Housing Needs Evidence Paper for the Development of the Local Housing Strategy 2021-2026

Date:	March 2021
Revisions made:	November 2021
Author:	Business Strategy Team Enterprise and Communities

LIVE
LEARN
WORK
INVEST
VISIT

Contents

1. Introduction

This paper summarises the main evidence on housing needs across North Lanarkshire and where appropriate reports at different geographical levels (i.e. housing sub market area (HSMA)[1], local housing market area (LHMA)[2]).

A number of information resources have been used to inform the development of this evidence paper, including:

- The Glasgow and Clyde Valley Housing Needs and Demand Assessment (HNDA2) undertaken by the Glasgow and Clyde Valley (GCV) Housing Market Partnership[3]
- Arneil Johnston Affordability Analysis, 2020
- The Council and RSL partners' Common Housing Register and housing allocations data
- The Council's Local Housing Market Area Profiles

Where appropriate, full reports are available on the Council's website.

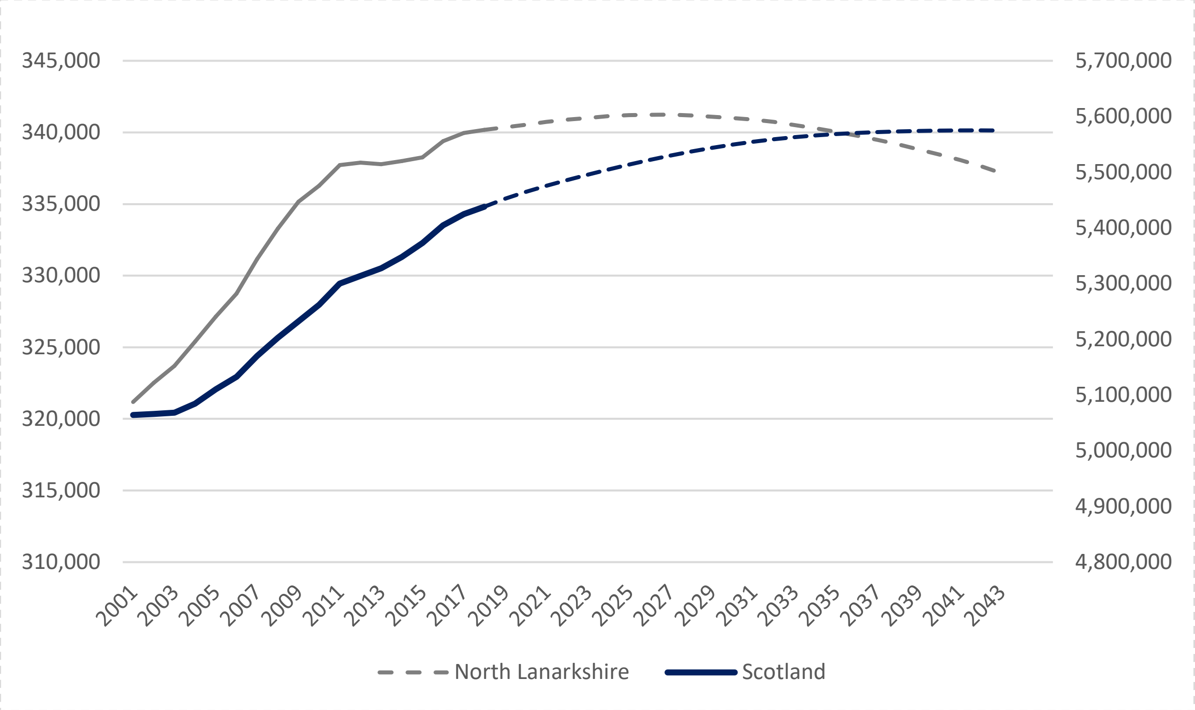
This evidence paper is one of a suite of evidence papers and statements that inform the 2021-2026 LHS. These papers can also be accessed from the LHS page on the Council's website.

[1] The three housing sub market areas are: Cumbernauld (which comprises Cumbernauld, Moodiesburn and Kilsyth), Airdrie & Coatbridge, and Motherwell (which comprises Bellshill, Motherwell, Shotts, Wishaw and Viewpark).
[2] The 10 LHMAs are: Airdrie, Bellshill, Coatbridge, Cumbernauld, Kilsyth, Motherwell, Moodiesburn, Shotts, Viewpark, and Wishaw.
[3] The Housing Partnership comprises the eight authorities within the Glasgow Clyde Valley area: East Ayrshire, East Renfrewshire, Glasgow, Inverclyde, North Lanarkshire, Renfrewshire, South Lanarkshire and West Dunbartonshire, with support from the Clydeplan team.

2. Demographic change

The population of North Lanarkshire has been steadily increasing for the past 18 years, from 321,180 in 2001 to 341,140 in 2020. Latest population projections suggest that this growth will continue until 2027, although at a much slower rate than previous years (0.3%). After 2027 the population is projected to decline by approximately 1.2% (4,008 people), returning to 2011 levels by 2043[4].

Chart 1: Population Projections (North Lanarkshire and Scotland)



Source: NRS Mid-Year Estimates and 2018-based Population Projections (Principle Projection)

This initial period of population growth will be driven by internal migration from neighbouring areas in Scotland, mainly Glasgow and Edinburgh. However, it will be offset by a natural decline in population as the number of deaths outweighs the number of births. Table 1 shows that the age profile of North Lanarkshire residents is similar to that of Scotland as a whole.

Table 1: Age Profile of Residents in North Lanarkshire and Scotland

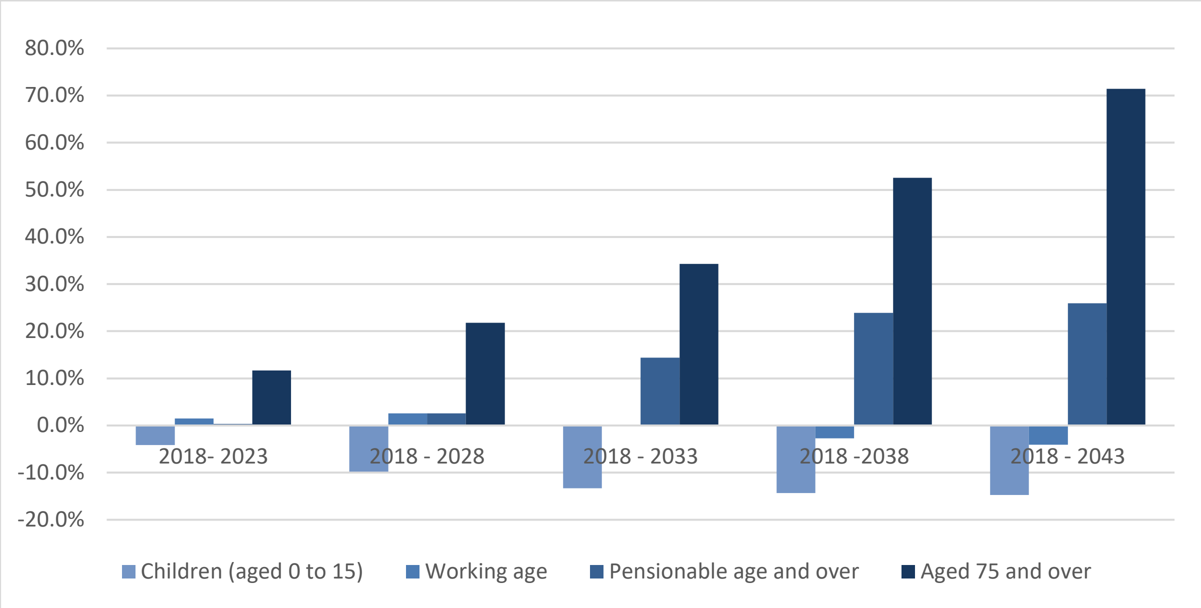
	Median Age	Under 16	Working Age	Pensionable Age
North Lanarkshire	41.6	18%	65%	17%
Scotland	42.1	17%	65%	18%

Source: NRS 2020 Mid-Year Estimates

[4] NRS 2018-based Population Projections (Principle Projection)

North Lanarkshire has the third youngest population in Scotland, out with the four cities. It also has the second smallest proportion of older residents. However, over the next 25 years, the number of residents of a pensionable age is projected to increase by 25.9% (compared to an increase of 23.2% across Scotland) and the number of residents over 75 is projected to increase by 71.4% (70.6% across Scotland)[5]. This will have considerable implications across services. The Older People's Evidence Paper considers the policy issues relating to the ageing population in depth.

Chart 2: Percentage Change by Population Group

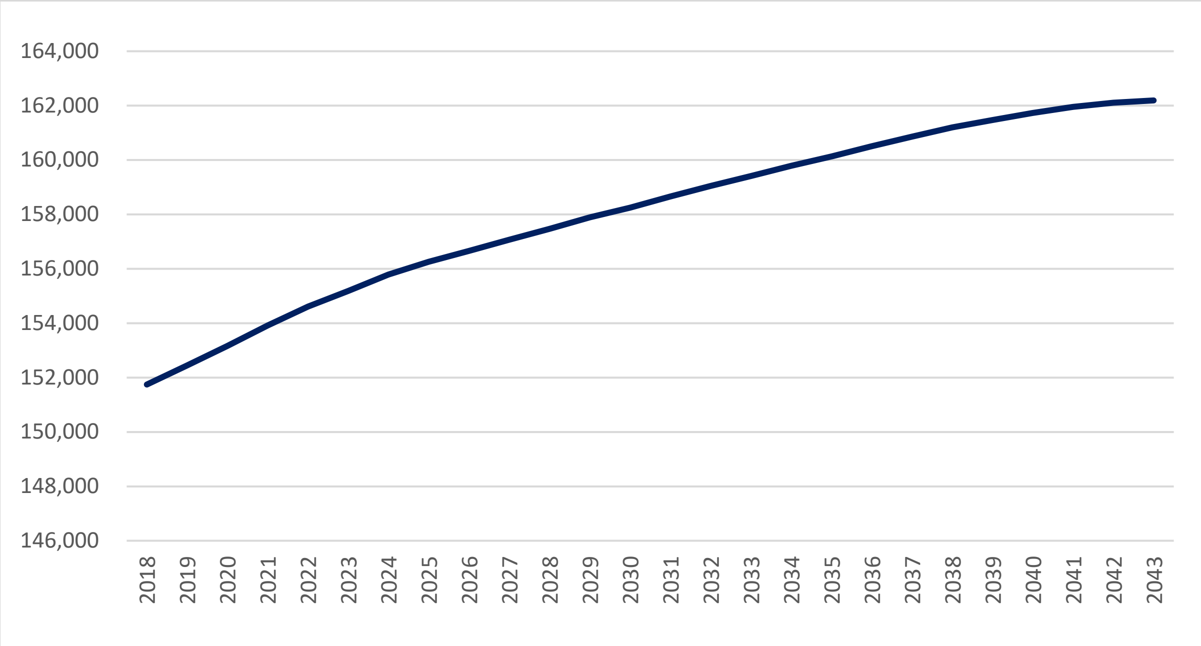


Source: NRS 2018-based Population Projections

Despite an overall decrease in population, the number of households in North Lanarkshire is projected to increase by 10,447 (7%) over the next 25 years. This is equivalent to 420 new households per year and is the result of decreasing household size. By 2043, the average household size is projected to have decreased by 8% from 2.23 to 2.06 (compared to a 7% decrease across Scotland)[6].

[5] NRS 2018-based Population Projections by Age (Principle Projection)
[6] NRS 2018-based Household Projections

Chart 3: Household Projections 2018-2043



Source: NRS 2018-based Household Projections

This decline in household size is driven by an ageing population increasingly living alone or in smaller households. At present over a third of households in North Lanarkshire are single person households and this is expected to increase by a further 14% by 2043.

Table 2: Households and Population by Local Housing Market Area

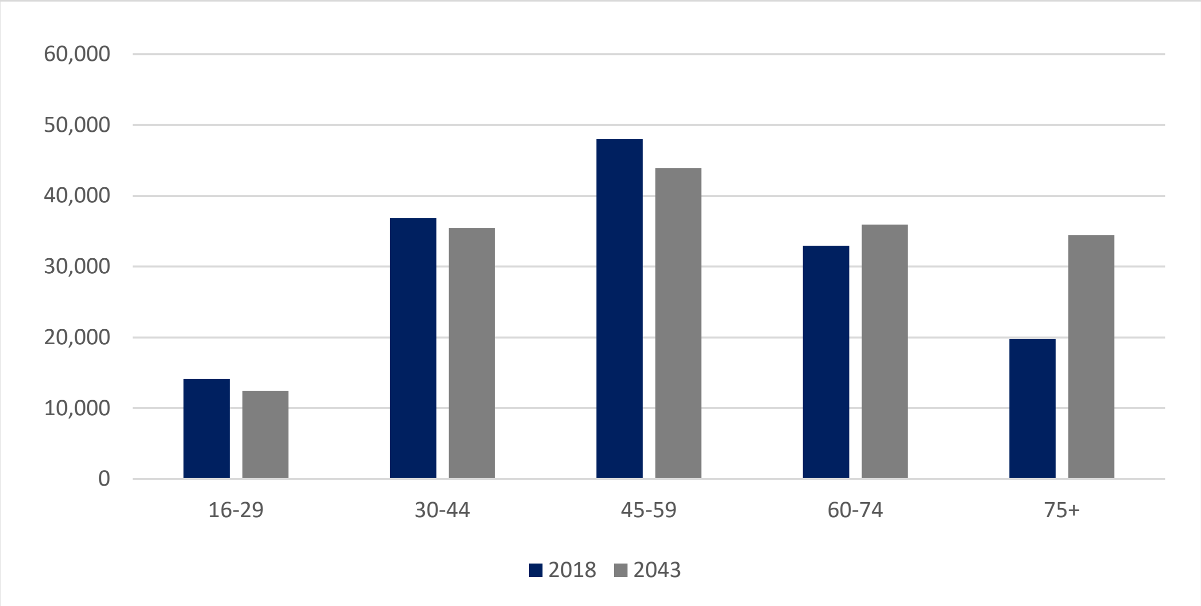
Local Housing Market Area	Number of Households	% Single Households	Population	Population change since 2015
Airdrie	26,207	37%	57,589	-1%
Bellshill	14,131	42%	29,632	-0.8%
Coatbridge	24,351	39%	50,520	+4%
Cumbernauld	22,737	38%	50,036	-6%
Kilsyth	6,796	39%	13,998	+25%
Moodiesburn	9,202	34%	22,941	+9%
Motherwell	21,362	41%	45,156	+6%
Shotts	6,044	42%	12,823	-0.3%
Viewpark	6,328	37%	15,403	-0.5%
Wishaw	20,343	42%	43,052	-4%

North Lanarkshire	157,498	39%	341,140	+0.9%

Source: NRS Small Area Household Estimates 2020

Between 2018 and 2043 the number of households aged 75 and over is projected to increase by 14,687 (74%). This is in line with the national trend, as is the decrease in younger households. However North Lanarkshire will see a greater than average decrease in the number of households aged 30 to 59.

Chart 4: Projected Change in Households (2018-43) by Age of Head of Household



Age Band	16-29		30-44		45-59		60-74		75+	
North Lanarkshire	-1,698	-12%	-1,437	-4%	-4,099	-9%	2,995	9%	14,687	74%
Scotland	-32,728	-13%	11,792	2%	-18,210	-2%	12,413	2%	264,197	74%

Source: NRS 2018-based Household Projections

The number of single and small adult households is projected to increase by 14% by 2043. Most of this increase is in the 70+ age group, however this masks a notable decrease in the number of young households forming across all household types.

Table 3: Projected change in number of households (2018-43) by household type

	1 adult, no children		2 adults, no children		3 or more adults, no children		1 adult and 1 or more children		2 or more adults and one or more children	
North Lanarkshire	7,243	14%	6,077	14%	-225	-2%	-532	-4%	-2,116	-7%

Scotland	146,030	16%	98,464	13%	882	0%	-821	-1%	-7,092	-2%

Source: NRS 2018-based Household Projections

North Lanarkshire has the joint 5th highest percentage of single parent families in Scotland. This is expected to decrease by 4% by 2043. The number of larger family households is projected to decrease at a greater rate than Scotland.

3. Housing Stock and Tenure Change

There are an estimated 157,625 dwellings in North Lanarkshire, 97.2% of which are occupied. Only 1.1% of dwellings in North Lanarkshire are considered to be long-term empty. This compares favourably to national levels and is the joint 10th lowest in Scotland[7].

Home ownership remains the predominant tenure in North Lanarkshire. Across the authority, 63% of households own their own home. Of those, 47% own their home outright and 53% own it with the help of a loan or mortgage. While overall home ownership levels are similar to national levels (62%), the proportion of owners who own their home outright is marginally lower.

There is significant variation in ownership levels across North Lanarkshire, with highest rates in Moodiesburn (83%) where the income profile is above the North Lanarkshire average and lowest rates in Wishaw (49%) where there is the greatest social housing stock.

Table 4: Tenure by Local Housing Market Area

Local Housing Market Area	North Lanarkshire Council	Registered Social Landlords	Private Rented Sector	Owner Occupied	Total
Airdrie	6,332	1,074	2,552	15,715	**25,673**
Bellshill	4,069	765	1,488	7,486	**13,808**
Coatbridge	6,474	1,059	2,049	11,560	**21,142**
Cumbernauld	1,423	3,158	2,655	15,689	**22,925**
Kilsyth	1,605	291	586	3,659	**6,141**
Moodiesburn	1,454	174	578	10,178	**12,384**
Motherwell	6,004	1,469	1,833	15,708	**25,014**
Shotts	1,943	167	446	4,492	**7,048**
Viewpark	1,619	278	404	3,769	**6,070**
Wishaw	5,885	1,130	1,851	8,132	**17,178**

[7] NRS Estimates of Households and Dwellings in Scotland 2020

North Lanarkshire	**36,808**	**9,745**	**14,442**	**96,388**	**157,383**

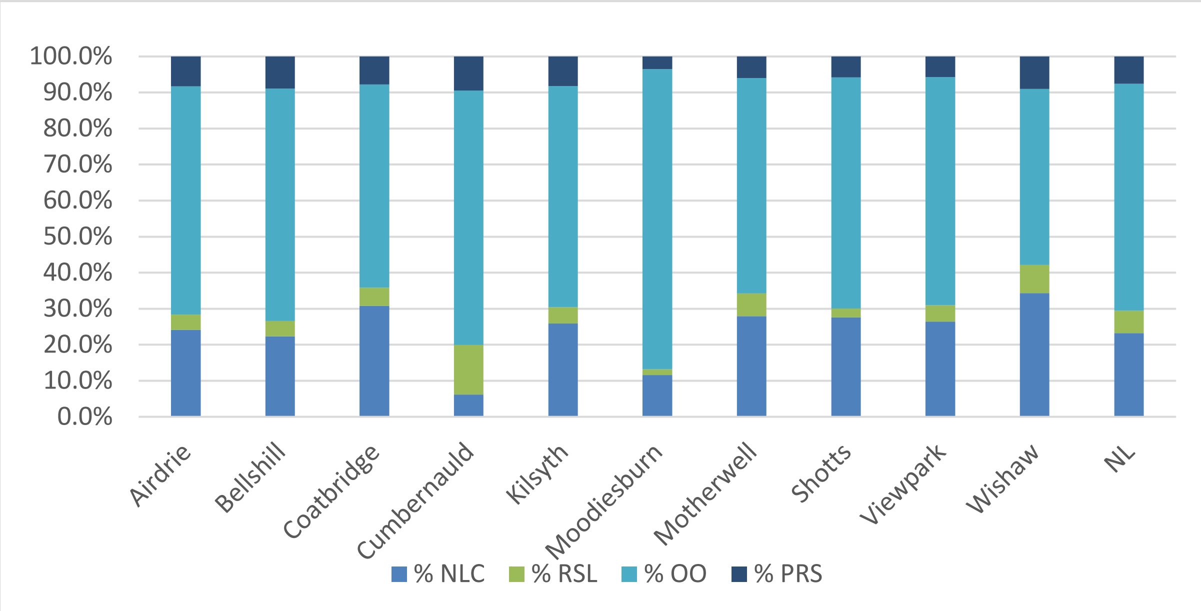
Source: North Lanarkshire Area Profiles 2020/21

Almost a third (29.5%) of households in North Lanarkshire rent from a social landlord (23.3% from the council and 6.2% from other social landlords), well above the Scottish average of 22.9%.

Cumbernauld and Moodiesburn have the lowest proportion of social rented stock (19.9% and 13.2% respectively) and the highest pressure on social housing, indicating a shortfall of affordable housing in the area.

Despite higher levels of social stock in other areas such as Coatbridge and Wishaw (35.9% and 42.2%), demand for social housing remains high, with on average 3 people on the waiting list for every let that becomes available.

Chart 5: Tenure by Local Housing Market Area



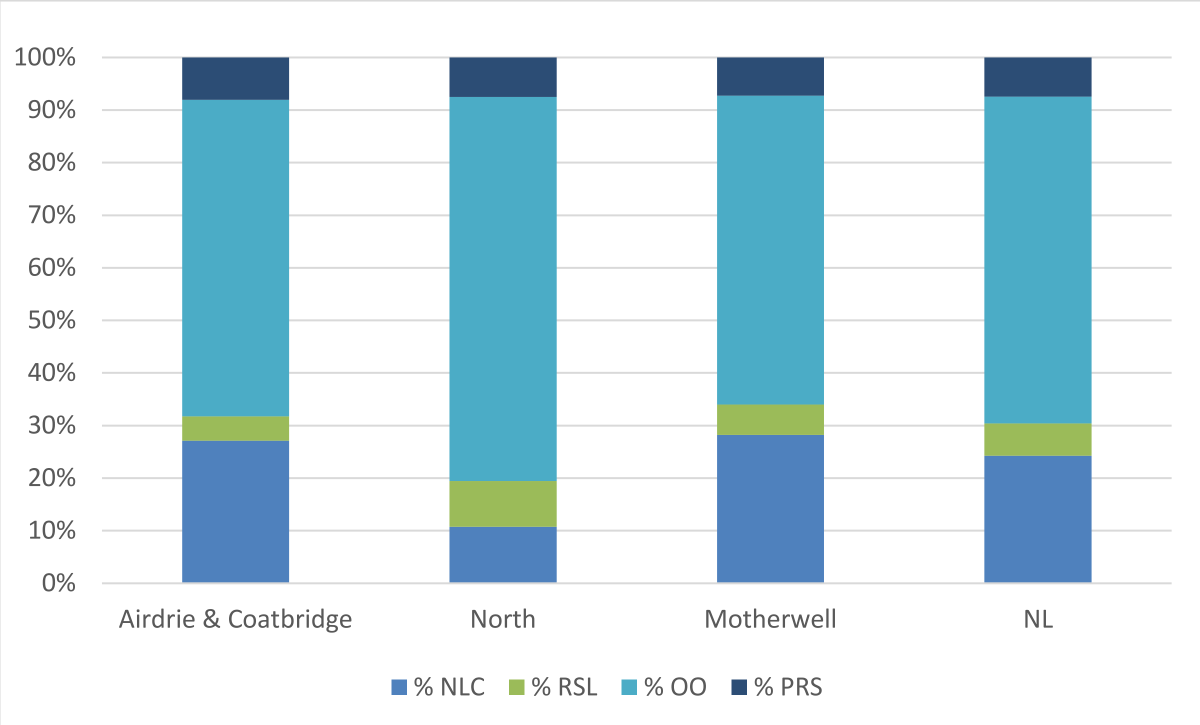
Source: North Lanarkshire Area Profiles 2020/21

There is a relatively high level of owner-occupation and a relatively small social rented sector in the Cumbernauld HSMA. This is particularly the case for Cumbernauld and Moodiesburn LHMAs. The profile for Kilsyth is broadly in line with the North Lanarkshire average.

In the Motherwell HSMA, there is a relatively low rate of owner-occupation and a relatively large social rented sector. Wishaw has a large social rented sector and relatively low rates of owner occupation. Levels of home ownership in Bellshill and Viewpark are around average.

The tenure profile in Airdrie and Coatbridge is close the North Lanarkshire average.

Chart 6: Tenure by Housing Sub Market Area



Source: North Lanarkshire Area Profiles 2020/21

Private renting levels are similar for each of the three HSMAs, at around 7%-8%. There is more variation at the LHMA level, with 9.5% of households in Cumbernauld renting privately and 9.0% in Wishaw, compared to just 3.5% in Moodiesburn.

Following a period of significant growth, the number of private rented properties in North Lanarkshire appears to have stabilised and currently accounts for around 7.6% of all properties.

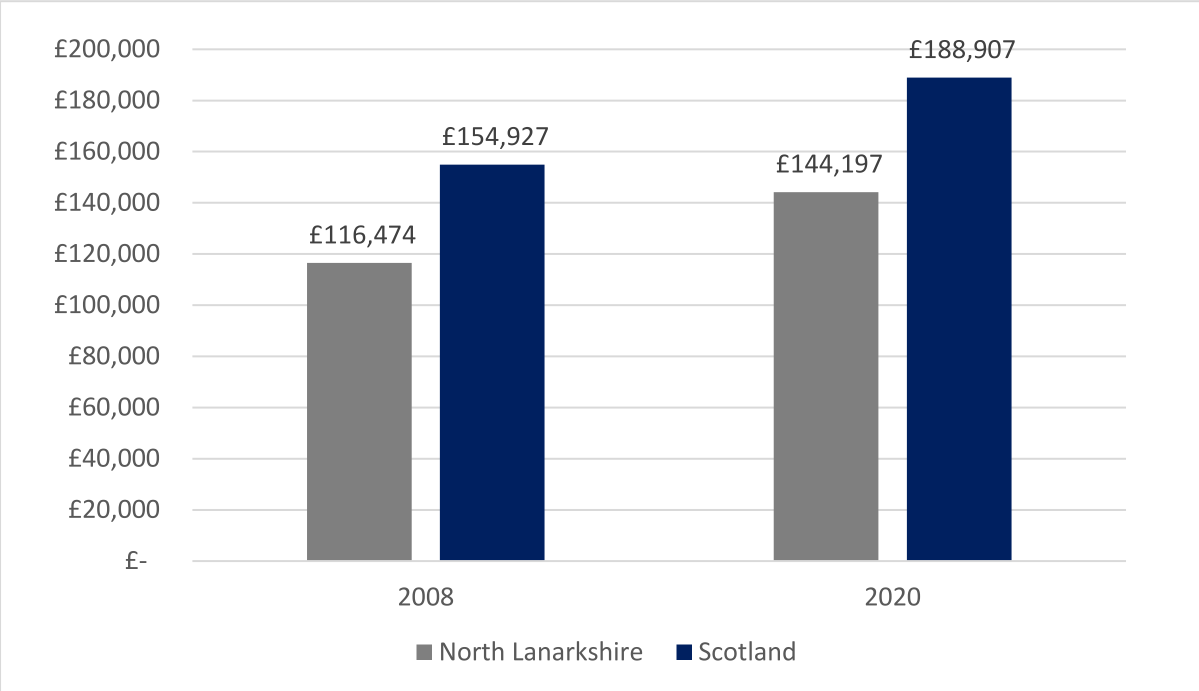
There are positive signs of recovery in the owner-occupied market. As will be covered in more detail below, house prices and turnover are showing some signs of stabilising. At the same time the North Lanarkshire 2019 Housing Land Audit has effective programming for 978 private sector units in 2019/20 and rising to 1,246 in 2025/26. The average annual effective programming for the private sector over the seven year period covered by the Housing Land Audit is 1,292 compared with 491 in the social sector.

4. House prices

The average house price in North Lanarkshire is £144,197 which is 24% lower than the Scottish average of £188,907[8]. This suggests home ownership is a more affordable option in North Lanarkshire compared with other areas in Scotland. However, over the past 10 years house prices in North Lanarkshire have been increasing at a greater rate than the Scottish average. In addition, the population of North Lanarkshire has a lower average income than Scotland as a whole, indicating there may be affordability issues.

[8] Registers of Scotland House Price Statistics 2020

Chart 7: Average Sales Price

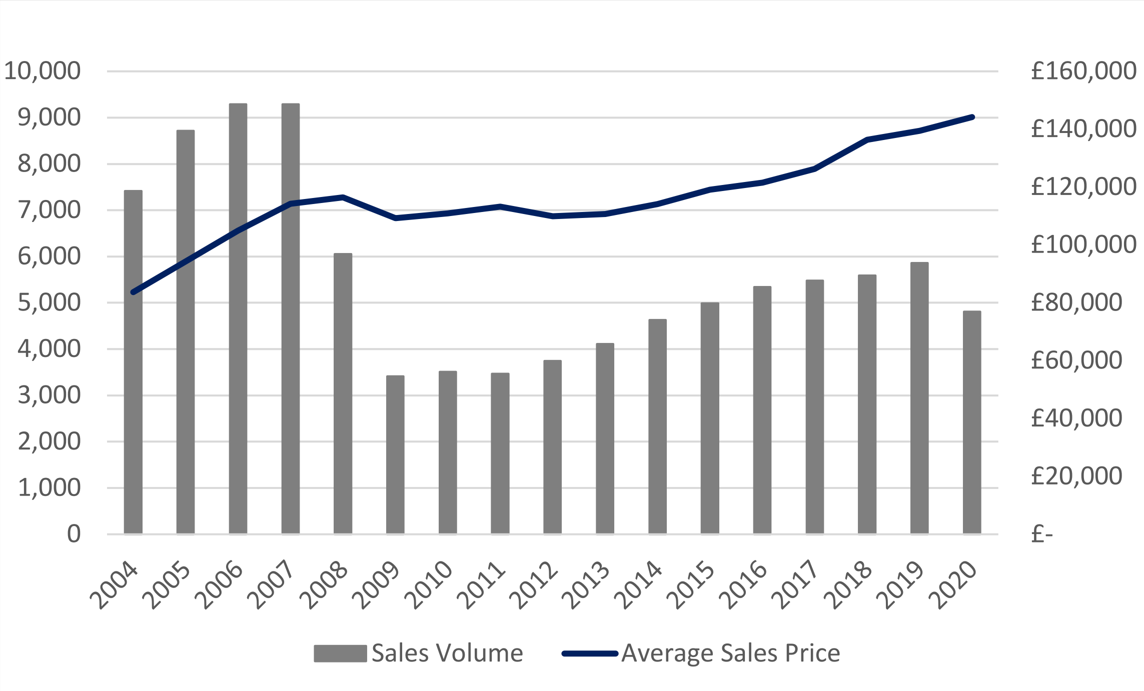


Source: Registers of Scotland Calendar Year Residential Market Review 2018

The number of house sales in North Lanarkshire has increased every year since 2011, and in 2019 reached 5,858. This is 72% higher than the lowest point in 2009. Nationally, sales volumes have also increased during this period, although at a lesser rate (50%).

For the first time since 2011, Scotland experienced an annual drop in the number of house sales. In 2018, the number of house sales nationally fell by 2.3%. During this time, house sales in North Lanarkshire increased by 2.0%. While house sales in North Lanarkshire fell by 17.9% during 2020, this is similar to the national picture where house sales fell by 17.6%.

Chart 8: House Prices and Volume of Sales 2004-2020



Source: Registers of Scotland Calendar Year Residential Market Review 2020

Following a period of stagnation in the wake of the financial crisis, house prices in North Lanarkshire have increased steadily year on year. In 2020, the average house price in North Lanarkshire reached £144,197; 31% higher than it was in 2012. Only seven other local authority areas in Scotland experienced a greater increase during this period. Nationally, house prices rose by 22%.

North Lanarkshire had the third greatest annual increase in average house price from 2017 to 2018 (8.0% growth compared to 3.7% nationally).

Despite this, house prices in North Lanarkshire remain relatively low in comparison to other local authorities. In 2020, average house prices were 24% lower than the average across Scotland and the sixth lowest of all local authority areas.

5. Demand Analysis and the Common Housing Register

As at March 2021, there were 13,336 households registered on the Common Housing Register as seeking a new home in North Lanarkshire. Of these, 9,192 (68.8%) were new applicants and 4,174 (31.2%) were transfer applicants. This is an increase of 14% from the previous year (11,685 applicants at year end 31st March 2020). This increase is the result of the waiting list review process being suspended due to Covid-19 which has meant very few applications have been cancelled over the past year in comparison to other years (764 cancellations over 2020/21 compared to over 3,000 the previous year).

Table 5: Applicants on the Common Housing Register by Waiting List Category

Waiting List Category	Number of Applicants	Percentage
Aspirational Transfer Shared Access (applicants currently living in a tower or a common access flat)	822	6.1%
Aspirational Transfer (all other transfer applicants)	698	5.2%
General	8,708	65.2%
Homeless	484	3.6%
Re-provisioning	563	4.2%
Transfer	2,091	15.6%
Total	**13,366**	**100%**

Source: Common Housing Register Waiting List 31st March 2021

As shown in Table 6, most new applicants currently reside in private rented accommodation or are living with family or friends.

Table 6: Common Housing Register Applicants by Tenure

Tenure at Application	Number of Applicants	Percentage
North Lanarkshire Council Tenant	4,175	31.2%
Staying with Partner/ Parents or Other Relatives or Friends	3,384	24.6%
Tenant of a Private Landlord	2,182	16.3%
Owner Occupier	967	7.2%
Tenant of a HA or Co-op within North Lanarkshire	910	6.8%
Other	1,005	7.5%
Tenant of a Council or Housing Association outside North Lanarkshire	512	3.8%
Not known	331	2.5%
Total	**13,366**	**100%**

Source: Common Housing Register Waiting List 31st March 2021

The social rented sector's capacity to respond to this demand is dependent on the number of properties available to let each year. The council undertakes an annual analysis of demand in the social rented sector in North Lanarkshire, based on the ratio of applicants for social housing at the end of March compared with the number of lets over the financial year. The analysis is carried out for North Lanarkshire as a whole and for the ten Local Housing Market Areas (LHMAs).

Table 7: Waiting List Pressure by Local Housing Market Area (3-year average 2017-2020)

Local Housing Market Area	Average number of applicants per vacancy[1]	Applicants on Waiting List
Airdrie	1.45	2,047
Bellshill	1.70	1,519
Coatbridge	1.75	2,320
Cumbernauld	2.24	1,575
Kilsyth	0.93	415
Moodiesburn	1.97	586
Motherwell	1.47	2,266
Shotts	0.83	378
Viewpark	2.27	1,700
Wishaw	1.19	560
North Lanarkshire	**1.54**	**13,366**

Source: CHR waiting list/ CHR allocations and NLC/ RSL stock – as at 31st March 2020

Table 8: Waiting List Pressure by Housing Sub Market Area (3-year average 2017-2020)

Housing Sub Market Area	Average number of applicants per vacancy
Airdrie/ Coatbridge	2.12
North	2.41
Motherwell	1.88
North Lanarkshire	1.54

Source: CHR waiting list/ CHR allocations and NLC/ RSL stock – as at 31st March 2020

Demand varies between and within areas in North Lanarkshire and is affected by local policy initiatives. To alleviate higher levels of pressure the council has an Affordable Housing Policy in the North, which helps enable the provision of new affordable housing provision. Analysis suggests that the policy coupled with other interventions including the significant increased scale of council new build programme in the North may be starting to prove effective in meeting housing need. Affordability analysis however suggests that affordability issues are greatest in the North. Further analysis is required to further understand the impact of the policy on meeting housing need.

There are some variations in the levels of pressure for properties of different size, as shown in Table 9. The greatest pressure is for larger properties, with waiting list pressure ratios of 8.6 for 4 bedroom properties. As above, this pressure varies between areas, with the greatest pressure for 4 bedroom properties in Bellshill (27.9), Moodiesburn (22.5) and Motherwell (19.6).

There is below average pressure for 1 bedroom properties, at 1.1 waiting list applications per let. Table 9 shows that most areas have ratios around this level. However, pressure is particularly low in Shotts (at 0.5).

Table 9: Overall Waiting List Pressure by Property Size (3-year average 2017-2020)[2]

LHMA	1 Bedroom	2 Bedroom	3 Bedroom	4 Bedroom	5+ Bedroom
Airdrie	0.9	2.8	1.8	5.1	15.8
Bellshill	1.2	2.6	4.8	27.9	11.8
Coatbridge	1.7	3.7	3.2	9.9	19.0
Cumbernauld	1.6	3.1	2.5	5.8	13.5
Kilsyth	0.9	1.9	1.8	3.9	1.8
Moodiesburn	1.6	2.7	3.0	22.5	4.3
Motherwell	1.0	2.6	4.2	19.6	19.0
Shotts	0.5	1.8	2.0	12.5	5.5
Viewpark	2.0	3.2	3.1	12.4	3.0
Wishaw	0.8	2.9	2.6	6.9	11.5
North Lanarkshire	**1.1**	**2.8**	**2.7**	**8.6**	**80.5**

Source: CHR waiting list/ CHR allocations and NLC/ RSL stock – as at 31st March 2020

6. Evidence from the GCV Housing Need and Demand Assessment

The Glasgow and Clyde Valley (GCV) Housing Need and Demand Assessment (HNDA) provides the main strategic evidence on housing need and demand in North Lanarkshire for the next five years and beyond. It is a requirement that HNDAs are carried out every five years to support the evidence base for housing policy in Local Housing Strategies and land use in Development Plans.

Work on the latest GCV HNDA3 is currently underway and ongoing, however due to delays caused by the global pandemic and national planning reform, output from the assessment is not yet available. Therefore, for the purposes of this paper and development of the Local Housing Strategy 2021-2026, evidence from GCV HNDA2 published in 2015 has been used.

HNDA2 indicates that there are around 2,223 households currently in housing need in North Lanarkshire. It is expected that there will be a further need for 3,246 social housing/ below market units over the period to 2029, bringing the total requirement to 5,469 units. This is equivalent to 322 units each year.

Table 10: Total housing need for social rented and below market rent housing (2012-2029)

Total Need		
	Number	**Percentage**
Existing Need	2,223	41%
Homeless Need	548	10%
Concealed and Overcrowded	1,675	31%
Need from new households	3,246	59%
Total	**5,469**	**100%**

Source: GCV HNDA2

HNDA2 does not produce housing need estimates at housing sub-market level. A needs-based approach to disaggregation of the HNDA housing estimate has been developed, using relative housing pressure ratios drawn from the pressure analysis to guide the share of the housing estimate allocated to each of the areas[9]. This approach indicates that the North has the greatest need for additional housing (162 units each year), followed by Airdrie/ Coatbridge (84 units each year) and Motherwell (76 units).

Table 12: Disaggregation of the Housing Need Estimate

Housing Sub Market Area	**Waiting List Pressure (3-year average)**	**% Share of Ratios WL Press**	**Applying Share of Ratios to Housing Estimate**
Airdrie/ Coatbridge	**2.8**	**26%**	**84**
North	**5.3**	**50%**	**162**
Motherwell	**2.5**	**24%**	**76**
North Lanarkshire	**3.0**	**100%**	**322**

[9] This is in line with the flexibility provided for in HNDA2 (at TR07 Table 6.3)

Source: Technical Justification for the Affordable Housing Policy, Housing Service response to the North Lanarkshire Local Development Plan MIR, 2015

The HNDA housing need and demand methodology, which uses an excel-based Tool to generate the estimate of need and demand, has limitations in that it doesn't fully quantify the impacts of poor quality and lower demand housing and the subsequent need for replacement of existing housing stock. As a consequence, the approach does not fully inform the housing-led regeneration elements of the Local Housing Strategy and the associated actions and housing investment that promote this.

7. Affordability analysis

An Affordability Analysis commissioned in 2020 indicates that most households in North Lanarkshire are able to afford social rented housing; with those experiencing affordability issues being able to access the sector through housing benefit. However, not all households are entitled to housing benefit to fully cover the cost of their rent. This is a particular issue for younger households, aged under 35, who are only able to claim the shared room rate of housing benefit.

Private rent levels in North Lanarkshire are relatively low in comparison to the rest of Scotland. In 2019, the average rent for a 2 bedroom property in North Lanarkshire was 36.9% lower than the average for a 2 bedroom property in Scotland. North Lanarkshire also has the lowest average market rent of all surrounding local authorities (across all bedroom sizes).

Rents have been growing at a slower rate over the past 10 years than they have been nationally, suggesting private renting in North Lanarkshire has become relatively more affordable. While this may be seen as a positive feature of the area's housing system, it may also reflect low demand and consumer confidence, and could disincentivise investment in the sector, both in new homes (to boost supply) and in the improvement and maintenance of existing stock.

Despite comparatively low market rent levels, analysis suggests that around 41% of households in North Lanarkshire are unable to afford the average market rent (when devoting 30% of their income to rent), indicating that market rents are out of reach for those on lower incomes, particularly those earning the minimum or living wage.

On average, market rents are 63% higher than North Lanarkshire Council rents and 12% higher than the Local Housing Allowance.

Table 13: North Lanarkshire Council Rents by Local Housing Allowance and Market Rent

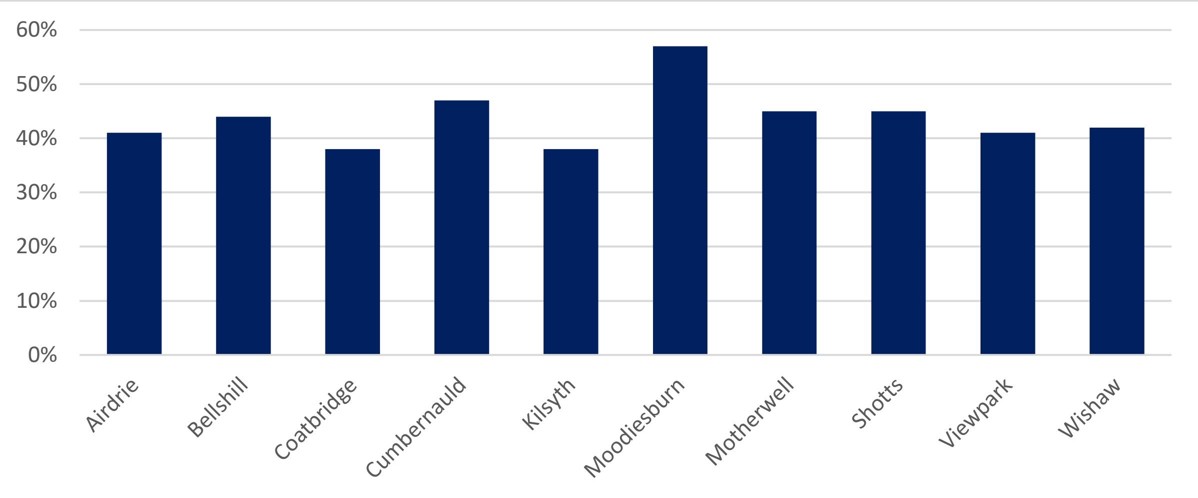
Property Size	North Lanarkshire Council Rent	Local Housing Allowance	Market Rent
1 Bedroom	£299.16	£359.02	£489.24
2 Bedroom	£324.46	£448.76	£546.48
3 Bedroom	£345.80	£493.65	£533.36

4 Bedroom	£340.70	£792.83	£803.40
Average	**£327.53**	**£475.70**	**£534.63**

Source: Arneil Johnston Affordability Analysis 2020

Affordability in the private sector varies considerably across North Lanarkshire and is dependent on size and location. However, evidence suggests affordability issues are greatest for those living in the Cumbernauld and Moodiesburn areas where there is also a higher than average pressure on social housing.

Chart 9: Households unable to afford the average market rent (based on 30% income to rent ratio) by Local Housing Market Area



Source: Arneil Johnston Affordability Analysis 2020

There is opportunity for intermediate tenure options to provide good quality housing at lower than market rents, in areas where market rents and demand for social housing is higher than average for North Lanarkshire.

Over the course of the previous LHS we explored options to develop intermediate tenure options within North Lanarkshire, including Mid-Market Rent (MMR) and Shared Equity housing. It was concluded that it was not financially viable for the council to directly provide MMR housing, however the recent review of Affordable Housing Investment Benchmarks undertaken in 2021 by the Scottish Government may potentially alter the viability.

The HNDA considered the affordability of owner-occupied housing over time (2008 – 2012) (Table 14). This analysis compared median house prices with median incomes, and lower quartile incomes with lower quartile house prices. This showed that the affordability of mid-priced housing in North Lanarkshire remained fairly stable, at just under 4 times income during the recession, and appears to be becoming more affordable as we move out of recession. However, as the market recovers, and the effect of new build activity in the area feeds through, it is likely that prices will adjust upwards, moderating the improvement noted in 2012.

Housing at the lower end of the market is less affordable than mid-priced housing: with prices around 5 times income. Affordability at the lower end of market deteriorated with the onset of the recession. As with the mid-priced housing, there is some evidence of improvement in the 2012 figures.

Table 14: Ratio of House Prices to Income, Medians and Lower Quartiles, 2008-2012

	2008	2009	2010	2011	2012
Medians					
North Lanarkshire	3.96	3.93	3.96	3.93	3.56
Scotland	5.06	5.07	5.12	5.12	4.86
Lower Quartiles					
North Lanarkshire	4.78	5.21	5.16	5.61	4.67
Scotland	5.64	6.04	6.07	6.72	5.98

Source: HNDA2 TR05, Table 3A, Table 3B

8. Key Issues

- Current Housing Supply Targets are based on evidence from Housing Need and Demand Assessment 2. Evidence in this paper will be revised following completion of HNDA3, expected late 2021.
- Evidence, including from Housing Need and Demand Assessments, suggests that there may be significant need and demand for intermediate tenures, including mid-market rent. Modelling work, however, finds that many of these models are not viable in our local markets due to scheme constraints (which are linked to local market rents) and high development costs
- Whilst the medium and long-term impacts of Covid-19 on the housing market are still unclear, it is likely that younger households and first-time buyers will be disproportionately affected
- Research suggests unemployment levels may rise as the furlough scheme ends, reducing access to mortgage finance, and increasing demand for affordable housing
- Evidence indicates shortfalls in provision of social rented stock with some 9,192 waiting list applicants (excluding transfer applicants) on the Common Housing Register as at 31st March 2021
- Affordability is a particular challenge in the North and although there is some evidence that the Affordable Housing Policy is having some positive impact, further exploration is required to help understand needs and impact further
- Older person and smaller households are projected to continue to increase over the next five years and beyond, indicating an increasing requirement for accessible and adapted housing
- HNDA2 did not find evidence of a shortfall in provision for Gypsy/Traveller or Travelling Show people sites. Analysis of local evidence shows declining encampments over the past five years
- The Glasgow and Clyde Valley Housing Need and Demand Assessment 2015 identified a net shortfall of 322 units per annum between 2016 and 2021, with a Housing Supply Target and Land Requirement of 300 units per annum

- Over the five-year period of the LHS, the effective programme through the Housing Land Audit is estimated at 9,402 units with 77% of this within the private sector and 23% (2,186 units) in the social sector.
- Making more effective use of the existing social rented stock including addressing low demand issues and ensuring that the stock is able to meet demographic change.

9. Suggested Actions

- Deliver alternative tenure housing to meet a broad range of needs and deliver sustainable, inclusive and diverse communities
- Improve our strategic understanding Covid-19 on housing need and aspirations
- Contribute to the strategic planning for housing in Glasgow and Clyde Valley
- Ensure land supply is available for housebuilding to meet identified needs in HNDA3
- Maximise provision of affordable homes, to meet a range of housing needs