AYRSHIRE JOINT STRUCTURE PLAN 2025: CONSULTATION DRAFT

REPORT OF SURVEY
IINTERIM TECHNICAL REPORT TR01/2004

STRATEGIC ASSESSMENT OF HOUSING LAND REQUIREMENTS

The Ayrshire Joint Structure Plan & Transportation Committee is a jointly funded partnership between East Ayrshire Council, North Ayrshire Council and South Ayrshire Council

FOREWORD

This technical report is part of the Report of Survey for the Ayrshire Joint Structure Plan. The full list of technical reports is appended to the back of this document. They are available on request, and in some instances will be subject to a minimum charge.

The purpose of these documents is to provide the reader with the evidence used in determining the policies that go to make up the structure plan. It is intended they will be updated as necessary.

Further information about the contents of this document, together with information about the Ayrshire Joint Structure Plan process and timescale can be obtained from the Ayrshire Joint Structure Plan & Transportation Committee at the address noted below.

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1 INTRODUCTION

The purpose of this technical paper is to present population and housing data which have been used to inform the future housing allocations outlined in the Consultation Draft Structure Plan 2025 "Growing Ayrshire". In presenting the information it is recognised that housing land requirements are dependant upon a range of variables and when these assumptions are projected into the future greater uncertainty exists as the time horizon is extended. The information that is presented is consistent , however, with that advocated in SPPG3 and PAN 38 (revised 2003) and in line with the COSLA ‘Baseline’ methodology, (refer Appendix, Diagram 1) for assessing future housing land requirement at a Structure Plan level.

Key components of the approach that has been adopted incorporate:

- an analysis if current and future population trends;
- an assessment of household change during the plan period;
- an assessment of change within the housing stock;
- an assessment of the land currently available for housing and its potential output;
- comparison of supply and demand parameters;
- incorporation of flexibility components; and
- distribution between communities.

2 POPULATION CHANGE

The future planning of an area such as Ayrshire is dependant on a knowledge of the trends in population which are taking place. The most recent forecasts for Ayrshire prepared by the General Register for Scotland (GRO(S)), (2002 base projections) are presented in the summary in the tables below Currently within Scotland the population is falling and ageing. The main cause of this national trend is a fall in the birth rate, which is amongst the lowest in the UK. Extended life expectancy has also changed the age profile of the population. Since 1981 the number of Children under 15 has fallen by 18% whilst there has been an almost 30% increase in the over -75's. There has also been pronounced shifts in the working age population with a higher proportion now over 45. Ayrshire is not immune to these national changes. As the tables below show population within Ayrshire is forecast to fall by around 7% in the period up-to 2018, this is equivalent to a drop of 26,000 in the period 2002 to 2018. The drivers of this change are discussed in more detail below.

2.1 <u>Natural Change- Births & Deaths</u>

In recent years births within the population have fallen. This trend is forecast to continue and by 2018 the GRO (S) estimate births will fall from their current level of 3,500 to around 3000 in 2018, a drop of 500. In contrast deaths, currently at around 4600 and will remain fairly constant during the period to 2018. Natural change in population is therefore estimated at to increase from 1100 per annum to 1400 per annum by 2018. This means that during the period 2002-2018 natural change will account for 19,000 almost three quarters of the population fall, this is equivalent to an annual drop of almost 1200 per annum. Refer Diagram 1

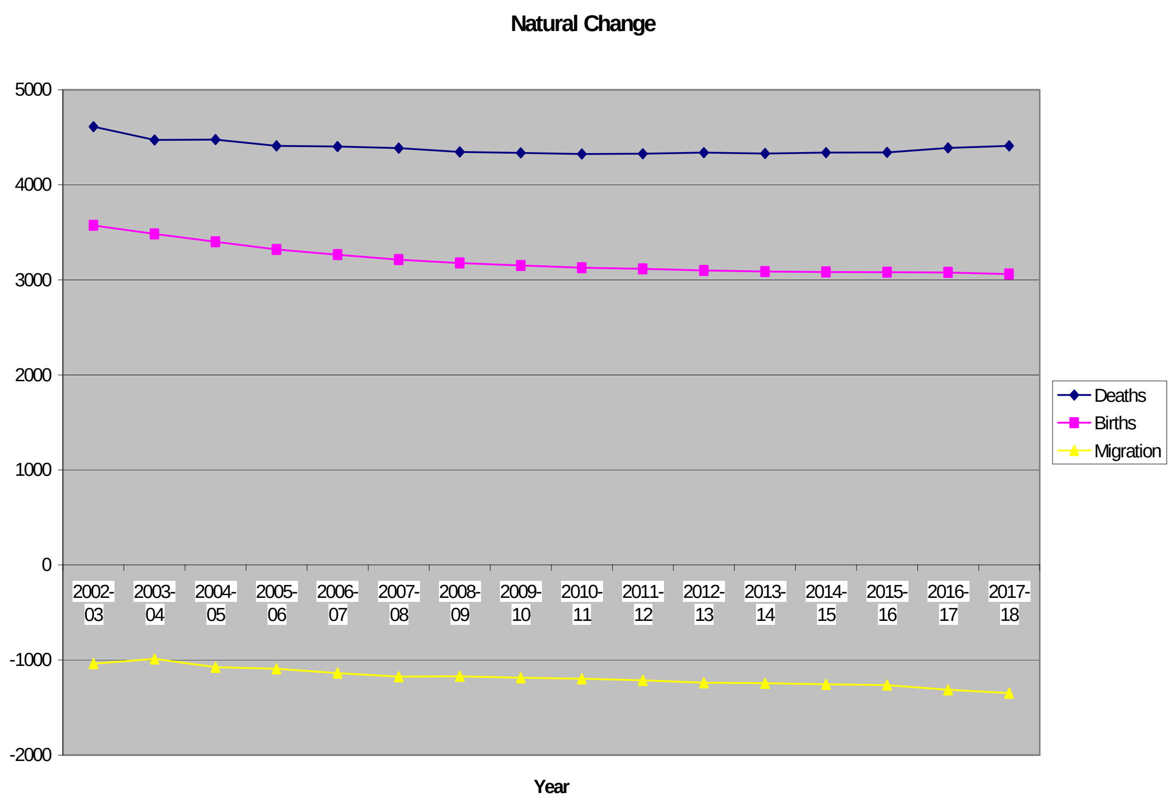
<u>Figure 1 - Projected Population by Local Authority Area</u>

	Base Year 2002	**2008**	**2013**	**2018**	**% change 2002-2018**
East Ayrshire	119,740	116,351	113,416	110,363	-7.8
North Ayrshire	135,650	132,446	129,518	126,252	-6.9
South Ayrshire	111,670	109,095	106,954	104,852	-6.1
Ayrshire	367,060	357,892	349,888	341,467	-7.0
Scotland	5,054,000	5,006,674	4,970,025	4,935,272	-2.4

Figure 2 - Projected change in Population from 2002 (base year) - 2013/2018, by broad age group: Ayrshire and Scotland

	2008 Ayrshire	2008 Scotland	2013 Ayrshire	2013 Scotland	2018 Ayrshire	2018 Scotland
All ages	-2.5	-1.0	-4.7	-1.7	-7.2	-2.4
0-4	-9.7	-8.2	-15.1	-10.3	-16.5	-9.5
5-14	-14.0	10.5	-22.7	-17.9	-27.8	-21.6
15-29	1.5	2.8	-0.7	0.7	-9.9	-5.5
30-44	-14.5	-11.3	-27.9	-20.0	-34.0	-23.7
45-59	2.0	5.8	5.0	11.0	2.3	9.9
60-74	10.7	8.3	17.2	15.1	22.4	23.0
75 & over	8.7	7.6	20.5	17.3	34.3	28.7

Chart 1 Natural Change In Population 2002-2018



2.2 Migration

Migration is an important indicator of the health of an economy. The Structure Plan strategy seeks to stabilise population loss in all parts of Ayrshire through economic investment. The latest migration assumptions issued by the Registrar General for Scotland (2002 Base) show that within Ayrshire, a modest population gain through net migration is projected in South Ayrshire whilst North and East Ayrshire exhibits net out migration. Across Ayrshire as a whole net out migration equivalent to 400 persons per annum is forecast (refer Figure 6).

Under the "Fresh Talent" initiative, the Executive is seeking to prevent the population of Scotland falling below 5 million. To achieve this it has set a target to attract an additional 8000 people per annum by:

- retaining those who may have left Scotland
- encouraging Scots who have moved to come back
- attracting people from the rest of Scotland and the EU and further a-field.

An increase in migrants of this scale would stabilise national population at around 5 million.

Figure 3 - Migration Assumptions by Council area (persons per annum)

	2002/2003	**2003-2004/ 2017-2018**
Ayrshire	-650	-400
East Ayrshire	-300	-250
North Ayrshire	-300	-200
South Ayrshire	-50	+50

Source: Registrar General for Scotland (2002 Based Population Projections

3 CHANGES IN POPULATION DISTRIBUTION

3.1 National Changes

The table illustrates that there are significant differences in population change are forecast between various parts of Scotland.

In part these reflect historical influences taking place in the local regional economies. In the future the National Planning Framework recognises that a more even spread of economic activity will help relieve pressures in areas of high growth such as the Lothians and provide additional opportunities in areas such as Ayrshire. Improvements in the connectivity of the Ayrshire economy to other parts of Scotland will therefore assist in the overall efficiency and sustainability of the Scottish economy.

Figure 4 - Projected Change in Population within Scotland

	Projected Change in population 2002-2018
West Lothian	+14.8
East Lothian	+11.6
Stirling	+9.1
Midlothian	+6.6
East Renfrewshire	+5.8
Argyll & Clyde	-6.9
Ayrshire	-7.0
Dumfries & Galloway	-7.2
Orkney	-10.5
Western Isles	-17.1

3.2 Regional Changes

As the table below shows, between the 1991 and 2001 censuses, the population of Ayrshire fell by approximately 1%, whereas the population of Scotland increased by 1%. Figure 5 below examines how this net change in population in Ayrshire masks differences between the landward towns and villages and the main urban centres.

Figure 5 - Population Change within Ayrshire 1991-2001

Area	Population 1991	Population 2001	% Change
All Ayrshire	371,988	368,149	-1%
Main Urban Core	219,431	219,096	-0.1%
Rural Communities with population >3000	90,927	87,354	-4%
Rural Communities with population between 400 and 3000	28637	28041	-2%
Outwith Settlements	32993	33658	+2%

Source: GROS, 2001 Census

Whereas the population of the primary urban settlements has remained relatively static, the numbers of people living in the larger rural settlements has declined by 4% (3573 people) and the numbers living in smaller towns and villages has fallen by 2% (596). The decline in the population of the larger rural towns accounts for three quarters of the total population loss of Ayrshire. This decline is not fully explained by the general fall in population of Ayrshire suggesting that a process of depopulation may be at work within the rural towns.

3.3 Trends Within Rural Ayrshire Communities

The pattern of population change varies from settlement to settlement. Of the 43 rural settlements examined, 12 gained population (1,722 people) while 31 lost of population (6,116 people). The main beneficiary in terms of gaining population was the village of Coylton in South Ayrshire, which gained 502 people, representing 29% of the total population gain in the rural settlements. In terms of the village itself, this represented a 25% gain in population and is the product of an extensive private greenfield development. Fairlie in North Ayrshire and Mauchline and Stewarton in East Ayrshire also registered relatively significant gains in population. Outwith these towns, the pattern of population gain is evenly spread between the remaining towns that gained population.

Of those towns losing population, Kilbirnie (North Ayrshire) and Auchinleck and New Cumnock (East Ayrshire) stand out as particular examples. These towns accounted for more than 1/3 of the population loss from all the rural towns. Not only were these declines in population significant at an Ayrshire level, but also at the level of the individual settlements they demonstrate a marked trend towards depopulation. In the case of New Cumnock, for example, the net loss of 803 people represented 20% of the town’s population in 1991.

4 HOUSEHOLD PROJECTIONS

The Scottish Executive prepares household projections for Scotland,[1] approximately every two years. Their purpose is to give an indication of possible future households if trends observed in the past continue. This common Scottish base allows for compatibility across the Ayrshire Councils and with other parts of Scotland. The projected households prepared by the Scottish Executive use the following two principal sources of information as a basis.

- Population projections (2002 base)[2] produced by the General Register Office for Scotland (GRO), and discussed above, give an indication of possible future trends in population within Scotland. Estimates of the number of persons living in communal establishments are deducted from the total population figures to produce projections of the numbers of persons living in private households; and
- Data from previous Censuses of Population to identify trends in past household formation rates.

The household projections are calculated by applying projected trends in household formation derived from census analysis to the number of persons in private households. However it should be recognised that population projections, like any other type of projection, may indicate that existing trends and policies are likely to lead to situations, which are judged as undesirable. If new policies are introduced they may result in the original projections not being realised. This however means that the projections will have fulfilled one of their prime functions, namely, to show the consequences of present demographic trends with sufficient notice for necessary actions to be taken. This issue is recognised in the National Planning Framework for Scotland where it is stated that household projections based on past trends should be regarded as indicative rather than intimations of a preordained future[3].

4.1 Changes In Total Households

During the last 30 years there has been a sustained increase in the number of households and a significant fall in average household size.

Figure 6 illustrates that between 1971 and 2001 households grew by almost 40,000. Whilst average household size has fallen from around 3 persons per house to just over two. The main drivers for this change have been the rapid rise in one-person households, social changes and growing affluence. This change has been despite modest changes in population over this period.

[1] Scottish Executive , Statistics Unit 2004
[2] Population Projections, Scotland (2002-based), as at January 2004
[3] Refer National Planning Framework, Paragraph 61

Figure 6 - Household Change 1971-2001

	Total Households 1971-2001				Change per annum 1971-2001
	1971	1981	1991	2001	
Ayrshire	117,975	13,2126	147,386	157,820	1,328
East Ayrshire	41,777	44,602	48,284	50,346	286
North Ayrshire	40,012	47,242	54,018	58,726	623
South Ayrshire	36,186	40,282	45,084	48,748	419

Source: Scottish Executive

4.2 Projected Housing Growth

The most recent projections issued by the Scottish Executive would suggest that households would grow by around 3%, just over 4000, in the sixteen year period 2002-2018. This is in contrast to a national growth in households of 7%. Across Scotland significant regional variations exist. These trends are illustrated in the table below.

Figure 7 Projected Number of Households in Scotland by Structure Plan Area

Structure Plan Area	Total Households (All Household Types)															
	2002	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**	**% change 2002 - 2016**
Scotland	**2,216,780**	**2,225,380**	**2,236,830**	**2,248,580**	**2,260,710**	**2,272,390**	**2,283,970**	**2,295,660**	**2,308,810**	**2,321,660**	**2,334,580**	**2,347,290**	**2,358,750**	**2,370,130**	**2,381,090**	***7%***
Aberdeen and Aberdeenshire	190,460	191,010	191,940	192,920	193,760	194,580	195,240	195,800	196,460	197,120	197,680	198,220	198,630	199,000	199,320	*5%*
Argyll & Bute	39,110	39,110	39,190	39,300	39,410	39,490	39,600	39,750	39,920	40,110	40,290	40,480	40,690	40,900	41,100	*5%*
Ayrshire	159,280	159,430	159,750	160,030	160,390	160,730	160,990	161,310	161,690	162,040	162,430	162,770	163,050	163,290	163,510	*3%*
Dumfries and Galloway	64,450	64,620	64,860	65,080	65,300	65,490	65,650	65,830	66,040	66,240	66,450	66,630	66,780	66,890	66,980	*4%*
Dundee and Angus	114,240	113,860	113,810	113,680	113,580	113,440	113,230	113,050	112,910	112,690	112,510	112,280	111,960	111,590	111,200	*-3%*
Edinburgh and Lothians	345,140	348,040	351,670	355,430	359,260	363,270	367,150	370,990	375,100	379,310	383,570	387,770	391,860	396,000	400,130	*16%*
Eilean Siar	11,320	11,320	11,340	11,360	11,380	11,390	11,380	11,380	11,380	11,380	11,370	11,360	11,340	11,330	11,290	*0%*
Falkirk	63,570	64,010	64,540	65,070	65,630	66,220	66,790	67,340	67,960	68,570	69,190	69,840	70,440	71,070	71,770	*13%*
Fife	152,080	153,120	154,340	155,600	156,860	158,070	159,270	160,500	161,810	163,130	164,450	165,740	166,960	168,170	169,310	*11%*
Glasgow and Clyde Valley	768,330	770,630	773,150	776,100	779,320	782,190	785,460	788,650	792,560	796,220	799,760	803,370	806,420	809,520	812,400	*6%*
Highland	90,510	90,950	91,460	91,930	92,400	92,780	93,140	93,560	94,030	94,430	94,860	95,250	95,610	95,970	96,280	*6%*
Moray	36,230	36,180	36,180	36,160	36,130	36,110	36,090	36,080	36,100	36,090	36,120	36,130	36,140	36,150	36,140	*0%*
Orkney	8,460	8,470	8,510	8,550	8,590	8,620	8,650	8,660	8,690	8,710	8,740	8,780	8,790	8,810	8,820	*4%*
Perth and KInross	59,160	59,520	59,980	60,360	60,750	61,170	61,530	61,980	62,400	62,820	63,280	63,720	64,150	64,500	64,900	*10%*
Scottish Borders	48,190	48,450	48,810	49,120	49,450	49,740	50,070	50,410	50,730	51,080	51,460	51,830	52,160	52,500	52,840	*10%*
Shetland	9,250	9,300	9,410	9,510	9,600	9,690	9,770	9,870	9,970	10,070	10,170	10,270	10,360	10,450	10,550	*14%*
Stirling and Clackmannanshire	57,000	57,360	57,880	58,380	58,920	59,430	59,970	60,510	61,080	61,660	62,250	62,860	63,410	63,990	64,540	*13%*

5 HOUSEHOLD AND POPULATION CHANGE: OPTIONS FOR DISCUSSION

The Draft Consultation Structure Plan 2025 seeks to illustrate the implications of the population and household changes for Ayrshire within the context of three scenarios.

Scenario 1 seeks to illustrate the implications of the GRO projections for the Structure Plan period 2005-2025. Based on the historical trends implicit in the population and housing projections the population of Ayrshire could fall to around 331,000 a drop of some 36,000. Assuming an average household size in 2005 of between 1.9 and 2.0 this would be equivalent to a growth in households of between 5,500 and 14,000.

Figure 8 - GRO/SE Projections Scenario 1

	2005		2025	
	Population	**Household**	**Population**	**Household**
Scenario1 GRO/SE Projections	362,495	160,040	331,000	165,500 169,743 174, 210

Scenario 2 seeks to illustrate the implications of a growth in households equivalent to the national household growth, 7% in the period 2002 to 2016. During the Structure Plan period ,2005-2025 households could rise by some 16,000. At an average household size of 2.0 this would be equivalent to a population in Ayrshire of 352,000. As with the previous Scenario the implications changes in average household size would have are illustrated.

Figure 9 - National Growth Scenario 2

	2005		2025	
	Population	**Household**	**Population**	**Household**
Scenario 2 Matching national Housing growth	362,495	160,040	352,000 343,258 334,457	176,030

Scenario 3 . The last Scenario seeks to maintain population levels within Ayrshire at projected 2005 levels. The implications of this option in terms of household growth are illustrated in the table below. As with previous options variations in household size are considered. These show that households could rise between 21,000 and 31,000 if this option was met.

Figure 10 - Stable Population Scenario 3

	2005		2025	
	Population	**Household**	**Population**	**Household**
Scenario 3 Maintaining a stable population at 2005 levels	362,495	160,040	362,495	181,247 185,894 190,787

Scenario 3 is the preferred option of the Ayrshire Joint Structure Plan & Transportation Committee. The Strategic Assessment of housing land requirement is based on this latter option.

Figure - 11 Summary Projected Change in Households

	2005-2025 (Household Growth)	Change per annum 2005-2025
Scenario 1 GRO/SE Projections	5,460-14,170	273-709
Scenario 2 Matching national housing growth	16,000	800
Scenario 3 Maintaining a stable population at 2005 levels	21,207-30,747	1060-1537

6 HOUSING STOCK CHANGE

In considering future housing requirements it is necessary to consider the changes that will occur within the existing stock of houses during the planning period. Changes brought about by the demolition of the existing stock, or a transfer of housing to second homes will reduce the supply of available housing in an area. Conversely conversions of existing property to housing may have a net increase in the stock. It is therefore appropriate to make a distinction between the effective supply, that is the usable housing stock and the non-effective supply which would include second homes and stock that is vacant.
During the last inter censal period housing stock, household spaces grew by 7.2%. The total number of dwellings was estimated to be 166,000 of which 158,000 were occupied, the remaining stock was either vacant or used as a second home.

Figure 12 - Housing Stock

	Dwellings	Residential Households	Vacant	Second Homes	Intercensal change in household spaces
East Ayrshire	52,550	50,346	2,123	98	4.83
North Ayrshire	62,300	58,726	2,104	1,491	7.84
South Ayrshire	51,100	48,748	1,648	745	8.95
Ayrshire	165,900	157,820	5,875	2,334	7.2

Source: Table KS16, 2001 Census

6.1 Vacant Stock

The proportion of the housing stock that is vacant at any particular time is due to a number of factors. Stock can be vacant because it is currently under improvement, it is new stock that has not yet been sold or the stock is lying vacant awaiting a new tenancy. From an analysis of previous census data for Ayrshire it appears that between 3-4% of the stock is within this category and therefore not available for occupancy. The level of vacancy between authorities within Ayrshire also varies and this is illustrated below.

Figure 13 -Total Vacant Stock 1981/2001/2017

	1981*	%	1991*	%	2001*	%
Ayrshire	5,730	4.0	5,085	3.3	5,875	3.5
East Ayrshire	1,978	4.1	1,762	3.5	2,123	4.0
North Ayrshire	2,311	4.3	2,117	3.7	2,104	3.4
South Ayrshire	1,441	3.3	1,206	2.6	1,648	3.2

*****Source: Table 54 - Occupancy, vacant and other accommodation, 1991 Census & Table KS16 Dwellings Household spaces and accommodation type, 2001 Census
Differences in totals attributed to rounding

6.2 Second Homes and Holiday Accommodation

As the Figure 14 below shows there are significant spatial differences in Ayrshire in the proportion of the stock that is utilised for second home or holiday accommodation. It would also appear that the proportion of secondary accommodation has fallen in absolute terms during the 1981-2001 period.

Figure 14 - Accommodation not used as a main residence 1981/2001/2017

	1981*	%	1991*	%	2001	%
Ayrshire	2,732	1.9	2,460	1.6	2,334	1.4
East Ayrshire	106	0.2	147	0.3	98	0.2
North Ayrshire	1,955	3.7	1,664	2.9	1,491	2.4
South Ayrshire	671	1.5	649	1.4	745	1.4

Source: Table 54 - Occupancy, vacant and other accommodation, 1991 Census & Table KS16 Dwellings Household spaces and accommodation type, 2001 Census
Differences in totals attributed to rounding

6.3 Demolition & Conversions

Information on previous levels of demolition within Ayrshire was sourced from the Scottish Executive Housing Research Unit. This indicates a wide range between authorities in the annual levels of demolition.

Conversions include the change of use of non-domestic properties for housing, the conversion of houses to other uses or their subdivision or amalgamation to form more or fewer units. Information on this form of development is limited and the numbers of property involved annually are small.

Figure 15 - Demolitions

	Annual Rate (past trends)
East Ayrshire	89
North Ayrshire	8
South Ayrshire	3
Ayrshire	100

Source: Scottish Executive

7 AFFORDABLE HOUSING REQUIREMENT AND PROGRAMMES

The ways in which the planning system can contribute to affordable housing provision varies and in areas where property values are high the private building industry may be able to make a contribution. The ways in which strategic planning policy can address variable needs and delivery mechanisms for affordable housing will be explored further during the consultation period. Public sector agencies currently build around 200 houses per annum within Ayrshire.

8 MARKET ASSESSMENT

8.1 Pattern of Household Movement

The Ayrshire housing market involves 7-8000 transactions annually (excluding right to buy property), almost 70% of house purchaser transactions move to another home within the same local authority area. This level of self-containment is greatest in areas where the influences of commuting and retirement markets are less. Markets influenced by buyers external to Ayrshire, include the Arran, Clyde Coast and the Garnock Valley areas. There are marked variations between the origin of buyers of used property and new build purchasers. For example in recent years households previously resident in the Glasgow Conurbation purchased almost one third of all new build property in the M77 Corridor. The

Clyde Coast and the Garnock Valley also attracted significant buyers from this area. The Girvan area and Arran were attractive to buyers from other parts of the UK and areas outside Scotland.

8.2 Household Size & Age Profile of House Movers

Around 20% of households surveyed were single, 40% formed two person households, a third lived within 3 to 4 person family households and 7% were in large family units. However this Ayrshire pattern masked significant variation across the communities within Ayrshire. For example the proportion of single households rose to almost a third (31.6%) in the Clyde Coast, whilst the Girvan, Cumnock areas had lower than average levels of single households. Family size households (3 or 4) were highest in the M77 Corridor, (44%). Within the new build sector there was also variations in household size, for example the proportion of single households was only 8% within the Irvine/Kilwinning area. In Troon/Prestwick/Ayr the proportion rose to 29%. The age profile of households also varied between the new build and second hand markets; just less than one quarter of households in the second hand market had occupants under 60 however in new build property this rose to around a third (35%) of purchasers.

8.3 Housing Search Areas

In general terms most people chose to relocate and search for new homes within their local community. However where commuting patterns or retirement influenced housing search patterns alternative housing locations were cited. Factors that influenced the choice of area varied. While for Ayrshire as a whole being “close to friends and relatives” was cited as the most important reason, a preference for the “local environment” was important for purchasers on the Clyde Coast and Ayr/Prestwick /Troon. For new build purchasers the “choice of houses” was the most significant reason given by households in the M77 Corridor and in the Ardrossan Saltcoats and Stevenston areas. A significant proportion of purchasers were able to buy within their first choice area (79% Second Hand Market, 71% New Build Market). Satisfaction with their home and with the area within which they live was also very high.

8.4 Reasons for Moving

The main reason cited for moving house was to purchase a larger house this was particularly the case in the Irvine/Kilwinning and M77 corridor areas. Jobs or retirement led moves were the second most common reasons. Only in the Clyde Coast sub area was this latter reason more significant. The pattern was also reflected in the new build sector.

8.5 First Time Buyers & Affordability

First time buyers (23%) bought almost one quarter of property sold. This however varies across the Ayrshire area with higher levels of first time buyers in Cumnock, Ardrossan/ Saltcoats/Stevenston areas (44% and 33% respectively). This in part reflects the average house price paid for property in these areas, for example almost two-thirds of property purchased in Cumnock was bought at a price below £50,000. The lowest level of first time buyer purchase was within the Clyde coast community (13%). It is significant to note that only a quarter of property purchased was within this price band. The survey also highlights significant variation between the proportion of new build property bought by first time buyers when compared with the second hand market. On average only 12% of house purchasers were within this category suggesting that the new build sector excludes a substantial sector of the market. In part this reflects average house price in the two markets. Only 6% of new built property were sold at a price below £50,000. This in contrast to the used market , 43% of property was in this price range. Refer Appendix , " Key Findings, 2003 Ayrshire Household Survey".

9 TRENDS IN HOUSING COMPLETIONS

The Ayrshire Joint Structure Plan and Transportation Committee monitor on an annual basis house completions on sites with a capacity greater than 4 units. This monitoring indicates that Ayrshire than during the last ten years completions averaged almost 1300 per annum. All three Council areas have had completion rates in excess of 500 per annum during the last decade. Historical trends in completions are shown in Table 16.
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Table 16 Total Completions, All Tenures, By Local Authority and Year

Council Area	1991-92	1992-93	1993-94	1994-95	1995-96	1996-97	1997-98	1998-99	1999-00	00-01	01-02	02-03	Total
South Ayrshire	339	361	430	450	616	284	346	431	338	213	451	437	4696
East Ayrshire	360	354	242	307	164	497	461	286	401	445	577	316	4410
North Ayrshire	463	577	640	543	656	557	476	584	290	377	407	399	5969
Ayrshire	1162	1292	1312	1300	1436	1338	1283	1301	1029	1035	1435	1152	15075

Source: Ayrshire Joint Structure Plan and Transportation Committee

10 LAND AVAILABLE FOR HOUSING

The Ayrshire Joint Structure plan Committee in conjunction with the Ayrshire Councils - East Ayrshire, North Ayrshire and South Ayrshire prepare on an annual basis an audit of the housing land supply. The audit[4] is prepared to meet Structure Plan needs and the requirements of SPPG3 that requires a minimum 5-year effective land supply to be maintained. The audit covers private rented, public sector, housing association as well as the private sector sites.

10.1 Established Supply

The established land supply are sites with a capacity of 4 or more housing units which are derived from:

- the remaining capacity of sites under construction;
- sites with planning consent;
- local plan allocations; and
- previous structure plan release sites.

10.2 Effective Supply

The effective supply is determined by removing all sites with a constraint attached to their development from the established supply. The constraints include an assessment of viability, physical, infrastructure, marketing or ownership issues. Once the effective land supply has been derived the programmed output of each site is estimated, the primary purpose of which is to determine the overall programmed output by each authority. The output of any effective site will be dependent on a variety of factors including:

- development lead in times;
- site location;
- the individual developer;
- type and price of dwelling; and
- past performance.

Figure 17 - Housing Land Supply March 2003

	Housing Land Supply		
	Effective Sites	**Non Effective**	**Established Land Supply**
East Ayrshire	1,790	1,608	3,398
North Ayrshire	3,311	3,804	7,115
South Ayrshire	2,559	1,888	4,447
Ayrshire	7,660	7,300	14,960

Source: AJSPT

[4] Housing Land Supply - 31st March 2003 , Ayrshire Joint Structure Plan and Transportation Committee

10.2 Urban Capacity

All three Councils have undertaken urban capacity studies for their respective areas[5]. An urban capacity study is an assessment of the potential for further housing within settlement boundaries, particularly on previously developed land or through conversion of existing buildings. Whilst the process is subjective it is recognised that within urban areas there are opportunities for further housing development within urban areas and which to date do not feature on the housing audit. They are therefore a useful tool in identifying areas where investment in regeneration is necessary and a way in responding to housing needs and future allocations whilst ensuring the re-use of existing land and buildings.

The Urban Capacity undertaken in Ayrshire study took account of:

- Previously Developed Vacant & Derelict Land;
- Vacant Land not previously developed;
- Redevelopment of existing uses;
- Development of underused car parks;
- Derelict Buildings unoccupied or in advance state of repair;
- Conversion & subdivision of Commercial/Residential Buildings;
- Retail Core/upper floors;
- Intensification and infill opportunities;
- Empty Homes; and
- Non effective housing audit sites.

The study was a snap shot of opportunities and was undertaken during 2003

[5] Refer to Technical Working Note 2 Urban Capacity in Ayrshire

Figure 18 - Urban Capacity 2002-2025

	Urban Capacity (expressed in potential housing units)		
	Assessment 2002-2025	**Non effective audit sites included in the assessment**	**Urban Capacity**
East Ayrshire	3,665	1,021	2,644
North Ayrshire	9,308	3,992	5,316
South Ayrshire	2,220	1,625	595
Ayrshire	15,193	6,638	8,555

Source: AJSPT

11 FLEXIBILITY ALLOWANCE

Flexibility is an integral part of any strategic assessment of future housing land requirement. It is incorporated on both the demand and supply sides of the analysis. The importance of the flexibility in the methodology and assumptions used is less about the order of magnitude but the consistent direction in which it tends to add an additional margin to allow for uncertainty inherent over the planning period.
On the demand side:

- a flexibility allowance of 30% has been added to accommodate greater housing choice in the housing market and also to take account of uncertainties that could occur within the future housing stock.

On the supply side this is achieved**:**

- by the adoption of a twelve and twenty year plan period;
- the exclusion of small conversions and sites of less than four units from the land supply; and
- a rigorous reassessment of all sites that have remained on the effective land supply continuously for four years.

12 HOUSING REQUIREMENT

12.1 Managing Housing Growth

As the tables 17 & 18 above illustrate, Ayrshire currently has identified a reserve of land to meet some of the future housing need. Some of this has planning permission or is currently identified in finalised or adopted local plans. Through the preparation of the urban capacity exercise potential significant new sources of brownfield land has been identified. However even assuming a significant proportion of these locations can be developed there remains a projected shortfall of 20,000 that will require to be met through additional allocations and the granting of consent.

Figure 18 - Strategic Assessment of Housing Land Requirements

STABLE POPULATION OPTION Housing Requirement 2005-2025	**Ayrshire**	**East Ayrshire**	**North Ayrshire**	**South Ayrshire**
Projected Household Change	25,854	9,752	8,752	7,350
Flexibility + 30%	7,756	2,925	2,625.6	2,205
Structure Plan Provision	33,610	12,677	11,377	9,555
Structure Plan Provision per annum	**1,681**	**634**	**569**	**478**
Effective Land Supply 2003	7,660	1,790	3,311	2,559
Less programmed output 2003/05	2,372	477	1,170	725
Estimated Effective Land Supply 2005	5,288	1,313	2,141	1,834
Surplus/Deficit	-28,322	-11,364	-9,236	-7,721
Contribution from Established Sites (50%)	3,650	804	1,902	944
Contribution from Urban Capacity (50%)	4,312	1,322	2,693	297
Shortfall 2025	-20,360	-9,238	-4,641	-6,480
Additional Need for controlled and Planned expansion	20,360	9,238	4,641	6,480

12.2 Distribution of Housing Growth by Community

The requirements for additional housing land that have been identified above were allocated to the major communities and groupings of service communities/investment corridors within Ayrshire[6]. The Structure Plan has sought to direct the assessed need toward these communities in ways that are consistent settlement structure and the wider sustainability objectives outlined within the Structure Plan. Accordingly the strategy seeks to direct major residential development toward the Core towns of Ayr, Irvine and Kilmarnock and local service centres 70% of the allocation is directed towards these locations. In considering the scale of allocations the Ayrshire Joint Structure Plan Committee has sought to have regard to the following.

- Community Hierarchy , economic priorities and local investment corridors which have been identified in the Structure plan;
- Available infrastructure and opportunities for new investment;
- Integration with transport network;
- The availability of existing land supply and local urban capacity to support communities services and facilities & promote housing choice; and
- The impact major housing release could have on the character & setting of the community

During the consultation phase the interim allocations will be considered in more detail against the above criteria.

[6] Refer Structure Plan Consultative Draft- Community Hierarchy

13 PROPOSED HOUSING ALLOCATIONS 2005-2025

Core Towns

North , West and South Kilmarnock	upto 8,000
East Irvine	upto 8,000
South and East Ayr	upto 8,000

Core Investment Area

Various Communities	500

Investment Corridors

Glasgow Link	1,200
Garnock Valley	700
North Coast and Arran	1,300
Carrick	400
M74 Link	1,600
Irvine Valley	500

Rural Ayrshire

Various Communities	1,000

APPENDIX Household Change in Ayrshire, 2002-2016

Ayrshire

	2002	203	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016		Change2002-2016
Ayrshire	159,280	159,430	159,750	160,030	160,390	160,730	160,990	161,310	161,690	162,040	162,430	162,770	163,050	163,290	163,510	*3%*	4,230
1 Adult	49,220	49,940	50,720	51,540	52,350	53,190	54,030	54,850	55,680	56,490	57,390	58,240	59,020	59,750	60,420	*23%*	11,200
1 Adult+children	10,610	10,750	10,890	11,030	11,170	11,290	11,390	11,480	11,580	11,680	11,770	11,860	11,960	12,040	12,120	*14%*	1,510
2 or more adults +children	35,400	34,480	33,600	32,780	31,990	31,100	30,190	29,310	28,450	27,670	26,800	25,970	25,190	24,470	23,770	*-33%*	-11,630
2 or more adults	64,050	64,260	64,540	64,690	64,890	65,150	65,390	65,670	65,980	66,200	66,470	66,690	66,890	67,040	67,210	*5%*	3,160

East Ayrshire	50,730	50,730	50,750	50,790	50,830	50,880	50,910	50,970	51,030	51,080	51,160	51,220	51,280	51,320	51,350	*1%*	620
North Ayrshire	59,430	59,570	59,790	60,000	60,210	60,460	60,640	60,830	61,060	61,270	61,490	61,730	61,880	62,010	62,180	*5%*	2,750
South Ayrshire	49,120	49,140	49,210	49,250	49,350	49,400	49,430	49,520	49,610	49,680	49,780	49,820	49,890	49,970	49,980	*2%*	860

Source: Scottish Executive 2004

SASINES ANALYSIS ORIGIN OF PURCHASER	**Second Hand Market** RESIDENTIAL LOCATION			**New Build Market** RESIDENTIAL LOCATION		
	East Ayrshire	**North Ayrshire**	**South Ayrshire**	**East Ayrshire**	**North Ayrshire**	**South Ayrshire**
East Ayrshire	**72.80**	**2.51**	**7.83**	**49.0**	**2.48**	**7.76**
North Ayrshire	**4.73**	**70.39**	**3.33**	**4.62**	**62.36**	**5.34**
South Ayrshire	**7.13**	**2.48**	**72.55**	**9.96**	**3.85**	**53.44**
Glasgow Conurbation	**9.94**	**16.22**	**7.54**	**26.36**	**18.76**	**12.6**
Rest of Scotland	**1.99**	**2.83**	**3.12**	**3.62**	**4.22**	**6.23**
Outside Scotland/Rest of UK	**3.19**	**4.98**	**5.11**	**5.89**	**7.33**	**9.54**
Rest of world	**0.21**	**.6**	**0.51**	**0.54**	**0.99**	**5.09**

SOURCE:
SASINES ANALYSIS - 2000/2001/2002
ORIGIN OF PURCHASER OF PROPERTY IN AYRSHIRE

SASINES ANALYSIS - 2000/2001/2002
SUB AREAS WITHIN AYRSHIRE - SECOND HAND (% Destination from Origin)

Origin	Destination: M77 Corridor	Clyde Coast	Arran	Ardrossan/ Saltcoats/ Stevenston	Irvine/ Kilwinning	Garnock Valley	Troon/ Prestwick/Ayr	Girvan	Cumnock
M77 Corridor	70.59	0.85	3.17	1.19	4.94	1.25	4.55	1.08	2.65
Clyde Coast	0.65	52.97	1.19	4.38	0.89	2.62	0.39	0.22	0.71
Arran	0.11	0.06	34.13	0.22	0.04	0.00	0.11	0.00	0.00
Ardossan/ Saltcoats/ Stevenston	0.62	2.26	1.19	67.66	5.15	1.37	0.45	0.00	0.88
Irvine/ Kilwinning	3.68	1.53	0.40	8.16	71.83	2.74	2.04	1.29	0.88
Garnock Valley	0.46	1.53	0.00	1.63	1.18	55.74	0.24	0.22	0.00
Troon/ Prestwick/Ayr	6.34	1.19	2.38	1.11	3.93	1.37	74.10	10.99	10.09
Girvan	0.16	0.11	0.00	0.07	0.17	0.00	1.47	55.82	0.18
Cumnock	0.68	0.06	0.00	0.30	0.04	0.00	1.85	0.43	73.27
Glasgow Conurbation	11.43	25.75	19.84	11.35	6.80	29.93	7.10	9.05	5.84
Rest of Scotland	2.09	4.47	7.94	1.34	2.15	2.00	2.95	4.53	1.42
Outside Scotland/Rest of UK	2.95	8.21	26.98	2.15	2.62	2.74	4.28	15.30	4.07
Rest of World	0.24	1.02	2.78	0.45	0.25	0.25	0.45	1.08	0.00

SASINES ANALYSIS - 2000/2001/2002
SUB AREAS WITHIN AYRSHIRE - NEW BUILD (% Destination from Origin)

		Destination								
		M77 Corridor	Clyde Coast	Arran	Ardossan/ Saltcoats/ Stevenston	Irvine/ Kilwinning	Garnock Valley	Troon/ Prestwick/Ayr	Girvan	Cumnock
Origin	M77 Corridor	46.13	1.95	5.56	0.50	3.69	1.22	5.21	0.00	2.70
	Clyde Coast	0.57	31.17	0.00	3.52	1.14	3.66	0.54	5.88	0.00
	Arran	0.00	0.00	44.44	0.50	0.28	0.00	0.33	0.00	0.00
	Ardossan/ Saltcoats/ Stevenston	0.68	7.79	0.00	62.31	6.25	0.00	0.87	0.00	0.00
	Irvine/ Kilwinning	3.42	3.90	0.00	7.54	51.70	4.88	2.61	0.00	1.35
	Garnock Valley	0.34	3.25	0.00	3.52	2.56	53.66	0.65	0.00	0.00
	Troon/ Prestwick/Ayr	5.24	2.60	5.56	3.02	5.97	0.00	56.68	5.88	17.57
	Girvan	0.11	0.00	0.00	0.00	0.00	0.00	1.95	47.06	0.00
	Cumnock	0.57	0.00	0.00	0.00	0.00	0.00	1.74	0.00	64.86
	Glasgow Conurbation	32.00	28.57	11.11	13.07	15.91	28.05	11.18	11.76	5.41
	Rest of Scotland	3.87	9.74	11.11	2.01	3.13	2.44	5.75	0.00	2.70
	Outside Scotland/Rest of UK	6.38	8.44	22.22	3.52	8.52	6.10	8.36	17.65	5.41
	Rest of World	0.68	2.60	0.00	0.50	0.85	0.00	4.13	11.76	0.00

KEY FINDINGS FROM 2003 SURVEY OF HOUSE PURCHASERS IN AYRSHIRE

HOUSEHOLD CHARACTERISTICS	M77 Corridor (Kilmarnock area)	Irvine/Kilwinning	Troon/Prestwick/Ayr	Ardrossan/Saltcoats/Stevenston
Demographic Structure	High levels of medium sized family units Below average proportion of household over 60 years of age	Above average single and 3 to 4 person family households	Above average one to two person households	Larger households above average
Factors Behind Decision to Move	Larger House, Job Related (new build sector)	Larger House	Larger/smaller house and jobs related moves	Larger house House type and poor environment (push factor) were cited as important reasons by new build purchasers
First Time Buyers	Average share of first time buyers	Average share of first time buyers	Below average share of first time buyers	High levels of first time buyers
DWELLING CHARACTERISTICS				
House type and size	Large semi detached property 3 Bedroom property High propotion of new build sector was detached with 3 to 4 bedrooms	Terraced 3 Bedroom property High propotion of new build sector was detached with 4 bedrooms	Detached/Semi Detached 2/3 bedroom property High proportion of flats in new build sector	Semi detached 2/3 bedroom property Detached also significant in new build sector
SPATIAL FACTORS				
Travel to Work	Kilmarnock/Glasgow Higher levels of Glasgow commuting in new build sector	Mainly local with commuting to Glasgow Higher levels of Glasgow commuting in new build sector	Mainly local with commuting to Glasgow	Mainly local and Irvine
Search Area	Mainly local however a significant propotion of new build purchasers cited Newton Mearns and Glasgow as areas they had considered	Mainly local but also included Ayr/Prestick/Troon market. One third of new build purchasers would have bought elsewhere (mainly Troon) price and availability were a deterrence	Mainly local	Mainly local but new build purchasers also considered Kilwinning
AFFORDABILITY				
	Price paid for property below Ayrshire average Two thirds of new build property sold for prices between £50-£99,999	Below average Marginally above Ayrshire average for new build property	Above average prices paid Over half of property sold at a price between £50-£99,999. 70% of new build property was sold in this price range	Below Ayrshire average prices were paid for new build and used property
FACTORS INFLUENCING CHOICE				
House	House Price/House Type Fixed price and no bidding were important factors for new build purchasers	House Type/size and Price	House Type/ House Price	House type/price Fixed price and no bidding important for purchasers of new build property
Area	Being near to friends/relatives return to local area local environment Choice of house and convenience to work were also cited by new buld	Being near to friends/relatives return to local area local environment,shops and services Housing choice and schooling were also cited by new build purchasers	Local Environment/Schools/Shops Services Friends relatives/old home area Local Environment was most significant for new build purchasers	Friends relatives/old home area Services and good schools House choice and work convenience important factors for new build buyers

purchasers

KEY FINDINGS FROM 2003 SURVEY OF HOUSE PURCHASERS

HOUSEHOLD CHARACTERISTICS	Clyde Coast	Garnock Valley	Cumnock	Girvan/Carrick
Demographic Structure	Above average 1 to 2 person households Above average retirement households	Above average share of two person households	Below average single households Above average 4 person households	Above average 2/3 person households Higher level of pensionable households
Factors Behind Decision to Move	New job/Retirement Smaller house and retirement additional reasons cited by new build purchasers	Larger House/Change in house type /Marriage cohabitation	Larger House	Smaller house
First Time Buyers	Low level of first time buyers	High levels of first time buyers	High proportion of first time buyers (twice Ayrshire average)	Below average share of first time buyers
DWELLING CHARACTERISTICS				
House type and size	High proportion of flatted property 2 Bedroom	Semi detached 3 Bedroom	Above average detached/semi detached property 3 Bedroom	Detached High proportion of 2 bedroom property
SPATIAL FACTORS				
Travel to Work	Glasgow/Greenock/Local	Glasgow	Ayr	local and Ayr
Search Area	High satisfaction levels with choice of area Mainly local although other coastal areas such as Ayr Prestwick and Troon were considered by new build purchasers	Paisley and other parts of North Ayrshire	Ayr/Prestwick and local	Ayr/Local
AFFORDABILITY				
	Above average Above average property sold in £100-£149,000 range (new build)	Below average prices paid in new build and used market	Below average almost two-thirds of property purchased was below £50,000, 80% of new build sold at a price between £50-99,999	Above average Two-thirds of property was sold for between £50,000 and £99,999
FACTORS INFLUENCING CHOICE				
House	House Type/size	House Type/House price Location	House Type/Price	House Type/size
Area	Local Environment (very important for new build purchasers), Return to home area/Friends Relatives, convenience fo work Fixed price and no bidding important for purchasers of new property	Friends relatives/old home area House choice and work convenience also important factors	Close to friends/relatives Local environment Convenience to work Choice of housing cited as important for new build purchasers	Local Environment Return to old home area

Diagram1 - CoSLA 'Baseline' Methodology