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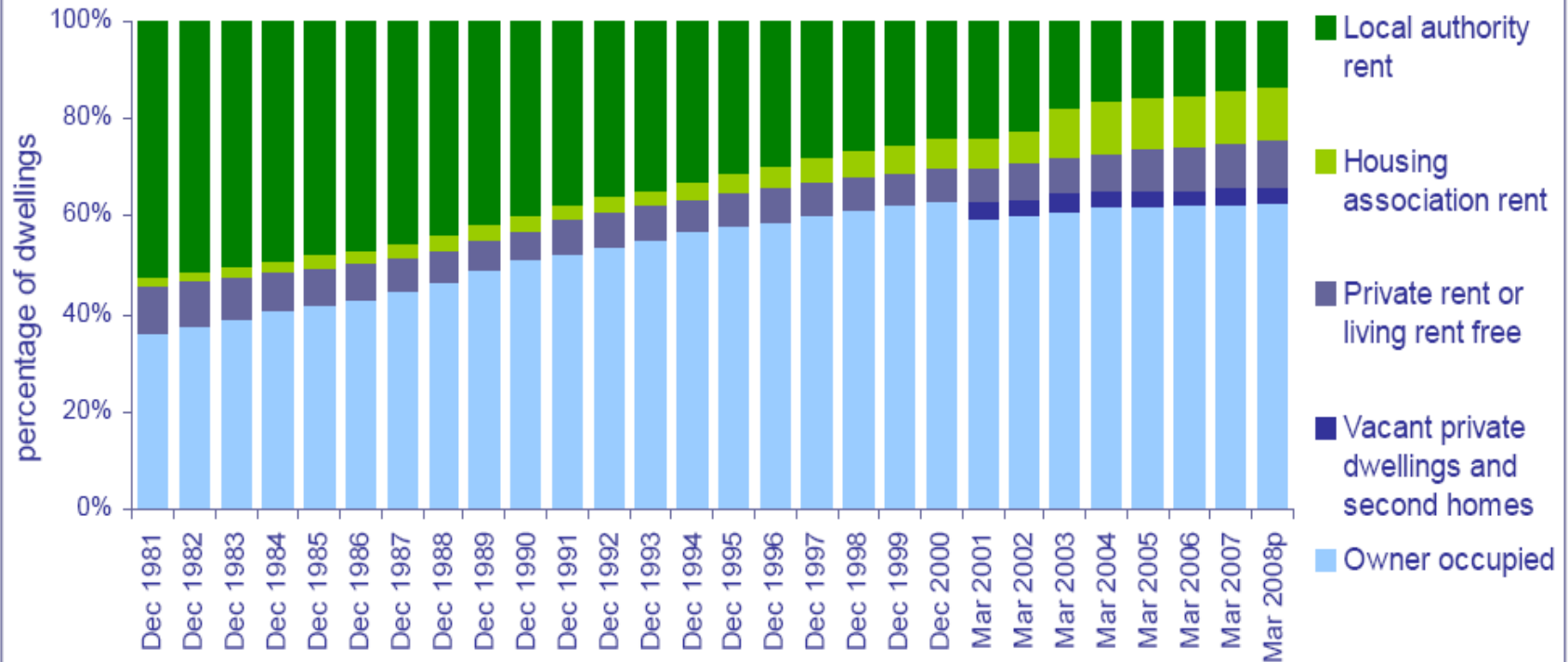
The Housing Landscape

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HOW HAS THE HOUSING LANDSCAPE CHANGED IN 10 YEARS?

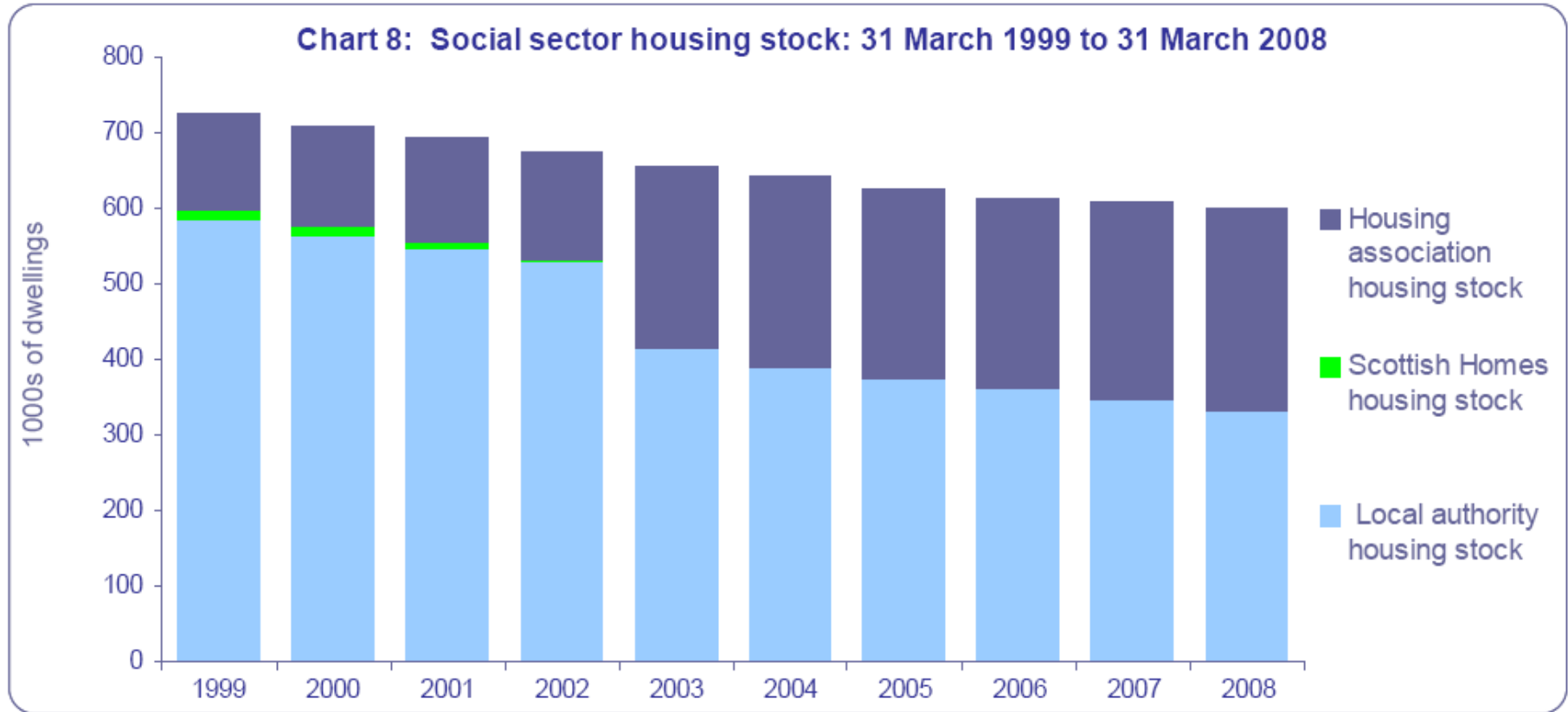
Continuation of trends -in tenure

Chart 1: Estimated stock of dwellings by tenure: 1981 to 2008

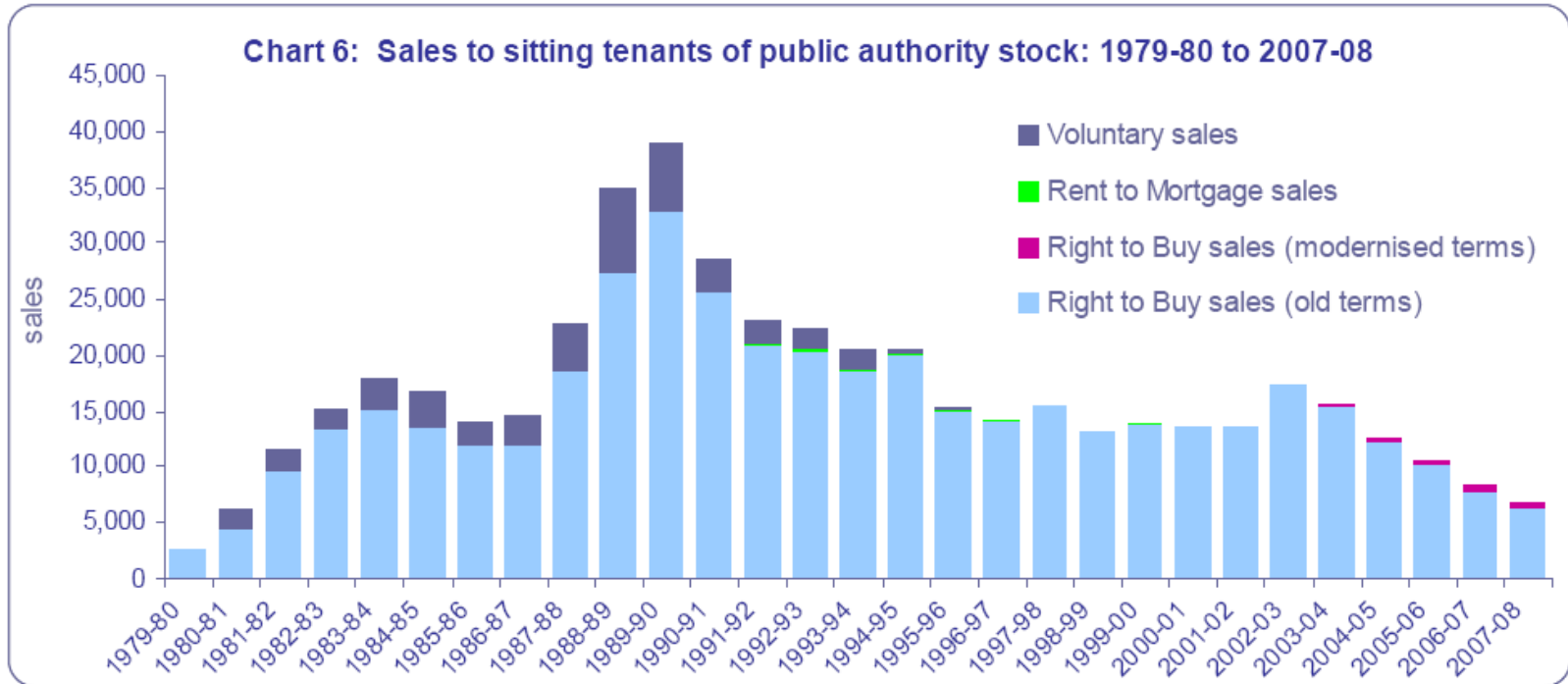


Note the change in methodology from March 2001. Scottish Household Survey data is combined with dwelling counts of occupied and vacant property (General Register Office for Scotland) to split privately owned stock into owner occupied, private rented and vacant. Social rented stock counts provided by local authorities and the Scottish Housing Regulator.

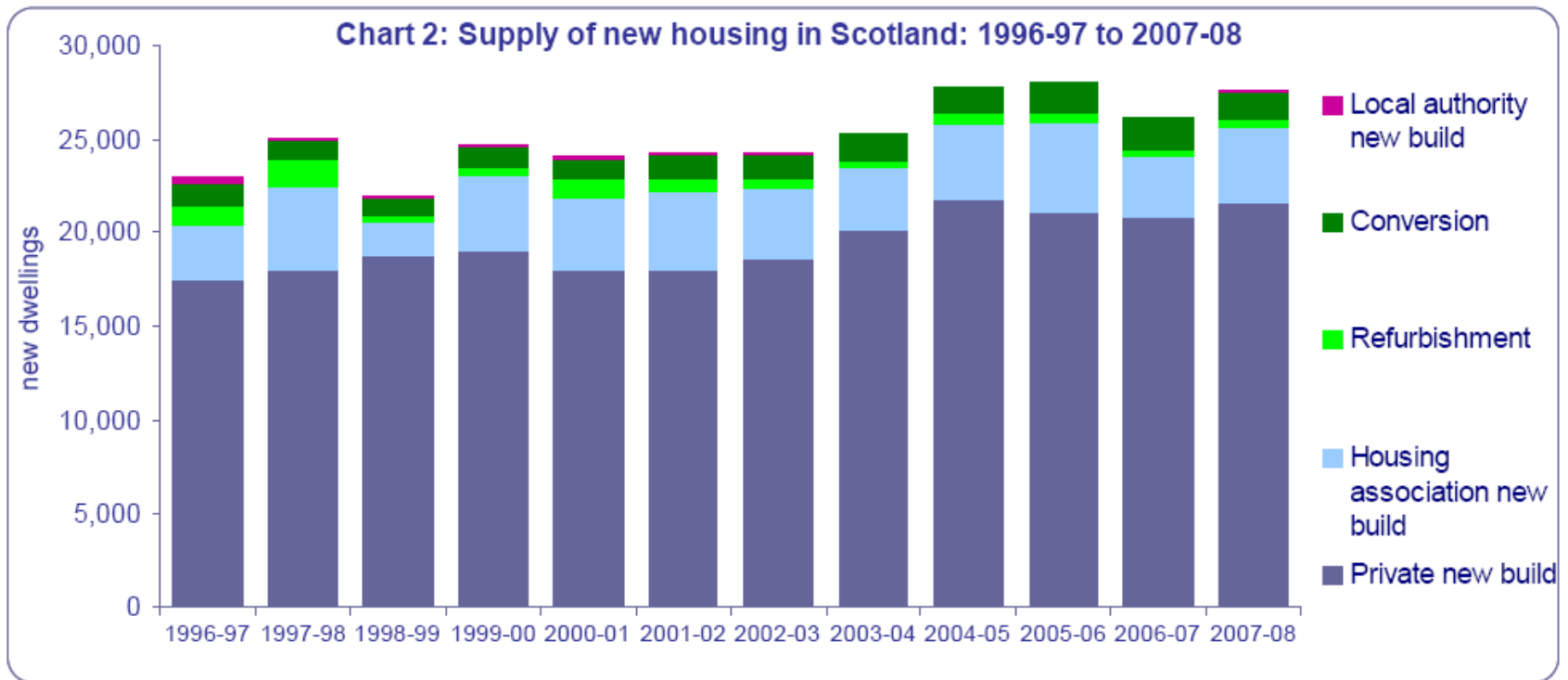
Shrinkage of social housing sector/ expanded role of housing associations



But RTB sales falling away

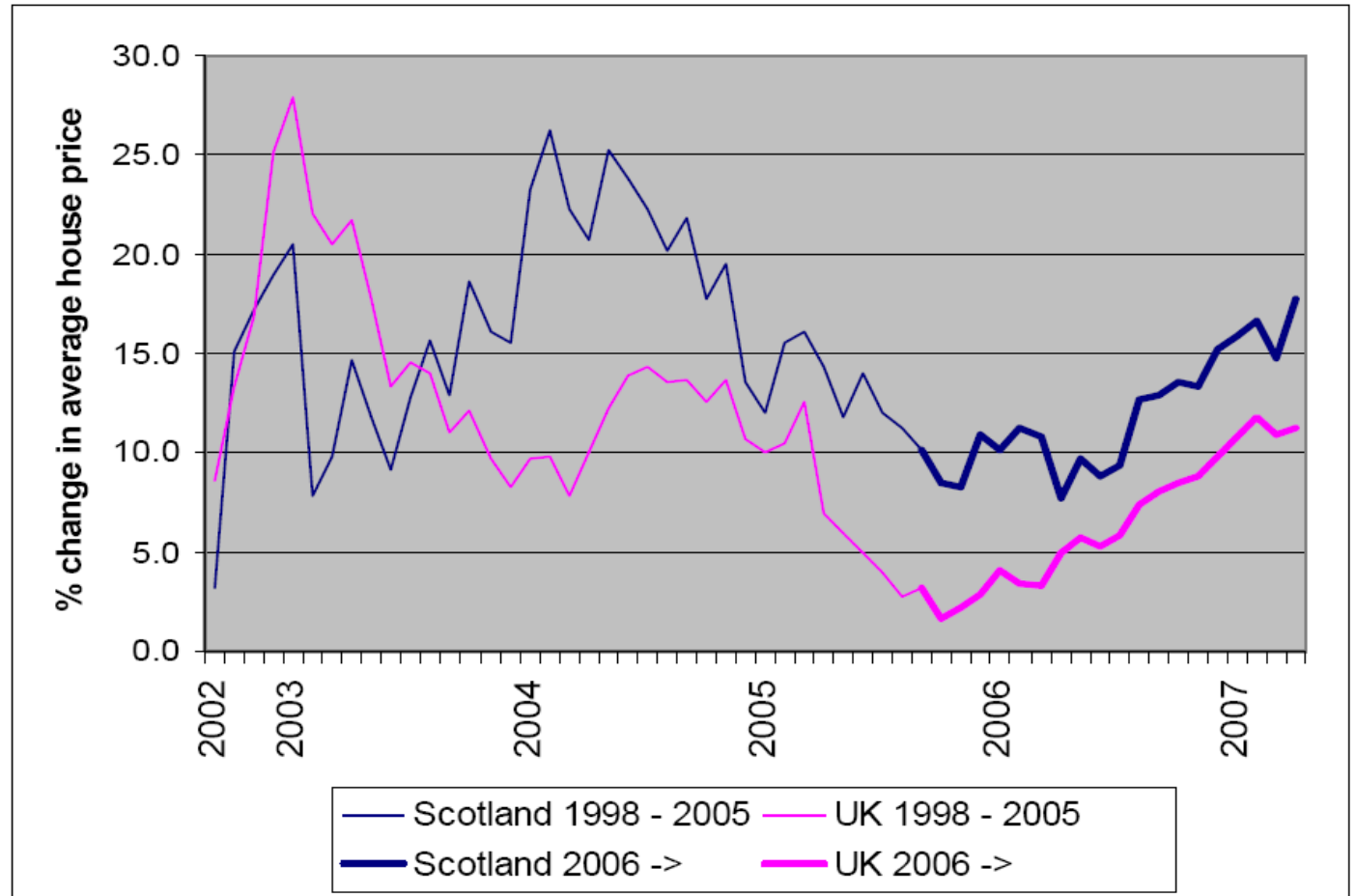


Supply fairly steady -until now- and dominated by private provision



But rising prices...

Figure 2: Scottish and UK House Price Growth Rates

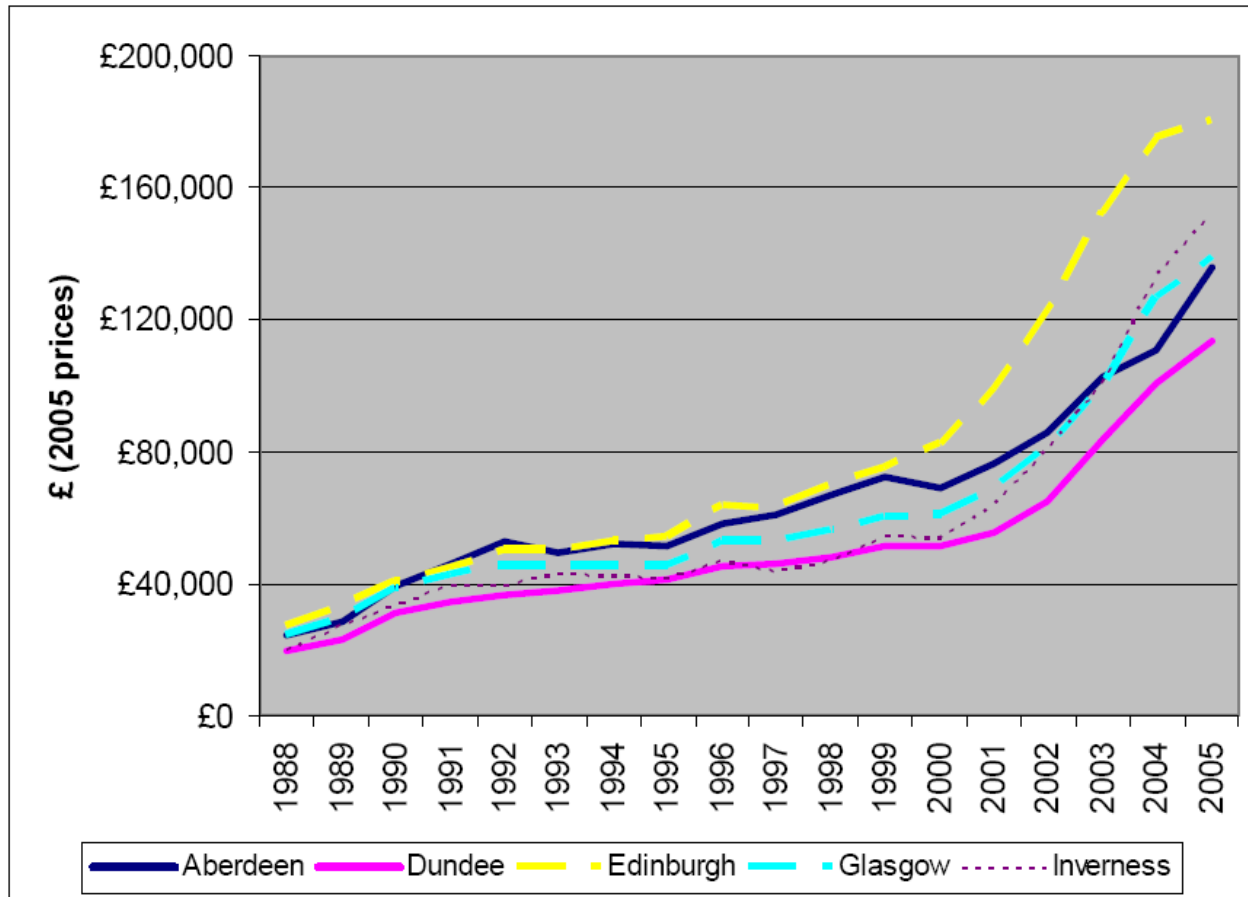


Source: DCLG table 590

Source:
Scottish
Housing
Market
Review -
Evidence and
Analysis.
2007

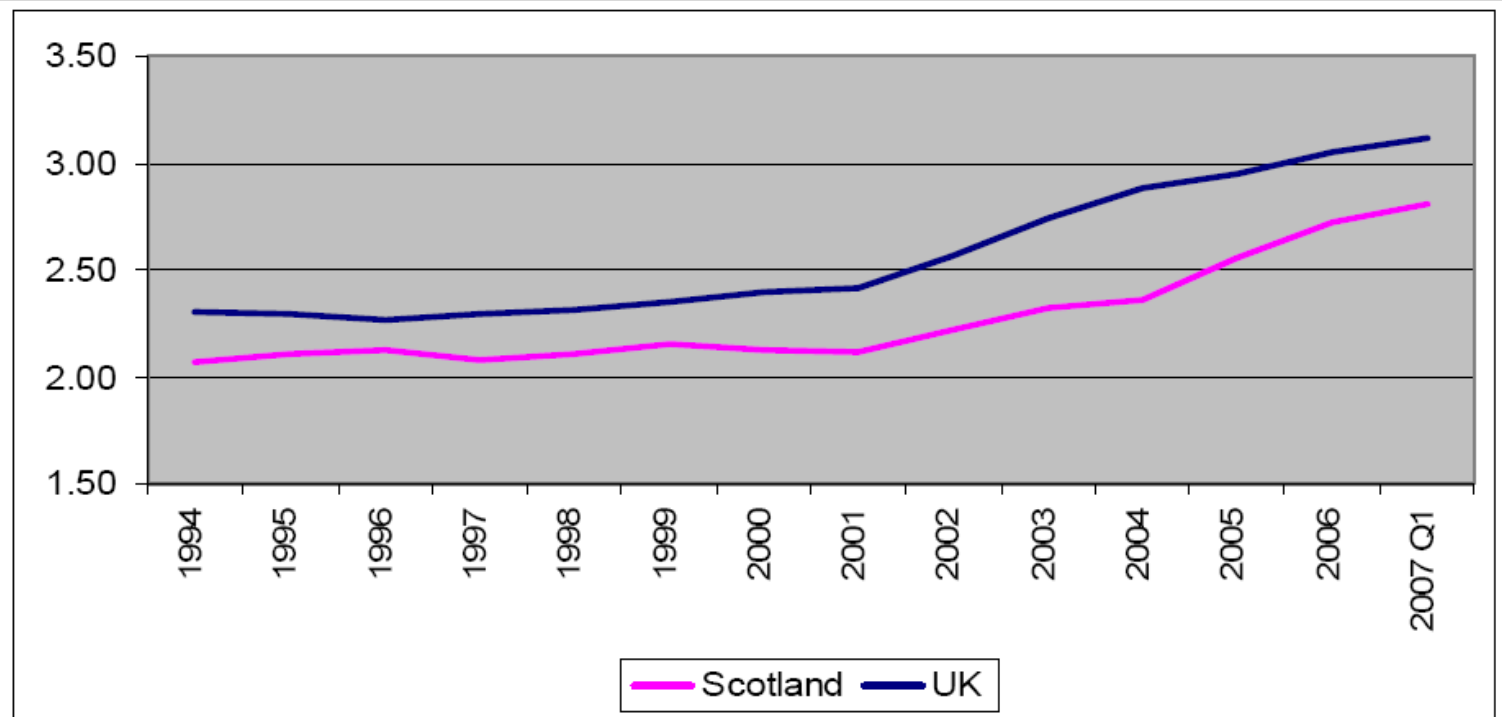
Source:
Scottish
Housing
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2007

Figure 3: Real Regional House Prices



Source: HBoS, HM Treasury GDP Deflator

Figure 9: Mortgage Size as a multiple of stated household income



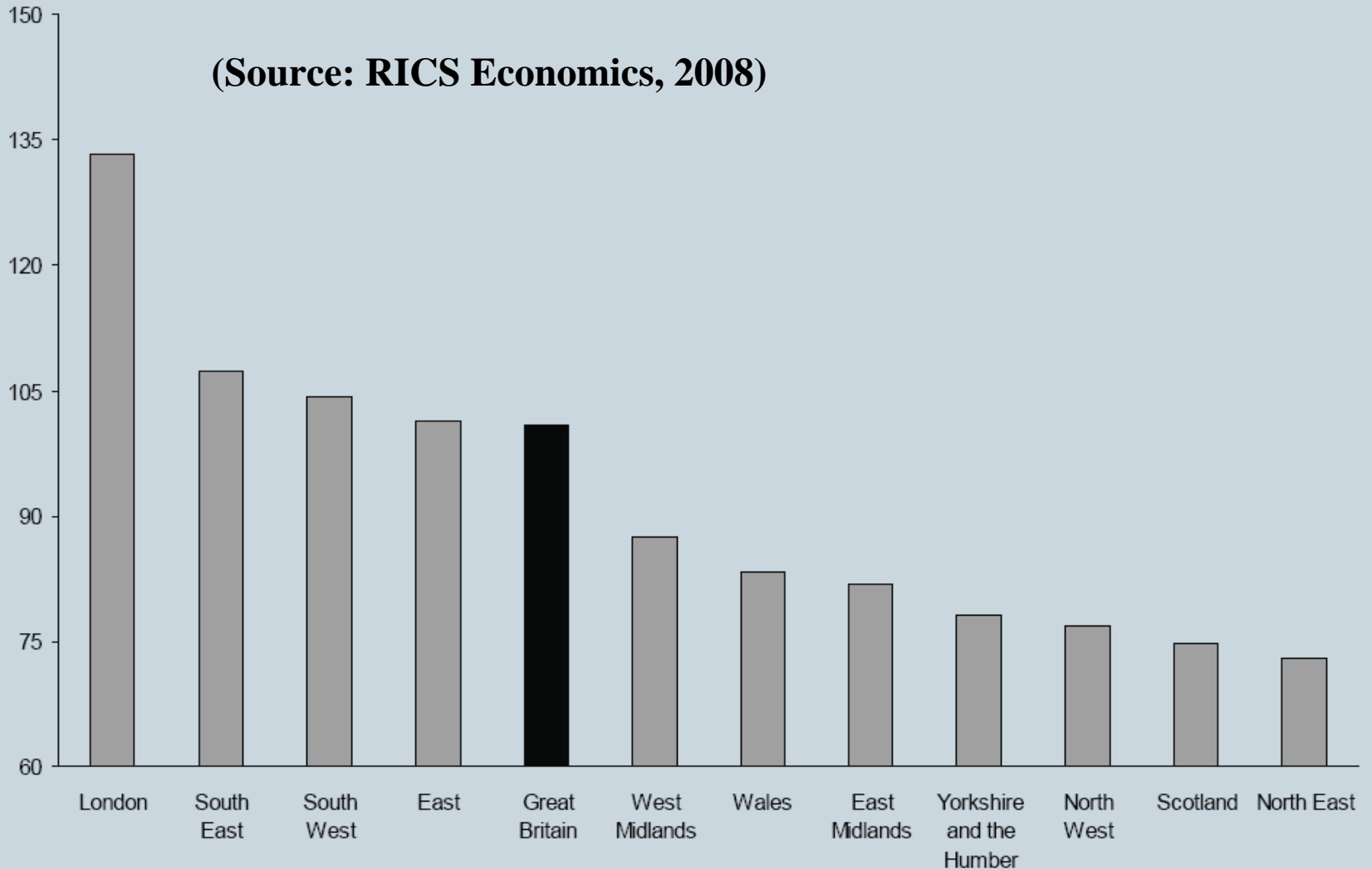
Source: CML Tables ML2, ML3

Source: Scottish Housing Market Review - Evidence and Analysis. 2007

...and (worse) falling accessibility.

Cost of Purchasing a House as a Percentage of Combined Take Home

(Source: RICS Economics, 2008)



Pay

VIEWS OF THE HOUSING LANDSCAPE

Very high levels of satisfaction with housing in Scotland

Table 3.4 Overall satisfaction with home

% very satisfied	Owner-occupiers	Social renters	Private renters	Total
	%	%	%	%
Very satisfied	77	44	41	66
Fairly satisfied	21	42	54	29
Not very satisfied	1	10	5	4
Not at all satisfied	0	4	1	1
Base: All respondents (n=1,211)	508	356	314	1,211

Source: S. Clegg et al (2007) *Housing Aspirations*, Scottish Government

..and the vast majority live in a house which they think is in good condition

Table 3.5 Rating of condition of current home

	Owner-occupiers	Social renters	Private renters	Total
	%	%	%	%
Excellent	28	17	16	24
Very good	46	32	31	41
Good	21	30	35	25
Fair	4	14	16	7
Poor	*	5	2	2
Very poor	*	2	*	1
Base: All respondents (n=1,211)	508	356	314	1,211

..most people live in their preferred tenure (and tenure change is consistent with preferences)

Table 4.1 Whether ideally would prefer to own or rent

	Owner- occupiers	Social renters	Private renters	Total
	%	%	%	%
Own	98	60	79	86
Rent:	1	32	16	10
No preference/don't know	1	8	5	4
Base: All respondents (n = 1211)	508	356	314	1211

Source: S. Clegg et al (2007) *Housing Aspirations*, Scottish Government

Perception of neighbourhood as fairly/very good place to live (Scotland): 1999-2007

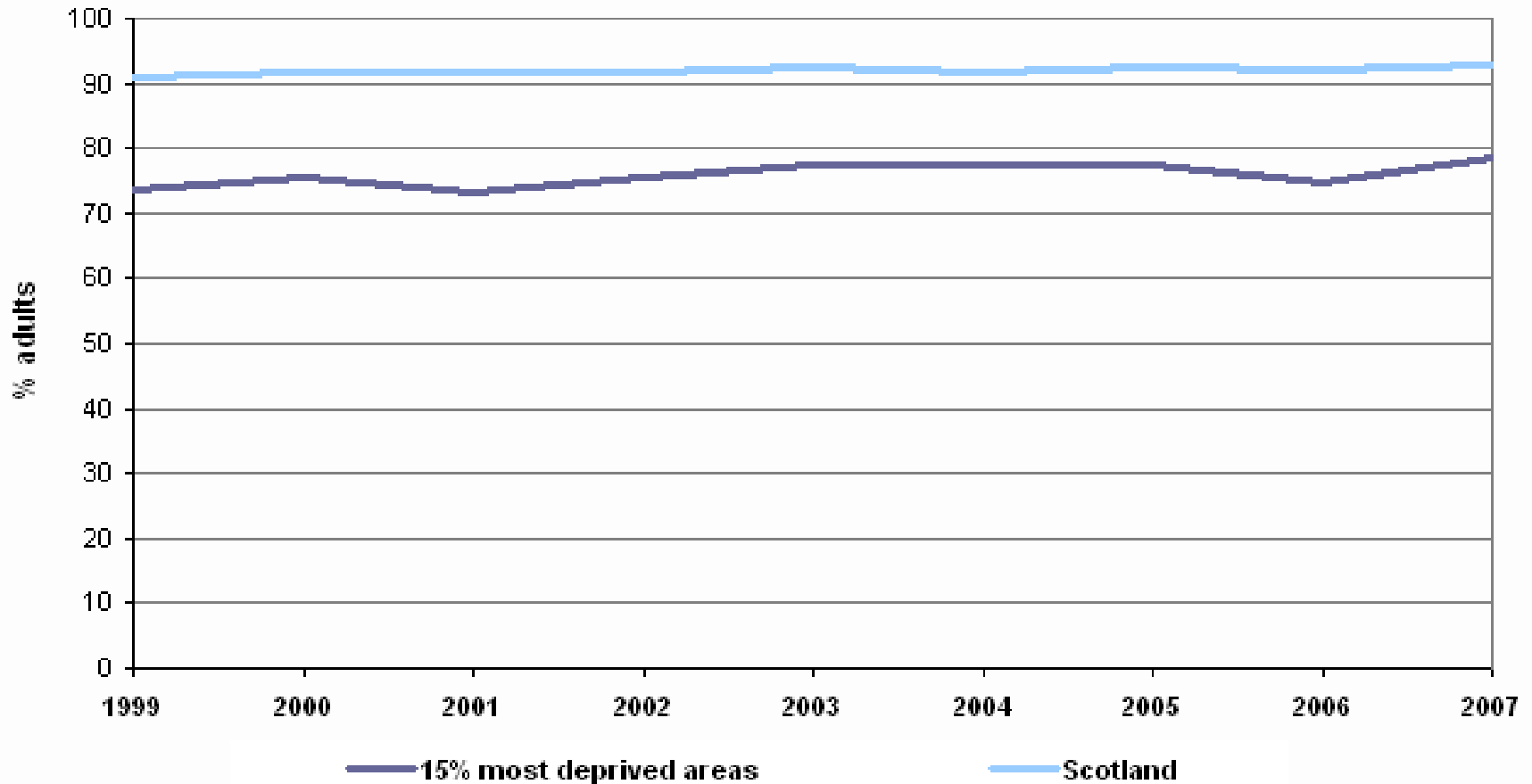
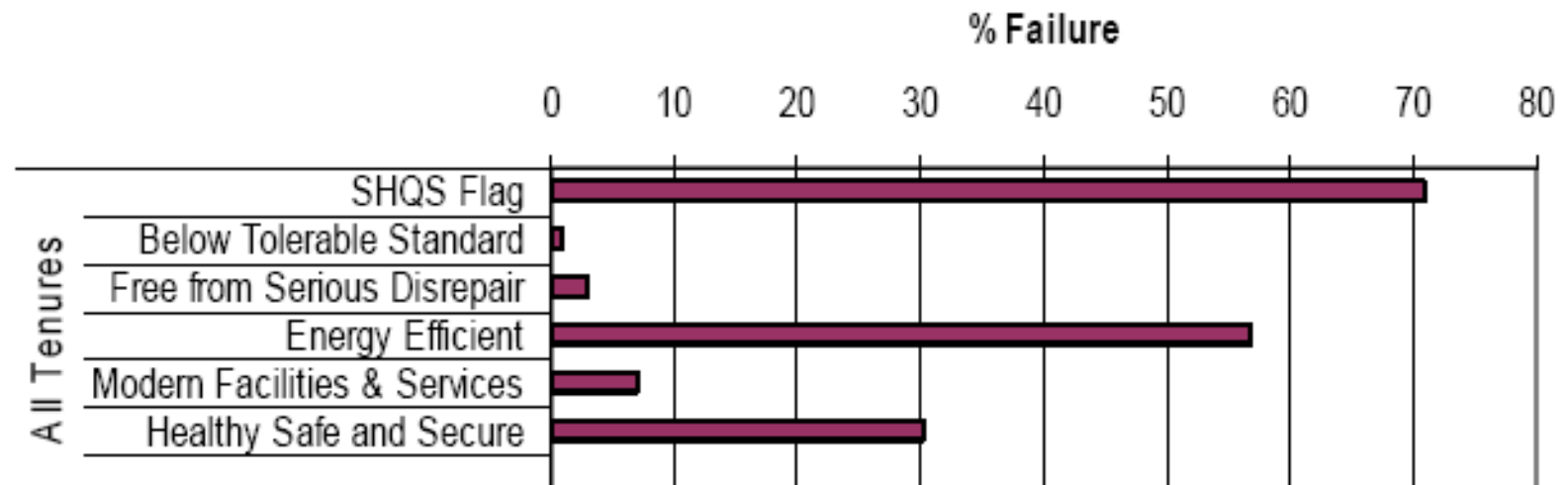


Figure 8: Dwellings by failure to meet Scottish Housing Quality Standard by tenure 2007 (%)



And the homeless have rights...

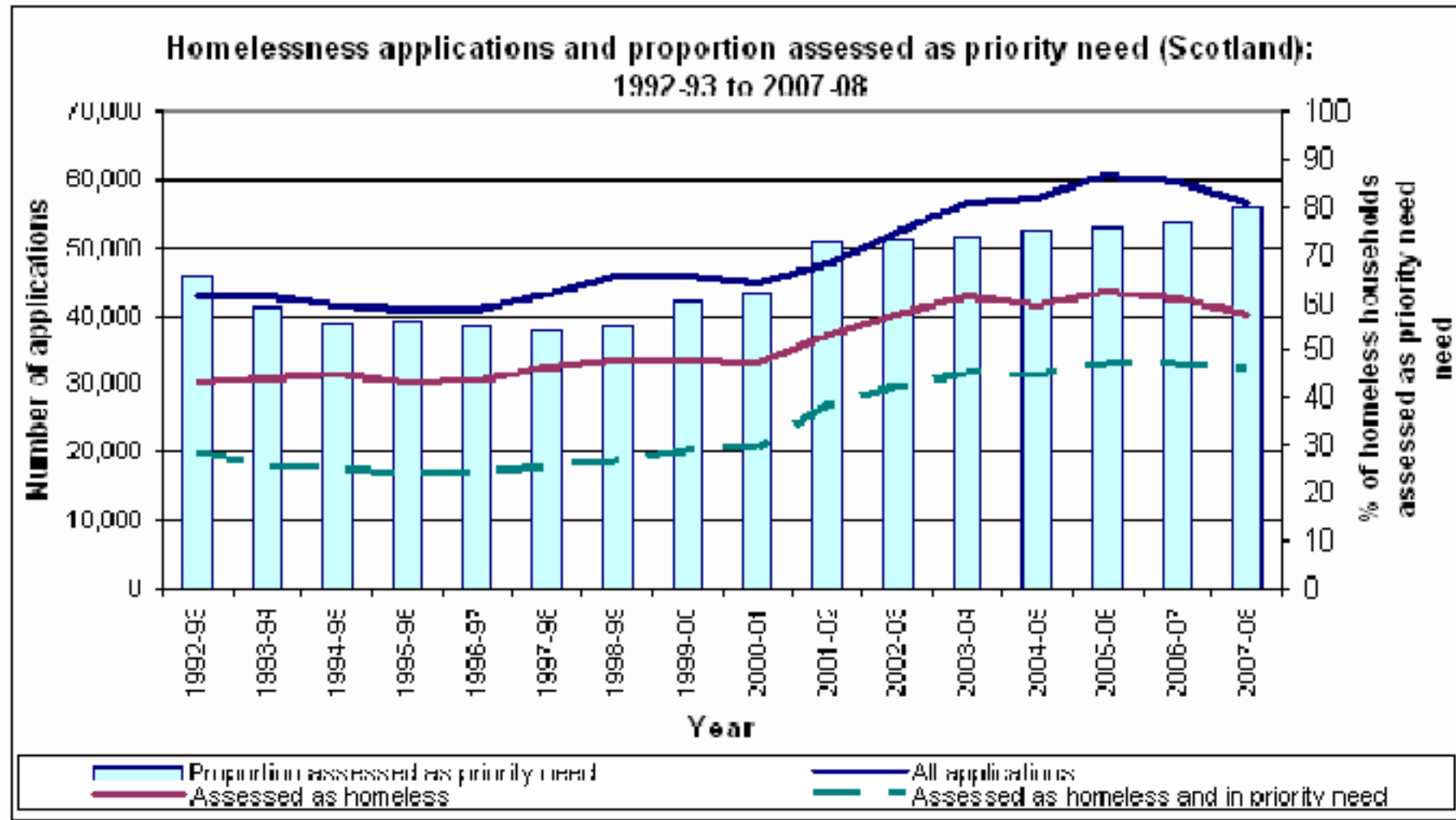
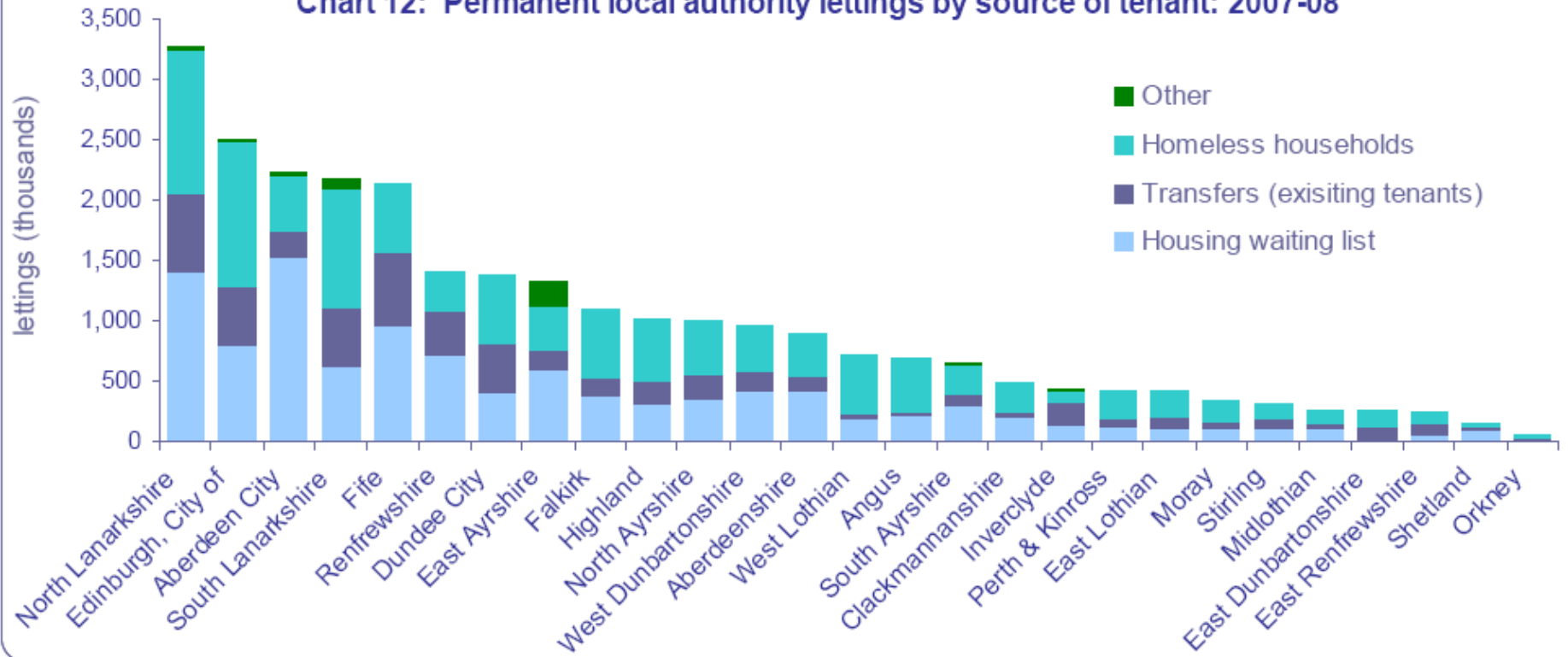


Chart 12: Permanent local authority lettings by source of tenant: 2007-08



WHAT HAS HOUSING LEGISLATION EVER DONE FOR US?

2001 and 2003 Acts

- Homelessness prevention and Homeless people's rights to housing
- 'Single' social housing tenancy
- Unified regulation
- Minor private sector elements
- Fuel poverty

2006 Act

- Housing Renewal Areas and more flexible powers
- Repairing standard for private rented housing
- Scheme of assistance for owners
- 'Home reports'
- Deposits in the private rented sector
- Re-legislating for HMO licensing

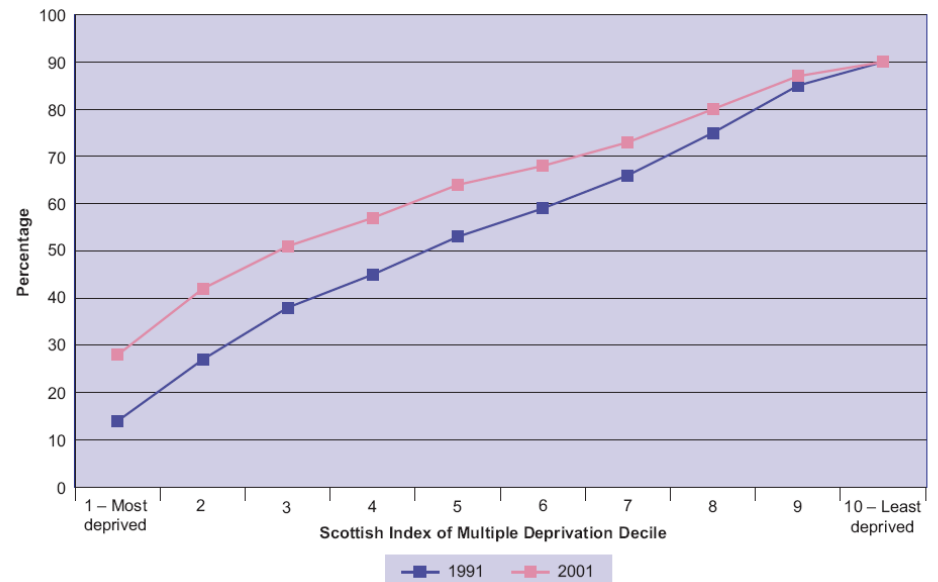
THE BIG ISSUES NOW?

1. Economic: Collapse of the housing market



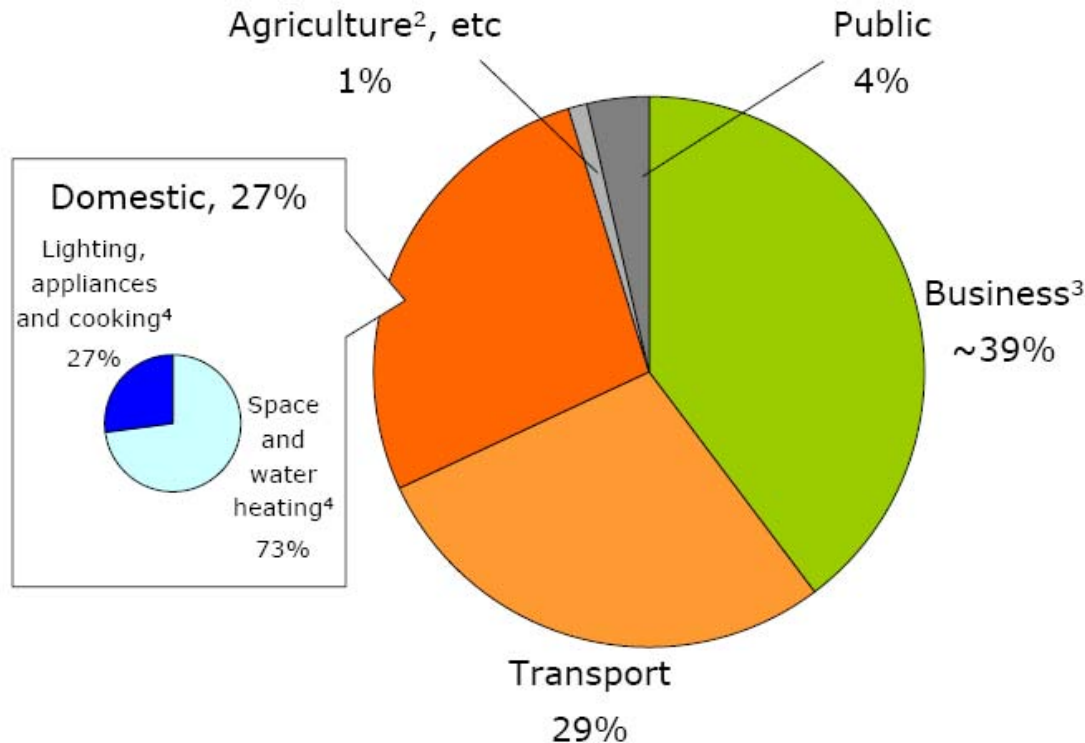
2. Social: Socio-spatial segregation

Chart 7.1: Owner Occupiers, 1991 and 2001 Percentage



3. Energy use in Housing/ Climate Change

UK carbon emissions¹



Emissions from the use of electricity and heating fuels by households account for 27% of the UK's total, making 148.5 MtCO₂

73% of household emissions arise from space and water heating, and 27% from lighting, appliances and cooking⁴



Glasgow Housing Association (Compulsory Transfer) Act 2009



The Home Report Suspension Order, 2009



Private Landlords (SHQS Compliance) Directive, 2010