

South Ayrshire Housing Need and Demand Assessment 2015

Estimate of Housing Need Scenario Testing

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on behalf of the South Ayrshire HMP Housing Supply Group



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Table 1 Scenario 1 Elements Selected	1
Table 2 Scenario 1 South Ayrshire (Constrained).....	1
Table 3 Scenario 1 Ayr Urban HMA (Constrained)	1
Table 4 Scenario 1 G&SC HMA (Constrained)	2
Table 5 Scenario 2 Elements Selected	3
Table 6 Scenario 2 South Ayrshire (Constrained).....	3
Table 7 Scenario 2 Ayr Urban HMA (Constrained)	3
Table 8 Scenario 2 G&SC HMA (Constrained)	4
Table 9 Scenario 3 Elements Selected	5
Table 10 Scenario 3 South Ayrshire (Constrained).....	5
Table 11 Scenario 3 Ayr Urban HMA (Constrained)	5
Table 12 Scenario 3 G&SC HMA (Constrained)	6
Table 13 Scenario 4 Elements Selected	7
Table 14 Scenario 4 South Ayrshire (Constrained).....	7
Table 15 Scenario 4 Ayr Urban HMA (Constrained)	7
Table 16 Scenario 4 G&SC HMA (Constrained)	8
Table 17 Scenario 5 Elements Selected	9
Table 18 Scenario 5 South Ayrshire (Constrained).....	9
Table 19 Scenario 5 Ayr Urban HMA (Constrained)	9
Table 20 Scenario 5 G&SC HMA (Constrained)	10
Table 21 Scenario 6 Elements Selected	11
Table 22 Scenario 6 South Ayrshire (Constrained).....	11
Table 23 Scenario 6 Ayr Urban HMA (Constrained)	11
Table 24 Scenario 6 G&SC HMA (Constrained)	12
Table 25 Scenario 7 Elements Selected	13
Table 26 Scenario 7 South Ayrshire (Constrained).....	13
Table 27 Scenario 7 Ayr Urban HMA (Constrained)	13
Table 28 Scenario 7 G&SC HMA (Constrained)	14
Table 29 Scenario 8 Elements Selected	15
Table 30 Scenario 8 South Ayrshire (Constrained).....	15
Table 31 Scenario 8 Ayr Urban HMA (Constrained)	15
Table 32 Scenario 8 G&SC HMA (Constrained)	16

Table 1 Scenario 1 Elements Selected

Element	Variable Selected
Households	2012 High Migration
Existing Need	HaTAP + Concealed and Overcrowded (390 + 400)
Years to clear backlog	10
Income Growth and Distribution	Small Area Income Estimates (HW)
Growth in Median Income Scenario	Inflation Target
Change in Income Distribution	Creeping Inequality
Prices and Affordability	Flat
Percentile	25%
Income Ratio	3.2
Proportion of market who buy	40%
Upper income-to-rent threshold	25%
Lower income-to-let threshold	35%
Rent Growth Recovery	Modest Increases

Table 2 Scenario 1 South Ayrshire (Constrained)

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
<i>Social Rent</i>	98	107	102	101	98	107	73	69	65	51
<i>Below Market</i>	51	49	48	46	40	39	27	25	21	17
<i>PRS</i>	94	93	79	72	63	66	45	43	39	31
<i>Buyers</i>	92	94	89	85	78	84	56	53	48	38
<i>Total</i>	334	343	318	304	278	296	201	190	174	136

Table 3 Scenario 1 Ayr Urban HMA (Constrained)

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
<i>Social Rent</i>	87	95	91	90	87	95	65	61	58	45
<i>Below Market</i>	45	43	43	41	35	34	23	22	19	15
<i>PRS</i>	86	85	72	66	58	61	42	40	36	28
<i>Buyers</i>	81	84	79	75	69	74	50	47	43	34
<i>Total</i>	299	307	285	272	249	265	180	170	155	122

Table 4 Scenario 1 G&SC HMA (Constrained)

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
<i>Social Rent</i>	11	12	11	11	11	12	8	8	7	6
<i>Below Market</i>	6	6	5	5	5	5	3	3	3	2
<i>PRS</i>	8	7	7	6	5	5	3	3	3	2
<i>Buyers</i>	11	11	10	10	9	9	7	6	6	4
<i>Total</i>	35	36	33	32	29	31	21	20	19	14

Table 5 Scenario 2 Elements Selected

Element	Variable Selected
Households	2012 High Migration
Existing Need	HaTAP (390) + Concealed and Overcrowded (400)
Years to clear backlog	10
Income Growth and Distribution	Small Area Income Estimates (HW)
Growth in Median Income Scenario	Inflation Target
Change in Income Distribution	Creeping Inequality
Prices and Affordability	Modest Recovery
Percentile	25%
Income Ratio	3.2
Proportion of market who buy	40%
Upper income-to-rent threshold	25%
Lower income-to-let threshold	35%
Rent Growth Recovery	Modest Increases

Table 6 Scenario 2 South Ayrshire (Constrained)

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
<i>Social Rent</i>	98	107	102	101	98	107	73	69	65	51
<i>Below Market</i>	51	49	48	46	40	39	27	25	21	17
<i>PRS</i>	104	105	93	86	78	84	57	54	50	39
<i>Buyers</i>	81	82	75	70	63	65	44	42	38	30
<i>Total</i>	334	343	318	304	278	296	201	190	174	136

Table 7 Scenario 2 Ayr Urban HMA (Constrained)

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
<i>Social Rent</i>	87	95	91	90	87	95	65	61	58	45
<i>Below Market</i>	45	43	43	41	35	34	23	22	19	15
<i>PRS</i>	96	96	85	79	71	78	53	50	46	36
<i>Buyers</i>	72	72	66	62	56	57	39	37	34	26

<i>Total</i>	299	307	285	272	249	265	180	170	155	122
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Table 8 Scenario 2 G&SC HMA (Constrained)

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
<i>Social Rent</i>	11	12	11	11	11	12	8	8	7	6
<i>Below Market</i>	6	6	5	5	5	5	3	3	3	2
<i>PRS</i>	9	9	8	7	6	7	5	4	4	3
<i>Buyers</i>	10	10	9	8	7	8	5	5	5	4
<i>Total</i>	35	36	33	32	29	31	21	20	19	14

Table 9 Scenario 3 Elements Selected

Element	Variable Selected
Households	2012 High Migration
Existing Need	HaTAP (390) + Concealed and Overcrowded (400)
Years to clear backlog	10
Income Growth and Distribution	Small Area Income Estimates (HW)
Growth in Median Income Scenario	Inflation Target
Change in Income Distribution	Higher End Runs Away
Prices and Affordability	Flat
Percentile	25%
Income Ratio	3.2
Proportion of market who buy	40%
Upper income-to-rent threshold	25%
Lower income-to-let threshold	35%
Rent Growth Recovery	Modest Increases

Table 10 Scenario 3 South Ayrshire (Constrained)

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
<i>Social Rent</i>	101	107	106	104	98	110	75	71	65	52
<i>Below Market</i>	47	49	45	43	39	36	25	23	21	15
<i>PRS</i>	94	93	80	73	63	67	46	44	40	32
<i>Buyers</i>	92	94	87	84	77	82	55	52	48	37
<i>Total</i>	334	343	318	304	278	296	201	190	174	136

Table 11 Scenario 3 Ayr Urban HMA (Constrained)

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
<i>Social Rent</i>	90	95	94	93	87	98	66	63	58	46
<i>Below Market</i>	42	43	40	38	35	32	22	20	19	13

<i>PRS</i>	86	85	73	67	58	62	43	40	37	29
<i>Buyers</i>	81	84	77	74	69	73	49	46	42	33
<i>Total</i>	299	307	285	272	249	265	180	170	155	122

Table 12 Scenario 3 G&SC HMA (Constrained)

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
<i>Social Rent</i>	11	12	12	11	11	12	8	8	7	6
<i>Below Market</i>	6	6	5	5	4	5	3	3	3	2
<i>PRS</i>	8	8	7	6	5	5	3	3	3	2
<i>Buyers</i>	11	11	10	10	9	9	6	6	5	4
<i>Total</i>	35	36	33	32	29	31	21	20	19	14

Table 13 Scenario 4 Elements Selected

Element	Variable Selected
Households	2012 High Migration
Existing Need	Average HL1 + Concealed and Overcrowded
Years to clear backlog	10
Income Growth and Distribution	Small Area Income Estimates (HW)
Growth in Median Income Scenario	Inflation Target
Change in Income Distribution	Higher End Runs Away
Prices and Affordability	Modest Recovery
Percentile	25%
Income Ratio	3.2
Proportion of market who buy	40%
Upper income-to-rent threshold	25%
Lower income-to-let threshold	35%
Rent Growth Recovery	Modest Increases

Table 14 Scenario 4 South Ayrshire (Constrained)

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
<i>Social Rent</i>	101	107	106	104	98	110	75	71	65	52
<i>Below Market</i>	47	49	45	43	39	36	25	23	21	15
<i>PRS</i>	104	105	93	87	79	85	57	54	50	39
<i>Buyers</i>	81	82	75	70	62	65	44	42	38	30
<i>Total</i>	334	343	318	304	278	296	201	190	174	136

Table 15 Scenario 4 Ayr Urban HMA (Constrained)

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
<i>Social Rent</i>	90	95	94	93	87	98	66	63	58	46
<i>Below Market</i>	42	43	40	38	35	32	22	20	19	13
<i>PRS</i>	96	96	85	79	72	78	53	50	46	36
<i>Buyers</i>	72	72	66	62	55	57	39	37	34	26
<i>Total</i>	299	307	285	272	249	265	180	170	155	122

Table 16 Scenario 4 G&SC HMA (Constrained)

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
<i>Social Rent</i>	11	12	12	11	11	12	8	8	7	6
<i>Below Market</i>	6	6	5	5	4	5	3	3	3	2
<i>PRS</i>	9	9	8	7	6	7	5	4	4	3
<i>Buyers</i>	10	10	9	8	7	8	5	5	5	4
<i>Total</i>	35	36	33	32	29	31	21	20	19	14

Table 17 Scenario 5 Elements Selected

Element	Variable Selected
Households	2012 High Migration
Existing Need	HaTAP (390) + Concealed and Overcrowded (400)
Years to clear backlog	10
Income Growth and Distribution	Small Area Income Estimates (HW)
Growth in Median Income Scenario	Flat
Change in Income Distribution	Creeping Inequality
Prices and Affordability	Flat
Percentile	25%
Income Ratio	3.2
Proportion of market who buy	40%
Upper income-to-rent threshold	25%
Lower income-to-let threshold	35%
Rent Growth Recovery	Modest Increases

Table 18 Scenario 5 South Ayrshire (Constrained)

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
<i>Social Rent</i>	111	121	119	120	115	128	87	82	75	59
<i>Below Market</i>	51	52	46	41	35	37	25	22	20	16
<i>PRS</i>	86	81	71	66	58	56	38	37	35	27
<i>Buyers</i>	87	89	82	78	71	75	51	48	44	34
<i>Total</i>	334	343	318	304	278	296	201	190	174	136

Table 19 Scenario 5 Ayr Urban HMA (Constrained)

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
<i>Social Rent</i>	99	107	105	106	102	114	77	73	67	52
<i>Below Market</i>	45	46	40	35	30	32	22	19	17	13
<i>PRS</i>	79	75	67	62	54	52	36	35	33	26
<i>Buyers</i>	77	79	73	69	63	67	45	43	39	30
<i>Total</i>	299	307	285	272	249	265	180	170	155	122

Table 20 Scenario 5 G&SC HMA (Constrained)

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
<i>Social Rent</i>	12	14	13	13	13	14	10	9	9	7
<i>Below Market</i>	6	6	6	5	5	5	3	3	3	2
<i>PRS</i>	7	6	5	4	3	3	2	2	2	2
<i>Buyers</i>	10	10	10	9	8	9	6	6	5	4
<i>Total</i>	35	36	33	32	29	31	21	20	19	14

Table 21 Scenario 6 Elements Selected

Element	Variable Selected
Households	2012 High Migration
Existing Need	Average HL1 + Concealed and Overcrowded
Years to clear backlog	10
Income Growth and Distribution	Small Area Income Estimates (HW)
Growth in Median Income Scenario	Flat
Change in Income Distribution	Creeping Inequality
Prices and Affordability	Modest Recovery
Percentile	25%
Income Ratio	3.2
Proportion of market who buy	40%
Upper income-to-rent threshold	25%
Lower income-to-let threshold	35%
Rent Growth Recovery	Modest Increases

Table 22 Scenario 6 South Ayrshire (Constrained)

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
<i>Social Rent</i>	111	121	119	120	115	128	87	82	75	59
<i>Below Market</i>	51	52	46	41	35	37	25	22	20	16
<i>PRS</i>	95	93	87	81	72	72	49	48	44	34
<i>Buyers</i>	77	77	67	63	56	59	40	38	34	27
<i>Total</i>	334	343	318	304	278	296	201	190	174	136

Table 23 Scenario 6 Ayr Urban HMA (Constrained)

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
<i>Social Rent</i>	99	107	105	106	102	114	77	73	67	52
<i>Below Market</i>	45	46	40	35	30	32	22	19	17	13
<i>PRS</i>	87	86	80	75	67	67	46	45	41	32
<i>Buyers</i>	68	68	59	56	50	52	35	33	30	24
<i>Total</i>	299	307	285	272	249	265	180	170	155	122

Table 24 Scenario 6 G&SC HMA (Constrained)

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
<i>Social Rent</i>	12	14	13	13	13	14	10	9	9	7
<i>Below Market</i>	6	6	6	5	5	5	3	3	3	2
<i>PRS</i>	8	7	6	6	5	5	4	3	3	2
<i>Buyers</i>	9	9	8	7	7	7	5	4	4	3
<i>Total</i>	35	36	33	32	29	31	21	20	19	14

Table 25 Scenario 7 Elements Selected

Element	Variable Selected
Households	2012 High Migration
Existing Need	HaTAP (390) + Concealed and Overcrowded (400)
Years to clear backlog	10
Income Growth and Distribution	Small Area Income Estimates (HW)
Growth in Median Income Scenario	Flat
Change in Income Distribution	Higher End Runs Away
Prices and Affordability	Flat
Percentile	25%
Income Ratio	3.2
Proportion of market who buy	40%
Upper income-to-rent threshold	25%
Lower income-to-let threshold	35%
Rent Growth Recovery	Modest Increases

Table 26 Scenario 7 South Ayrshire (Constrained)

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
<i>Social Rent</i>	111	124	122	122	115	128	87	83	77	60
<i>Below Market</i>	50	49	43	38	35	34	23	22	18	14
<i>PRS</i>	86	81	73	66	58	59	41	38	35	27
<i>Buyers</i>	87	89	81	78	71	74	50	48	44	34
<i>Total</i>	334	343	318	304	278	296	201	190	174	136

Table 27 Scenario 7 Ayr Urban HMA (Constrained)

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
<i>Social Rent</i>	99	111	108	109	102	114	77	73	68	53
<i>Below Market</i>	45	43	37	33	30	29	20	19	16	12
<i>PRS</i>	79	75	68	62	54	56	38	36	33	26
<i>Buyers</i>	77	79	72	69	63	66	45	42	39	30
<i>Total</i>	299	307	285	272	249	265	180	170	155	122

Table 28 Scenario 7 G&SC HMA (Constrained)

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
<i>Social Rent</i>	13	14	13	13	13	14	10	10	9	7
<i>Below Market</i>	6	6	6	5	5	5	3	3	3	2
<i>PRS</i>	7	6	5	4	3	3	2	2	2	2
<i>Buyers</i>	10	10	9	9	8	9	6	6	5	4
<i>Total</i>	35	36	33	32	29	31	21	20	19	14

Table 29 Scenario 8 Elements Selected

Element	Variable Selected
Households	2012 High Migration
Existing Need	HaTAP (390) + Concealed and Overcrowded (400)
Years to clear backlog	10
Income Growth and Distribution	Small Area Income Estimates (HW)
Growth in Median Income Scenario	Flat
Change in Income Distribution	Higher End Runs Away
Prices and Affordability	Modest Recovery
Percentile	25%
Income Ratio	3.2
Proportion of market who buy	40%
Upper income-to-rent threshold	25%
Lower income-to-let threshold	35%
Rent Growth Recovery	Modest Increases

Table 30 Scenario 8 South Ayrshire (Constrained)

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
<i>Social Rent</i>	111	124	122	122	115	128	87	83	77	60
<i>Below Market</i>	50	49	43	38	35	34	23	22	18	14
<i>PRS</i>	95	94	87	81	72	75	51	48	44	35
<i>Buyers</i>	77	75	67	63	56	59	40	38	34	27
<i>Total</i>	334	343	318	304	278	296	201	190	174	136

Table 31 Scenario 8 Ayr Urban HMA (Constrained)

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
<i>Social Rent</i>	99	111	108	109	102	114	77	73	68	53
<i>Below Market</i>	45	43	37	33	30	29	20	19	16	12
<i>PRS</i>	87	87	80	75	67	70	47	45	41	32
<i>Buyers</i>	68	66	59	56	50	52	35	33	30	24
<i>Total</i>	299	307	285	272	249	265	180	170	155	122

Table 32 Scenario 8 G&SC HMA (Constrained)

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
<i>Social Rent</i>	13	14	13	13	13	14	10	10	9	7
<i>Below Market</i>	6	6	6	5	5	5	3	3	3	2
<i>PRS</i>	8	7	6	6	5	5	4	4	3	3
<i>Buyers</i>	9	9	8	7	7	7	5	4	4	3
<i>Total</i>	35	36	33	32	29	31	21	20	19	14

Table 33 Summary Housing Need 2016 – 2025 by Tenure and Scenario per Year for South Ayrshire

	2016 - 2020				2021 - 2025			
	<i>Social Rent</i>	<i>Below Market</i>	<i>PRS</i>	<i>Buyers</i>	<i>Social Rent</i>	<i>Below Market</i>	<i>PRS</i>	<i>Buyers</i>
<i>Core</i>	56	29	45	73	30	21	30	50
<i>Scenario 1</i>	101	47	80	87	73	26	45	56
<i>Scenario 2</i>	101	47	93	74	73	26	57	44
<i>Scenario 3</i>	103	45	81	87	74	24	46	55
<i>Scenario 4</i>	103	45	93	74	74	24	57	44
<i>Scenario 5</i>	117	45	72	81	86	24	39	51
<i>Scenario 6</i>	117	45	86	68	86	24	50	40
<i>Scenario 7</i>	119	43	73	81	87	22	40	50
<i>Scenario 8</i>	119	43	86	68	87	22	51	40
<i>Average</i>	110	45	83	78	80	24	48	48

Table 34 Summary Housing Need 2016 – 2025 by Tenure and Scenario per Year for Ayr Urban HMA

	2016 - 2020				2021 - 2025			
	<i>Social Rent</i>	<i>Below Market</i>	<i>PRS</i>	<i>Buyers</i>	<i>Social Rent</i>	<i>Below Market</i>	<i>PRS</i>	<i>Buyers</i>
<i>Core</i>	50	26	41	65	26	19	28	44
<i>Scenario 1</i>	90	41	74	77	65	23	42	49
<i>Scenario 2</i>	90	41	86	66	65	23	52	39
<i>Scenario 3</i>	92	40	74	77	66	21	42	49
<i>Scenario 4</i>	92	40	86	65	66	21	52	39

<i>Scenario 5</i>	104	39	67	72	77	21	36	45
<i>Scenario 6</i>	104	39	79	60	77	21	46	35
<i>Scenario 7</i>	106	37	68	72	77	19	38	44
<i>Scenario 8</i>	106	37	79	60	77	19	47	35
<i>Average</i>	98	39	77	69	71	21	44	42

Table 35 Summary Housing Need 2016 – 2025 by Tenure and Scenario per Year for G&SC HMA

	<i>2016 - 2020</i>				<i>2021 - 2025</i>			
	<i>Social Rent</i>	<i>Below Market</i>	<i>PRS</i>	<i>Buyers</i>	<i>Social Rent</i>	<i>Below Market</i>	<i>PRS</i>	<i>Buyers</i>
<i>Core</i>	6	3	4	8	3	2	2	6
<i>Scenario 1</i>	11	5	6	10	8	3	3	6
<i>Scenario 2</i>	11	5	8	9	8	3	5	5
<i>Scenario 3</i>	11	5	7	10	8	3	3	6
<i>Scenario 4</i>	11	5	8	9	8	3	5	5
<i>Scenario 5</i>	13	6	5	9	10	3	2	6
<i>Scenario 6</i>	13	6	6	8	10	3	3	5
<i>Scenario 7</i>	13	5	5	9	10	3	2	6
<i>Scenario 8</i>	13	5	6	8	10	3	4	5
<i>Average</i>	12	5	6	9	9	3	3	6