221	6,426	10,473	917	463,405		
Sub Market Area	Projected Private Sector Households at 2018	Mobile Demand 50% of In-Migrant Households from outside Structure Plan Area (-)	Mobile Demand 50% of In-Migrant Households from Central Conurbation (-)	Mobile Demand 50% of In-Migrant Households from Eastern Conurbation (-)	Local Demand at 2018 (=)		
Eastern Conurbation							
Airdrie & Coatbridge	39,397	247	318	246	38,586		
Motherwell	48,368	366	335	989	46,678		
Clydesdale	24,069	476	110	411	23,072		
Hamilton	42,553	353	770	688	40,742		
Total	154,387	1,442	1,533	2,334	149,078		
Conurbation	635,608	7,868	12,006	3,251	612,483		
					Mobile Demand at 2018		
					Central Conurbation	16,899	(6426 + 10473)
					Eastern Conurbation	3,776	(1442 + 2334)
					Conurbation	2,450	(917 + 1533)
					Total	23,125	

9.0 Private Sector Comparison of Demand and Supply at 2011 and 2018

- 9.1 In order to establish if there is a requirement for additional land for private housing at 2011 and 2018, the projected effective stock is compared with projected demand. The comparisons are set out in Table 9.1 and 9.2.
- 9.2 Dumbarton & Vale of Leven and Inverclyde HMAs are treated as self-contained market areas and the concept of mobile demand is not applicable. The comparison is therefore simply between total demand and effective stock. Table 9.1 shows that in Dumbarton & Vale of Leven no shortfall in supply emerges by 2011. There is, therefore, an adequate supply of land already identified in the existing supply. The surplus stock at 2011 is carried forward to help meet demand in the 2011-18 period, and, consequently, the balance of supply and demand shown at 2018 is a cumulative one covering both periods. Table 9.2 shows that the surplus in Dumbarton & Vale of Leven increases between 2011 and 2018. This indicates that, based on the potential capacity identified in the Urban Capacity Study, an adequate supply of housing land can be identified.
- 9.3 In Inverclyde HMA, a shortfall in supply is identified for the 2004/11 period. In the long term, however, the surplus at 2018 indicates that, based on the potential capacity identified in the Urban Capacity Study, an adequate supply of land can be identified.
- 9.4 In the wider conurbation HMA the comparison involves a three-stage process:
- (a) The first stage is a test of the adequacy of the projected stock in meeting local demand. Local demand is compared with the effective stock in each Sub Market Area.
 - (b) The second stage involves the comparison of supply and mobile demand for each of the two second-tier HMAs. The local surpluses of stock that emerge from the first stage are summed for the Central Conurbation and the Eastern conurbation separately and compared with mobile demand that is specific to those areas.
 - (c) The third and final stage involves the comparison of supply and mobile demand for the Conurbation first-tier HMA. If any surpluses emerge from the second stage they are summed and compared with the estimate of demand that is mobile across the wider conurbation.

Any shortfalls in supply that emerge from each stage in the comparison should be remedied at the relevant tier in the HMA system.

- 9.5 Tables 9.1 and 9.2 identify shortfalls at all three stages at both 2011 and 2018. Overall, the shortfalls in supply amount to approximately 4,000 at 2011 and a further 15,000 at 2018. Local Sub Market Area shortfalls (1,847) account for approximately 10% of the total, 2nd Tier Market Areas shortfalls (12,239) 64% and the 1st Tier Conurbation Market Area (4,900) 26%. Table 9.3 below summarises the position on shortfalls in the conurbation.

Table 9.1 - Comparison of Private Sector Supply and Demand, 2011

STAGE1 Sub Market Area	Locally Targeted Demand at 2011	Effective Stock at 2011	Local Shortfall	Local Surplus
Greater Glasgow North & West	92,498	100,409	0	7,911
Strathkelvin & Springburn	33,043	33,010	33	0
Glasgow East	36,027	38,690	0	2,663
Cumbernauld	29,191	30,175	0	984
Greater Glasgow South	116,004	120,038	0	4,034
Renfrewshire	71,525	72,319	0	794
East Kilbride	32,438	32,707	0	269
Central Conurbation Total	410,726	427,348	33	16,655
Airdrie & Coatbridge	33,922	33,666	256	0
Motherwell	40,895	40,817	78	0
Clydesdale	20,488	21,394	0	906
Hamilton	35,516	37,470	0	1,954
Eastern Conurbation Total	130,821	133,347	334	2,860
STAGE 2 2nd Tier Market Area	Mobile Demand at 2011	Local Surplus at 2011	Mobile Shortfall	Mobile Surplus
Central Conurbation	16,899	16,655	244	0
Eastern Conurbation	3,776	2,860	916	0
Conurbation Total	20,675	19,515	1,160	0
STAGE 3 1st Tier Market Area	Mobile Demand at 2011	Mobile Surplus at 2011	Mobile Shortfall	Mobile Surplus
Conurbation	2,450	0	2,450	0
Individual HMA	Demand at 2011	Effective Stock at 2011	Shortfall	Surplus
Dumbarton & Vale of Leven	15,198	15,804	0	606
Inverclyde	26,292	26,023	269	0
FOOTNOTE 1 Local Surplus : This is the balance of the projected stock which remains once local demand has been met. It does not imply a genuine surplus in the sense of empty housing. It is carried forward to Stage 2 where it helps to meet mobile demand in the wider market area. In effect, it represents, in net terms, the potential of each area to attract mobile demand.				
FOOTNOTE 2 Mobile Surplus : The mobile surpluses which emerge in the 2nd tier HMAs are carried forward to the 1st tier HMA.				

Table 9.2 - Comparison of Private Sector Supply and Demand, 2018

STAGE1	Locally Targeted	Effective Stock	Local Shortfall	Local Surplus
Sub Market Area	Demand at 2018	at 2018		
Greater Glasgow North & West	109,123	114,066	0	4,943
Strathkelvin & Springburn	36,199	37,172	0	973
Glasgow East	43,191	45,772	0	2,581
Cumbernauld	32,600	32,537	63	0
Greater Glasgow South	129,597	128,871	726	0
Renfrewshire	77,907	77,733	174	0
East Kilbride	34,788	34,948	0	160
Central Conurbation Total	463,405	471,099	963	8,657
Airdrie & Coatbridge	38,586	38,271	315	0
Motherwell	46,678	46,476	202	0
Clydesdale	23,072	23,882	0	810
Hamilton	40,742	40,871	0	129
Eastern Conurbation Total	149,078	149,500	517	939
STAGE 2	Mobile Demand	Local Surplus	Mobile Shortfall	Mobile Surplus
2nd Tier Market Area	at 2018	at 2018		
Central Conurbation	16,899	8,657	8,242	0
Eastern Conurbation	3,776	939	2,837	0
Conurbation Total	20,675	9,596	11,079	0
STAGE 3	Mobile Demand	Mobile Surplus	Mobile Shortfall	Mobile Surplus
1st Tier Market Area	at 2018	at 2018		
Conurbation	2,450	0	2,450	0
Individual HMA	Demand at 2018	Effective Stock at 2018	Shortfall	Surplus
Dumbarton & Vale of Leven	16,917	18,139	0	1,222
Inverclyde	28,642	29,358	0	716
FOOTNOTE 1 Local Surplus : This is the balance of the projected stock which remains once local demand has been met. It does not imply a genuine surplus in the sense of empty housing. It is carried forward to Stage 2 where it helps to meet mobile demand in the wider market area. In effect, it represents, in net terms, the potential of each area to attract mobile demand.				
FOOTNOTE 2 Mobile Surplus : The mobile surpluses which emerge in the 2nd tier HMAs are carried forward to the 1st tier HMA.				

Table 9.3 Summary of Private Sector Supply Shortfalls, 2011 and 2018

	2011	2018	Total
<u>Sub Market Area</u>			
Strathkelvin & Springburn	33		33
Cumbernauld		63	63
Greater Glasgow South		726	726
Renfrewshire		174	174
Airdrie & Coatbridge	256	315	571
Motherwell	78	202	280
Sub Market Area Total	367	1,480	1,847
<u>2nd Tier Market Area</u>			
Central Conurbation	244	8,242	8,486
Eastern Conurbation	916	2,837	3,753
2 nd Tier Market Area Total	1,160	11,079	12,239
<u>1st Tier Market Area</u>			
Conurbation	2,450	2,450	4,900
Structure Plan Area Total	3,977	15,009	18,986

- 9.6 Tables 11 and 12 in the Structure Plan are the equivalent of Tables 9.1 and 9.2 in this Technical Report, but with figures rounded to the nearest fifty.
- 9.7 The Structure Plan approach to meeting these shortfalls is set out in the section on Urban Expansion Areas (2006 Plan paragraphs 2.9 to 2.16). Schedule 1(c) lists the Community Growth Areas that are expected to make a significant contribution to meeting the shortfalls in housing land. Schedule 6(b)(ii) sets out the additional supply requirements for each Sub Market Area and Local Authority.

10.0 Social Rented Sector at 2011 and 2018

- 10.1 The 2000 Plan focussed on the owner-occupied sector, but, in the 2006 Plan, it is considered more appropriate to present the wider picture across all tenures for the following reasons:
- (a) The Agenda for Sustained Growth set out in the 2006 Plan provides a different context within which to consider all housing needs.
 - (b) The scale of restructuring of the social rented housing stock raises issues that affect both the private and social rented sectors.
 - (c) Advice in SPP3 and PAN 38 to address the land requirements for all tenures.
- 10.2 Tables 5.5 and 5.6 show the projected change in household tenure by 2011 and 2018 respectively. They highlight the projected reduction of households in the social rented sector – 52,100 between 2002 and 2011 and a further 24,000 in the period up to 2018. RTB sales are a continuing, albeit reducing, factor in this shift in tenure, but even when this is discounted, the social rented sector is projected to decline by 9,200 households by 2011 and a further 3,200 by 2018.
- 10.3 It must be stressed that this household projection does not represent a full assessment of all housing needs in the social rented sector or the scale or range of need identified in individual Local Housing Strategy documents. Local needs assessments provide a more detailed spatial and sectoral analysis of housing needs. For example, Council-wide assessments can mask potential shortages in more localised areas: assessments need to be more finely grained in spatial terms. The projection also takes no account of the backlog of housing need that remains unmet at the base date and no account is taken of special housing needs. For example, the projection does not reflect the Executive's target of ensuring that all unintentionally homeless people have access to permanent housing by 2012. Although partly reflected in demolition programmes, the issues of housing quality and the mismatch between housing stock and household requirements are not fully taken into account. In addition, the projection does not reflect the specific affordable housing needs identified by East Dunbartonshire, East Renfrewshire and South Lanarkshire Councils.
- 10.4 What the projection does provide is a demographic-based assessment of the future demand for social renting on a basis that is consistent with and complementary to the approach used for the private sector. This provides a consistent regional context within which local authorities can review their detailed assessment of housing needs in Local Housing Strategies. However, for the purpose of identifying future housing land requirements, the assessments of affordable/social rented housing needs presented in each local authority's Local Housing Strategy take precedence over the social rented household projections presented in this document.
- 10.5 Projections of social rented stock at 2011 and 2018 are shown in Tables 10.1 and 10.2 respectively. They illustrate the breakdown of social rented stock projections at local authority level between Local Authority, Scottish Homes and Housing Association stock. However, based on currently known data, it is only possible to present a partial assessment of future stock changes. In particular, the known land supply for social rented housing is closely related to the relatively short-term nature of the funding programmes and, overall, represents only a three to four year supply. The programmed completions included in the stock projections are limited to (a) the known sites in the 2004 land supply for the 2004/11 period and (b) potential social rented sector sites identified in the Urban Capacity Study for the 2011/18 period. The figures do not, therefore, represent a full assessment of future new build in the social rented sector. On the other hand, for most of the local authorities, future demolition estimates provide a

longer-term view, e.g. the planned demolition of over 19,000 Glasgow Housing Association properties between 2004 and 2016.

- 10.6 The Housing Market Area system developed for the 2000 Plan provides the geographical framework for comparing supply and demand in the private sector. There is some movement between local authorities in the social rented sector, but it is less prevalent and, it would therefore be inappropriate to use this framework for the social rented sector. In the absence of a wider framework, the demand and stock projections are presented at the local authority level.
- 10.7 A two-stage process of comparing projected households and stock at 2011 and 2018 has been adopted. The initial comparison is based on the stock projections shown in Tables 10.1 and 10.2, which, in a summarised form, are repeated in the first part of Tables 10.3 and 10.4. The initial balance between supply and demand, therefore, reflects the limited short-term view of future land supply contained in the stock projections. Tables 10.3 and 10.4 show that, on this basis, the sum of individual local authority shortfalls amounts to 6,300 at 2011, rising to 9,000 at 2018. Glasgow accounts for over 75% of these shortfalls, reflecting a stock projection based on the full demolition programme, but with a very limited short-term view of future new build. (The shortfall at 2018 represents the cumulative position over both plan periods: it is not additional to the 2011 shortfall.)
- 10.8 The second stage of the comparison involves revising the stock projection to reflect anticipated social rented new build programmes. The figures in the “New Build (2)” columns in Tables 10.3 and 10.4 represent the anticipated new build that is additional to the supply identified in the 2004 Housing Land Supply and Structure Plan Urban Capacity Study. The impact of including the longer-term new build programmes is to shift the overall balance of supply and demand from a shortfall to a surplus, leaving only two authorities with small shortfalls at 2018: East Dunbartonshire and Inverclyde. It must be reiterated that the outcomes presented here are based on a projection of households in the social rented sector that does not represent a full assessment of social or affordable housing needs.

HOUSING ASSOCIATION

June 2002 stock*	=	741	1,104	40,571	3,320	7,763	6,667	3,959	5,695	69,820
Actual completions 2002/04	+	6	62	2,031	147	446	226	483	250	3,651
Programmed completions 2004/2011	+	30	113	3,519	273	781	805	509	605	6,635
Losses from RTB sales 2002/2011	-	134	59	2,133	241	704	698	454	299	4,722
Transfers from SH/LA 2002/2011	+	930	0	2,027	0	86	122	904	18	4,087
Demolitions 2002/2011	-	192	60	3,535	160	161	301	126	589	5,124
Stock at June 2011	=	1,381	1,160	42,480	3,339	8,211	6,821	5,275	5,680	74,347
2002 vacancy rate		0.94	0.99	4.26	0.60	4.75	6.75	1.96	3.39	
2002 vacancies		7	11	1,740	20	372	452	79	195	2,876
2011 vacancies	-	13	11	1,757	120	376	246	106	170	2,799
2011 vacancy rate		0.94	0.95	4.14	3.60	4.58	3.60	2.00	3.00	
Other non-effective stock	-	0	0	0	0	0	0	0	0	0
Effective stock at June 2011	=	1,368	1,149	40,723	3,219	7,835	6,575	5,169	5,510	71,548

TOTAL SOCIAL RENTED STOCK

June 2002 stock*	=	6,446	5,048	125,227	13,896	53,074	26,124	37,975	19,410	287,200
Actual completions 2002/04	+	6	62	2,055	147	446	226	483	250	3,675
Programmed completions 2004/2011	+	30	113	3,519	273	781	805	509	605	6,635
Losses from RTB sales 2002/2011	-	2,050	1,121	9,826	1,650	11,704	4,258	9,900	2,374	42,883
Demolitions 2002/2011	-	233	306	17,170	2,313	1,123	3,964	2,078	1,960	29,147
Stock at June 2011	=	4,199	3,796	103,805	10,353	41,474	18,933	26,989	15,931	225,480
2011 vacancies	-	33	51	4,823	681	948	888	649	560	8,633
2011 vacancy rate		0.79	1.34	4.65	6.58	2.29	4.69	2.40	3.52	
Other non-effective stock		0	0	0	0	0	0	0	0	0
Effective stock at June 2011	=	4,166	3,745	98,982	9,672	40,526	18,045	26,340	15,371	216,847

Demolitions 2011/2018	-	0	0	0	0	0	0	0	0	0
2018 Stock	=	1,644	1,364	42,572	3,961	7,910	6,741	4,807	5,603	74,602
2011 vacancy rate		0.94	0.95	4.14	3.59	4.58	3.61	2.01	2.99	
2011 vacancies		13	11	1,757	120	376	246	106	170	2,799
2018 vacancies	-	16	13	1,758	143	373	243	96	168	2,810
2018 vacancy rate		0.97	0.95	4.13	3.60	4.72	3.60	2.00	3.00	
Other non-effective stock	-	0	0	0	0	0	0	0	0	0
2018 Effective Stock	=	1,628	1,351	40,814	3,818	7,537	6,498	4,711	5,435	71,792
TOTAL SOCIAL RENTED STOCK										
		East Dunbartonshire	East Renfrewshire	Glasgow City	Inverclyde	North Lanarkshire	Renfrewshire	South Lanarkshire	West Dunbartonshire	Structure Plan Area Total
2011 Stock	=	4,199	3,796	103,805	10,353	41,474	18,933	26,989	15,931	225,480
Programmed completions 2011/2018	+	335	238	1,632	734	259	360	12	77	3,647
Losses from RTB sales 2011/2018	-	1,122	556	4,900	703	5,884	1,555	5,204	854	20,778
Demolitions 2011/2018	-	0	0	6,983	1,750	0	700	595	725	10,753
2018 Stock	=	3,412	3,478	93,554	8,634	35,849	17,038	21,202	14,429	197,596
2018 vacancies	-	29	45	3,287	330	854	614	506	503	6,168
2018 vacancy rate		0.78	1.33	4.06	3.14	2.37	5.28	2.35	4.42	
Other non-effective stock		0	0	0	0	0	0	0	0	0
2018 Effective Stock	=	3,383	3,433	90,267	8,304	34,995	16,424	20,696	13,926	191,428

TABLE 10.3 Social Rented Supply & Demand Comparison, 2011

	Projected Households	Stock 2002	Demolitions 2002-11	RTB 2002- 11	New Build (1) 2002-11	Total Stock 2011 (F=B-C- D+E)	Vacant Stock 2011	Effective Stock 2011	Initial Supply/Demand Comparison 2011 (I=H-A)	New Build (2) 2002-11	Revised Total Stock 2011 (K=F+J)	Revised Vacant Stock 2011	Revised Effective Stock 2011 (M=K-L)	Revised Supply/Demand Comparison 2011 (N=M-A)
	(A)	(B)	(C)	(D)	(E)	(F)	(G)	(H)	(I)	(J)	(K)	(L)	(M)	(N)
East Dunbartonshire	4,414	6,446	233	2,050	36	4,199	33	4,166	-248	277	4,476	36	4,440	26
East Renfrewshire	3,575	5,048	306	1,121	175	3,796	51	3,745	170	132	3,928	52	3,876	301
Glasgow City	103,805	125,227	17,170	9,826	5,574	103,805	4,823	98,982	-4,823	4,486	108,291	5,009	103,282	-523
Inverclyde	10,137	13,896	2,313	1,650	420	10,353	681	9,672	-465	427	10,780	696	10,084	-53
North Lanarkshire	40,171	53,074	1,123	11,704	1,227	41,474	948	40,526	355	969	42,443	992	41,451	1,280
Renfrewshire	17,497	26,124	3,964	4,258	1,031	18,933	888	18,045	548	453	19,386	904	18,482	985
South Lanarkshire	27,090	37,975	2,078	9,900	992	26,989	649	26,340	-750	1,066	28,055	670	27,385	295
West Dunbartonshire	14,718	19,410	1,960	2,374	855	15,931	560	15,371	653	270	16,201	568	15,633	915
Structure Plan Area Total	221,407	287,200	29,147	42,883	10,310	225,480	8,633	216,847	-4,560	8,080	233,560	8,928	224,632	3,225

New Build (1) : Actual Completions 2002/04 + 2004/11 output based on 2004 housing land supply. New Build (2) : Anticipated new build (2004/11) additional to figures in New Build (1)

CAVEATS

It must be stressed that this household projection does not represent a full assessment of all housing needs in the social rented sector or the scale or range of need identified in individual Local Housing Strategy documents. In addition, the projection does not reflect the specific affordable housing needs identified by East Dunbartonshire, East Renfrewshire and South Lanarkshire Councils. For the purpose of identifying future housing land requirements, the assessments of affordable/social rented housing needs presented in each local authority's Local Housing Strategy take precedence over the social rented household projections presented in this document.

TABLE 10.4 Social Rented Supply & Demand Comparison, 2018

	Projected Households	Stock 2011	Demolitions 2011-18	RTB 2011- 18	New Build (1) 2011-18	Total Stock 2018 (F=B-C- D+E)	Vacant Stock 2018	Effective Stock 2018	Initial Supply/Demand Comparison 2018 (I=H-A)	New Build (2) 2004-18	Revised Total Stock 2018 (K=F+J)	Revised Vacant Stock 2018 (L)	Revised Effective Stock 2018 (M=K-L)	Revised Supply/Demand Comparison 2018 (N=M-A)
East Dunbartonshire	3,457	4,199	0	1,122	335	3,412	29	3,383	-74	0	3,412	29	3,383	-74
East Renfrewshire	3,187	3,796	0	556	238	3,478	45	3,433	246	139	3,617	46	3,571	384
Glasgow City	97,375	103,805	6,983	4,900	1,632	93,554	3,287	90,267	-7,108	9,904	103,458	3,696	99,762	2,387
Inverclyde	8,836	10,353	1,750	703	734	8,634	330	8,304	-532	393	9,027	344	8,683	-153
North Lanarkshire	33,905	41,474	0	5,884	259	35,849	854	34,995	1,090	2,460	38,309	970	37,339	3,434
Renfrewshire	14,864	18,933	700	1,555	360	17,038	614	16,424	1,560	1,073	18,111	653	17,458	2,594
South Lanarkshire	22,023	26,989	595	5,204	12	21,202	506	20,696	-1,327	2,629	23,831	559	23,272	1,249
West Dunbartonshire	13,780	15,931	725	854	77	14,429	503	13,926	146	1,068	15,497	535	14,962	1,182
Structure Plan Area Total	197,427	225,480	10,753	20,778	3,647	197,596	6,168	191,428	-5,999	17,666	215,262	6,832	208,430	11,003

New Build (1) : 2011/18 output based on Urban Capacity Study. New Build (2) : Anticipated new build (2004/18) additional to supply identified in 2004 Housing Land Supply and Urban Capacity Study. Note that the 2011 stock base shown above includes 2004/11 new build derived solely from the 2004 housing land supply. That is why New Build (2) above contains additional new build capacity for both the 2004/11 and 2011/18 periods.

CAVEATS

It must be stressed that this household projection does not represent a full assessment of all housing needs in the social rented sector or the scale or range of need identified in individual Local Housing Strategy documents. In addition, the projection does not reflect the specific affordable housing needs identified by East Dunbartonshire, East Renfrewshire and South Lanarkshire Councils. For the purpose of identifying future housing land requirements, the assessments of affordable/social rented housing needs presented in each local authority's Local Housing Strategy take precedence over the social rented household projections presented in this document.

APPENDIX ONE - REVIEW OF HOUSING MARKET AREAS

The Housing Market Area system was redefined for the 2000 Plan, based on an analysis of house-buying moves over the 1988-97 period sourced from the Sasines. An updated analysis of Sasines data covering the seven-year period 1996-2002 has been completed.

The approach has been to repeat the exercise carried out for the 2000 Structure Plan utilising the new data. It involved an iterative process in which the original 63 audit areas were tested for significant links between each other, merged where the links were strongest, the matrix of moves reformulated for the reduced number of areas and the process repeated.

Four iterations reduced the original 63 areas down to the same set of thirteen building blocks. There were some differences in the order in which areas merged and the level of self-containment, but, overall, the same pattern of linkages emerged. Tables APP1 – APP5 show the levels of self-containment at each stage of the process. An examination of the inter-relationship between the building blocks was carried out to test whether the assumptions on the wider market area system remained valid. Again, the more recent evidence shows that the linkages between these areas are just as strong.

Analysis of the updated Sasines dataset highlights the substantial degree of consistency in the strength of linkages between each part of the Structure Plan area. There are differences, but these are marginal. This update provides a greater degree of confidence in the robustness of the Housing Market Area system used in the Structure Plan.

A fuller description of the methodology used to define Housing Market Areas can be found in Technical Report 5 'A Housing Market Area Framework' produced in conjunction with the 2000 Plan.

Table APP 1-1 - Review of Housing Market Areas, Percentage Self-Containment in Original 63 Audit Areas

LA	Audit Areas	Origin-based Self-containment	Destination-based Self-containment
1	WD Vale of Leven	71.9	73.3
2	WD Dumbarton	69.3	72.1
3	WD Milton, Bowling & Old Kilpatrick	27.9	28.1
4	WD Clydebank	58.8	60.8
5	ED Bearsden	37.3	36.0
6	ED Milngavie	37.4	36.8
7	GC Drumchapel	33.4	32.5
8	GC West End	61.1	50.5
9	GC North	43.6	32.9
10	GC City Centre	21.0	16.6
11	GC Springburn	43.9	43.6
12	ED Bishopbriggs	49.4	43.9
13	ED Kirkintilloch	50.0	53.3
14	ED Lenzie	41.0	31.6
15	ED Northern Villages	40.7	47.3
16	GC East End	59.7	56.2
17	GC Easterhouse	41.7	35.0
18	NL Moodiesburn	29.3	52.7
19	NL Cumbernauld	68.9	79.4
20	NL Kilsyth & Villages	63.8	63.2
21	GC Govan	48.5	41.3
22	GC Pollok	37.5	45.6
23	GC South Side	55.4	48.5
24	GC Castlemilk	36.1	29.6
25	ER Giffnock, Thornliebank, Clarkston & Busby	29.1	37.8
26	ER Newton Mearns	38.4	50.9
27	ER Eaglesham & Waterfoot	31.8	38.5
28	SL Rutherglen	36.2	43.0
29	SL Cambuslang	32.6	53.4
30	ER Barrhead	50.9	59.5
31	ER Neilston	42.3	52.3
32	ER Uplawmoor	38.9	28.4
33	RF Paisley	65.3	70.1
34	RF Johnstone	58.2	50.2
35	RF Renfrew	50.9	58.9
36	RF Erskine & Bishopton	54.8	60.5
37	RF Gryffe	47.0	51.9
38	IC Kilmacolm & Quarriers Homes	40.2	46.7
39	IC Port Glasgow	70.1	53.3
40	IC Greenock	73.6	68.7
41	IC Gourock	46.7	44.6
42	IC Wemyss Bay & Inverkip	22.0	42.6
43	SL East Kilbride	73.0	79.0
44	SL Strathaven	46.6	53.7
45	NL Airdrie	69.5	71.4
46	NL Coatbridge	66.1	68.9
47	NL Bellshill	50.8	56.2
48	NL Motherwell	55.1	54.1
49	NL Wishaw & Newmains	65.5	65.8
50	NL Shotts & Harthill	77.7	64.2
51	SL Carluke	60.7	65.1
52	SL North Clydesdale	33.1	48.8
53	SL Lanark	63.0	41.0
54	SL Clyde Valley	10.4	33.3
55	SL South Clydesdale	59.0	51.8
56	SL Douglas Valley	25.9	44.0

57	SL	Lesmahagow	40.1	43.5
58	SL	Blackwood & Kirkmuirhill	27.7	38.1
59	SL	Stonehouse	28.2	51.4
60	SL	Larkhall	59.7	62.2
61	SL	Hamilton	63.6	65.8
62	SL	Blantyre	49.2	45.8
63	SL	Bothwell & Uddingston	36.5	34.4

Table APP 1-2 - Review of Housing Market Areas, Percentage Self-Containment - Iteration 1

	LA	Audit Areas	Origin-based Self- containment	Destination- based Self-containment
1	WD	Vale of Leven	83.9	86.4
	WD	Dumbarton		
2	WD	Milton, Bowling & Old Kilpatrick	65.2	67.3
	WD	Clydebank		
3	ED	Bearsden	47.7	46.4
	ED	Milngavie		
4	GC	Drumchapel	69.6	56.5
	GC	West End		
	GC	North		
	GC	City Centre		
5	GC	Springburn	58.4	55.6
	ED	Bishopbriggs		
6	ED	Kirkintilloch	59.7	57.8
	ED	Lenzie		
7	ED	Northern Villages	40.7	47.3
8	GC	East End	66.6	61.7
	GC	Easterhouse		
9	NL	Moodiesburn	29.3	52.7
10	NL	Cumbernauld	71.4	80.8
	NL	Kilsyth & Villages		
11	GC	Govan	64.7	58.5
	GC	Pollok		
	GC	South Side		
	GC	Castlemilk		
12	ER	Giffnock, Thornliebank, Clarkston & Busby	44.6	58.2
	ER	Newton Mearns		
	ER	Eaglesham & Waterfoot		
13	SL	Rutherglen	45.3	62.6
	SL	Cambuslang		
14	ER	Barrhead	54.8	64.0
	ER	Neilston		
	ER	Uplawmoor		
15	RF	Paisley	70.9	73.5
	RF	Johnstone		
16	RF	Renfrew	59.3	67.0
	RF	Erskine & Bishopton		
17	RF	Gryffe	52.7	58.8
	IC	Kilmacolm & Quarriers Homes		
18	IC	Port Glasgow	70.1	53.3
19	IC	Greenock	83.4	78.2
	IC	Gourock		
20	IC	Wemyss Bay & Inverkip	22.0	42.6
21	SL	East Kilbride	73.0	79.0
22	SL	Strathaven	46.6	53.7
23	NL	Airdrie	80.4	83.1
	NL	Coatbridge		
24	NL	Bellshill	64.2	67.1
	NL	Motherwell		
25	NL	Wishaw & Newmains	65.5	65.8
26	NL	Shotts & Harthill	77.7	64.2
27	SL	Carluke	60.7	65.1
28	SL	North Clydesdale	61.2	55.3
	SL	Lanark		
	SL	Clyde Valley		
29	SL	South Clydesdale	59.0	51.8
30	SL	Douglas Valley	25.9	44.0

31	SL	Lesmahagow	41.3	50.3
	SL	Blackwood & Kirkmuirhill		
32	SL	Stonehouse	28.2	51.4
33	SL	Larkhall	67.7	70.1
	SL	Hamilton		
34	SL	Blantyre	49.2	45.8
35	SL	Bothwell & Uddingston	36.5	34.4

Table APP 1-3 - Review of Housing Market Areas, Percentage Self-Containment - Iteration 2

	LA	Audit Areas	Origin-based Self- containment	Destination- based Self-containment
1	WD	Vale of Leven	83.9	86.4
	WD	Dumbarton		
2	WD	Milton, Bowling & Old Kilpatrick	65.2	67.3
	WD	Clydebank		
3	ED	Bearsden	77.4	64.6
	ED	Milngavie		
	GC	Drumchapel		
	GC	West End		
	GC	North		
	GC	City Centre		
4	GC	Springburn	58.4	55.6
	ED	Bishopbriggs		
5	ED	Kirkintilloch	62.3	63.1
	ED	Lenzie		
	ED	Northern Villages		
6	GC	East End	66.6	61.7
	GC	Easterhouse		
7	NL	Moodiesburn	29.3	52.7
8	NL	Cumbernauld	71.4	80.8
	NL	Kilsyth & Villages		
9	GC	Govan	73.1	71.6
	GC	Pollok		
	GC	South Side		
	GC	Castlemilk		
	ER	Giffnock, Thornliebank, Clarkston & Busby		
	ER	Newton Mearns		
	ER	Eaglesham & Waterfoot		
10	SL	Rutherglen	45.3	62.6
	SL	Cambuslang		
11	ER	Barrhead	54.8	64.0
	ER	Neilston		
	ER	Uplawmoor		
12	RF	Paisley	77.9	83.6
	RF	Johnstone		
	RF	Renfrew		
	RF	Erskine & Bishopton		
	RF	Gryffe		
	IC	Kilmacolm & Quarriers Homes		
13	IC	Port Glasgow	70.1	53.3
14	IC	Greenock	85.6	87.7
	IC	Gourock		
	IC	Wemyss Bay & Inverkip		
15	SL	East Kilbride	73.0	79.0
16	SL	Strathaven	46.6	53.7
17	NL	Airdrie	80.4	83.1
	NL	Coatbridge		
18	NL	Bellshill	72.9	75.3
	NL	Motherwell		
	NL	Wishaw & Newmains		
19	NL	Shotts & Harthill	77.7	64.2
20	SL	Carluke	68.6	67.6
	SL	North Clydesdale		
	SL	Lanark		
	SL	Clyde Valley		
21	SL	South Clydesdale	59.0	51.8
22	SL	Douglas Valley	25.9	44.0

23	SL	Lesmahagow	41.3	50.3
	SL	Blackwood & Kirkmuirhill		
24	SL	Stonehouse	28.2	51.4
25	SL	Larkhall	67.7	70.1
	SL	Hamilton		
26	SL	Blantyre	49.2	45.8
27	SL	Bothwell & Uddingston	36.5	34.4

Table APP 1-4 - Review of Housing Market Areas, Percentage Self-containment - Iteration 3

	LA	Audit Areas	Origin-based Self-containment	Destination-based Self-containment
1	WD	Vale of Leven	83.9	86.4
	WD	Dumbarton		
2	WD	Milton, Bowling & Old Kilpatrick	65.2	67.3
	WD	Clydebank		
3	ED	Bearsden	77.4	64.6
	ED	Milngavie		
	GC	Drumchapel		
	GC	West End		
	GC	North		
	GC	City Centre		
4	GC	Springburn	66.4	64.8
	ED	Bishopbriggs		
	ED	Kirkintilloch		
	ED	Lenzie		
	ED	Northern Villages		
5	GC	East End	66.6	61.7
	GC	Easterhouse		
6	NL	Moodiesburn	29.3	52.7
7	NL	Cumbernauld	71.4	80.8
	NL	Kilsyth & Villages		
8	GC	Govan	74.6	76.4
	GC	Pollok		
	GC	South Side		
	GC	Castlemilk		
	ER	Giffnock, Thornliebank, Clarkston & Busby		
	ER	Newton Mearns		
	ER	Eaglesham & Waterfoot		
	SL	Rutherglen		
	SL	Cambuslang		
9	ER	Barrhead	78.6	85.0
	ER	Neilston		
	ER	Uplawmoor		
	RF	Paisley		
	RF	Johnstone		
	RF	Renfrew		
	RF	Erskine & Bishopton		
	RF	Gryffe		
	IC	Kilmacolm & Quarriers Homes		
10	IC	Port Glasgow	91.8	90.1
	IC	Greenock		
	IC	Gourock		
	IC	Wemyss Bay & Inverkip		
11	SL	East Kilbride	73.0	79.0
12	SL	Strathaven	46.6	53.7
13	NL	Airdrie	80.4	83.1
	NL	Coatbridge		
14	NL	Bellshill	72.9	75.3
	NL	Motherwell		
	NL	Wishaw & Newmains		
15	NL	Shotts & Harthill	77.7	64.2
16	SL	Carluke	71.0	69.0
	SL	North Clydesdale		
	SL	Lanark		
	SL	Clyde Valley		
	SL	South Clydesdale		
17	SL	Douglas Valley	25.9	44.0

18	SL	Lesmahagow	41.3	50.3
	SL	Blackwood & Kirkmuirhill		
19	SL	Stonehouse	28.2	51.4
20	SL	Larkhall	70.4	71.7
	SL	Hamilton		
	SL	Blantyre		
21	SL	Bothwell & Uddingston	36.5	34.4

**Table APP 1-5 - Review of Housing Market Areas, Percentage Self-containment - Iteration 4
(Final 13 Building Blocks)**

LA	Audit Areas	Origin-based Self- containment	Destination- based Self-containment	Housing Market Area Building Blocks
1	WD Vale of Leven WD Dumbarton	83.9	86.4	Dumbarton & Vale of Leven
2	WD Milton, Bowling & Old Kilpatrick WD Clydebank ED Bearsden ED Milngavie GC Drumchapel GC West End GC North GC City Centre	81.0	69.2	Greater Glasgow North & West
3	GC Springburn ED Bishopbriggs ED Kirkintilloch ED Lenzie ED Northern Villages	66.4	64.8	Strathkelvin & Springburn
4	GC East End GC Easterhouse	66.6	61.7	Glasgow East
5	NL Moodiesburn NL Cumbernauld NL Kilsyth & Villages	65.6	80.6	Cumbernauld
6	GC Govan GC Pollok GC South Side GC Castlemilk ER Giffnock, Thornliebank, Clarkston & Busby ER Newton Mearns ER Eaglesham & Waterfoot SL Rutherglen SL Cambuslang	74.6	76.4	Greater Glasgow South
7	ER Barrhead ER Neilston ER Uplawmoor RF Paisley RF Johnstone RF Renfrew RF Erskine & Bishopton RF Gryffe IC Kilmacolm & Quarriers Homes	78.6	85.0	Renfrewshire
8	IC Port Glasgow IC Greenock IC Gourrock IC Wemyss Bay & Inverkip	91.8	90.1	Inverclyde
9	SL East Kilbride SL Strathaven	72.7	79.3	East Kilbride
10	NL Airdrie NL Coatbridge	80.4	83.1	Airdrie & Coatbridge
11	NL Bellshill NL Motherwell NL Wishaw & Newmains NL Shotts & Harthill	74.7	76.1	Motherwell
12	SL Carluke SL North Clydesdale SL Lanark	72.3	75.1	Clydesdale

	SL	Clyde Valley			
	SL	South Clydesdale			
	SL	Douglas Valley			
	SL	Lesmahagow			
	SL	Blackwood & Kirkmuirhill			
13	SL	Stonehouse	69.3	71.3	Hamilton
	SL	Larkhall			
	SL	Hamilton			
	SL	Blantyre			
	SL	Bothwell & Uddingston			

APPENDIX TWO – BACKGROUND DETAIL FOR WRITTEN STATEMENT TABLE 2

Table 2 in the Written Statement provides a summary of housing land requirements for the Structure Plan Area as a whole. The table below provides more detail on the calculations underlying these figures and identifies the link with specific tables in the Technical Report.

Written Statement Table 2 - Details

	2002-2011	2011-2018	2002-2018	Technical Report Tables
Increase in Households (excl RTB)	62,566	58,475	121,041	Tabs 6.1 & 6.2
Increase in Vacancies	1,046	664	1,710	Tabs 7.5 & 7.6
Private Sector Demolitions	26	0	26	Tab 7.5
Total Housing Requirement	63,638	59,139	122,777	
June 2002 – March 2004 Completions	11,716	0	11,716	Tab 7.3 *
2004-2011 Housing Land Supply	48,281		48,281	Tab 7.5
2011-2018 Urban Capacity Study		45,460	45,460	Tab 7.6
Total Identified Supply Capacity	59,997	45,460	105,457	
Additional Requirement	3,641	13,679	17,320	
Surpluses in individual HMAs	606	1,332	1,938	Tabs 9.1 & 9.2 **
Shortfall in Inverclyde HMA	269	0	269	Tab 9.1
Adjustment for individual HMAs	-337	-1,332	-1,669	
Additional capacity required for Conurbation HMA	3,978	15,011	18,989	

* Table 7.3 shows completions between April 2002 and March 2004 (13,315), but April-June 2002 completions (1,599) are excluded from the above figures because of the June base date.

** Note that the 'Surpluses in individual HMAs' for 2011/18 reflect the sum of the surpluses at 2018 (1,222 + 716) minus the surplus in Dumbarton & Vale of Leven at 2011 (606). This is because the surplus in Dumbarton & Vale of Leven at 2018 reflects the cumulative position over both periods.

