

AYRSHIRE JOINT STRUCTURE PLAN 2025:

“Growing a Sustainable Ayrshire”

REPORT OF SURVEY

TECHNICAL REPORT TR01/2006

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.

Ayrshire Joint Structure Plan & Transportation Committee
Prestwick Municipal Chambers
15 Links Road
Prestwick
Ayrshire
KA9 1QG

Tel: 01292 673760
Fax: 01292 671455
E-Mail: AJSPmail@south-ayrshire.gov.uk

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1 INTRODUCTION

The purpose of this technical paper is to present population and housing data that have been used to inform the future housing allocations outlined in the Ayrshire Joint Structure Plan - “Growing a Sustainable 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. This has been dramatically illustrated by the significant increase in migration to Scotland when compared with previous trends and forecasts. 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 of 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)), (2004 base projections) are presented in the summary in the tables below. The results of the recent projections show an increase in the population for Scotland from 5.08 million to around 5.13 million by 2017 before falling back to current levels in 2031. At a national level the most significant factor affecting future projected levels to around 2020 is migration. Extended life expectancy has also changed the age profile of the population. The number of children under 16 is expected to continue to fall whilst there will be an increase of almost 75% in the number of people over 75 by 2031. There has also been pronounced shifts in the working age population with a higher proportion now over 45. The average age of the population will rise from the current average of 40 to 45 by 2031. Ayrshire is not immune to these national changes. As the tables below show population within Ayrshire is forecast to fall by around 3% in the period up-to 2024, this is equivalent to a drop of 13,000 in the period 2006 to 2024. However this trend is significantly different from the 2002 Base projections that projected a significantly higher drop in population. This reversal in part reflects higher national in-migration to the Scottish economy. The drivers of this change are discussed in more detail below.

2.1 Natural Change- Births & Deaths

The GRO (S) estimate births within Scotland will continue to fall during the period upto 2026, there will also be a slight increase in deaths over a similar period. Within Ayrshire the current level of 3,500 of births annually is projected to fall to around 3000 per annum over a similar period, a drop of 500. Deaths, currently at around 4000 per annum, will also fall during the period to around 3500. Natural change in the population therefore contributes to a net loss of population (deaths greater than births). Refer Chart 1.

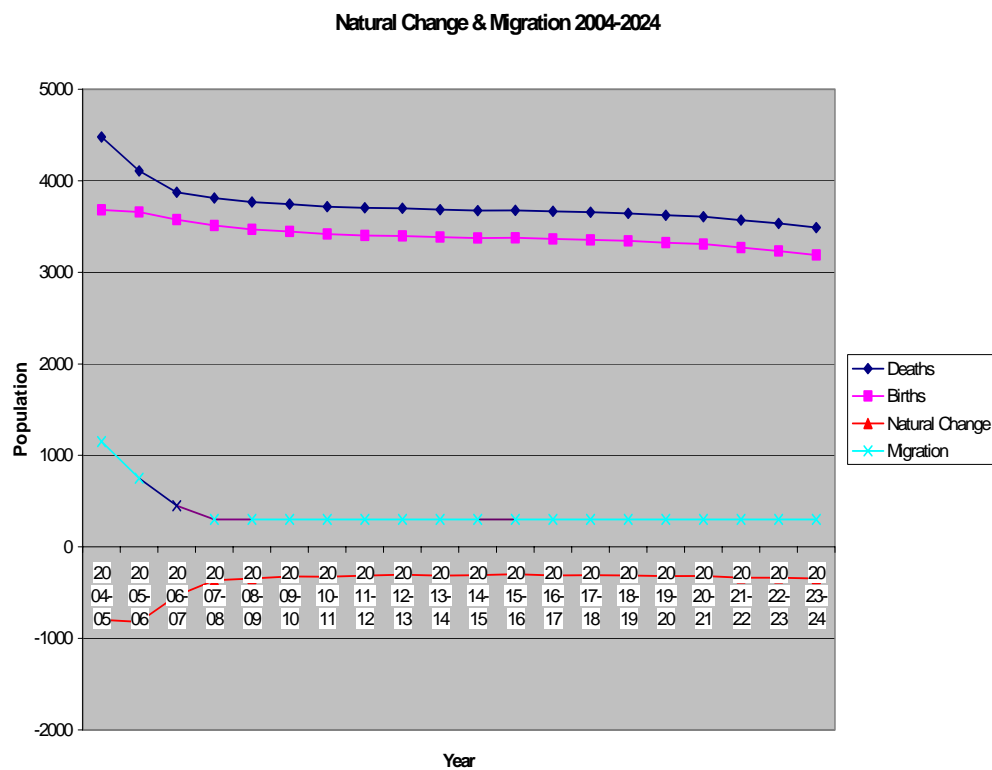
Figure 1 - Projected Population by Local Authority Area

	Base Year 2004	2012	2017	2024	% change 2004-2024
East Ayrshire	119,720	118,895	117,987	116,259	-2.9
North Ayrshire	138,020	134,388	132,630	129,270	-6.4
South Ayrshire	111,850	111,225	110,431	109,027	-2.5
Ayrshire	367,590	363,860	361,048	354,556	-3.5
Scotland	5,078,400	5,120,983	5,127,169	5,118,926	+0.8

Figure 2 – Projected % change in Population from 2004 (base year) - by broad age group: Ayrshire and Scotland 2004-2024

	0-15	16-59/64	60/65+
Ayrshire	-18	-7	+21
East Ayrshire	-16	-5	+17
North Ayrshire	-24	-10	+27
South Ayrshire	-13	-7	+18
Scotland	-12	-1	+19

Chart 1 Natural Change In Population 2004-2024



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 show that within Ayrshire, net migration has increased significantly in recent years.

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; and
- 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 3A – Trends in net civilian migration by Council area (persons per annum)

	2001/2002	2002/2003	2003/2004	Average 2001-2004
Ayrshire	-169	1136	1386	784
Scotland	-3,745	8,879	26,004	10,379
East Ayrshire	-249	97	334	61
North Ayrshire	52	592	279	308
South Ayrshire	28	447	773	416

Source: Registrar General for Scotland

Figure 3B – Migration Assumptions 2004 Base projections
by Council area (persons per annum)

	2004/2005	2005/2006	2006/07	2007-2024
Ayrshire	1150	750	450	300
Scotland	21,000	13,500	8,500	4,000
East Ayrshire	300	150	100	50
North Ayrshire	200	100	50	0
South Ayrshire	650	500	300	250

Source: Registrar General for Scotland

The decline in overall population, projected by the GRO-Scotland, would be reversed if the migration trends of recent years were sustained. (Migration is greater than natural changes)

3 CHANGES IN POPULATION DISTRIBUTION

3.1 National Changes

The table illustrates that significant changes in population are forecast for various parts of Scotland.

In part these reflect historical influences taking place in the local regional economies. However in the future the National Planning Framework recognises that a more even spread of economic activity across Scotland would be desirable and would help relieve pressures in areas of high growth such as the Lothians whilst providing additional opportunities in areas such as Ayrshire. This could be achieved through job relocation or infrastructure investment, and as recently shown¹ improvements in the connectivity of the Ayrshire economy with other parts of Scotland will assist not only in the economic growth of Ayrshire but in the overall efficiency and sustainability of the Scottish economy.

Figure 4 - Projected Change in Population within Scotland

	Projected %Change in population 2004-2024
West Lothian	+21
East Lothian	+13
Fife	+9
South Lanarkshire	+4
Argyll & Bute	+4
East Renfrewshire	+3
Ayrshire	-4
Dumfries & Galloway	--2
Dundee City	-15
Aberdeen City	-24

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.

¹ Ayrshire- Transport & the Economy- MVA, Scottish Executive,2006

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 General Register Office for Scotland (GRO) has recently taken on responsibility for the preparation of household projections for Scotland,² and these will be published approximately every two years. The next revisions based on the 2004 Base Projections will be published in May 2006. Their purpose is to give an indication of scale and distribution of possible future households within Scotland 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 General Register Office for Scotland (GRO) will use as a basis the following two principal sources of information:

- Population projections (2004 base)³ 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 on which they are based, 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/housing 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 future⁴.

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, during this period 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.

² Previously Scottish Executive, Statistics Unit

³ Population Projections, Scotland (2004-based), as at October 2005

⁴ 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	132,126	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

In the absence of more recent forecasts that incorporate the recent 2004 based estimates of population the assumptions shown in table 7 have been made by the Joint Committee. These assume household formation rates consistent with previously published GRO figures for Ayrshire for the period upto 2017, in the period 2017-2025 (for which there is no sub national estimates), it is assumed Ayrshire will track the national trend for household formation. The assessment assumes that residential population (population living in households) will remain stable at 363,000.

Figure 7 - Household Change 2005-2025

	Total Households* 2005-2025				Change 2005-2025
	2005	2012	2017	2025	
Population	363000	363000	363000	363000	0
Households	161500	171200	177200	191300	29800
Household Size	2.25	2.12	2.05	1.90	-0.35

*Figures rounded

5 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. 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. For Ayrshire as a whole it is assumed that vacant and second homes will account for 3.5% of total dwelling stock or the equivalent of 3.7% of residential households. This ratio remains constant during the plan period and has the effect of increasing the number of vacant and second homes from around 6000 to 7100 during the plan period 2005-2025.

Figure 12 - Housing Stock 2005

	Dwellings	Residential Households	Vacant & Second Homes 2004	Vacant & Second Homes 2005	Ratio of vacant/second homes to residential households (%)
East Ayrshire	53,800	51,500	1267	1286	2.5
North Ayrshire	64,100	60,000	3056	2897	5.1
South Ayrshire	52,400	50,500	1645	1534	3.3
Ayrshire	170,300	162,000	5968	5717	3.7

Source: GRO Household Estimates for Scotland, 2005

Note: The 2005 figures were not published until Mid December 2005, after the technical work for the Structure plan had been completed. The 2004 vacant/second homes figure was therefore used.

5.1 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. Following discussions with each council within Ayrshire it was agreed that the assumptions illustrated in Table 15 should be used. Across

Ayrshire as a whole this is almost a 50 % increase and in part reflects regeneration funding and the suitability of future public sector housing. However as a proportion of the total stock the number of homes demolished remains low.

Figure 15 - Demolitions

	Annual Rate (past trends)	Structure Plan Assumptions (per annum)	Structure Plan Assumption 2005-2025
East Ayrshire	89	80	1600
North Ayrshire	8	60	1200
South Ayrshire	3	5	100
Ayrshire	100	145	2900

Source: Scottish Executive

6 AFFORDABLE HOUSING REQUIREMENT AND PROGRAMMES

The ways in which the planning system can contribute to affordable housing provision varies and in areas where land values are high the private building industry may be able to make a contribution. Local housing strategies identify the needs within a local area for affordable housing taking into account local circumstance and appropriate mechanisms for delivery. Public sector agencies currently build around 200 houses per annum within Ayrshire. Funding is in place to double this level of provision in the short term (over the next three years).

7 MARKET ASSESSMENT

7.1 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.

7.2 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.

7.3 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.

7.4 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.

7.5 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 (2002/2003 prices). 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 was 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".

8 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 during the period 1991-2005 completions have been as high as 1400 per annum, most recently in 2001-02. 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.

Table 16 - Total Completions, All Tenures, By Local Authority and Year

Council Area	91-92	92-93	93-94	94-95	95-96	96-97	97-98	98-99	99-00	00-01	01-02	02-03	03-04	04-05	Total 1991-05
South Ayrshire	339	361	430	450	616	284	346	431	338	213	451	437	426	362	5484
East Ayrshire	360	354	242	307	164	497	461	286	401	445	577	316	287	309	5006
North Ayrshire	463	577	640	543	656	557	476	584	290	377	407	399	450	505	6924
Ayrshire	1162	1292	1312	1300	1436	1338	1283	1301	1029	1035	1435	1152	1163	1176	17414

Source: Ayrshire Joint Structure Plan and Transportation Committee

9 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 audit⁵ 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.

9.1 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.

9.2 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 2005

	Housing Land Supply		
	Effective Sites	Non Effective	Established Land Supply
East Ayrshire	2285	1243	3528
North Ayrshire	5051	1885	6413
South Ayrshire	2040	3651	5691
Ayrshire	9,376	6,779	16,155

Source: AJSP

⁵ Housing Land Supply - 31st March 2005 , Ayrshire Joint Structure Plan and Transportation Committee

9.3 Urban Capacity

All three Councils have undertaken urban capacity studies for their respective areas⁶. 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

Figure 18 - Urban Capacity 2005-2025

	Urban Capacity (expressed in potential housing units)		
	Assessment 2005-2025	Non effective audit sites included in the assessment	Urban Capacity
East Ayrshire	3888	1245	2643
North Ayrshire	7657	1885	5772
South Ayrshire	4255	3649	606
Ayrshire	15,800	6,779	9,021

Source: AJSP

⁶ Refer to Technical Working Note 2 Urban Capacity in Ayrshire

10 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 10% 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.

11 HOUSING REQUIREMENT

11.1 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 almost 20,000 that will require to be met through additional allocations and the granting of consents.

Figure 18- Strategic Assessment of Housing Land Requirements

Housing Requirement 2005-2025	Ayrshire
Projected Household Change	29,800
Net change in Vacant & Second Home Stock	1100
Allowance to replace housing stock that has been demolished.	2900
Flexibility (10%)	3400
Total Assessed Housing Requirement	37,200

Housing Opportunities 2005-2025	Ayrshire
Contribution from Effective Land Supply (2005)	9400
Contribution from Established Sites (50%)	3400
Contribution from Urban Capacity (50%)	4500
Total Potential Housing Opportunities	17,300
Indicative Shortfall 2005-2025	19,900

The strategic assessment of housing land requirements assumes the following:

- The residential population (population living in households) will remain stable at 363,000 during the period 2005-2025;
- Future Households⁷ will increase from 161,500 to 191,330 an increase of 29,830 in the period 2005-2025;
- The proportion of stock vacant and in second homes will remain the same as current levels. This however will mean the allowance made for vacancies & second homes will result in a net increase of 1093; and
- It is assumed that there will be 2900 demolitions and that this stock loss will be replaced.

Taking the above factors together, natural change in households, changes in vacancies, second homes and demolitions, means provisions for 33,823 homes are required. An

⁷ Future Households assumes household formation rates consistent with the published Ayrshire average in the period 2005-2017, in the period 2017-2025 it is assumed Ayrshire will track the trends at a national level.

additional allowance of 3382 (10% of 33,823) was added. The addition of this flexibility gives a final figure of 37,200 that it is proposed will provide an indicative target and context for future housing land allocations across the Structure Plan area (refer Figure 18).

Redistribution Between Authorities

The total assessed housing requirement for Ayrshire was redistributed to each council area on the basis of their current shares of population (refer Figure 19)

Figure 19 - Population share & proposed housing allocation by Council area

	Residential Population	% Share	Council Share of Ayrshire allocation*
East Ayrshire	118,320	32.6	12,100
North Ayrshire	134,504	37.0	13,800
South Ayrshire	110,320	30.4	11,300
Ayrshire	363,114	100	37,200

Allocation of land between 2005-2025

The strategic land requirements shown in Figure 19 have been allocated to each Council area for the period 2005- 2017 and 2005-2025, this is illustrated in Figure 20.

Table 20 - Distribution- pro rata share by Council Area

	East Ayrshire	North Ayrshire	South Ayrshire	Ayrshire
Allocation 2005-2012	3600	4800	2700	11100
Allocation 2005-2017	7300	8300	6800	22400
Allocation 2005- 2025	12,100	13,800	11,300	37,200

11.2 Redistribution of Housing Growth within Council areas

To give further strategic guidance below each Council area 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 Ayrshire⁸. The Structure Plan has sought to direct the assessed need toward these communities in ways that are consistent with the 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 Bay and Kilmarnock and local service centres within the Core area, 65% of the allocation is directed towards these locations. Almost a third of the allocation is directed toward the corridor communities. Refer also to Technical Report 7, “Distribution of population and development land for housing between core area, investment corridors and non-corridor communities”. In considering the scale of allocations the Ayrshire Joint Structure Plan Committee has sought to have regard to the following:

⁸ Refer Structure Plan SCHEDULE 2 & SCHEDULE 3 and Table 3 of the Structure Plan

- Community Hierarchy, refer Schedule 3 and also, the economic priorities which are identified in the Structure Plan;
- Regeneration priorities;
- Available infrastructure and opportunities for new investment;
- The opportunities for integration of development with the transport network, particularly the rail 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

A range of opportunities which reflect these criteria and identified during consultation are confirmed in Schedule 5 of the Structure Plan.

APPENDIX

Moving from Area to Area - Second Hand % (1996 to 2004)

		Moving to:		
		East Ayrshire	North Ayrshire	South Ayrshire
Moving from:	East Ayrshire	72.67%	2.64%	7.59%
	North Ayrshire	4.12%	70.24%	3.54%
	South Ayrshire	7.62%	2.43%	72.10%
	Glasgow Conurbation	10.12%	16.58%	8.22%
	Rest of Scotland	2.11%	2.95%	3.44%
	Rest of UK	3.08%	4.59%	4.49%
	Rest of World	0.28%	0.56%	0.61%

Source: Sasines Analysis 1996 to 2004

Moving from Area to Area - New Build % (1996 to 2004)

		Moving to:		
		East Ayrshire	North Ayrshire	South Ayrshire
Moving from:	East Ayrshire	54.53%	3.59%	8.63%
	North Ayrshire	4.62%	65.73%	5.21%
	South Ayrshire	9.11%	3.63%	56.61%
	Glasgow Conurbation	23.09%	16.90%	12.71%
	Rest of Scotland	3.86%	3.55%	5.13%
	Rest of UK	4.32%	5.96%	8.59%
	Rest of World	0.46%	0.63%	3.11%

Source: Sasines Analysis 1996 to 2004

Moving from a Sub Area to a Sub Area - Second Hand % (1996 to 2004)

		Moving to:								
		M77 Corridor	Clyde Coast	Arran	Ardrossan/ Saltcoats/ Stevenston	Irvine/ Kilwinning	Garnock Valley	Troon/ Prestwick/Ayr	Girvan	Cumnock
Moving from:	M77 Corridor	70.75%	0.93%	2.95%	1.05%	5.13%	1.40%	4.77%	1.58%	2.96%
	Clyde Coast	0.42%	53.06%	0.98%	4.17%	0.82%	2.10%	0.37%	0.17%	0.43%
	Arran	0.06%	0.06%	34.78%	0.24%	0.08%	0.00%	0.11%	0.17%	0.06%
	Ardrossan/ Saltcoats/ Stevenston	0.53%	2.74%	0.98%	68.84%	5.49%	1.62%	0.53%	0.08%	0.43%
	Irvine/ Kilwinning	3.29%	1.28%	0.42%	8.17%	70.32%	2.54%	2.15%	0.75%	1.05%
	Garnock Valley	0.48%	1.44%	0.14%	1.13%	1.87%	56.46%	0.33%	0.25%	0.00%
	Troon/ Prestwick/Ayr	6.87%	1.12%	1.54%	1.24%	4.26%	1.09%	73.22%	10.59%	10.31%
	Girvan	0.10%	0.06%	0.00%	0.03%	0.15%	0.00%	1.12%	56.30%	0.25%
	Cumnock	0.74%	0.04%	0.00%	0.18%	0.18%	0.09%	1.85%	0.42%	72.72%
	Glasgow Conurbation	11.69%	27.01%	18.79%	10.47%	7.14%	29.45%	7.69%	11.43%	5.31%
	Rest of Scotland	2.09%	4.42%	12.06%	1.48%	1.90%	2.28%	3.23%	5.00%	2.53%
	Outside Scotland/Rest of UK	2.70%	6.80%	25.25%	2.66%	2.39%	2.76%	4.06%	12.26%	3.58%
	Rest of World	0.26%	1.04%	2.10%	0.34%	0.26%	0.22%	0.57%	1.00%	0.37%

Source: Sasines Analysis 1996 to 2004

Moving from a Sub Area to a Sub Area - New Build % (1996 to 2004)

		Moving to:								
		M77 Corridor	Clyde Coast	Arran	Ardrossan/ Saltcoats/ Stevenston	Irvine/ Kilwinning	Garnock Valley	Troon/ Prestwick/Ayr	Girvan	Cumnock
Moving from:	M77 Corridor	50.73%	1.63%	5.45%	1.31%	5.92%	1.04%	4.99%	0.86%	7.01%
	Clyde Coast	0.38%	34.33%	0.00%	6.13%	0.81%	2.08%	0.58%	1.72%	0.00%
	Arran	0.00%	0.00%	49.09%	0.15%	0.32%	0.00%	0.16%	0.00%	0.00%
	Ardrossan/ Saltcoats/ Stevenston	1.18%	5.18%	0.00%	60.73%	6.89%	1.56%	0.86%	0.00%	0.00%
	Irvine/ Kilwinning	3.07%	2.45%	0.00%	7.88%	55.83%	3.65%	2.84%	0.00%	1.27%
	Garnock Valley	0.61%	2.45%	0.00%	2.48%	2.59%	57.81%	0.51%	0.00%	0.64%
	Troon/ Prestwick/Ayr	7.47%	2.45%	3.64%	1.31%	5.27%	0.52%	60.33%	3.45%	21.66%
	Girvan	0.14%	0.00%	0.00%	0.00%	0.16%	0.00%	1.60%	30.17%	2.55%
	Cumnock	0.66%	0.00%	0.00%	0.00%	0.16%	0.00%	2.07%	0.00%	56.05%
	Glasgow Conurbation	26.86%	29.70%	16.36%	12.41%	14.18%	26.04%	11.26%	8.62%	6.37%
	Rest of Scotland	3.78%	9.54%	12.73%	2.63%	2.03%	2.60%	4.99%	11.21%	1.91%
	Outside Scotland/Rest of UK	4.49%	10.63%	12.73%	4.23%	5.43%	4.69%	7.79%	21.55%	2.55%
	Rest of World	0.61%	1.63%	0.00%	0.73%	0.41%	0.00%	2.03%	22.41%	0.00%

Source: Sasines Analysis 1996 to 2004

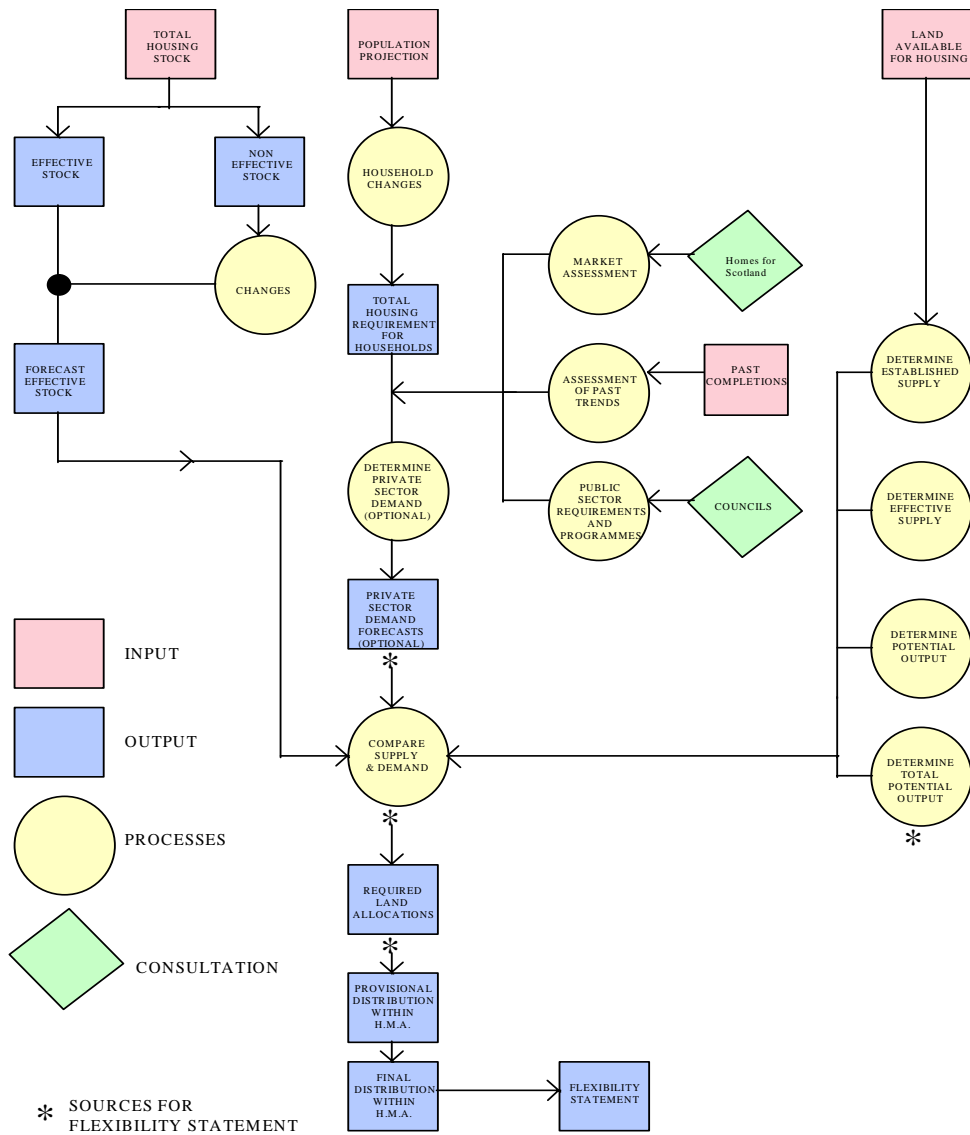
KEY FINDINGS FROM 2003 SURVEY OF HOUSE PURCHASERS IN AYRSHIRE

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 proportion of new build sector was detached with 3 to 4 bedrooms	Terraced 3 Bedroom property High proportion 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 proportion of new build purchasers cited Newton Mearns and Glasgow as areas they had considered	Mainly local but also included Ayr/Prestwick/Troon market. One third of new build purchasers would have bought elsewhere (mainly Troon) price and availability were a deterrent	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 build purchasers	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

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 to 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

Diagram 1 - CoSLA 'Baseline' Methodology



Ayrshire Joint Structure Plan 2025: Growing a Sustainable Ayrshire

Publicity Statement & Summary of Consultation

- 1 AJSP 2025 – Results of Consultation
- 2 AJSP 2025 – Results of Consultation Appendix 1 - 7

Technical Reports

- 1 Strategic Assessment of Housing Land Requirements
- 2 Study of Urban Capacity within Ayrshire
- 3 Renewables
- 4 Community Profiles
- 5 Retail Capacity Assessment - East, North & South Ayrshire 2004 to 2012
- 6 New Housing – The Key to Developing a Sustainable Ayrshire
- 7 Distribution of Population and Development Land for Housing between
Core Area, Investment Corridors and Non-Corridor Communities

Supporting Environmental Information

- 1 Environmental Assessment
- 2 An Assessment of the Impact of the AJSP on Natura 2000 (Appropriate
Assessment)

Background Reports

- 1 Ayrshire Development Study (Drainage)
- 2 Housing Land Supply 2005 (Draft)
- 3 Sustainability Report
- 4 Scottish Executive Form for Objections or Representations