

# CLACKMANNANSHIRE & STIRLING STRUCTURE PLAN 3RD ALTERATION

Housing 2025 Topic Paper



Draft



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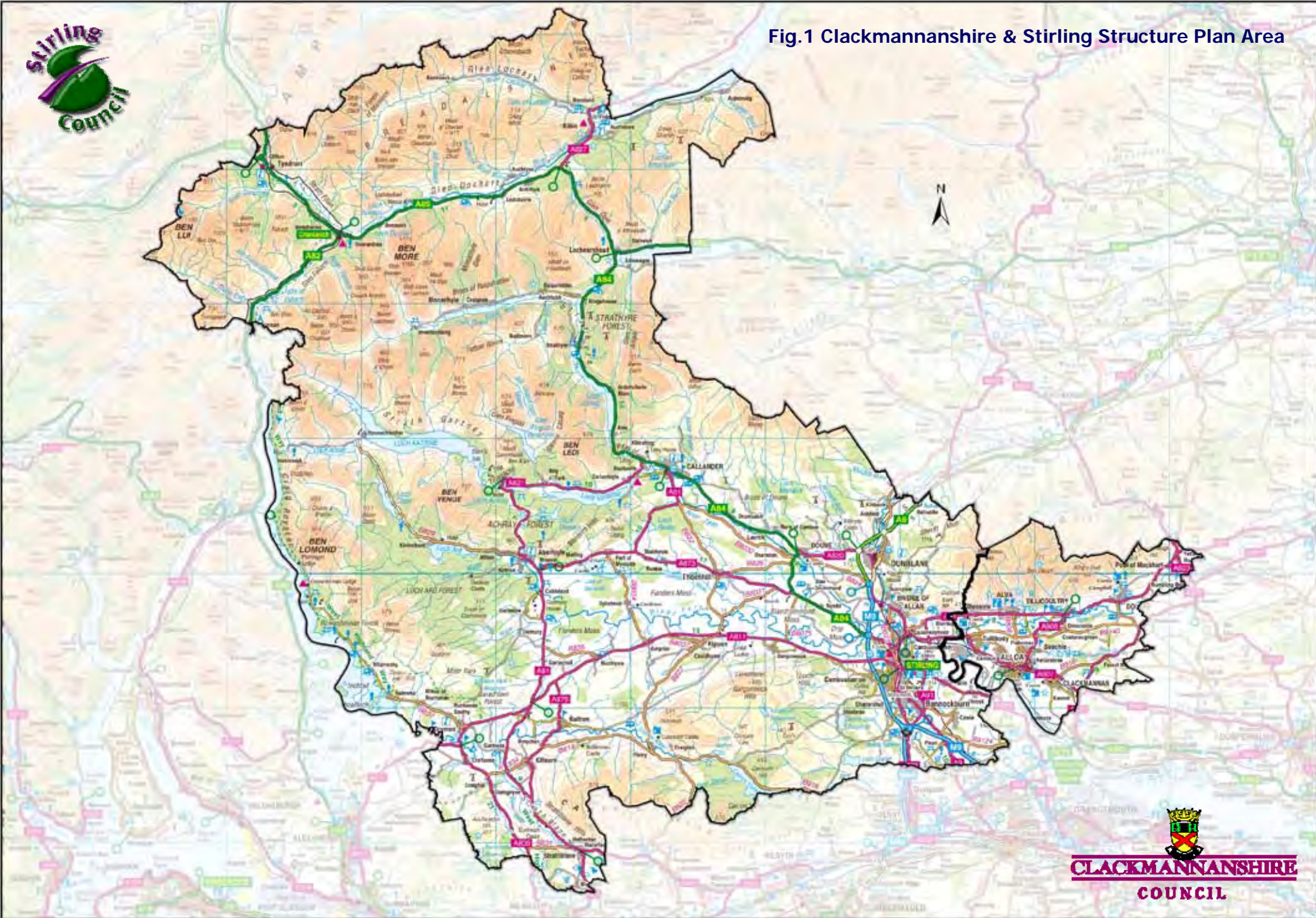
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Fig.1 Clackmannanshire & Stirling Structure Plan Area





## Introduction

1.1 The Clackmannanshire and Stirling Structure Plan as approved in 2002, planned for housing growth to 2017 on the basis of the 1996 Scottish Executive Household Projections.

1.2 Ten years on it is important to review whether the growth that was projected has actually happened, whether up to date projections highlight a greater or lesser housing requirement than was anticipated and whether the current characteristics of the housing market in Stirling and Clackmannanshire signal the need for a change in approach. Scottish Planning Policy on Housing (SPP3) points to a longer time horizon in planning for future housing. This report therefore looks beyond the 2017 time horizon in the approved Structure Plan, towards 2025 (although it should be appreciated that projections become increasingly less reliable over time and will require to be regularly monitored and reviewed).

1.3 Housing provision is closely linked to health, energy efficiency, the environment, economic opportunity and quality of life. Housing can also play a key role in regeneration. Planning for housing can assist in the maintenance and enhancement of all these factors if new provision is directed to sustainable locations, is of a high quality, affordable and is accompanied by the appropriate enhancement in transport infrastructure, employment, shopping and other opportunities.

## Projections and Trends

1.4 In reviewing and updating the housing figures and approach of the existing Structure plan this report examines the following-:

### Population Projections

1.5 These projections are produced by the General Register Office (Scotland) every two years, but tend to be around two years behind the current date. The current most up to date projections are for 2004. These present a picture of how the population of the Structure Plan area is expected to grow and change in the future. They include information on population by age group and sex. ( p 13 – 17)

### Household Projections

1.6 The number of households likely to be forming in an area is derived from the population projections allowing an estimate of the number of heads of households (therefore likely future households) as well as the age group and composition of these households. It is this information that enables the likely future housing requirement to be calculated by deducting the current stock of housing and new housing that is already planned from the total amount of expected new households. These figures will also give some indication as to the range and type of housing that will be required. The most current figures are for 2002 but revised 2004 projections are expected this year. This report has therefore had to take 2002 as the base year but the more recent 2004 population projections indicate that some changes in the forecast trends may be anticipated. Further review will therefore be required as the Council move from this stage in the process to a consultative draft plan. ( p 21 – 29)

## Migration

1.7 The population projections enable us to determine the extent to which population growth is resulting from increased births or from people moving into the area. Information on migration from the Sasines Data (which records house moves) on movement between areas and the degree of self containment within areas allows us to define market areas and the strength of links between Clackmannanshire and Stirling as well as other areas. The GRO projections do include assumptions about the future pull of an area to attract new households (through migration assumptions) so some external demand is catered for in the household projections. It is however possible that local factors linked to economic growth or enhanced accessibility may point to the need to cater for demand to a greater or lesser extent. ( p 33 – 42)

## Economic Indicators

The number and type of job opportunities in an area combined with unemployment rates, levels of economic activity and income levels will all have implications for the operation of the housing market area. Housing growth can have a bearing on promoting regeneration and economic growth. Household projections are based on a continuation of current trends but it is possible to consider the potential to cater for an increased level of demand in order to support population stabilisation or promote growth within an area. ( p 44 – 54)

## Affordability

Planning for housing is not just about numbers, types and sizes of housing but is also about the provision of appropriate housing for everyone in the community including those on lower incomes and with particular needs. Estimating the need for affordable and particular needs housing requires a more sophisticated view of the housing market than that which can be provided through the GRO projections. Each Council produces a Local Housing Strategy which looks in detail at the operation of the housing market in the area. SPP3 points to the need to integrate Development Plans and Local Housing Strategies in planning for future housing. In this context this report refers to the LHS documents currently produced by both Councils and highlights the issues which could be addressed through the next LHS review to strengthen the linkages between these documents. This current report includes updated information on house prices, incomes and their geographical distribution.

## KEY FINDINGS

- **POPULATION** Unlike many areas of Scotland population growth in the Structure Plan area is likely to continue. This growth is however focused on Stirling (5%). Clackmannanshire's population is forecast to decline by 1% (GRO Scotland 2004 Based Population Projections).
- **HOUSEHOLDS** The trend towards smaller households is set to continue. Requirements to 2017 are expected to be higher than anticipated in the current Structure Plan with additional households forming in the longer term up to 2025. Projected growth in households focuses on Stirling (17% for Stirling compared to 7% in Clackmannanshire).

Both Council's have a healthy existing supply of land to meet these needs but a potential long term shortfall in housing land is identified.

- **MIGRATION** The Structure Plan area is likely to continue to attract new population from out with the area. There is likely to be continued movement from Stirling into Clackmannanshire. Recent trends including the mid year estimates indicate that Clackmannanshire is attracting external demand for housing. A number of neighbouring authorities are seeking to promote growth in excess of the GRO projections.
- **ECONOMIC INDICATORS** The economy is likely to continue to be characterised by a degree of polarisation and a lack of local employment opportunity. The area is influenced by a relatively large travel to work area.
- There is a significant interdependency between Clackmannanshire and Stirling with high levels of in and out commuting.
- **AFFORDABILITY** Research indicates a degree of mismatch between house prices and incomes with apparent mismatches in demand and supply which are particularly prevalent in areas of high demand. The stock of social rented housing is declining and again this is accentuated in certain areas. A recent housing needs study for Clackmannanshire indicates that there is sufficient existing supply of social rented housing and this is likely to inform future review of the Local Housing Strategy (LHS). In Stirling the LHS does signal the need for future affordable housing provision but further work is required to calculate the longer term extent of this need. An additional allowance to the total requirement may also be required to allow for any backlog of need which may not be accounted for within the GRO projections.

## Conclusions/Strategy/Policy Implications

- If all sites classified as “likely” in the Urban Capacity Study and all sites in the Housing Land Audit and development plan along with small windfall sites are built ( total 11,538) then an additional Greenfield Housing Land release of 1800 units is required to meet housing need to 2025 (assuming a continuation of current trends).
- Strong links between the Clackmannanshire and Stirling Housing Market areas and the availability of surplus urban capacity in Clackmannanshire point to a more integrated approach to meeting the areas future housing needs.
- The economic, population and household trends characteristic of Clackmannanshire along with the opportunities presented by improved accessibility may signal the need to assess whether and how the population could be stabilised in order to halt future decline.
- Economic and travel to work information signal that current employment provision is not fully addressing polarisation or the need to travel longer distances to find employment opportunities.
- A percentage of the housing land requirement, to be informed by the Local Housing Strategy, should be targeted for affordable/particular needs housing.
- Continuing need to focus on delivering a range and mix of house sizes, types in order to tailor future housing provision to meet forecast needs.
- An ageing population structure points to the need to attract development to achieve a balanced age structure and to consider suitable house types.



# CLACKMANNANSHIRE & STIRLING STRUCTURE PLAN 3RD ALTERATION

Population





## 2.0 Population

### 2.1 Introduction

The GRO produce population projections every two years. The latest projections cover the period from 2004 to 2024. The following sections look at the anticipated changes in the areas population over the period up to 2025 (see Appendix for *Uses and Limitations of Projections*).

### 2.2 Population Projections 2004

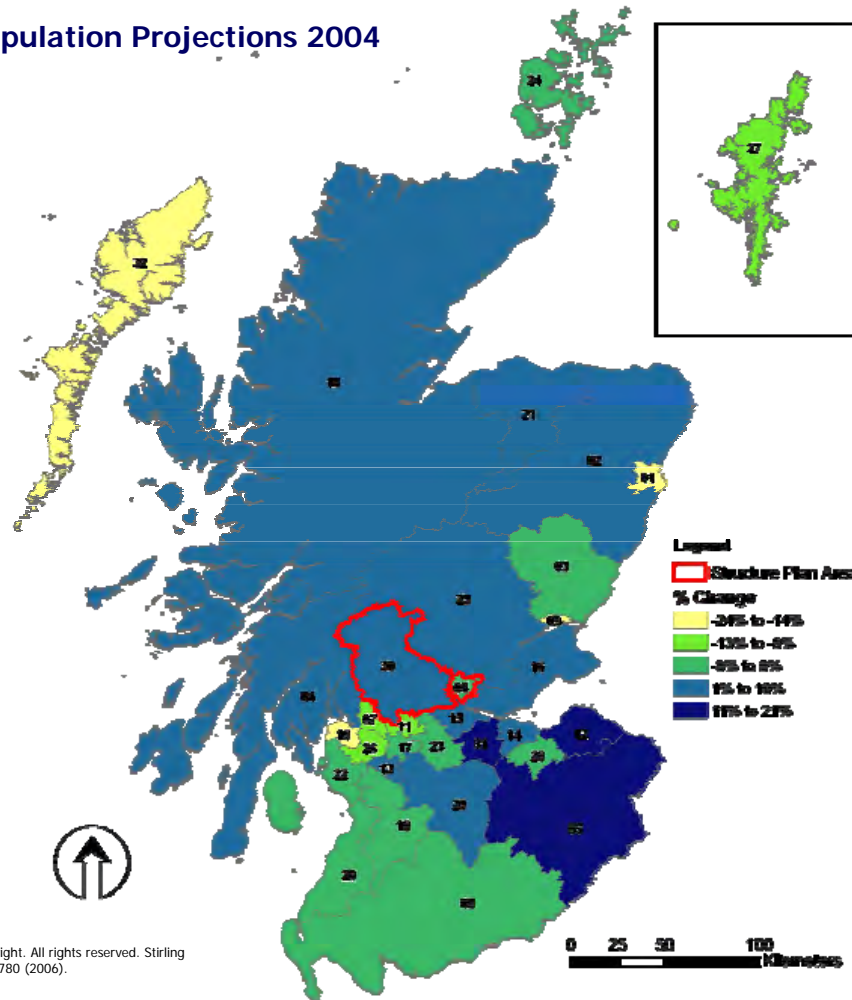
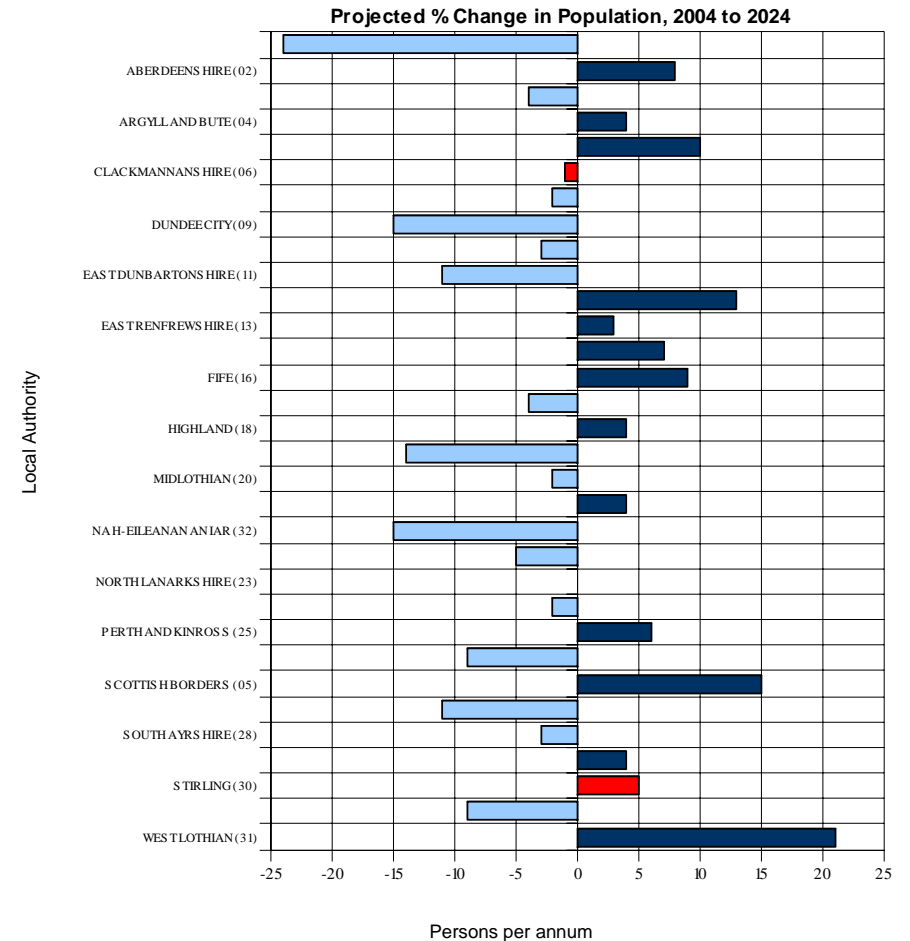


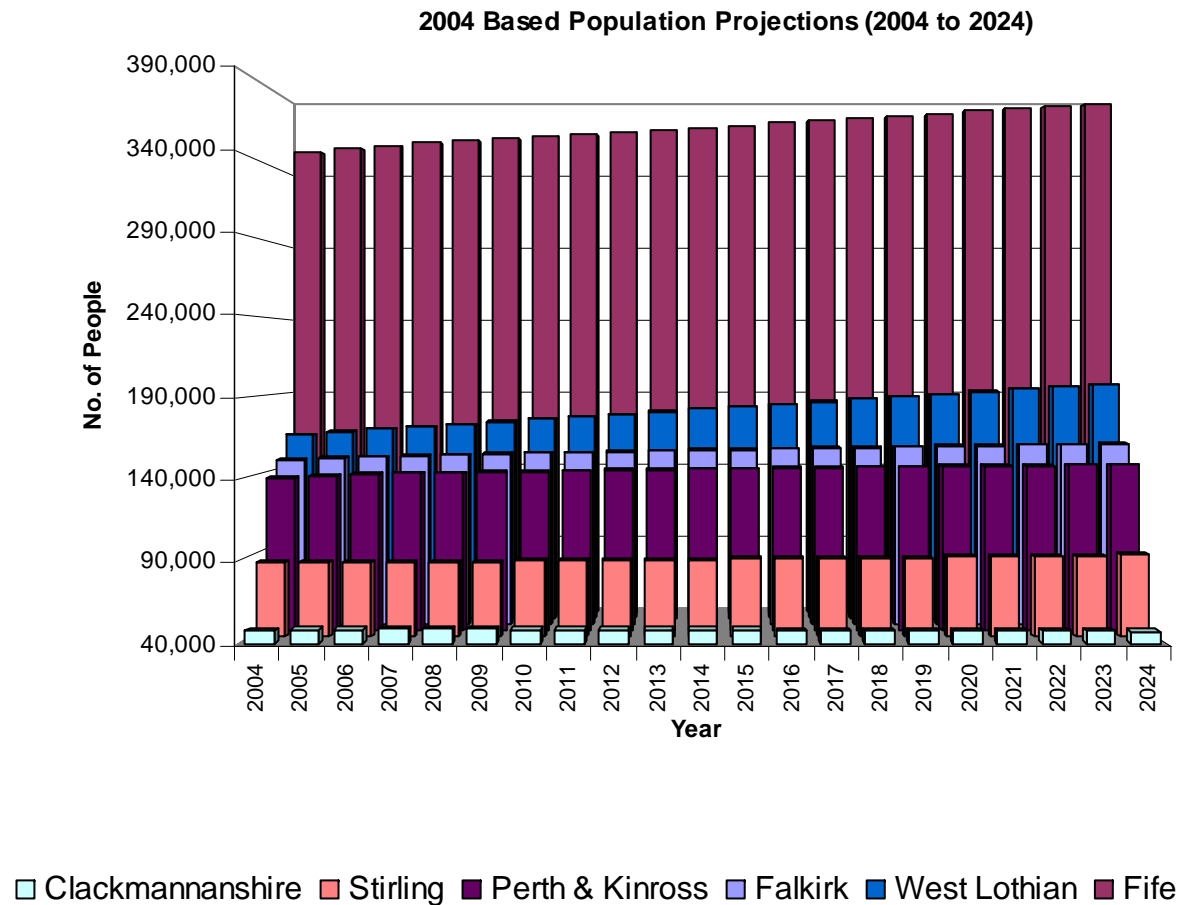
Fig.2 Projected Change in Population, 2004 to 2024 (By Local Authority)



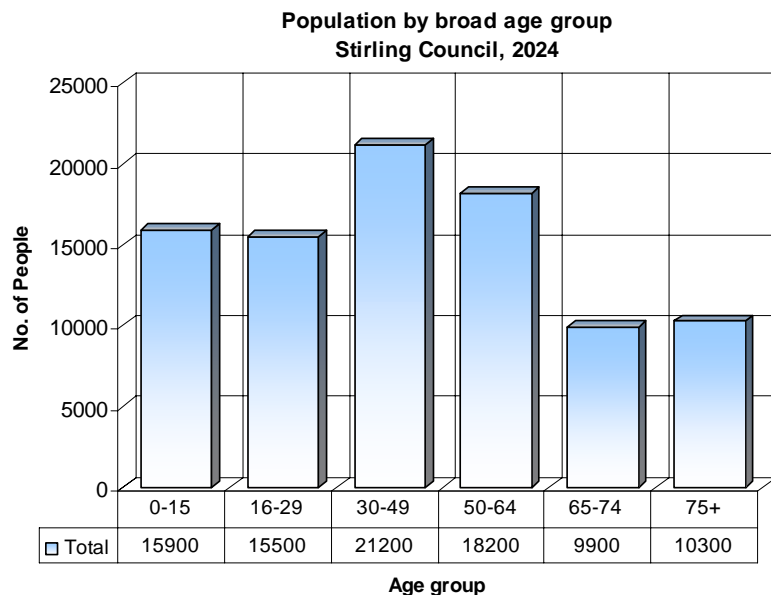
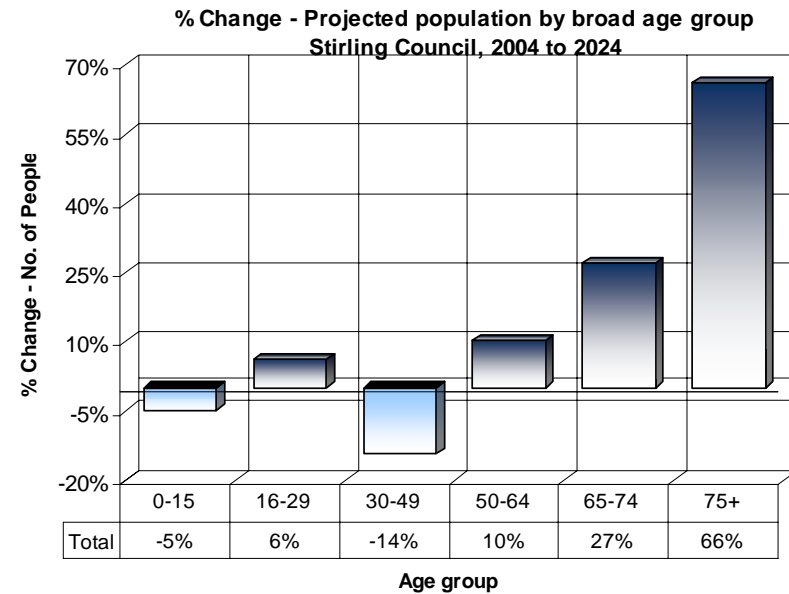
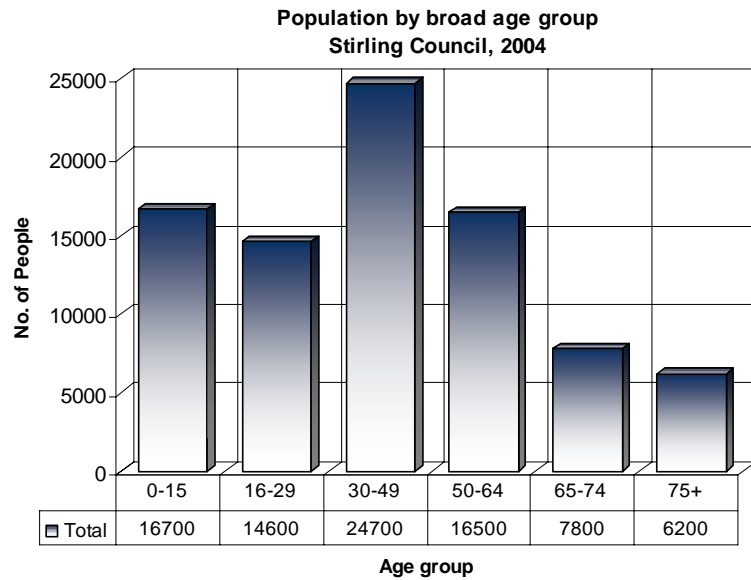
2.2.1 Fig.2 shows the projected growth in population for Stirling Council (5%) compared to a decline in population for Clackmannanshire (-1%) by 2024. This compares with a projected increase in the population of Scotland by 1%. These figures do however signal a shift from the 2002 based projections which indicated a higher rate of growth for Stirling (9%) and higher projected decrease for Clackmannanshire (-6%). It is anticipated that these revised Population Projections will influence the 2004 Household Projections which are likely to be released in May 2006.

**Fig.3 2004 Population Projections (GRO) Scotland**

2.2.2 Fig.3 shows the increasing population trend in Stirling compared with the declining trend in Clackmannanshire. The bar chart compares growth in the Structure Plan area with that of Perth and Kinross, Falkirk, West Lothian and Fife showing the highest rates of growth in West Lothian and Fife.



**Fig.4 Projected population by broad age group (Stirling Council)**

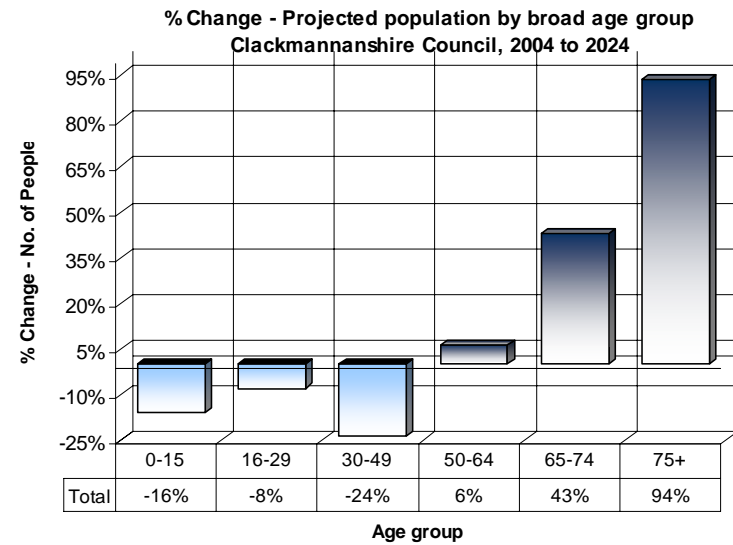
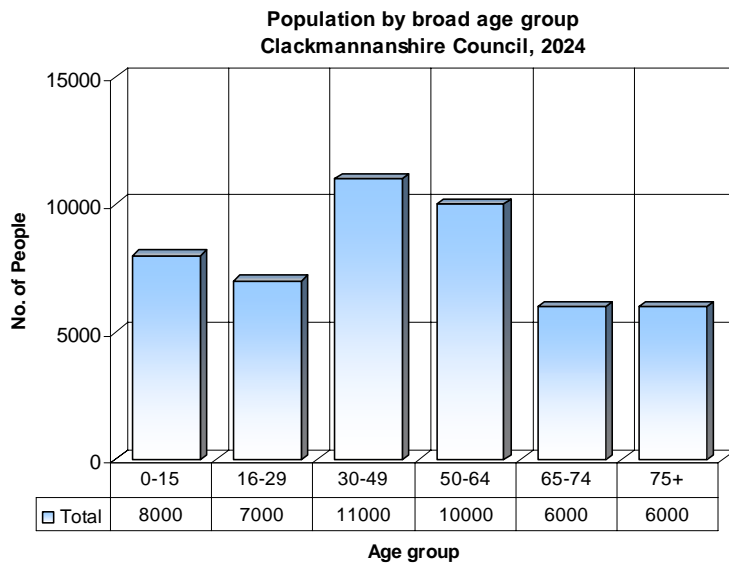
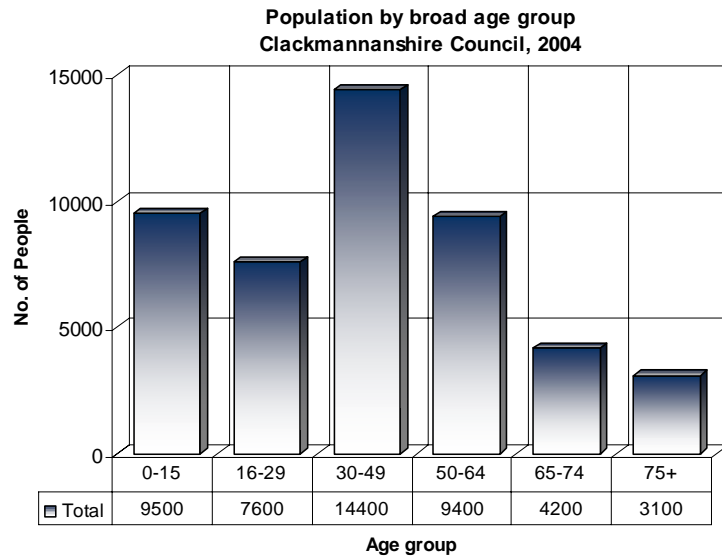


2.2.3 Fig.4 indicates that Stirling has an ageing population with a 66% increase in the number of people aged 75 and over. The number of people aged 65 to 74 is projected to increase by 27% over the same period (2004 to 2024). The increase in the population within four of the age groups will also be due to a degree of in-migration from other local authorities.

2.2.4 There is a corresponding decrease in the number of people in the younger age groups. The number of people aged 0 to 15 is projected to decline by 5%, with a 14% reduction in the number of people aged 30 to 49.

2.2.5 Significantly however the number of people aged 16 to 29 is projected to increase by 6% (900 people). This is likely to be a result of people in the 0-15 age group ageing over the period.

**Fig.5 Projected population by broad age group (Clackmannanshire Council)**



2.2.6 The projections show that Clackmannanshire has an ageing population with a 94% increase in the number of people aged 75 and over. The number of people aged 65 to 74 is projected to increase by 43% over the same period (2004 to 2024).

2.2.7 The projections indicate that Clackmannanshire will experience a considerable reduction in the number of people in the younger age groups. The number of people aged 0 to 15 is projected to decline by 16%, 16 to 29 year olds by 8% and 30 to 49 year olds by 24%.

2.2.8 The trend towards an ageing population is emphasised in Clackmannanshire.

## 2.3 Conclusions

- Stirling's population is projected to continue to increase although growth is at a lower rate than anticipated by the 2002 projections
- Clackmannanshire population is forecast to decline although there are indications that this decline is slowing particularly in the last few years.
- Both Council's have an ageing population and a decline in the younger age groups but this trend is accentuated in Clackmannanshire.
- There is a projected significant decrease in the economically active age group 16-49 in Clackmannanshire and both areas have a projected decrease in school age pupils.
- Other areas of Scotland are forecast to experience significantly higher rates of growth than anticipated in Clackmannanshire and Stirling.

2.3.1 The above conclusions highlight a number of issues which this current review of the plan will consider. Stability or growth along with balance in any population are generally preferred to decline and a focus on any particular age group. One issue for the plan to consider will be if and how forecast population decline in Clackmannanshire might be addressed. This will include consideration of the implications of significant forecast population growth in other areas such as Fife.

2.3.2 The age structure of the population has implications for future house types to meet the needs of an ageing population (perhaps signaling increasing emphasis on whole life or barrier free housing). It also has implications for health provision, nursery education and schools capacity as well as economic participation and activity.



# CLACKMANNANSHIRE & STIRLING STRUCTURE PLAN 3RD ALTERATION

Households





## 3.0 Households

### 3.1 Introduction

3.1.1 The Scottish Executive's Housing Projections allow Councils to estimate the likely future housing requirements in their area. They also enable some indication of the range and choice of house types and sizes that might be required in the future.

### 3.2 Household Projections 2002

3.2.1 The Scottish Executive produce household projections approximately every two years, in line with the biennial population projections produced by the GRO (Scotland). The projections give an indication of possible future numbers of households if trends identified in past Censuses continue. They are calculated using assumptions about future population growth and patterns of household formation (see Appendix for an explanation of how the Household projections are calculated). Since smaller areas tend to be affected more by migration, projections for these areas tend to be less reliable than those for areas with large populations; especially the further into the future the projections are taken.

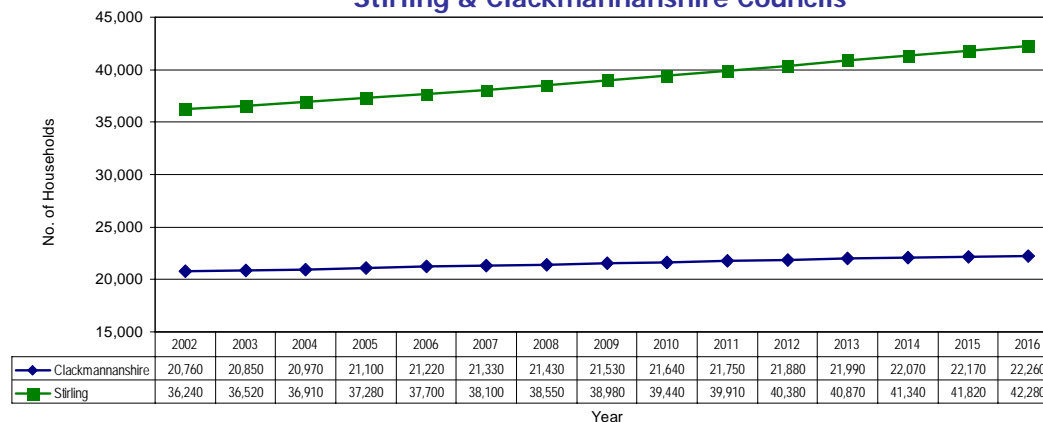
3.2.2 "It should be recognised that household projections, like other projections, may indicate that existing trends and policies are likely to lead to situations which are judged undesirable. If new policies are then introduced they may result in the original projections not being realised. However, this means the projections will have fulfilled one of their prime functions; to show the consequences of present trends with sufficient notice for any necessary action to be taken."

*Scottish Executive Methodology for 2002-Based Household Projections for Scotland*

3.2.3 Updated projections for a 2004 base year are anticipated in April 2006. The housing need requirement will be updated to reflect these more up to date figures before the consultative draft plan is published. Higher than expected population estimates indicate that the updated projections may be slightly higher than anticipated.

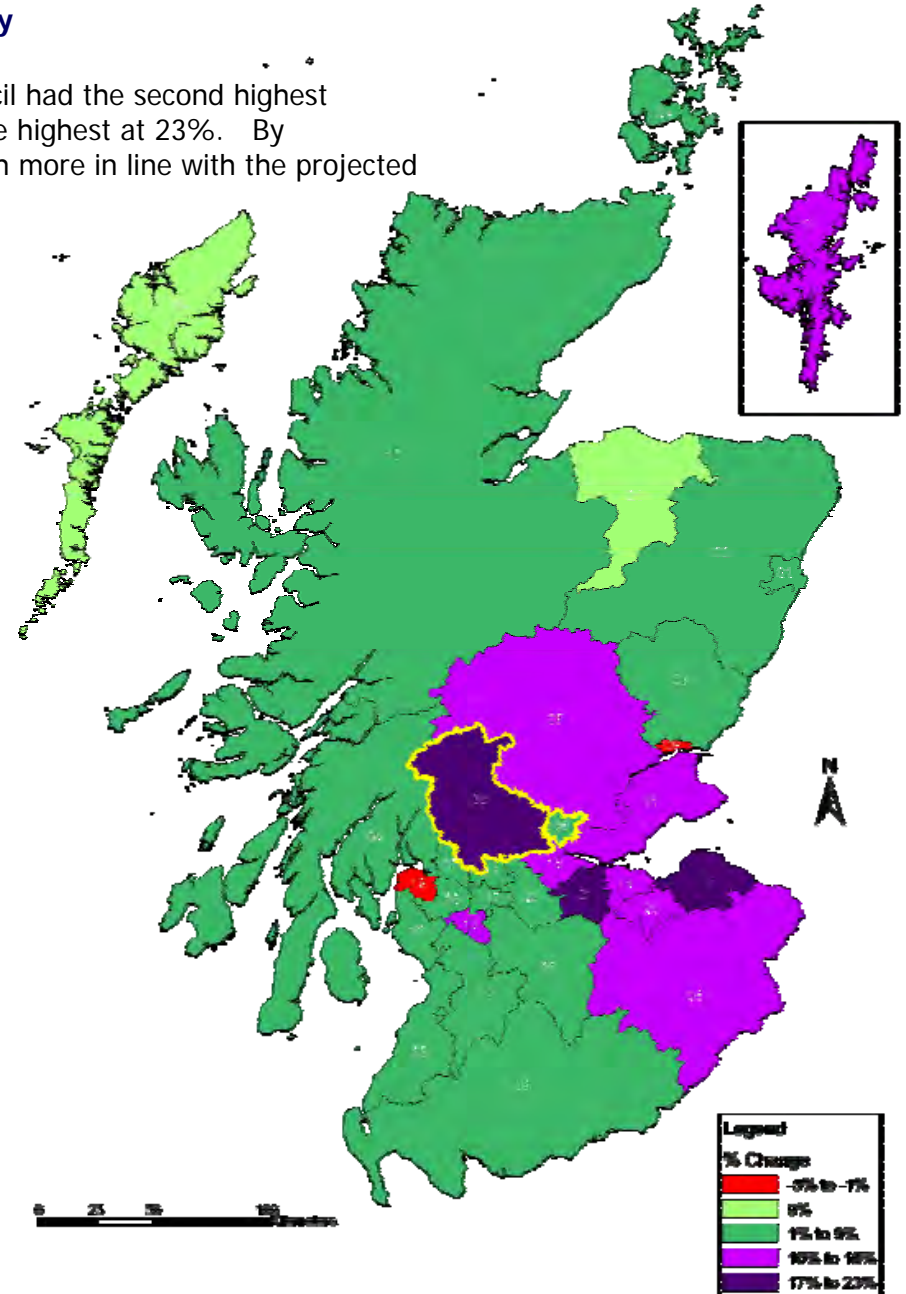
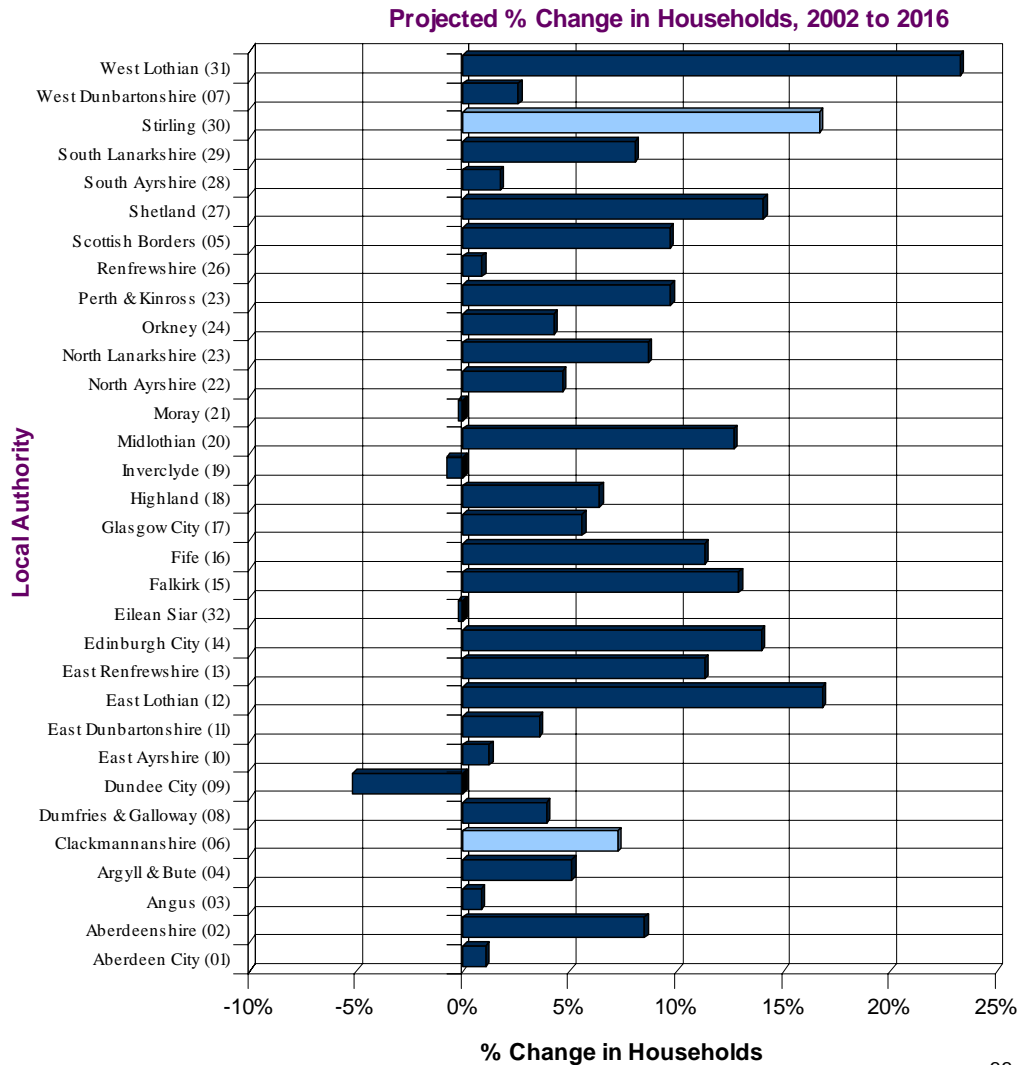
3.2.4 Fig.6 shows that the number of households in Stirling Council was projected to increase by 17% between 2002 and 2016, from 36,200 to 42,200 households. This is a higher rate of growth than predicted through the current Structure plan which is based on 1998 projections. The number of households in Clackmannanshire was projected to increase by 7% from 20,760 to 22,260 (Fig.6).

**Fig. 6 Projected Number of Households 2002 to 2016  
Stirling & Clackmannanshire Councils**



**Fig.7 Projected Change in Households, 2002 to 2016 by Local Authority**

3.2.5 Fig.7 indicates that of the 32 Local Authorities in Scotland, Stirling Council had the second highest projected increase in households (equal to East Lothian). West Lothian had the highest at 23%. By comparison, Clackmannanshire is projected to experience a lower rate of growth more in line with the projected growth forecast overall in Scotland (7%).



3.3.1 Tables 1 and 2 illustrate how the GRO (housing need) target for Clackmannanshire and Stirling is calculated up to 2025 to derive the target figures shown in Table 3. Programmed demolitions from the regeneration areas (720 for Stirling and 500 for Clackmannanshire) are added to the totals in column 1.

**Table 1: Clackmannanshire Council Housing Needs Assessment 2003 to 2025**

1. Year	2. Household Projections (Actual)*	3. Household Projections (Trend Extrapolation)**	4. Vacancies	5. Other Non-effective Stock	6. Conversions & Demolitions (Net loss of Stock)	7. Housing Stock	8. Assessed Housing Need
2002	20,760	20,760	0	0	0	0	0
2003	20,850	20,850	667	42	3	21,682	-120
2004	20,970	20,970	671	42	6	21,682	7
2005	21,100	21,100	675	42	9	21,682	144
2006	21,220	21,220	679	42	12	21,682	271
2007	21,330	21,330	683	43	15	21,682	388
2008	21,430	21,430	686	43	18	21,682	495
2009	21,530	21,530	689	43	21	21,682	601
2010	21,640	21,640	692	43	24	21,682	718
2011	21,750	21,750	696	44	27	21,682	835
2012	21,880	21,880	700	44	30	21,682	972
2013	21,990	21,990	704	44	33	21,682	1,089
2014	22,070	22,070	706	44	36	21,682	1,174
2015	22,170	22,170	709	44	39	21,682	1,281
2016	22,260	22,260	712	45	42	21,682	1,377
2017		22,402	717	45	45	21,682	1,526
2018		22,511	720	45	48	21,682	1,642
2019		22,620	724	45	51	21,682	1,758
2020		22,729	727	45	54	21,682	1,873
2021		22,838	731	46	57	21,682	1,989
2022		22,947	734	46	60	21,682	2,105
2023		23,056	738	46	63	21,682	2,220
2024		23,164	741	46	66	21,682	2,336
2025		23,273	745	47	69	21,682	2,452

\* Scottish Executive 2002 based household projections

\*\* The Scottish Executive projections only extend to 2016.

2. Scottish Executive 2002 based household projections

3. Trend extrapolation of household projections

4. Census 2001 - Table UV53 Housing stock. Vacancy rate of 3.2% (household spaces)

5. Census 2001 - Table UV53 Housing Stock. Second residence/holiday accommodation, 0.2% (household spaces). The 2001 Census students at their term time address, whereas the 1991 Census counted students at their home address.

6. Local authority 'Stock 4' Scottish Executive quarterly return.

7. No. of dwellings on the Council Tax Register at 2/9/03. Scottish Executive Statistical Bulletin HSG/2003/6. Excludes a projection of ho

8. 2003 to 2025

Households

# Households

**Table 2: Stirling Council Housing Needs Assessment 2003 to 2025**

1. Year	2. Household Projections (Actual)*	3. Household Projections (Trend Extrapolation)**	4. Vacancies	5. Other Non-effective Stock	6. Conversions & Demolitions	7. Housing Stock	8. Assessed Housing Need
2002	36,240	36,240	0	0	0	0	0
2003	36,520	36,520	1,023	511	10	37,566	498
2004	36,910	36,910	1,033	517	20	37,566	914
2005	37,280	37,280	1,044	522	30	37,566	1,310
2006	37,700	37,700	1,056	528	40	37,566	1,757
2007	38,100	38,100	1,067	533	50	37,566	2,184
2008	38,550	38,550	1,079	540	60	37,566	2,663
2009	38,980	38,980	1,091	546	70	37,566	3,121
2010	39,440	39,440	1,104	552	80	37,566	3,610
2011	39,910	39,910	1,117	559	90	37,566	4,110
2012	40,380	40,380	1,131	565	100	37,566	4,610
2013	40,870	40,870	1,144	572	110	37,566	5,131
2014	41,340	41,340	1,158	579	120	37,566	5,630
2015	41,820	41,820	1,171	585	130	37,566	6,140
2016	42,280	42,280	1,184	592	140	37,566	6,630
2017		42,606	1,193	596	150	37,566	6,980
2018		43,046	1,205	603	160	37,566	7,448
2019		43,486	1,218	609	170	37,566	7,916
2020		43,926	1,230	615	180	37,566	8,385
2021		44,365	1,242	621	190	37,566	8,853
2022		44,805	1,255	627	200	37,566	9,321
2023		45,245	1,267	633	210	37,566	9,789
2024		45,685	1,279	640	220	37,566	10,258
2025		46,125	1,291	646	230	37,566	10,726

\* Scottish Executive 2002 based household projections

\*\* The Scottish Executive projections only extend to 2016.

2. Scottish Executive 2002 based household projections

3. Trend extrapolation of household projections

4. Census 2001 - Table UV53 Housing stock. Vacancy rate of 2.8% (household spaces)

5. Census 2001 - Table UV53 Housing Stock. Second residence/holiday accommodation, 1.4% (household spaces). The 2001 Census students at their term time address, whereas the 1991 Census counted students at their home address.

6. Local authority 'Stock 4' Scottish Executive quarterly return. Uniform monitoring from June 2001 for private residential.

7. No. of dwellings on the Council Tax Register at 2/9/03.

8. 2003 to 2025

### 3.3 Calculating the Housing Land Requirement

3.3.2 Table 3 shows how the future housing land requirement is calculated. This takes account of all the land that is currently planned for (with planning consent or in the development plan), flexibility (15%), and housing that is reasonably expected to come forward in the existing urban area. A separate urban capacity study has been produced “Stirling and Clackmannanshire Urban Capacity Study 2005” and this indicates the majority of the housing indicated in column seven below. Separate allowance has been made for new development in regeneration areas and windfall development on small sites.

3.3.3 The calculation indicates that a large proportion of the areas future housing needs is already planned for or could be accommodated on land which can reasonably be expected to come forward in the period up to 2025. Taking this into account the lower rate of growth in Clackmannanshire indicates more land is available than may actually be required (a surplus of 2048, assuming current trends continue). In Stirling however which is projected to experience continued higher rates of growth there is however a significant shortfall (column 8, 3375). Table 3 indicates that if the additional capacity in Clackmannanshire were utilised then the total shortfall in the Structure Plan area (for new greenfield land) would be circa 1800 units.

Households

**Table 3: Structure Plan Housing Land requirement: 2005 - 2025**

	(1) GRO Housing Need target to 2025	(2) Completions & Programmed Effective Land supply - 2004/5 – 2008/9	(3) Potential supply (Remaining Est Land Supply) - 2008/9 – 2017 + MGA	(4) 1 – (2+3)	(5) Flexibility : Add 15% of (4)	(6) Total Land requirement: (4)+(5)	(7) Estimated potential future windfall	(8) New greenfield requirement in Local Plans: (6) – (7)
Stirling	11446	2469	2978	5999	900	6899	3524	3375
Clacks	2952	2189	744	19	3	22	2070	-2048
Total	14398	4658	3722	6018	903	6921	5594	1327

The housing land requirement (expressed in terms of numbers of dwellings to be accommodated) is calculated as follows:

Housing need target @ 2025 (from GRO) Plus programmed demolitions (Column 1 )

**Minus** Identified/Programmed land supply (Columns 2 and 3) = Calculated need @ 2025 (Column 4)

**Plus** Flexibility at 15% (Column 5) = Total Land Requirement (Column 6)

**Minus** assumed contribution from urban capacity and small sites plus contribution from regeneration areas (Column 7)

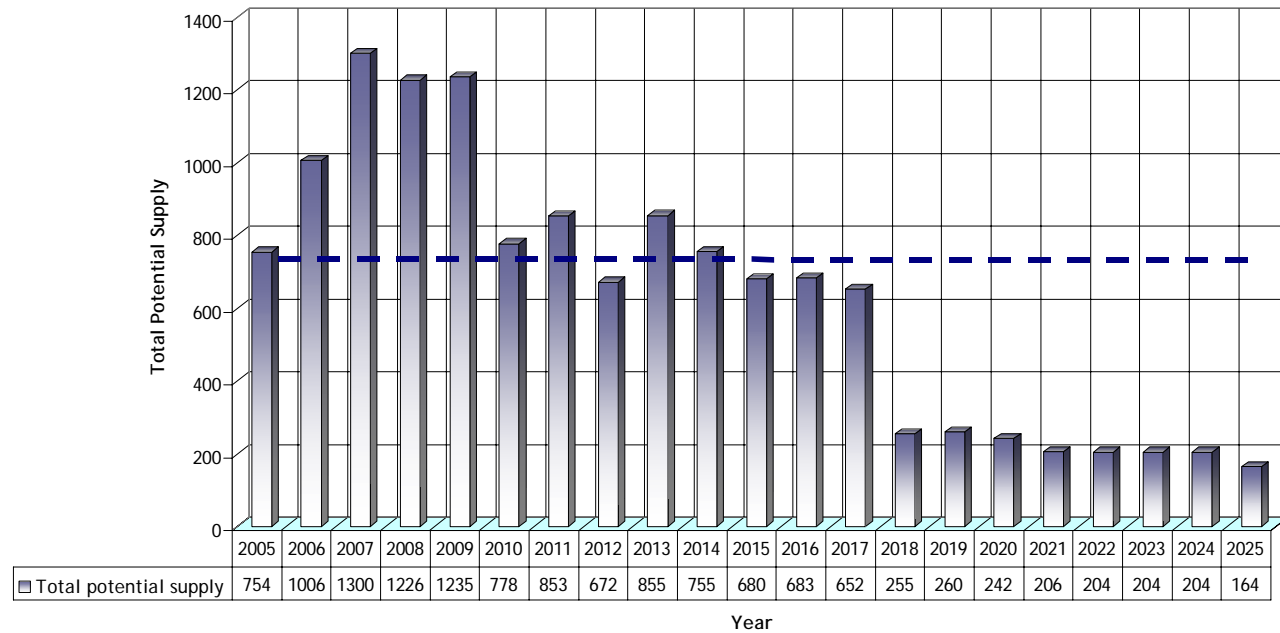
**= Additional Housing Land Requirement** (Column 8)

The Clackmannanshire additional land requirement results in a negative figure because there is a higher level of urban capacity/windfall than would be required to meet projected needs. If this surplus is combined with the shortfall for Stirling this indicates a:

**Total potential shortfall for the Structure Plan Area of 1327 (Column 8).**

3.3.4 In seeking to maintain a long term supply of housing land in accordance with Scottish Planning Policy on Housing, the timing of delivery is important. Most if not all of the land indicated in columns 2 and 3 of Fig 8 including Stirling's Major Growth Area (2500) houses is expected to be built out by 2017. A proportion of the land in column 7 will also be delivered in this time frame but some of this will feed into the longer term supply of land. Fig 8 shows the existing land supply in the context of the total land requirement up to 2025. This indicates that a 12 year land supply could be maintained and that shortfalls only arise towards the later years of the Plan period. The dotted line represents average completions which would be needed to achieve the full requirement.

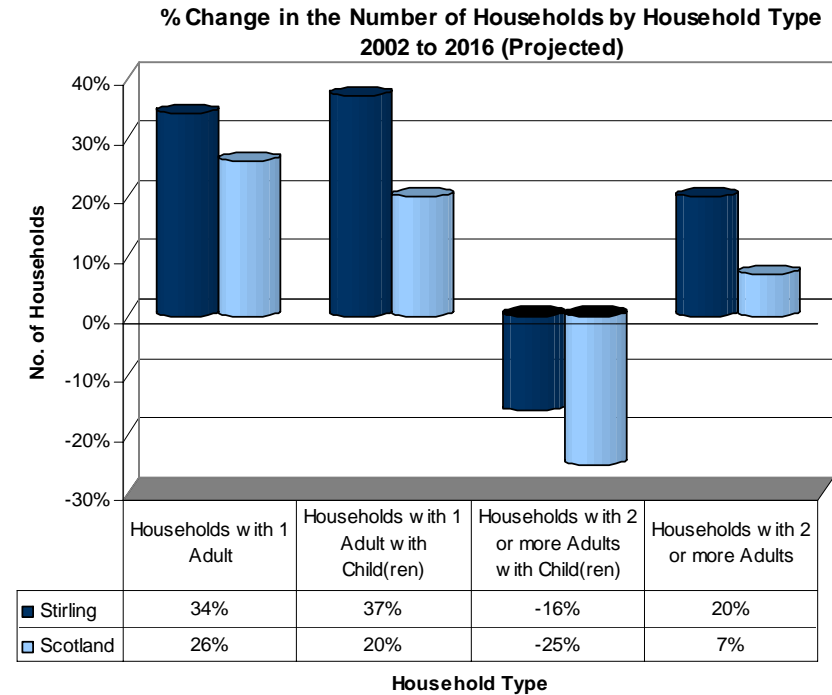
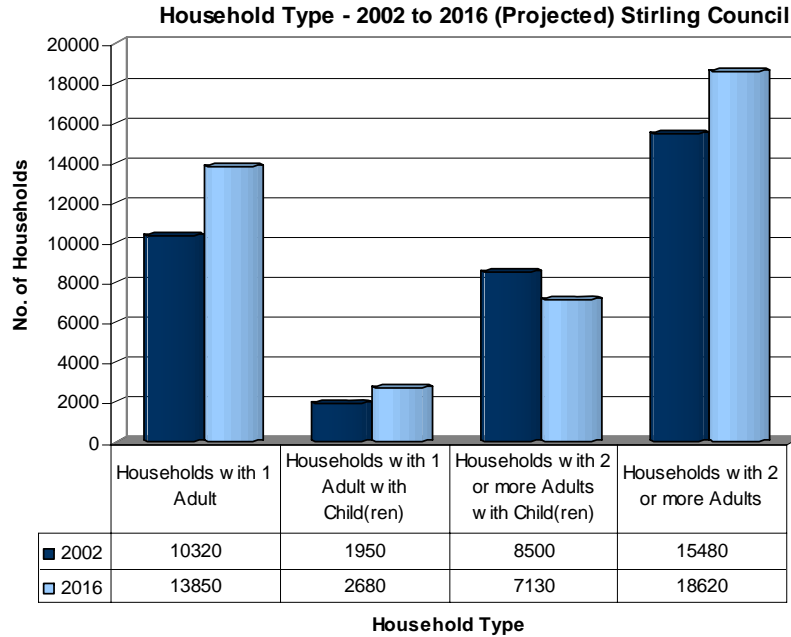
**Fig. 8: Housing Land Supply- Structure Plan Period**



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### 3.4 Household Type

Fig.9 Household Type – Stirling Council

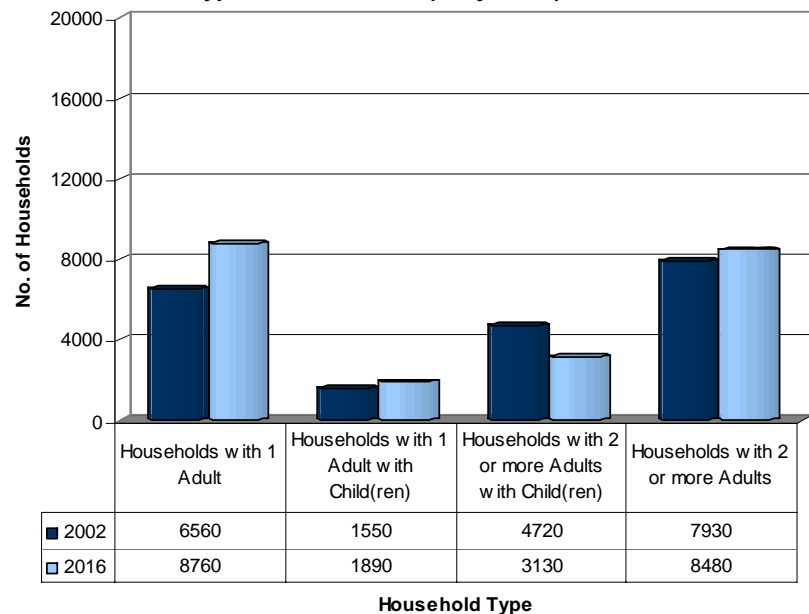


3.4.1 The number of *Households with 1 Adult* was projected to increase by 34% in Stirling by 2016. This compares to a 26% increase for Scotland.

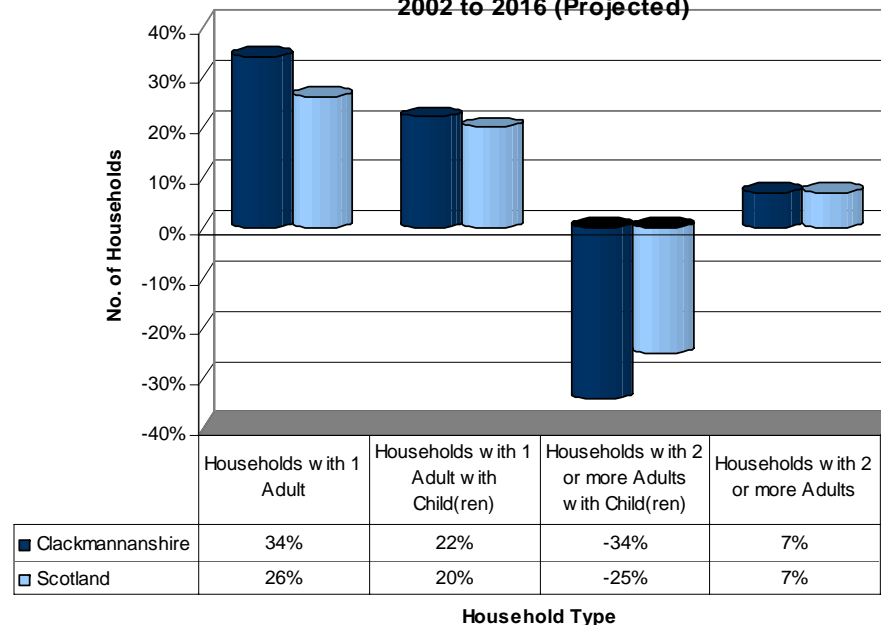
3.4.2 The number of Households with 2 or more Adults with Child(ren) was expected to decrease by 1,370 households (-16%) over the same period.

**Fig.10 Household Type – Clackmannanshire Council**

**Household Type - 2002 to 2016 (Projected) Clackmannanshire Council**



**% Change in the Number of Households by Household Type 2002 to 2016 (Projected)**



3.4.3 Within Clackmannanshire Council, the number of *Households with 1 Adult* will increase by 2,200 households (34%) by 2016.

3.4.4 The number of Households with 2 or more Adults with Child(ren) will decrease by 550 households (-34%) over the same period.

### 3.5 Conclusions

- Analysis of the Scottish Executive Household projections indicates continued growth in the number of households in the Structure Plan area, above that predicted in the current Plan.
- Clackmannanshire is projected to experience lower rates of growth whilst Stirling continues to experience one of the highest rates of growth in Scotland.
- The programmed land supply along with anticipated windfall and urban capacity is expected to deliver an adequate 12 year housing land supply in the context of current GRO projections.
- Assuming current trends continue there is anticipated to be a shortfall in the longer term supply of housing land in the Structure Plan area of around 1300 units.
- There is a continued trend towards smaller households.

3.5.1 The key issue for this structure plan review will be the approach to accommodating revised household growth assumptions. The GRO projections do indicate higher rates of growth than anticipated through the Structure Plan in 2002. The majority of this growth will however be generated in the Stirling Council area. Analysis of the existing land supply and urban capacity indicates that assuming current trends additional land release may not be required until the latter stages of the plan period. In demonstrating a 12 year land supply significantly greater emphasis than previously adopted is placed on urban capacity and this is an issue which will be subject to consultation.

3.5.2 The above analysis assumes current trends based on the GRO projections should continue but reference to the previous section on population indicates that this will not address the trend towards population decline in Clackmannanshire. This issue will need to be addressed along with the relative split in housing numbers between the two areas and the approach to be taken to the longer term greenfield requirement. This should be set in the context of projections which by their nature become increasingly uncertain towards the latter stages of the plan period.



# CLACKMANNANSHIRE & STIRLING STRUCTURE PLAN 3RD ALTERATION

Migration





## 4.0 Migration

### 4.1 Introduction

4.1.1 The movement of households within and between Council areas has a significant bearing in planning for new housing provision. Housing planning has traditionally reflected defined housing market areas. Scottish Planning Policy on housing (SPP3) states that housing land requirements should be met within market areas in the context of a sustainable settlement strategy. Communities Scotland the national housing agency produced a report entitled "Housing Market Context Statement for Forth Valley" in 2002. This identifies Stirling and Clackmannanshire as a single housing market recognising Clackmannanshire as a sub market of Stirling. A housing market area is essentially a geographic area within which people are willing to search for housing and move.

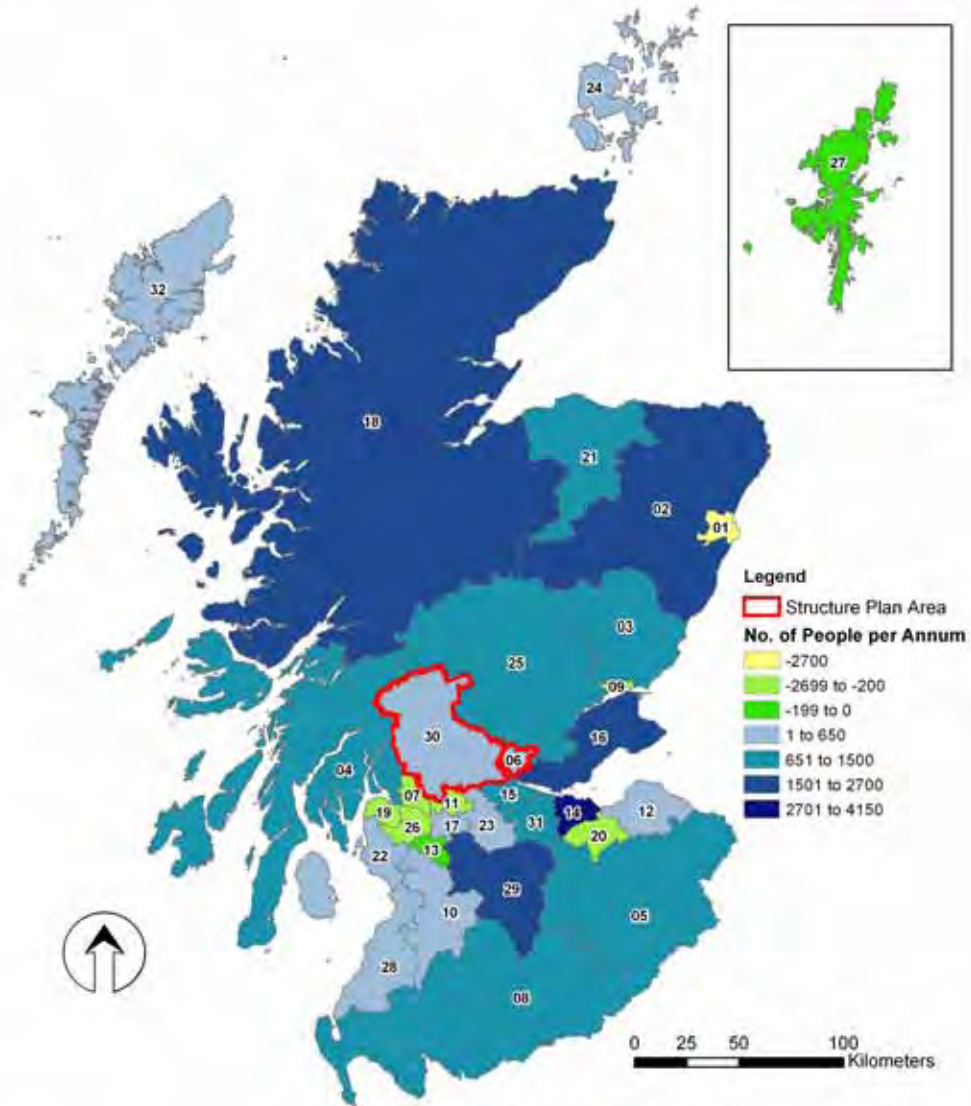
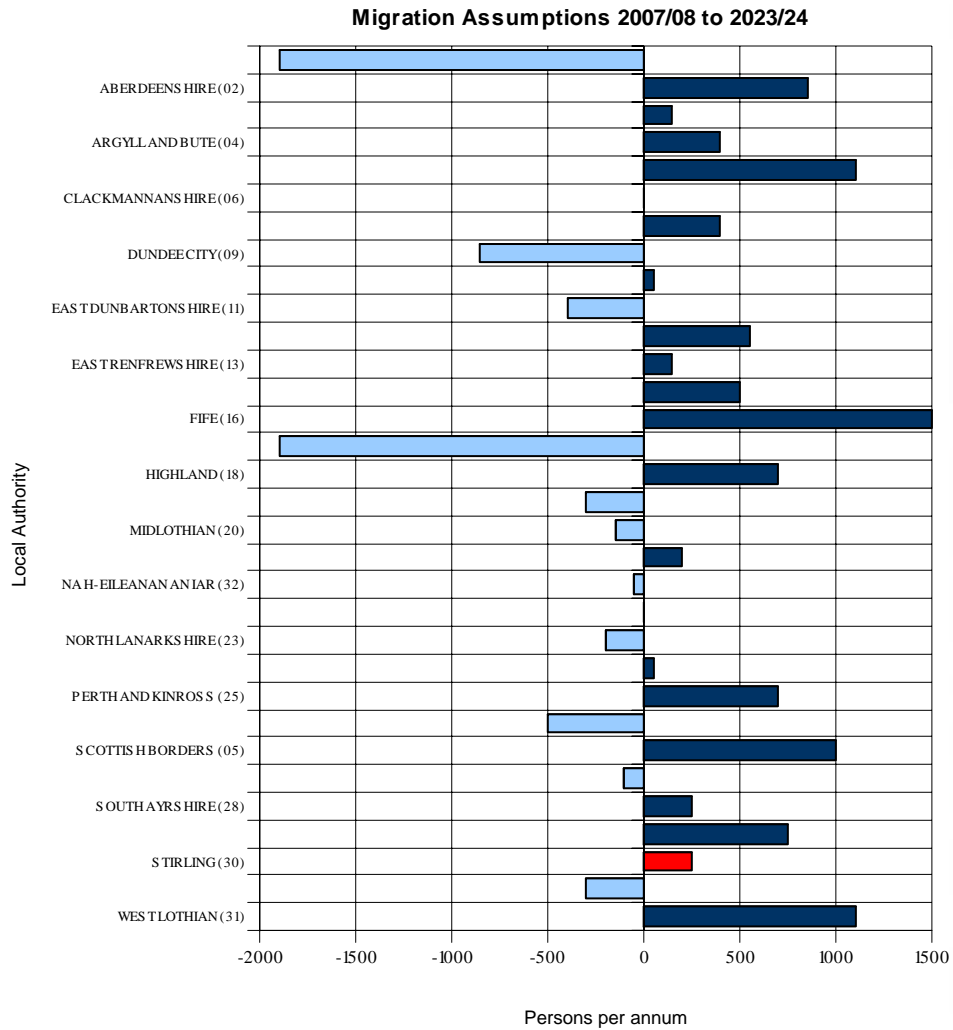
4.1.2 Information derived from the 2001 Census shows the net movements of people within and between Local Authority areas as well as to and from Scotland as a whole. The Register of Sasines records all house moves and enables a more detailed assessment of inward and outward migration.

### 4.2 Migration Assumptions 2001

4.2.1 The 2002 population projections for the Structure Plan area indicated an annual gain of 550 people per year to Stirling through in migration. Fig 11 however indicates that the updated 2004 based projections show this to have halved to 250 people per year. The 2004 projections also signal some change for Clackmannanshire with no net loss of people compared with the 50 people per year loss previously projected.

4.2.2 The 2004 projection show that Edinburgh, Fife and the Borders are now forecast to attract significantly more in migration than had previously expected. These revised figures are likely to have implications for the revised 2004 household projections due in May.

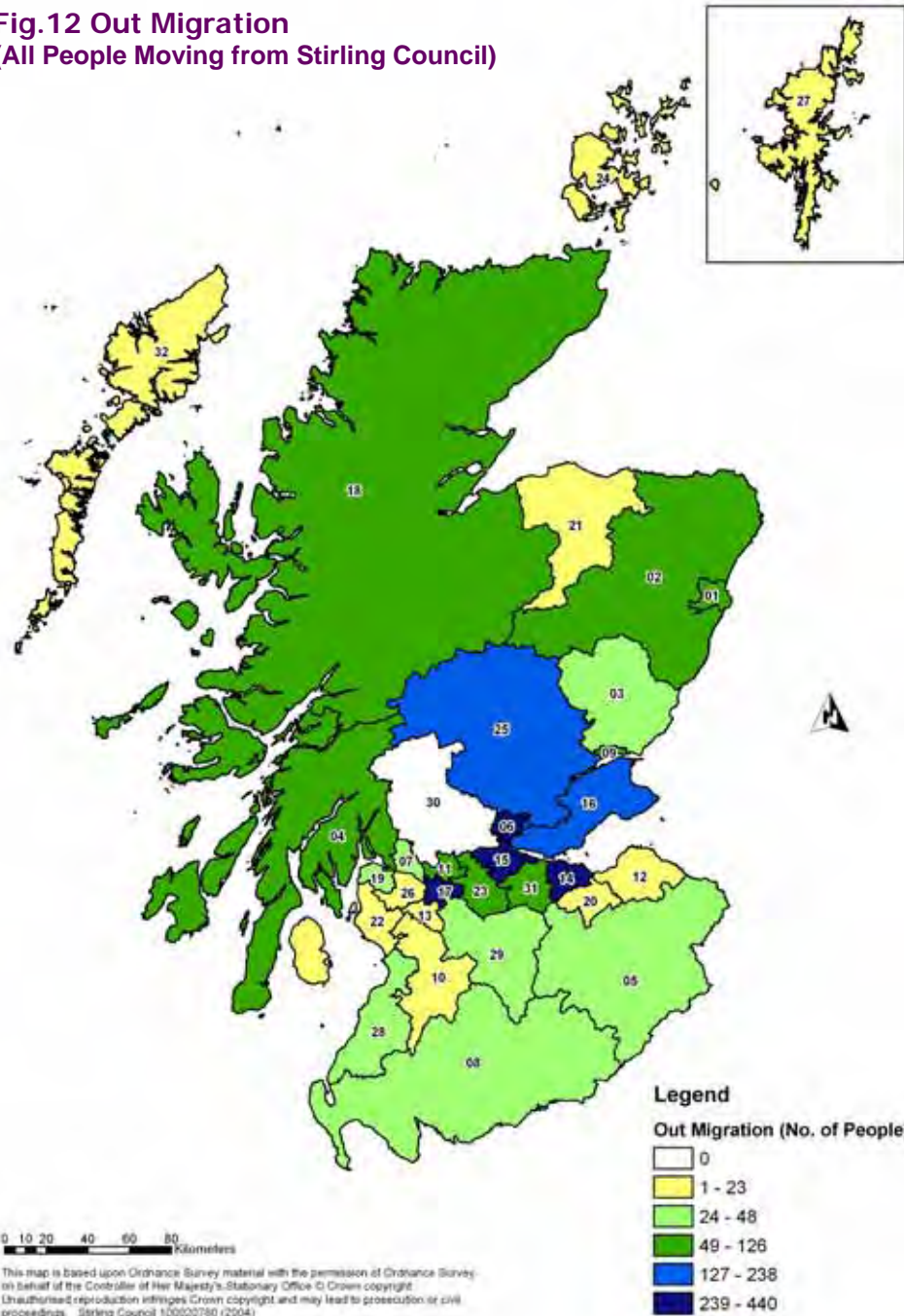
**Fig.11 Migration Assumptions (net), 2004/05 to 2023/2024 By Local Authority**



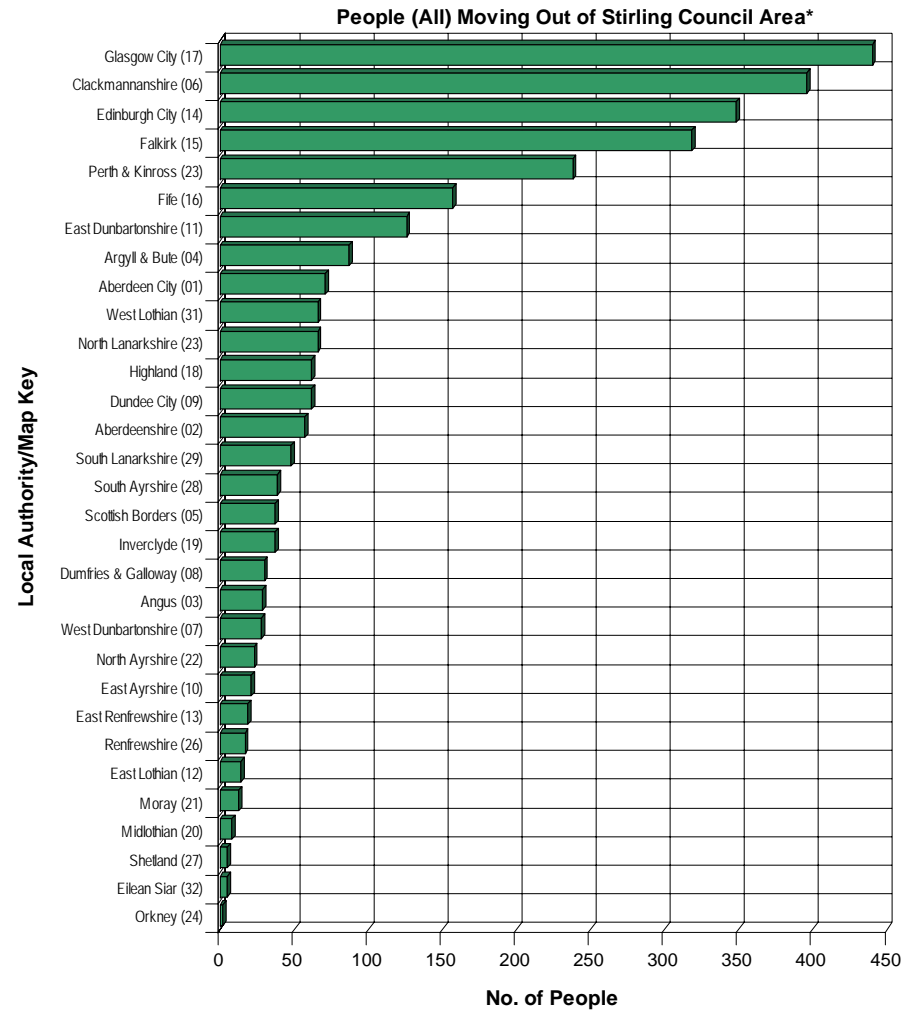
- Net in-migration of 250 people per year in Stirling and net out-migration of 0 people per year in Clackmannanshire between 2007 and 2024.

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**Fig.12 Out Migration  
(All People Moving from Stirling Council)**



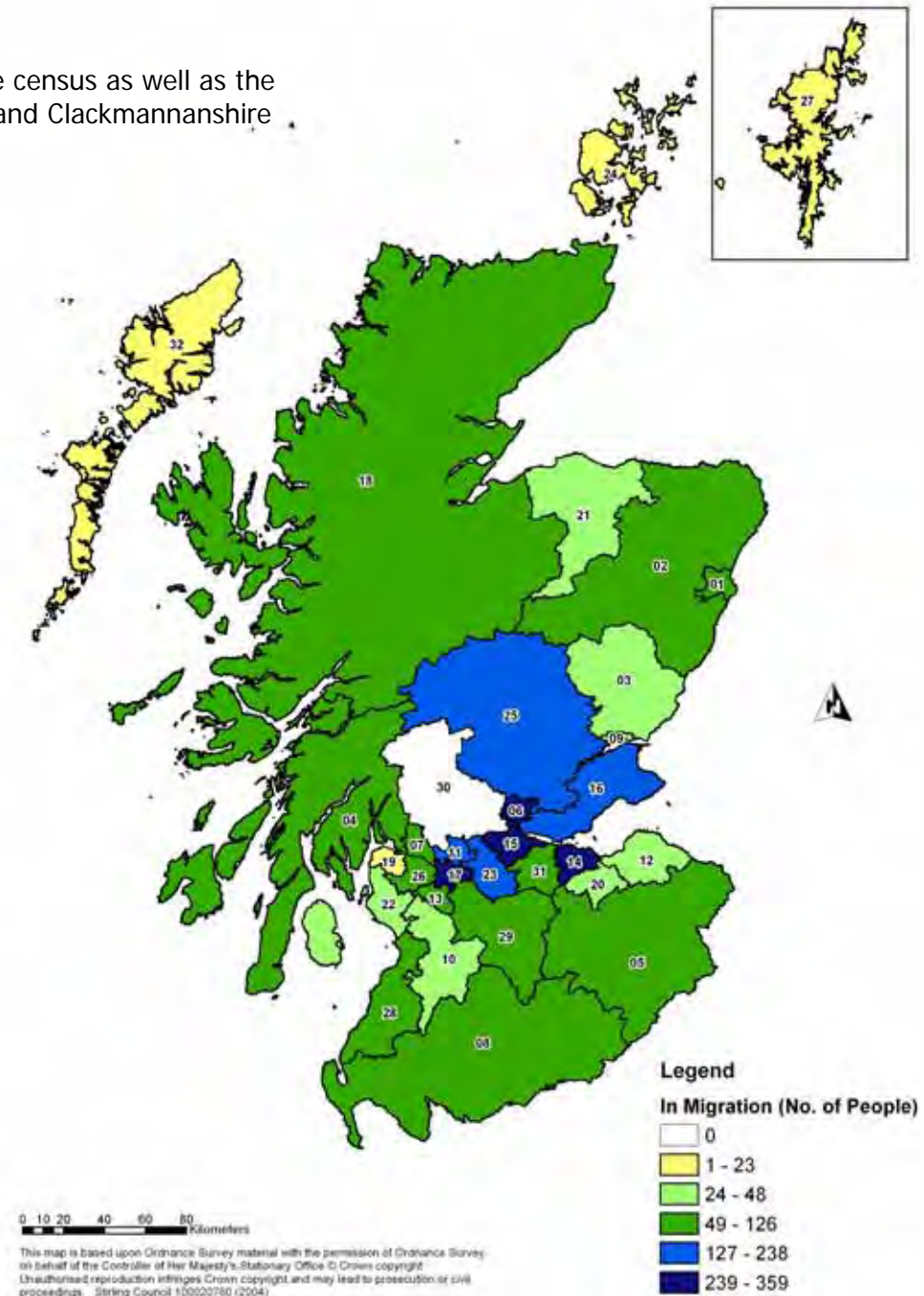
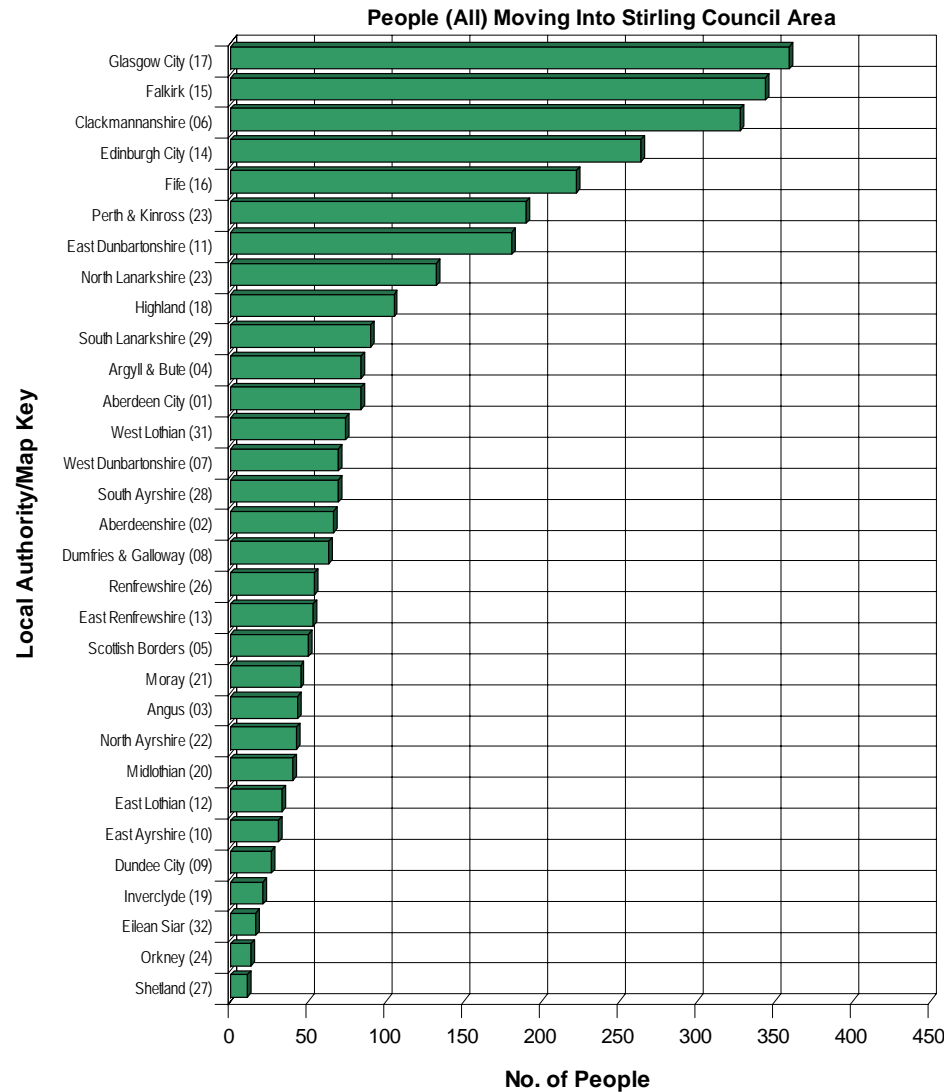
4.2.3 Fig 12 shows the number of people moving out of Stirling the year before the census as well as the destination of their move. This shows the greatest movement to Clackmannanshire (the sub market area) but also significant movements to Glasgow, Edinburgh and Falkirk.



\* All people moving out of Stirling Council area during the year prior to the Census

**Fig.13 In Migration (All People Moving to Stirling Council)**

4.2.4 Fig 13 shows the number of people moving to Stirling the year before the census as well as the origin of their move. This shows the greatest movement from Glasgow, Falkirk and Clackmannanshire (the sub market area).



Source: 2001 Census

**Fig.14 Out Migration (All people moving out of Clackmannanshire)**

4.2.5 Fig 14 shows the strong pull of Stirling, Glasgow, Perth and Fife for residents in Clackmannanshire who are looking for a house. Fig 15 however shows that Clackmannanshire also attracts new residents from these areas. There was in fact a net loss of people to Perth and Kinross and Glasgow.

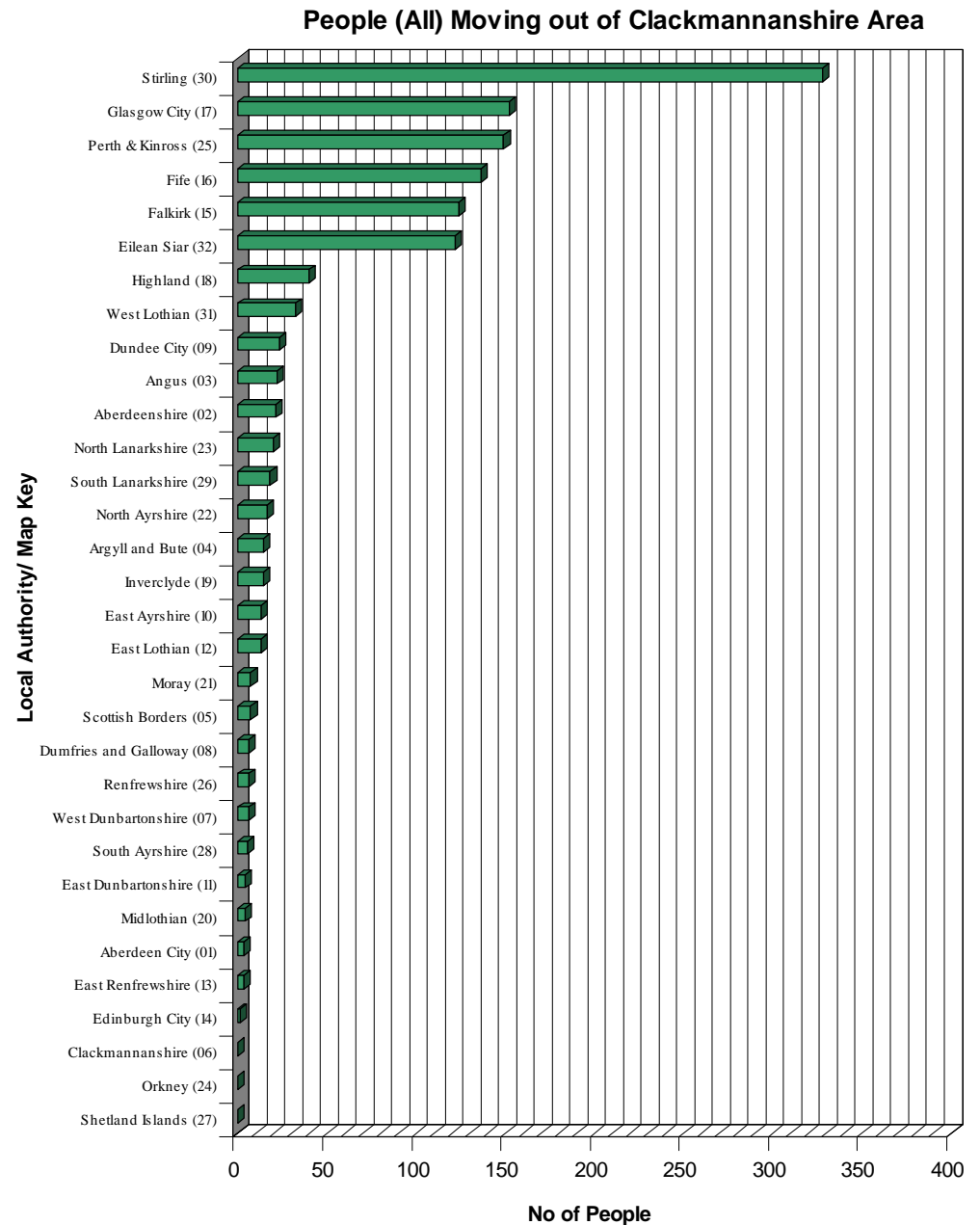
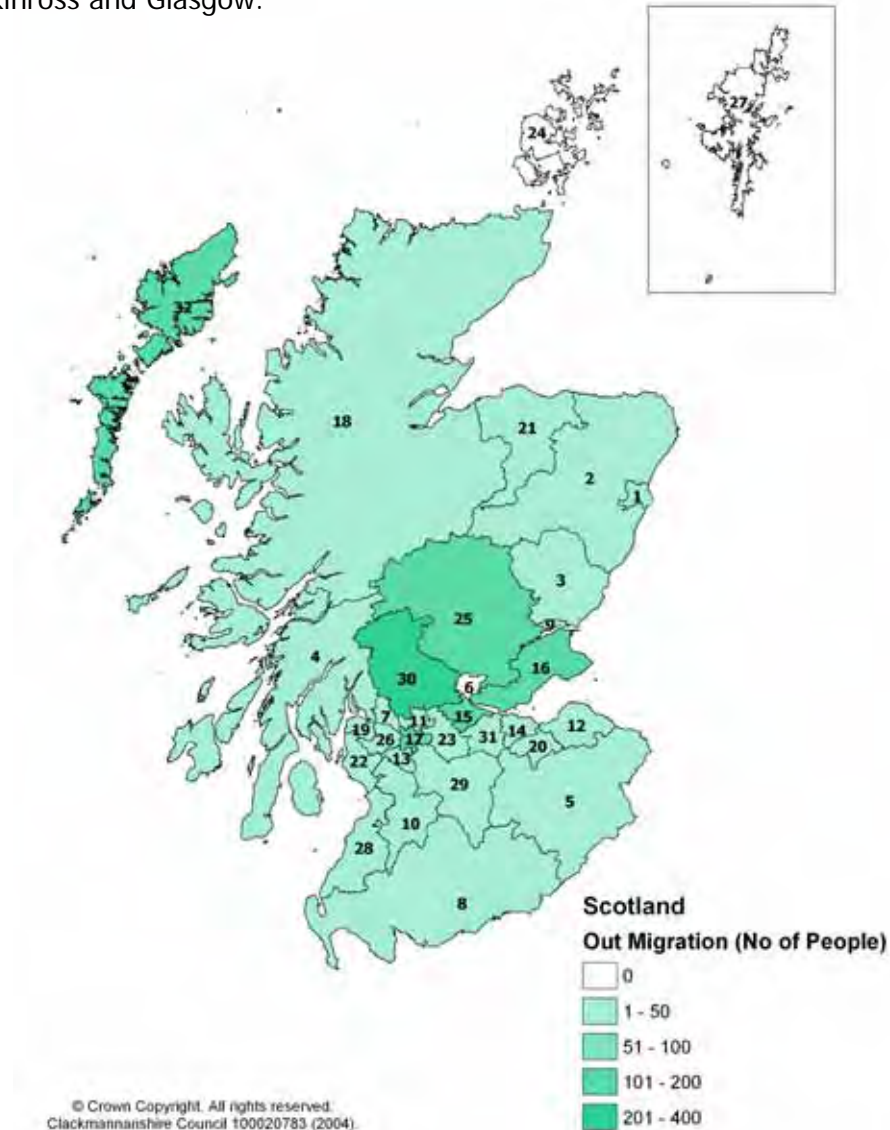
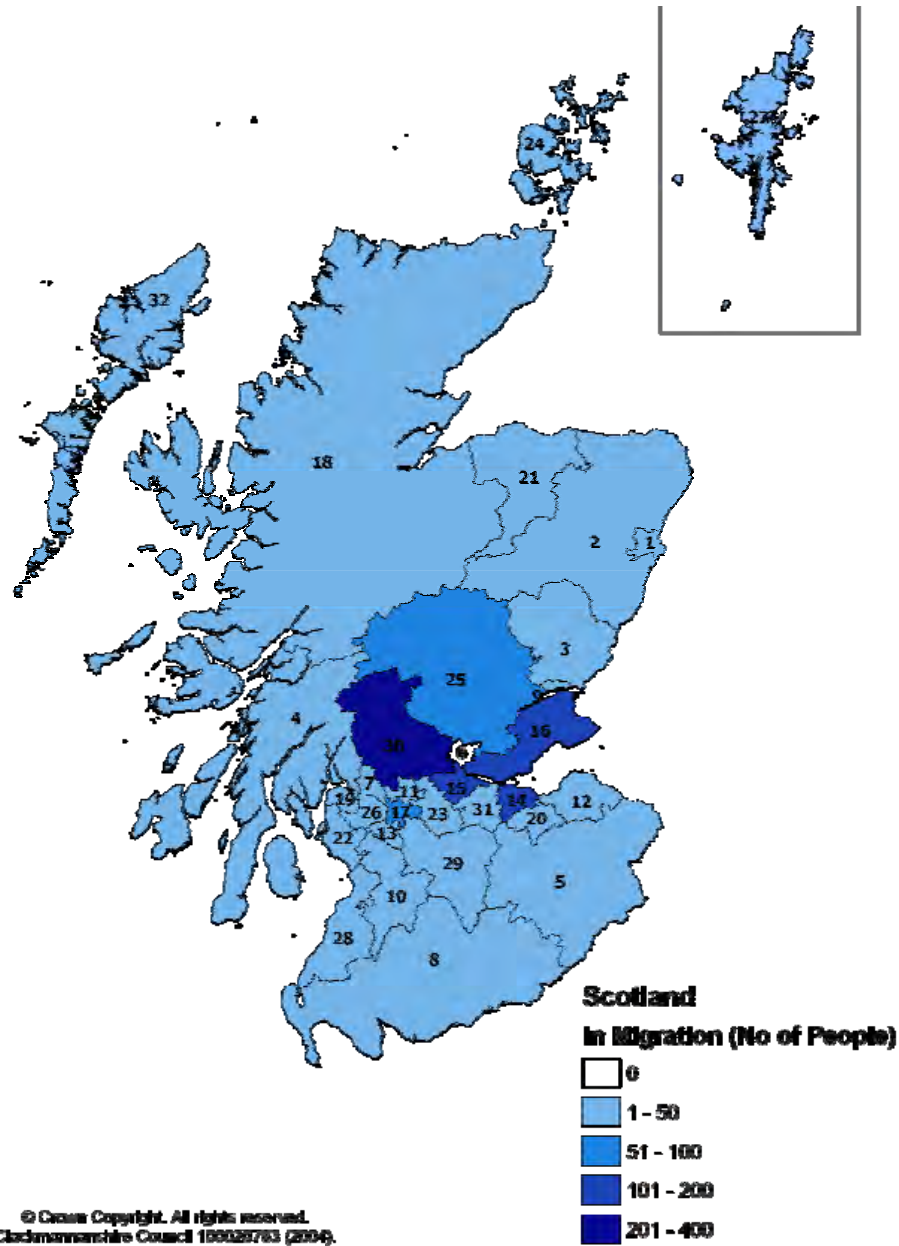
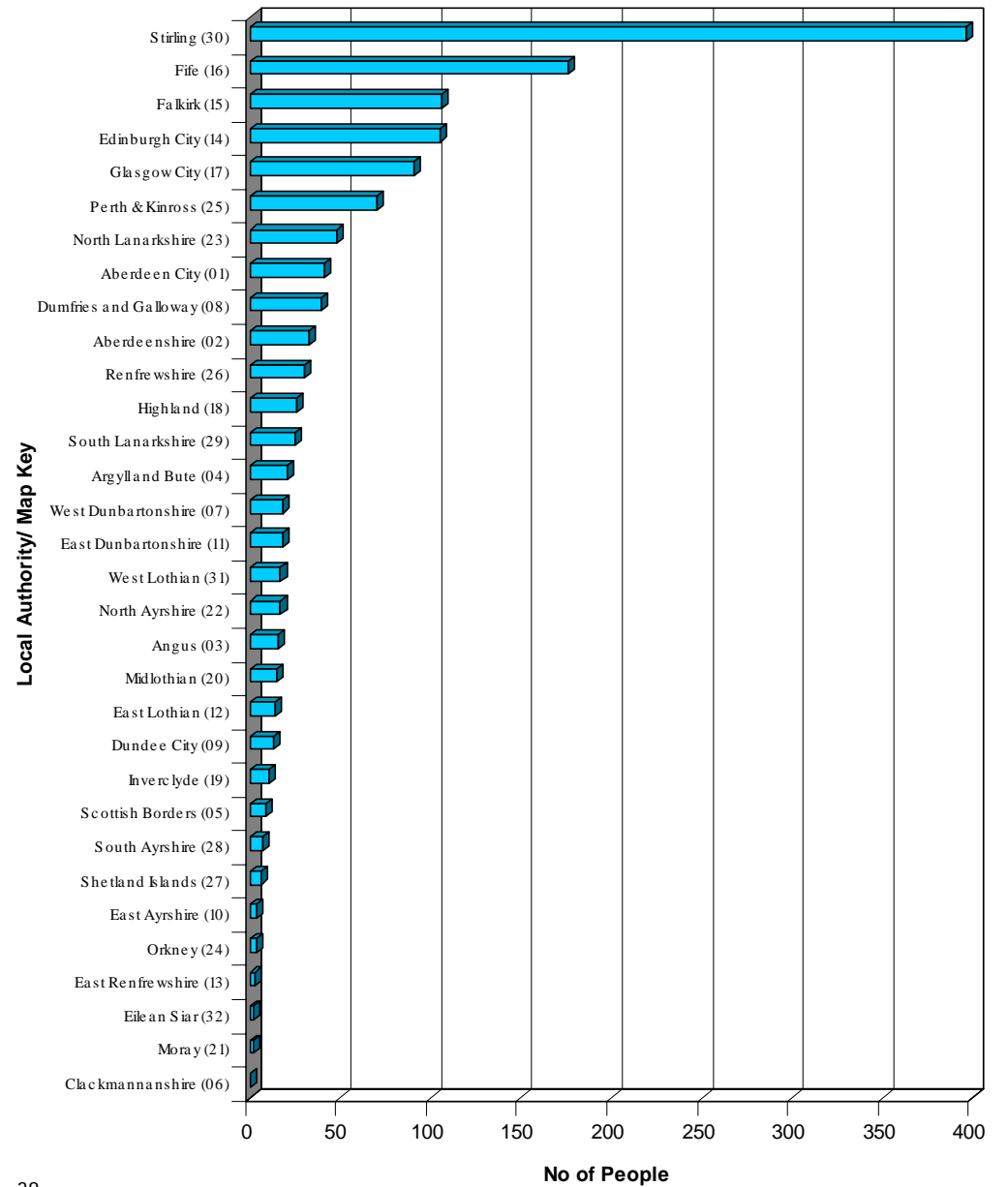


Fig.15 In Migration (All people moving to Clackmannanshire)

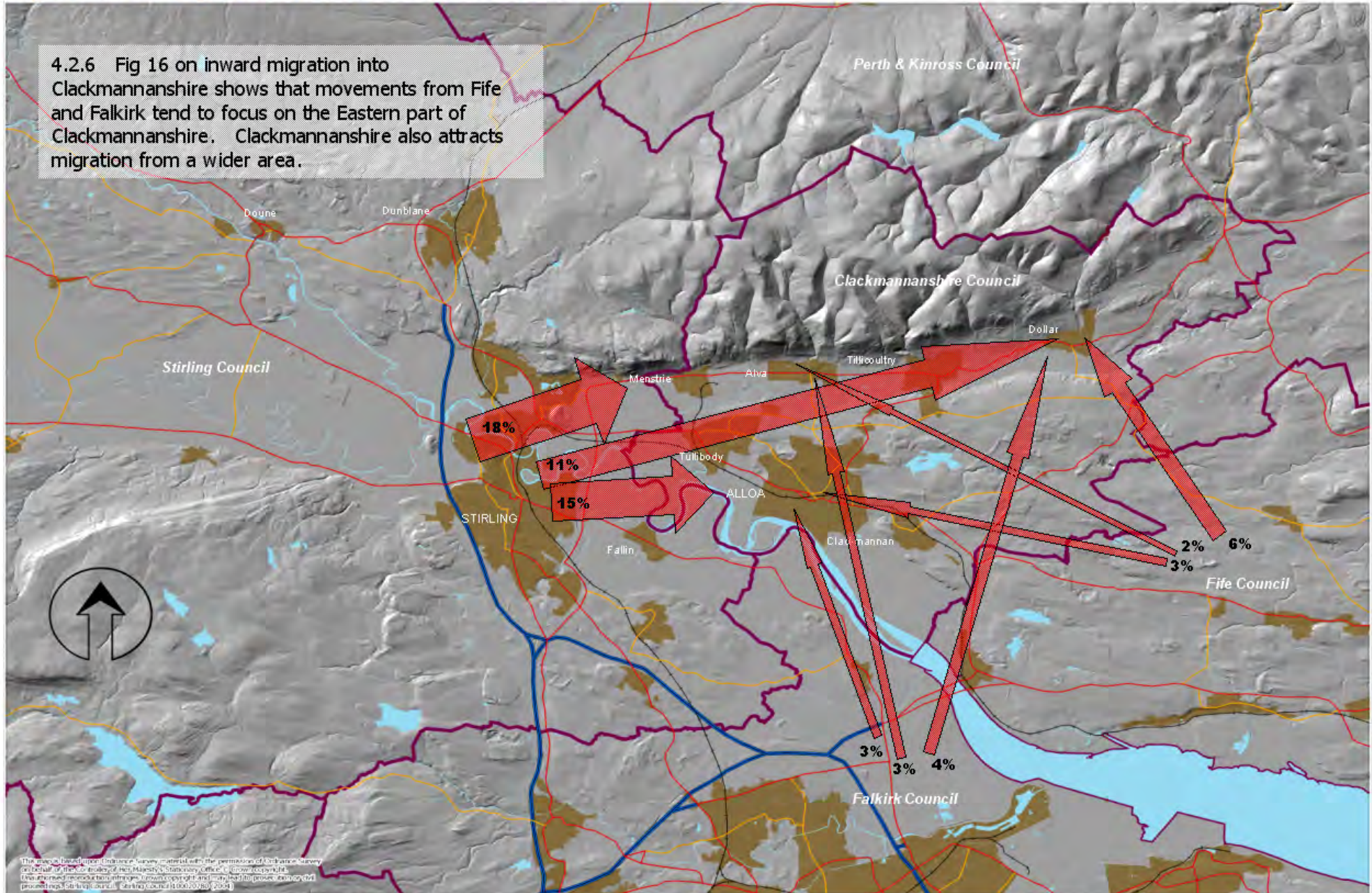


People (All) Moving into Clackmannanshire Area



**Fig.16 Inward Migration to Clackmannanshire Council – 2000 to 2004**

4.2.6 Fig 16 on inward migration into Clackmannanshire shows that movements from Fife and Falkirk tend to focus on the Eastern part of Clackmannanshire. Clackmannanshire also attracts migration from a wider area.

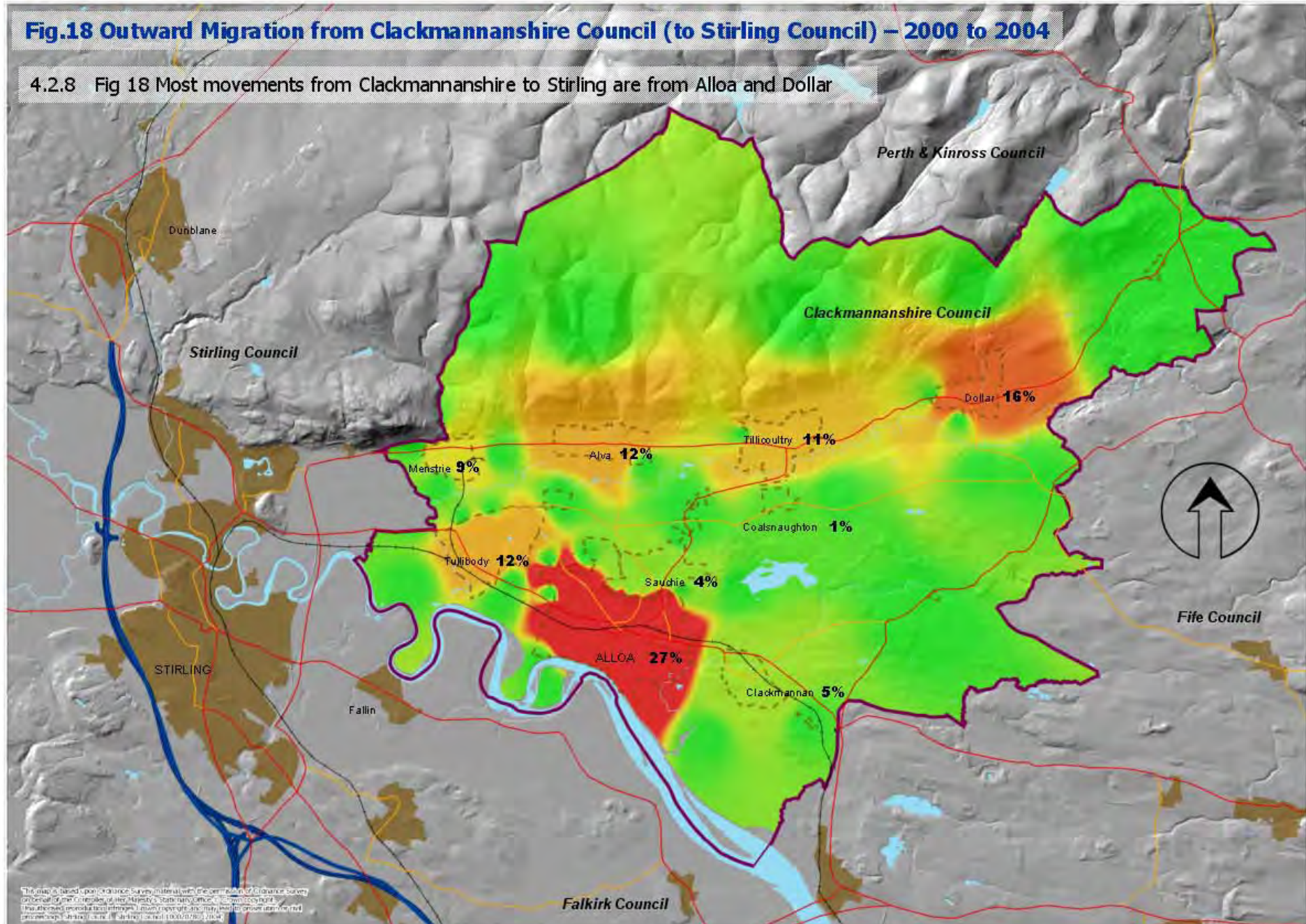


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**Fig.18 Outward Migration from Clackmannanshire Council (to Stirling Council) – 2000 to 2004**

4.2.8 Fig 18 Most movements from Clackmannanshire to Stirling are from Alloa and Dollar



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4.2.9 Historically the Structure Plan area has attracted mobile demand but this demand must be finite and the growth scenarios of neighbouring authorities will capture some of this demand. This may have consequences for the Structure Plan area in the future.

4.2.10 Some Central Scotland authorities are continuing to be very successful in capturing in migration. Falkirk councils net migration figure between 2003 and 2004 equaled 1521 people. Falkirk Council's 2020 Structure Plan states "The strategy of the Structure Plan has been designed to encourage in migration and ensure population growth." Their target of 14000 new houses relies on attracting an annual net in migration rate of 500 people per year. Fife are adopting a similar strategy in planning for 35000 houses to 2026 and West Lothian is also relying on its ability to continue to attract new population in planning for 12000 new homes. The development strategies of neighbouring Councils are therefore to some extent competing with each other to attract a finite supply of mobile demand.

### 4.3 Conclusions

- Clackmannanshire is a sub market of the Clackmannanshire and Stirling Housing market.
- The Structure Plan Housing market area is attracting migration from Glasgow, Edinburgh, Fife, Falkirk and Perth as well as further-a-field.
- These areas are however also the focus of out migration from the area.
- The links between the Clackmannanshire and Stirling markets are strongest in the western parts parts of Clackmannanshire including Alloa. Linkages are also apparent along the Hillfoots corridor.

- The links between Clackmannanshire, Falkirk and Fife are most emphasised in the eastern parts of Clackmannanshire.
- 004 projections indicate that the assumptions of earlier 2002 projections overestimated annual in migration to Stirling (less than half anticipated) and underestimated future in migration to Clackmannanshire.

*(Further work is required on Sasines information for Stirling)*

4.3.1 Movements within and between areas are influenced by a variety of factors including employment opportunities, house prices, housing choice and accessibility. This analysis shows that the Structure Plan is continuing to attract new residents but that whilst Stirling is gaining population overall in migration will equate to out migration in Clackmannanshire. There are planned improvements to accessibility in Clackmannanshire (notably the Rail Link and Upper Forth Crossing) which may increase external demand and an opportunity for the Plan to consider how to address this.

4.3.2 The amount of mobile demand within Central Scotland that the Structure Plan area can continue to attract will be tempered by the amount of housebuilding currently being progressed in neighbouring authorities. This may also encourage an increase in out migration from the Structure Plan area with longer term consequences. Differences between the 2002 and 2004 migration assumptions may signal that the growth strategies of other Council areas or changing economic and other factors are already having an impact on the relative distribution of people and their locational choices. This Structure Plan review will need to consider these issues in determining a sustainable approach to long term planning for the area.

# CLACKMANNANSHIRE & STIRLING STRUCTURE PLAN 3RD ALTERATION

Economy





## 5. Economy

### 5.1 Introduction

5.1.1 The Census provides information on economic activity in the Structure Plan area as well as the split of people within each social grade. The Scottish Executive Economic Briefing 2005 provides comparative information on unemployment, reliance on service sector jobs and average weekly earnings. The Scottish Executive Index of Multiple Deprivation allows analysis of smaller geographical areas to help to identify any particular concentrations of low incomes, high unemployment etc within areas.

### 5.2 Economic Activity

5.2.1 Fig. 19 indicates that just under 63% of Clackmannanshire's population (aged 16 to 74) is economically active compared to 65% for Stirling and Scotland. Stirling has more full-time students and self-employed people than the national average Clackmannanshire has slightly higher levels of people who are retired, permanently sick/disabled and unemployed (especially people aged 16 to 24) than the national average.

**Fig.19 Economic Activity (Census 2001)**

Area	All people aged 16-74	Percentage of people aged 16 - 74										Percentage of unemployed people aged 16 - 74			
		Economically active					Economically inactive					Aged 16 - 24	Aged 50 and over	Who have never worked	Who are long-term unemployed <sup>2</sup>
		Employees <sup>3</sup>		Self-employed <sup>3</sup>	Un-employed <sup>4</sup>	Full-time student <sup>5</sup>	Retired	Student	Looking after home/family	Permanently sick/disabled	Other				
		Part-time <sup>1</sup>	Full-time <sup>1</sup>												
a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p
Scotland	3731079	11.12	40.25	6.60	3.97	3.03	13.89	4.28	5.51	7.44	3.89	27.84	17.97	11.89	33.61
Clackmannanshire	35009	11.35	39.66	5.36	4.11	2.19	14.24	3.03	5.96	8.98	5.13	29.21	16.90	10.22	32.20
Stirling	63552	11.12	37.84	8.92	2.97	4.26	13.68	6.10	5.49	6.20	3.41	26.57	18.00	8.21	30.97

Note:

1 For the Census, part-time is defined as working 30 hours or less a week. Full-time is defined as working 31 or more hours a week.

2 "Long-term unemployed" are those who stated they have not worked since 1999 or earlier.

3 'Employees' and 'Self-employed' excludes full-time students.

4 'Unemployed' excludes full-time students.

5 'Economically active full-time students' comprises full-time students who are in employment or unemployed.

**Fig.20 Approximated Social Grade - All people aged 16 and over in households**

	ALL PEOPLE	AB Higher and intermediate managerial/administrative/professional	C1 Supervisory, clerical, junior managerial/administrative/professional	C2 Skilled manual workers	D Semi-skilled and unskilled manual workers	E On state benefit, unemployed, lowest grade workers
SUMMARY	104550	22965	27345	14649	17951	21640
Clackmannanshire	37182	6115	8943	5862	7389	8873
Stirling	67368	16850	18402	8787	10562	12767

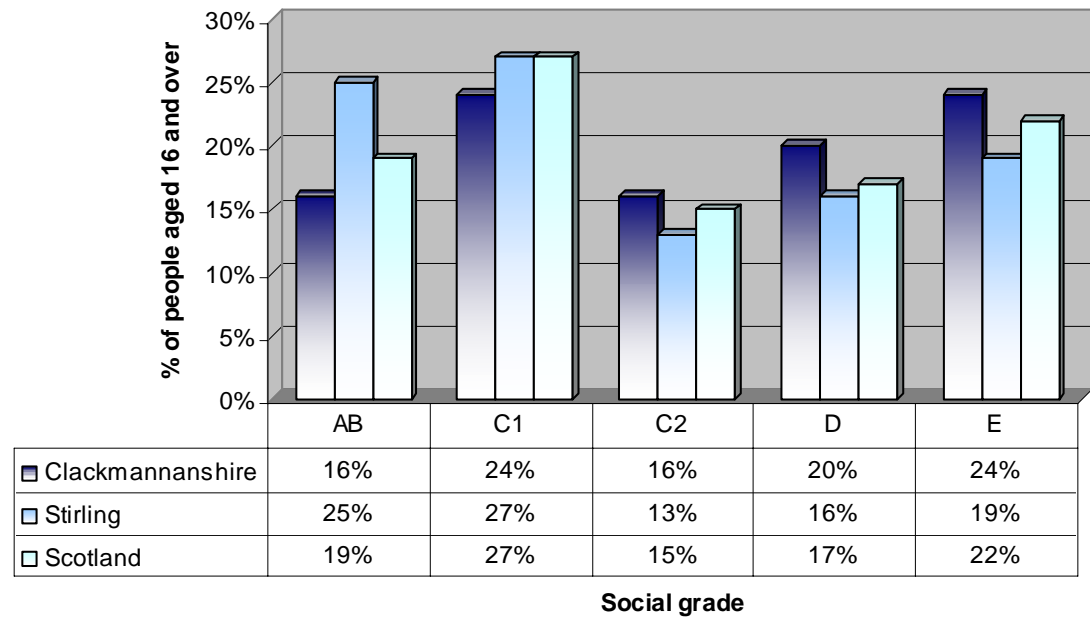
Footnotes:

1 Social Grade is the socio-economic classification used by the market research and marketing industries, most often in the analysis of spending habits and consumer attitudes. Although it is not possible to allocate Social Grade precisely from information collected by the 2001 Census, the Market Research Society has developed a method for using Census information to provide a good approximation of Social Grade.

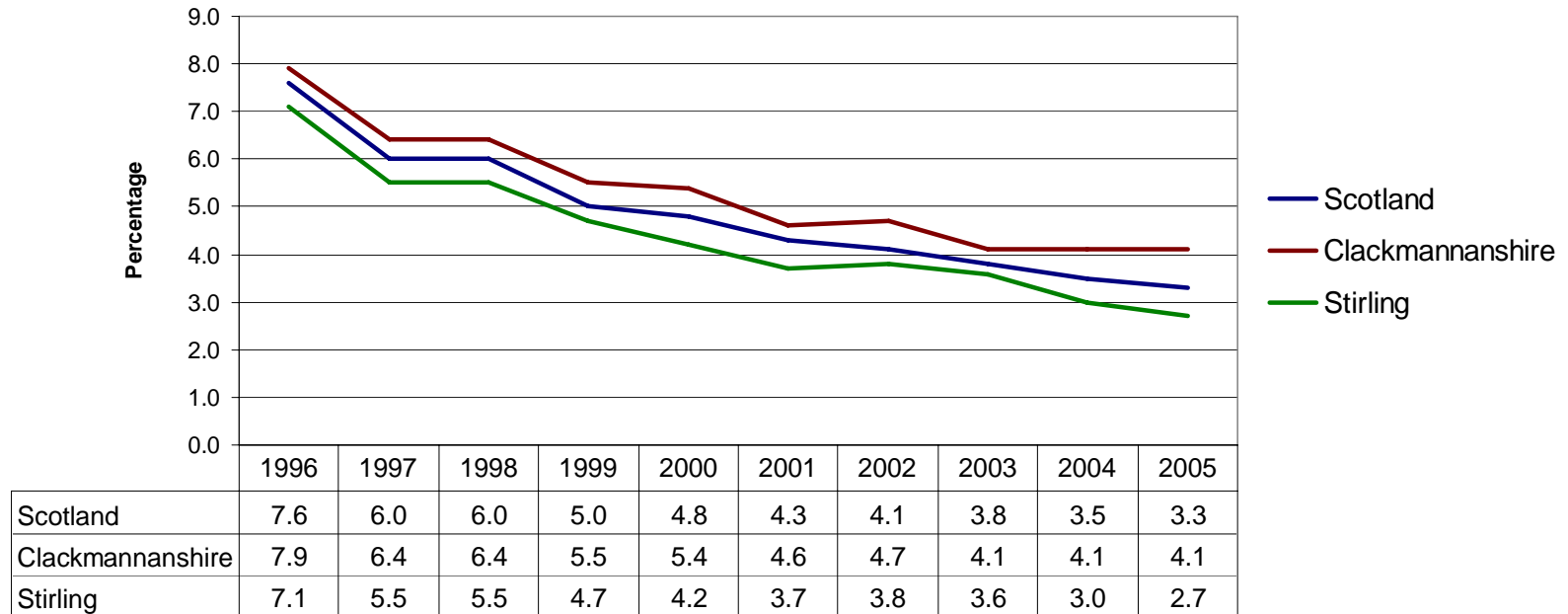
2 In this table people are classified by the Approximated Social Grade of their Household Reference Person.

5.2.2 Figs 20 and 21 show the numbers and relative percentages of people in the various categories of employment. Stirling has higher than average proportions of the population in the higher managerial, supervisory and professional sectors (AB and C1). Clackmannanshire has higher than the national proportion of people in the semi skilled , lowest grade and unemployed categories (D and E).

**Fig. 21 Approximate Social Grade - % of All People within Local Authority**



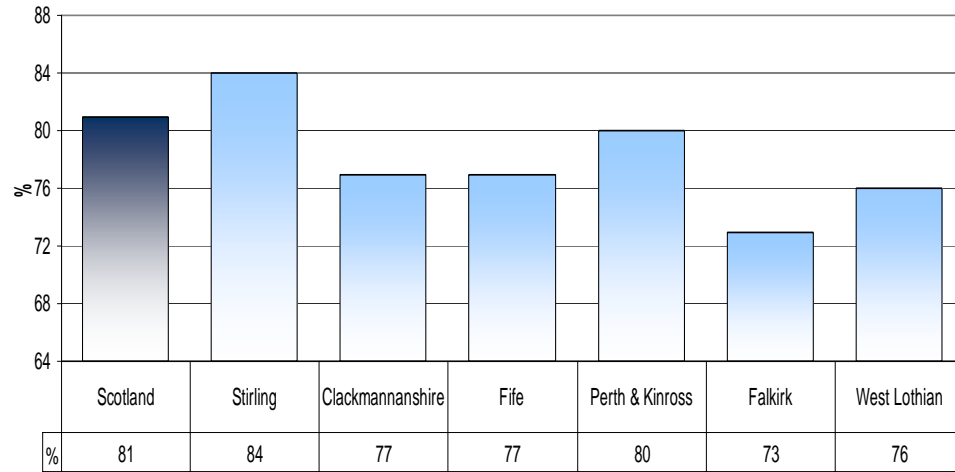
**Fig.22 Unemployment Rates Over Time: 1996-2005**



Source: Scottish Executive, 18/05/2005, Stirling and Clackmannanshire Economic Briefing

5.2.3 Fig 22 compares unemployment figures in Clackmannanshire and Stirling with those for Scotland as a whole. This shows that Stirling has a lower rate of unemployment (2.7%) with an improving trend compared to Scotland and Clackmannanshire. In Clackmannanshire unemployment has been decreasing but this trend has flattened of in the last few years retaining an unemployment rate above that for Scotland (4.1% compared to 3.3%). Unemployment amongst 18-24 year olds in Clackmannanshire is particularly high having risen by 22% between 2004 and 2005.

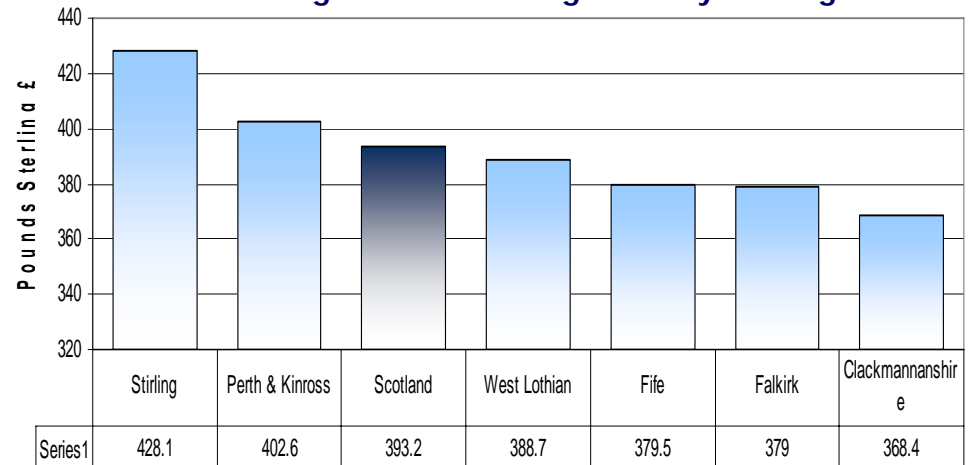
**Fig.23 Percentage of Employee Jobs in Services**



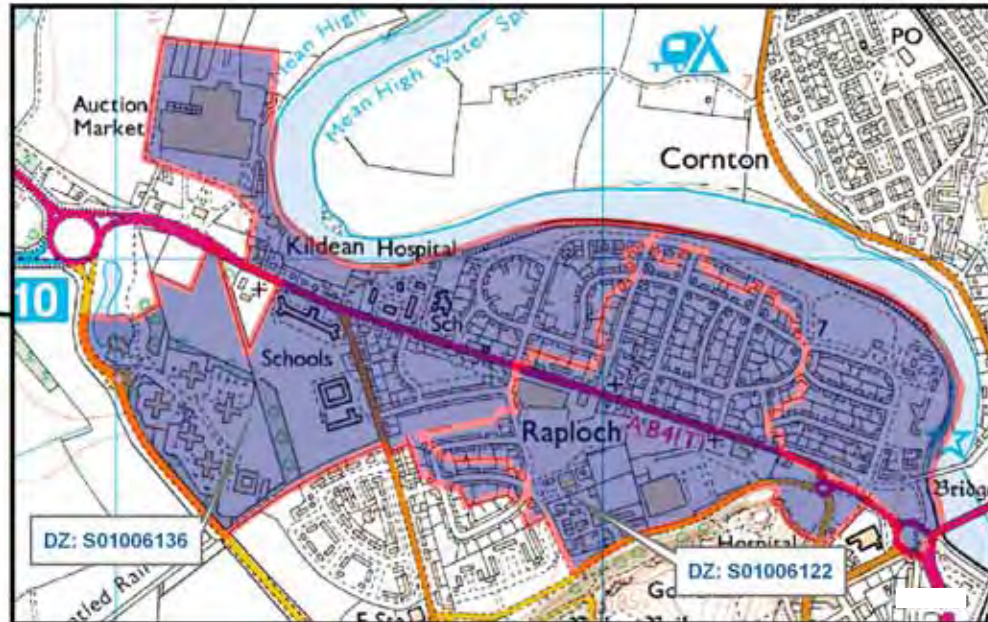
The employee jobs figures are taken from the NOMIS database. These figures should be treated with caution due to the use of relatively small samples.

5.2.4 Fig 23 shows that Stirling has particularly high dependency on the service sector. Only 10 employers account for almost a third of Stirling's total employment. Fig 24 illustrates that residents of Stirling do however earn higher than average weekly earnings outstripping those of neighbouring authorities and of Scotland as a whole. Stirling has experienced a 30% reduction in manufacturing jobs and 7% increase in service sector jobs since 1997. Over the same period Clackmannanshire has experienced a 27% increase in Service sector jobs since 1997. Average weekly earnings in Clackmannanshire are 6% below the Scottish average.

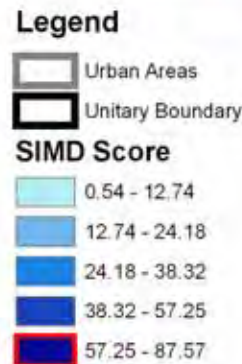
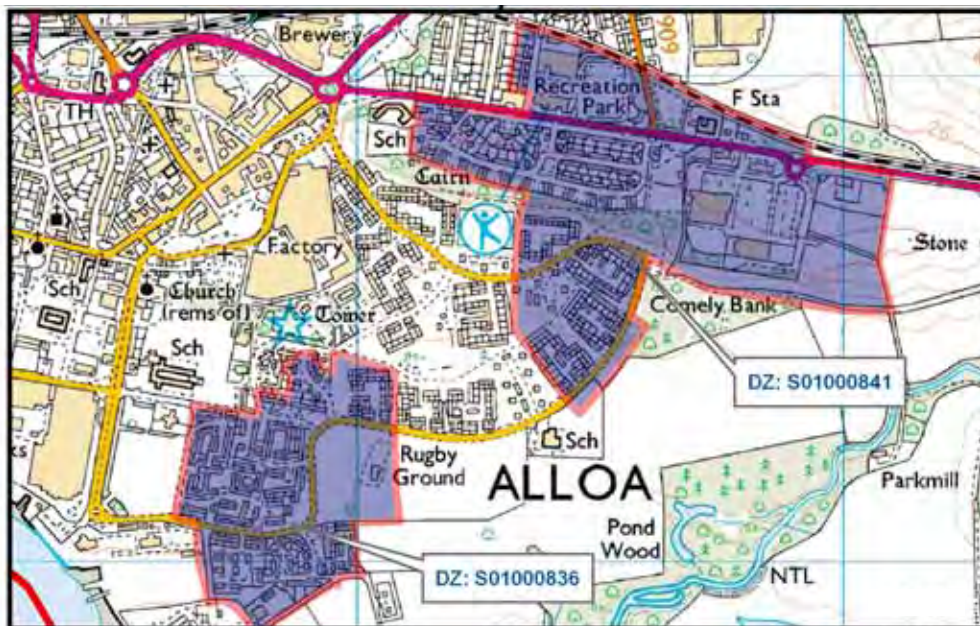
**Fig.24 Gross Average Weekly Earnings**



Note: Figures are taken from the Annual Survey of Hours and Earnings and is based on full-time employees on adult rates whose pay was not affected. This is run each year by the Office for National statistics.



5.2.5 Fig 25 shows that figures for the Council areas as a whole can mask particular concentrations of deprivation at a local level. In Stirling this is particularly evident as whilst the overall economic profile of the area highlights prosperity and growth there are pockets of high unemployment and low incomes. Stirling Council has 5 data zones that are within the most deprived 10% across Scotland and Clackmannanshire has 4 data zones within this category. Clackmannanshire is ranked 8<sup>th</sup> worst Local Authority in Scotland in terms of income deprivation and 7<sup>th</sup> in terms of employment deprivation. Fig.25 illustrates those data zones with the highest levels of deprivation in Raploch and Alloa.



Data zones with the highest levels of deprivation:  
Clackmannanshire & Stirling Structure Plan Area

Datazone	2001 Population	Working Age Population	SIMD Score	SIMD Rank
S01006136	975	516	70.03	123
S01006132	823	497	62.65	222
<b>Stirling Council*</b>			<b>10.88</b>	<b>4465</b>
S01000841	970	558	61.05	237
S01000836	847	519	59.53	269
<b>Clacks Council*</b>			<b>18.97</b>	<b>2915</b>

Note: Score and Rank for Stirling and Clackmannanshire Councils are Medians. The table shows the most deprived areas located within Stirling City and Alloa.

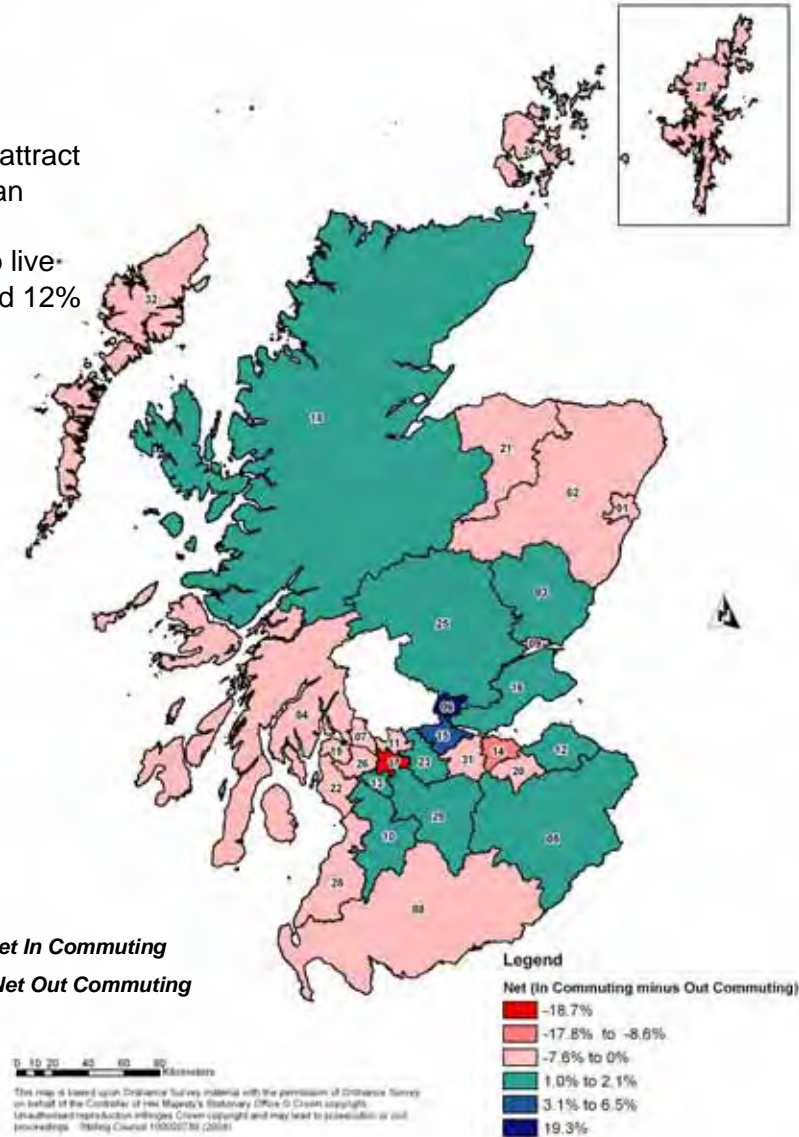
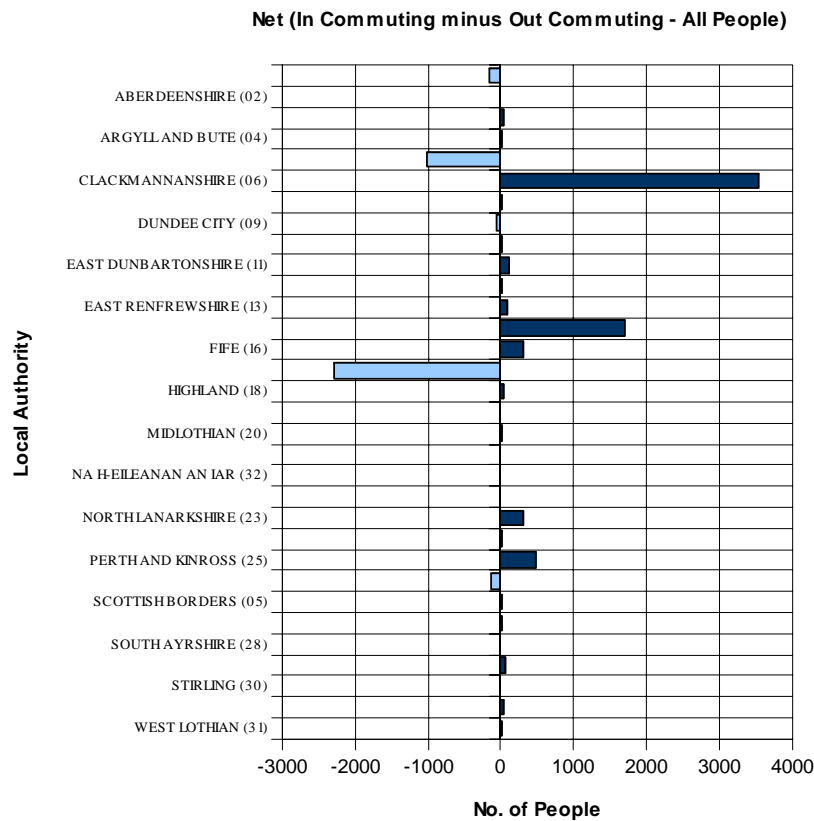
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### 5.3 Travel to Work

5.3.1 In Stirling out commuting and in commuting are roughly in balance. Both Council's attract as well as generate significant amounts of commuting indicating that whilst the Structure Plan area is generally successful as a place to live it is not providing the number and range of employment opportunities which match the needs of the local workforce or enable people to live-and work in the area. 24% of commuters from Stirling travel to Glasgow, 21% to Falkirk and 12% to Clackmannanshire (Fig 27).

**Fig.26 Census 2001: Travel to Work or Study (In and Out of Stirling Council Area)**

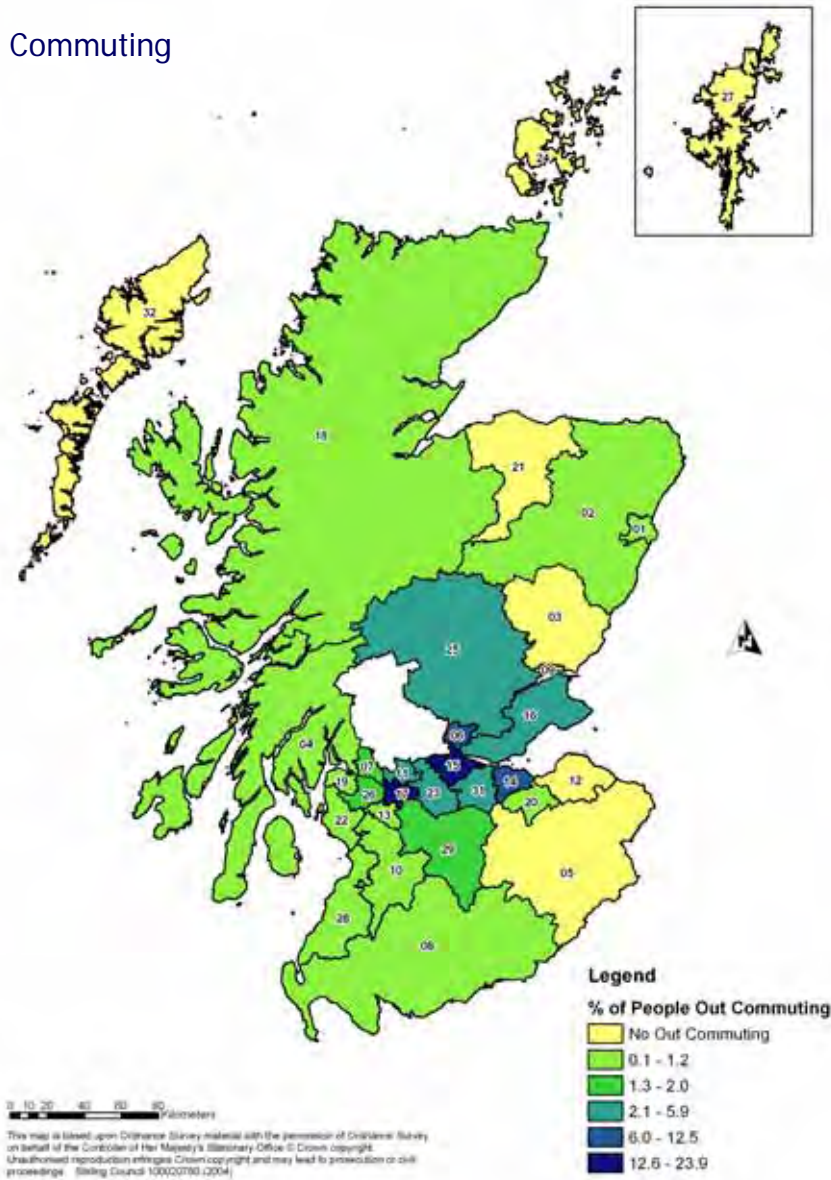


**Travel to Work or Study**

	All People	Total Students	Not Students	Other
In-commuting	16154	990	12804	2360
Out-commuting	13418	390	11596	1432
<b>Net In-commuting</b>	<b>2736</b>	<b>600</b>	<b>1208</b>	<b>928</b>

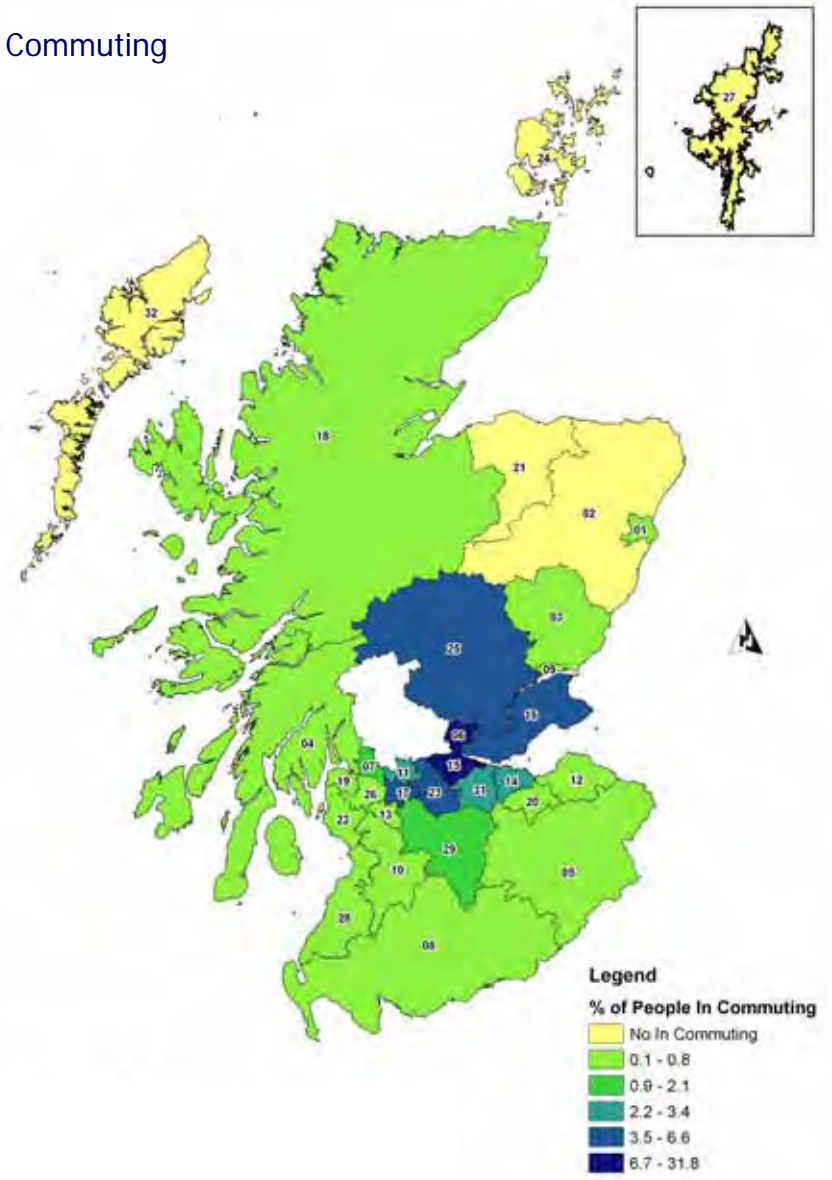
**Fig.27 Census 2001: Travel to Work or Study (Percentages of Totals – Stirling Council Area)**

**Out Commuting**



- 24% of Out Commuters travel to work in Glasgow
- 21% travel to work in Falkirk

**In Commuting**



- 32% of In Commuters travel to work from Clackmannanshire
- 28% travel to work from Falkirk

**Fig.28 Census 2001: Travel to Work or Study (Percentages of Totals – Clackmannanshire Council Area)**

**Table 1 - Place of Residence for Clackmannanshire Workers**

Place of Residence	Clackmannanshire workforce		
	No. Of Workers	% of total workforce	% of total in-commuters
Clackmannanshire	10,889	76.3	
Stirling	1,207	8.5	35.7
Falkirk	709	5.0	21.0
Fife	595	4.2	17.6
Perth & Kinross	223	1.6	6.6
North Lanarkshire	136	1.0	4.0
Edinburgh City	125	0.9	3.7
West Lothian	91	0.6	2.7
Glasgow City	88	0.6	2.6
South Lanarkshire	55	0.4	1.6
Other Scottish LAs	148	1.0	4.4

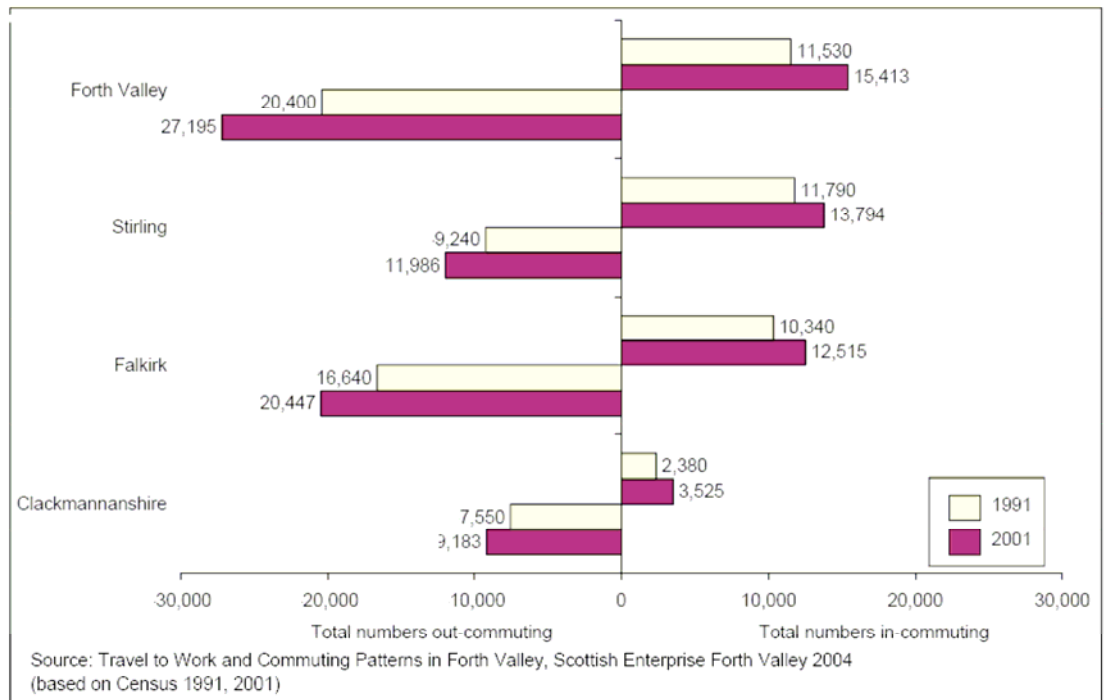
**Table 2 – Place of work of Clackmannanshire residents, 2001**

Place of Residence	Clackmannanshire residents		
	No. of Residents	% of total Residents	% of total of out-commuters
Clackmannanshire	10,899	55.6	
Stirling	4,311	22.0	49.5
Falkirk	1,418	7.2	16.3
Fife	996	5.1	11.4
Perth & Kinross	539	2.8	6.2
North Lanarkshire	405	2.1	4.7
Edinburgh City	245	1.3	2.8
West Lothian	227	1.2	2.6
Glasgow City	225	1.1	2.6
South Lanarkshire	87	0.4	1.0
Other Scottish LAs	250	1.3	2.9
<b>Total Residents</b>	19,592	100.0%	100.0%

Source: ESEP, Migration & Commuting patterns in the East of Scotland

5.3.2 Fig 28 indicates that whilst 76.3% of Clackmannanshire workers live in the area, 8.5% of the remainder travels from Stirling, 5% from Falkirk and 4.2% from Fife. Table 2 shows that 22% of Clackmannanshire residents work in Stirling and Fig 28B shows that the trend towards in and out commuting has increased in Stirling and Clackmannanshire between 1991 and 2001.

**Fig.28B Census 2001: Commuting Trends in Forth Valley, 1991 and 2001**



## 5.4 Conclusions

- Clackmannanshire exhibits characteristics of high unemployment and generally lower levels of prosperity.
- These characteristics are particularly emphasised in particular local areas.
- Stirling has high employment and generally higher levels of prosperity.
- These characteristics are however contradicted in certain local areas which have high unemployment and low prosperity.
- Both Council's export and import workers and are dependent on external employment opportunities.
- The Structure Plan area is more successful as a place to live than a place to work.

5.4.1 The above conclusions indicate a number of issues to be considered in the context of the Plan's strategy of working towards sustainability. Ideally the most sustainable scenario is where people can choose to live and access employment in the same locality, as this reduces the need to travel.

5.4.2 Creating the right conditions for this to happen however is reliant upon a number of factors. Some of these are out with the remit of planning but the provision of a range and choice of high quality and affordable housing can help to stabilise the population and retain/attract the appropriate workforce. A range and choice of accessible employment land can help to attract new jobs into the area.

This was always the rationale behind grouping jobs and homes together in the Structure Plan. A separate Topic Paper has been produced to consider in detail issues relating to the employment land supply.

5.4.3 The continued concentration of deprivation in certain geographical areas remains an issue but one that is currently being addressed in many areas through regeneration initiatives, generally housing led i.e. the Raploch in Stirling and Alloa south and east in Clackmannanshire. Future monitoring will indicate how successful this has been and there will be a continued need to assess how the Structure Plan can assist with future regeneration.