HNDA 2025 - 2045

Introduction

The Housing Need and Demand Assessment (HNDA) is an evidence based document and is required to inform and shape future policy decisions in the Local Housing Strategy (as set out in the 2001 Housing (Scotland) Act) and the Local Development Plan (under the Town and Country Planning (Scotland) Act 1997(as amended by the Planning (Scotland) Act 2016). The HNDA supports both these processes.

An HNDA estimates the number of additional housing units that are required to meet existing and future housing need and demand. It also captures information on the operation of the housing system to assist local authorities to develop policies on new housing supply, management of existing stock and the provision of housing related services. It is designed to give long term estimates of housing need, rather than precise figures.

Its purpose is to provide a robust, shared and agreed evidence base for housing policy and land use planning and to ensure that both the LHS and Development Plan are based upon a common understanding of existing and future housing requirements. Where the Scottish Government is satisfied that the HNDA is robust and credible, the approach used will not normally be considered further at a Development Plan examination.

The main aims of the HNDA are to achieve greater understanding on:

- Housing Market Areas
- Key Housing Drivers
- Housing Stock Profile, Pressures & Management Issues
- Estimate of range of additional Housing units
- Housing Needs of Specific Households

The HNDA is prepared in line with The Scottish Government Centre for Housing Market Analysis (CHMA) Housing Need and Demand Practitioners Guide 2020 and Managers Guide 2020, and follows the structure of the guidance. The HNDA is set out over 5 Chapters with 4 core outputs which form the content of the chapters as detailed below.

The Scottish Government's Centre for Housing Market Analysis (CHMA) will assess the HNDA as being 'Robust and Credible' so is written to include all criteria contained in the guidance to ensure process and methodology are sufficient for successful appraisal.

Structure

- Chapter 1 Introduction & Housing Sub Market Analysis
- Chapter 2 Key Housing Market Drivers
  - Core Output 1
    - Identifies key factors driving the Housing Market;
    - Includes household formation, population and migration, housing affordability including income, house prices, rent levels, access to finance and key drivers of the local and national economy;
    - Will inform the choice of scenarios of the local and national economy.
- Chapter 3 Housing Stock Profile, Pressures and Management Issues
  - Core Output 2
    - Consider what existing stock is available to meet local housing needs and identify and any under-supply or surplus of housing types;
    - Show where existing stock is pressured and could be managed differently to meet the housing needs;
    - Describe the types and number of in-situ solutions used;
    - Stock should be considered by size, type, condition, occupancy (overcrowding and under-occupancy), concealed households and turnover (re-lets and voids), tenure and location.
- Chapter 4 Estimate a range of additional future Housing units
  - Core Output 3
    - Estimate a RANGE of additional future housing units;
    - Broken down by owner occupation, private rent, below market rent and social rent;
    - Estimate for each 5 year period of a 20 year projection and the cumulative total at the end of the 20 year projection (output from the HNDA tool);
    - The geography (Housing Market Areas) should fit with those required for the Local Housing Strategy and the Local Development Plan;
    - All assumptions and choices made about scenarios (demographic, existing need, house price, income and affordability) used in the Tool must be based on evidence and clear explanation.
- Chapter 5 Housing Needs of Specific Household Groups
  - Core Output 4
    - Identify the contribution that Specialist provision plays in enabling people to live well, with dignity and independently for as long as possible;

- Identify any gaps in that provision and the future level and type of provision required;
- Consider evidence regarding property needs, care and support needs and locational / land needs;
- Undertakes consultation with all appropriate stakeholders who represent the views of those people who this chapter may impact on and reports the findings of all consultation;
- Gives due consideration to the provisions of the Equality Act (2010).

Governance

The HNDA is produced in Housing with close consultation with Planning. This is overseen by the Housing Market Partnership Group who agreed and signed off each Chapter throughout the process. The Group consists of

- Housing Services
- Planning
- Homes for Scotland
- Stirling & Clackmannanshire Health and Social Care Partnership
- Private Developers
- Registered Social Landlords
- Scottish Government More Homes Division
- Housing Convenor
- Planning Convenor

The remit of the group is to support the development of the HNDA by challenging assumptions made and formally agreeing the content of the document.

Housing Market Areas

The study is based on housing market areas (HMA) identified within the Clackmannanshire boundary. Housing market areas were previously defined in 2010, using house price data to examine patterns of household movement across the Forth Valley area.

Looking at origin and destination of buyers identified trends in migration patterns across settlements and identified areas of containment, pressure in terms of high prices, and high levels of inward / outward migration.

Households in Alloa mainly move within Alloa (33%), but 17% will purchase in Clackmannan, 21% in Sauchie and 11% in Tullibody/Cambus. As a large percentage of people moving house in these settlements sought a dwelling within this area, it would conclude that these settlements make up the Alloa HMA.

The Coalsnaughton/ Devonside/ Fishcross area has links to the settlements of both Alloa (13%) and Tillicoultry (11%) as a destination. Due to the very small number of transactions involved, the analysis at this level is inconclusive. Geographically, Fishcross is more likely to be influenced by the Alloa HMA and Coalsnaughton and Devonside by the Hillfoots HMA. Fishcross will therefore move into the Alloa HMA.

Menstrie is also only showing tenuous links to the rest of the Hillfoots HMA, and is probably more linked to Stirling's HMA. There is further evidence to suggest this as 63% of purchasers of properties in Menstrie are not from Clackmannanshire i.e. inward migration. However, as this study is primarily relating to the predefined Clackmannanshire local authority area, Menstrie remains in the Hillfoots HMA.

Dollar remains unlinked to any other settlement and has it's own unique stand-alone housing market, 83% of purchasers in Dollar originate from Dollar.

Forestmill is allocated as a new settlement in the Local Development Plan. The current settlement has only had 6 house sales in the past 7 years, so there is no evidence that places Forestmill. As it is currently a rural settlement, it has been placed with other rural settlements of Dollar and Muckhart. This is a slight adjustment from 2010, when Forestmill was within the Alloa HMA.

The analysis shows three spheres of influence existing within the Clackmannanshire boundary, these are the three HMAs and are identified as follows:

HMA 1: Alloa/Clackmannan/Tullibody, including the 'lower level' settlements:

Sauchie;
Kennet;
Cambus, and;
Fishcross.

HMA 2: Alva/Menstrie/Tillicoultry including the 'lower level' settlements:

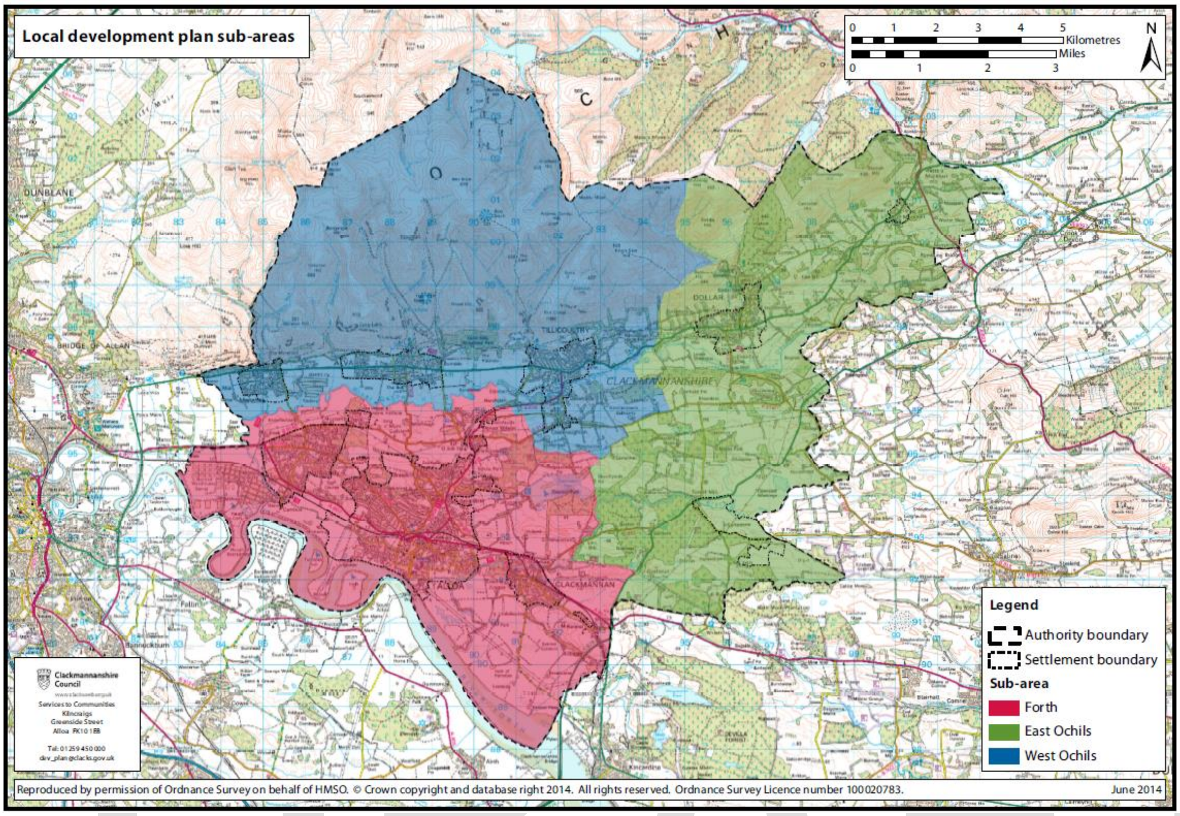
Coalsnaughton, and;
Devonside.

HMA 3: Dollar including the 'lower level' settlements:

Muckhart.
Forestmill.

The defined housing market areas are set out on the map below.

Map 1 - Housing Market Areas © Crown Copyright and database right 2014. All rights reserved. Ordnance Survey Licence number 100020783.



A refresh of the Housing Market Areas (HMAs) was undertaken.

Quality Assurance

A housing market partnership was set up to oversee and agree that the HNDA process has been undertaken in a clear and methodical way.

This section will be expanded as per the findings, agreement and challenges made by the housing market partnership through the process of the HNDA. The agreed information will be used to inform the information input and run in the HNDA database tool.

Chapter 2 Key Housing Drivers

Core Output 1

The purpose of this chapter is to identify the key drivers in the housing market, including household formation, population, migration, housing affordability to include house prices, rents, access to finance and the key drivers to the local and national economy. This should inform the choice of scenarios run in the HNDA tool.

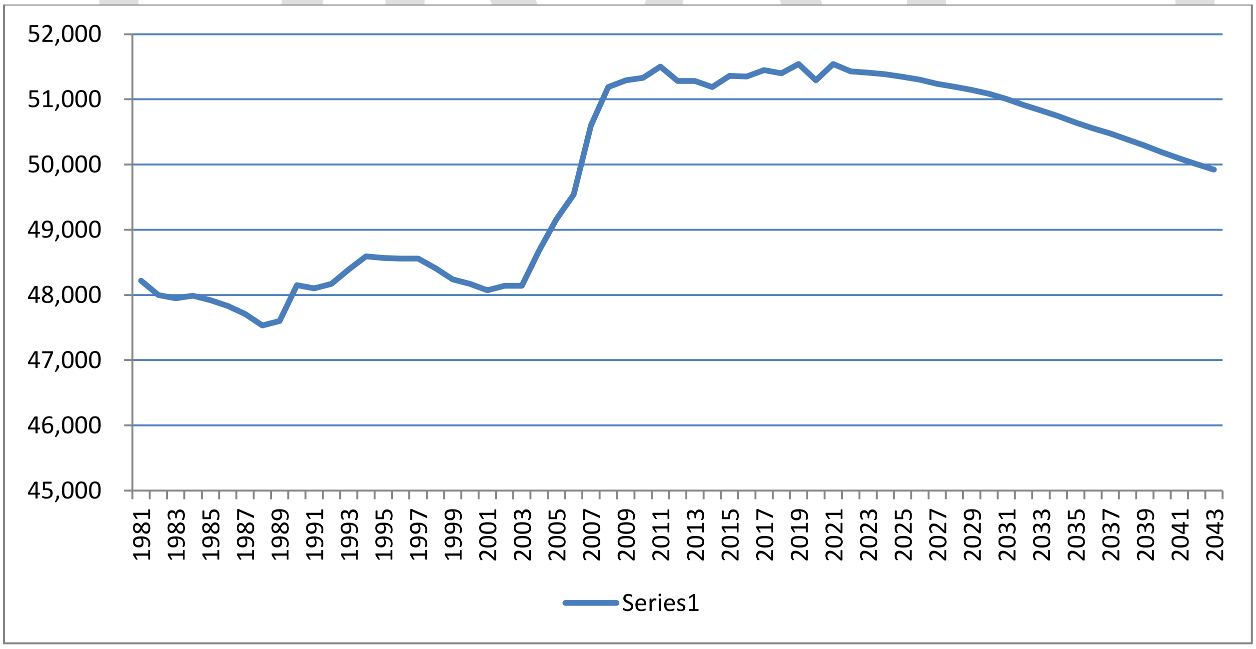
This Chapter includes an analysis of demographic, housing affordability and wider economic trends which are key drivers of the local housing market. It includes information on household composition, household projections, house purchase and rental prices, income and affordability to give a greater understanding of the Housing Market in Clackmannanshire and inform the context of the economic and affordability scenarios to be run in the HNDA Tool.

The analysis will inform what these Key Issues are for Clackmannanshire and will be summarised at the end of the Chapter.

Demographic Trends

This looks at the population profile of Clackmannanshire at the current time and how the population and households are projected to 2043. The information is based on the 2018 based population projections published by National Records of Scotland (NRS)[1].

Chart 2.1 Actual and projected Population of Clackmannanshire 1981 - 2043



Source: National Records of Scotland

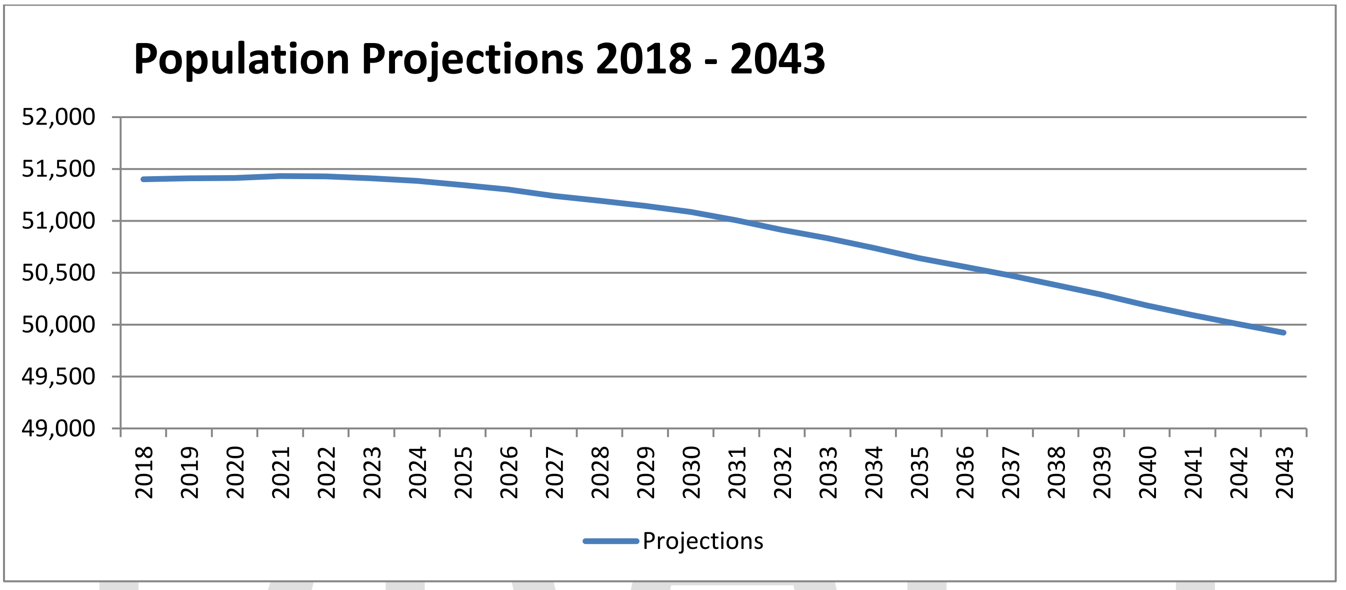
Between 1981 and 1989, the population of Clackmannanshire declined from 48,218 to 47,600. It then steadily increased and stayed at around 48,150 between 1990 and 2003. Between 2003 and 2008 levels of house building were between 300 to 400 completions a year and the

[1] www.nrscotland.gov.uk

population of Clackmannanshire increased from 48,140 in 2003 to 51,500 in 2011. This was an increase of 3,360 people over 8 years (6.9% increases in total population).
The 2018 NRS statistics show a decrease of 1,476 people (-2.8%) in the 25 year period from 51,440 in 2018 to 49,924 in 2043.

These projections are slightly higher than the previous HNDA, based on 2012 population projections which predicted a decrease of 1,237 people (-2.4%) in the population in the 25 year period from 51,280 in 2012 to 50,043 in 2037.

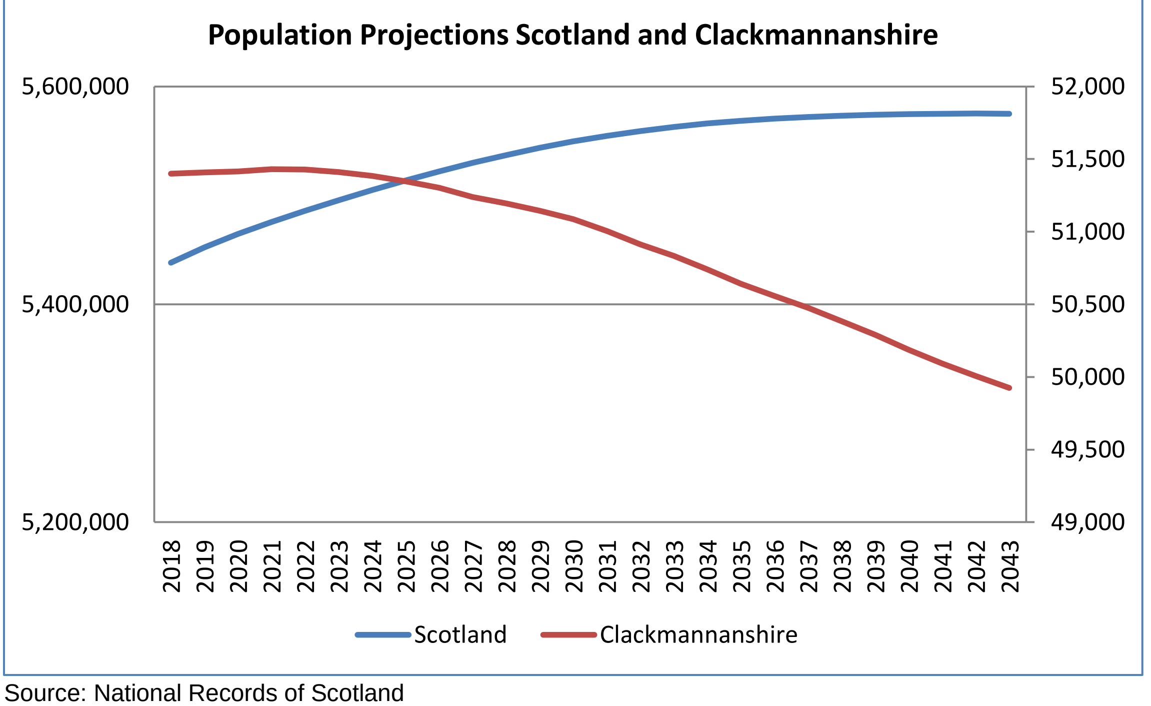
Chart 2.2 Population projections Clackmannanshire 2018 – 2043



Source: National Records of Scotland

Chart 2.3 below shows that, overall, Scotland is predicted to increase population by 2.5% with Clackmannanshire predicted to have a fall of -2.8%.

Chart 2.3 Population projections compared to Scotland 2018 - 2043



Source: National Records of Scotland

The components of population change is driven by *natural change* and *net migration*,

Natural change – number of births minus number of deaths.

Net migration - number of people moving into an area minus number of people moving out of an area.

Natural Change

Table 2.1 shows where decreases in population will be over the next 25 years. It shows there will be 3,441 (27%) more deaths than births.

Net migration of 2,114, is 1,327 (-2.5%) less than natural change which gives the overall decrease in population.

Table 2.1 Components of population change mid 2020-21 and mid 2018 -2043

Year	Mid 2020-2021	Mid 2018-2043
Estimated population 30 June 2020	51,290	51,290
Births	455	12,525
Deaths	616	15,966
Natural Change	-161	-3,441
Estimated net migration	150	2,114
Other changes	-24	-149
Estimated population 30 June 2021	51,540	
Population mid-2043		49,924
Population change	**Number**	**%**
	250	0.5
	-1,366	-2.7

Source: National Records of Scotland

Population by Age Group

Table 2.2 shows the population in Clackmannanshire by sex and age as estimated at 30 June 2021. The largest age group is the 45 to 64 age group at 29.5%, this is slightly higher than Scotland at 27% but largely, Clackmannanshire and Scotland have a similar age profile.

Table 2.2 Population of Clackmannanshire by age group 2021

Age Groups	Male	Female	All People	Clackmannanshire % of Population	Scotland % of Population
0 to 15	4,547	4,330	8,877	17.2	16.6
16 to 24	2,562	2,387	4,949	9.6	10.2
25 to 44	5,776	6,023	11,799	22.9	26.4
45 to 64	7,391	7,806	15,197	29.5	27.2
65 to 74	2,933	3,219	6,152	11.9	10.9
75 and over	1,987	2,579	4,566	8.9	8.7
Total	25,196	26,344	51,540	100	100

Source: National Records of Scotland

The population profiles by Housing Market Area are relatively similar, with one slight difference in the Dollar HMA where there are fewer households in the 25–44 age bracket and more 45-64 year old households. This may be reflective of the higher house prices in the Dollar HMA, where fewer younger households can afford to buy or rent.

Table 2.3 Population by Age Group and Housing Market Area

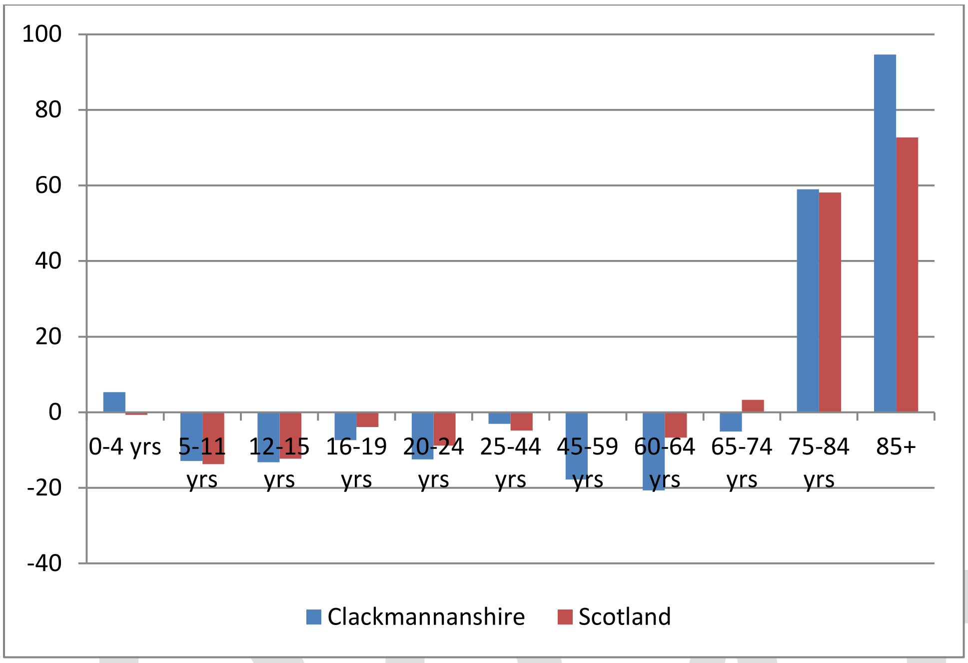
	0-15 years	16 -24 years	25-44 years	45-64 years	65 +		
Alloa HMA	17%	9%	26%	29%	18%		100.0%
Hillfoots HMA	15%	8%	23%	29%	24%		100.0%
Dollar HMA	17%	8%	18%	34%	23%		100.0%

Source: Census 2022-Person-2Cv1 "Scotland's Census 2022 - National Records of Scotland Table UV102b - Age (20) by sex all people"

From population projections in Clackmannanshire and Scotland shown in chart 2.4 and table 2.4, it is clear that by 2043, the profile of the older population in Clackmannanshire will be greater than that in Scotland overall. The number of people in the 85+ age group by 2043 will increase by the greatest amount, 95% in Clackmannanshire and 73% in Scotland.

An increase in older people will mean more housing suitable for the aging population will be required.

Chart 2.4 Population Projections percentages for Clackmannanshire and Scotland by Age Group 2021 – 2043



Source: National Records of Scotland

Table 2.4 Population Projections by age group 2021 – 2043 Clackmannanshire

Age Group	2021	2043	Difference No	Difference %
0-4 years	2,423	2,552	129	5
5-11 years	4,081	3,556	-525	-13
12-15 years	2,373	2,059	-314	-13
16-19 years	2,164	2,004	-160	-7
20-24 years	2,785	2,437	-348	-12
25-44 years	11,799	11,437	-362	-3
45-59 years	11,622	9,552	-2070	-18
60-64 years	3,575	2,837	-738	-21
65-74 years	6,152	5,838	-314	-5
75-84 years	3,464	5,507	2043	59
85+	1,102	2,145	1043	95
All	**51,540**	**49,924**	-1,616	-3

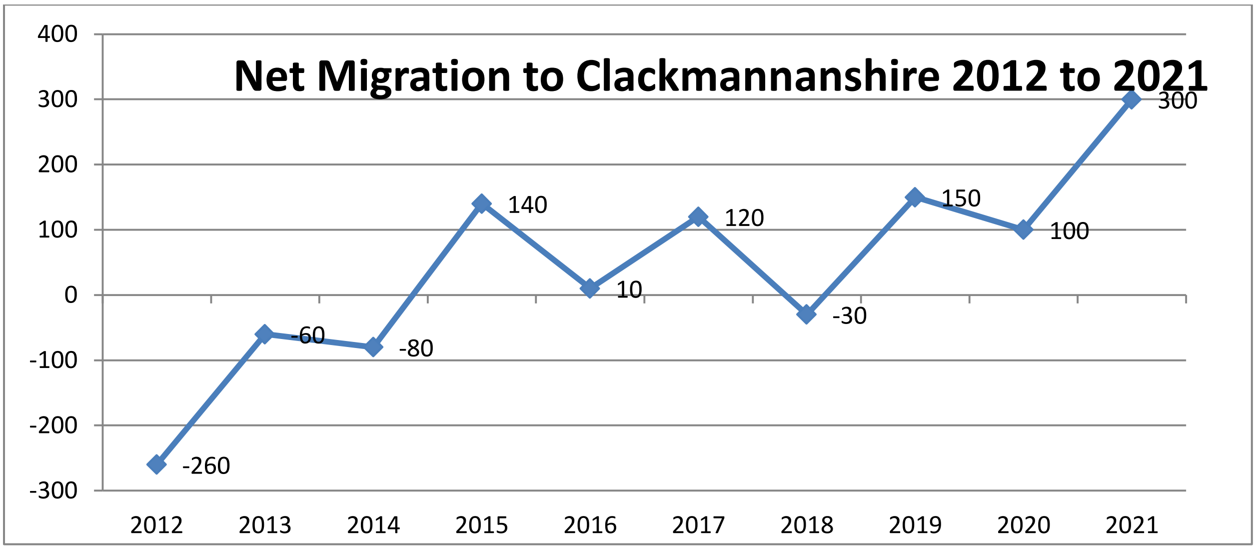
Source: National Records of Scotland mid year 2021 estimates

Net Migration

Chart 2.5 shows net migration into Clackmannanshire from 2012 to 2021. From 2012 to 2014 there was a net outward migration of 400 people. From 2015 to 2021 there were more people moving in to Clackmannanshire than moving out. There were 810 people moving in but only 40 moving out.

Over the ten year period, 810 people moved in to Clackmannanshire with only 440 people moving out.

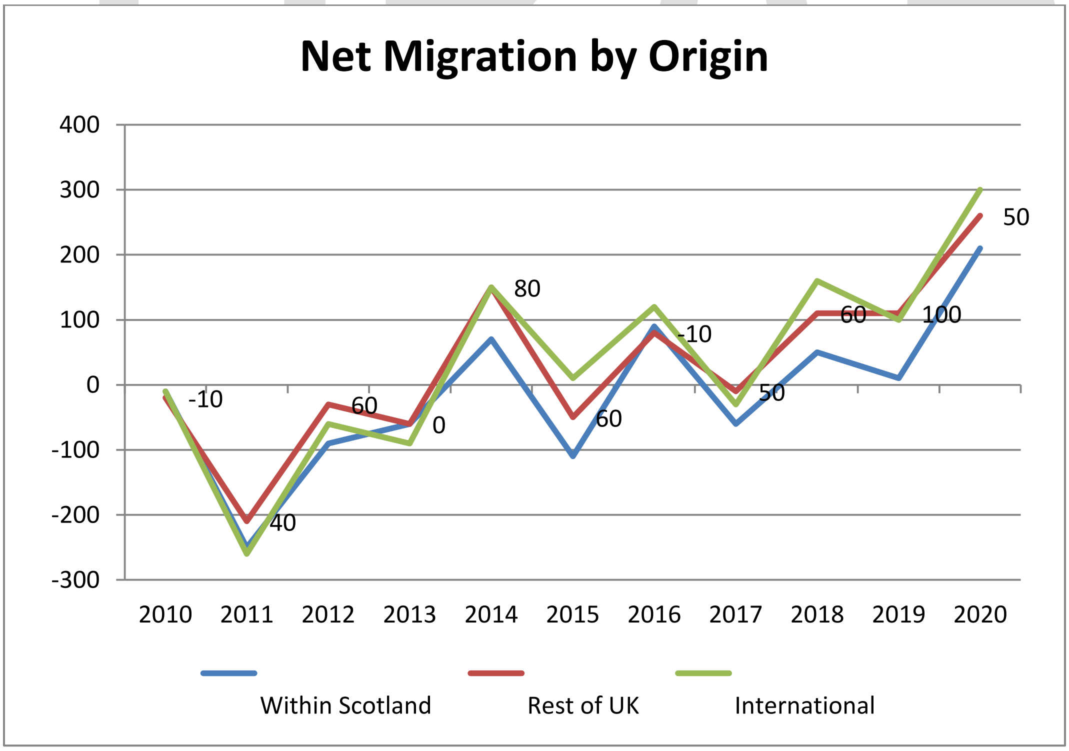
Chart 2.5 Net Migration over time



Source: National Records of Scotland

There is a fairly even spread of migration in Clackmannanshire between Scotland, UK and international.

Chart 2.6 Net Migrations by Origin



Source: National Records of Scotland

Ethnicity

Table 2.5 shows the latest census data by ethnicity and by HMA showing the majority of the population in Clackmannanshire over all HMA's is white Scottish or British.

Table 2.5 Ethnicity by Housing Market Area (HMA)

Ethnicity	All People	White: White Scottish	White: Other White British	White: White Irish	White: Gypsy/ Traveller	White: White Polish	Other White	Asian, Asian Scottish or Asian British: Total	African: Total	Other ethnic groups: Other ethnic group
Alloa HMA	33113	86.2%	6.9%	0.5%	0.1%	1.7%	1.4%	1.6%	0.3%	1.3%
Hillfoots HMA	13607	83.7%	10.3%	0.7%	0.1%	0.7%	1.9%	1.3%	0.4%	1.1%
Dollar HMA	5233	73.9%	19.9%	0.8%	0.0%	0.3%	2.2%	1.5%	0.1%	1.2%

Source: Scotland's Census 2022 - National Records of Scotland Table UV201 - Ethnic group
All people

Households – Type, Age, Size and gender

According to the National Records of Scotland, in 2022, there were around 24,157 households in Clackmannanshire and 2,549,000 in the whole of Scotland. Census 2022 data shows 24,472 in Clackmannanshire and 2,509,000 in Scotland. Where possible, data will be triangulated to compare data from different sources.

Household projections are produced by National Records of Scotland (NRS) every two years, showing how many additional households would form based on assumptions from previous demographic trends on population growth.

Principal projections produced by NRS uses assumptions thought to be the most likely to occur over the next 25 years. As well as principle projections, a range of variants are also produced, low and high migration variants. These use the same assumptions about fertility and mortality but assume various levels of migration to and from Clackmannanshire.

Table 2.6 Household projections for Clackmannanshire by Variant (2018 based)

	2018	2028	2043	Change (%) 2018-2028	Change (%) 2018-2043
Low Migration	23,674	24,319	24,145	2.7%	2.0%
Principal Projection	23,674	24,384	24,408	3.0%	3.1%
High Migration	23,674	24,448	24,698	3.3%	4.3%

Source: National Records of Scotland Household projections

The HNDA Tool can run on Low, Principle or High Migrations, depending on a set of assumptions and scenarios. All variants will lead to an increase in household numbers.

Household Projections by Age Group

Household projections are produced by age group of Head of Household. Looking at projections to 2043 can assist in decisions on the type of housing to be provided in the future. These are a key driver in the HNDA tool and the future needs calculation.

Table 2.7: Household Projections by Age Group of Head of Household 2018 and 2043, Clackmannanshire and Scotland

Age Group	Clacks 2018	Clacks 2043	Clacks % Change	Scotland 2018	Scotland 2043	Scotland % Change
16-29	1,876	1,618	-14%	258,182	225,453	-13%
30-44	5,088	5,104	0%	583,082	594,874	2%
45-59	7,731	6,257	-19%	743,256	725,039	-2%
60-74	5,603	5,099	-9%	534,746	547,804	2%
75+	3,372	6,329	88%	358,008	621,567	74%
Total	23,670	24,407	3%	2,477,274	2,714,737	10%

Source: National Records of Scotland Household projections

There is projected to be only a 3% increase in households in Clackmannanshire between 2018 and 2043 compared to a 10% increase in the whole of Scotland. There is a marked difference between Clackmannanshire and Scotland in the 45-59 age group, a reduction of 19% compared to just 2% over Scotland. At the same time, the over 75's are projected to increase by 88% in Clackmannanshire and by 74% in Scotland. Both figures show that the number of older people will increase dramatically a sign of people living longer overall.

The sharp decrease of working age adults in the 45-59 year old age group in Clackmannanshire will mean a reduction in economic activity in the area by 2043.

Table 2.8 Household Projections by Household Type 2018 and 2043, Clackmannanshire and Scotland

Household Type	Clacks 2018	Clacks 2043	Clacks % Difference	Scotland 2018	Scotland 2043	Scotland % Difference
1 adult	7,943	8,838	11.3%	892,685	1,038,716	16.4%
1 adult, 1+ children	1,625	1,541	-5.2%	154,526	153,705	-0.5%
2 adults	7,926	8,464	6.8%	774,681	873,145	12.7%
2+ adults, 1+ children	4,160	3,785	-9.0%	445,241	438,149	-1.6%
3+ adults	2,016	1,779	-11.8%	210,141	211,022	0.4%

Source: National Records of Scotland Household projections

The figures in Table 2.8 above show that 1 and 2 adult households made up the majority of total households in 2018 at 67% and are projected to rise to 71% of all households by 2043.

There is a reduction of -11.8% in the number of 3+ adult households, in contrast to Scotland, with a slight increase of 0.4%.

Household Size

Table 2.9 below shows that both Clackmannanshire and Scotland project a reduction in household size. This follows from Table 2.8 above showing an increase in the number of 1 and 2 adult households. It can also be assumed from tables predicting an increase in the age of the population that these, smaller households will predominately be older single people or couples.

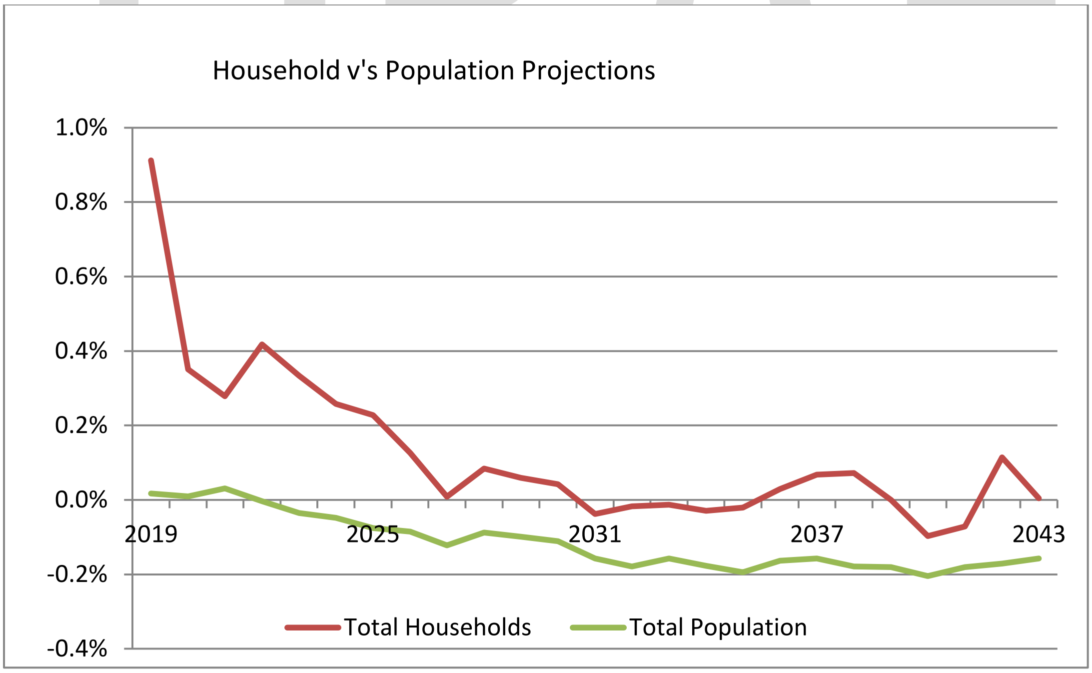
Table 2.9 Projected household size 2018 – 2043

AREA	2018	2024	2029	2035	2043	Overall change 2018 - 2043	Overall % change 2018 - 2043
Scotland	2.15	2.1	2.07	2.04	1.99	-0.16	-7.4%
Clackmannanshire	2.12	2.07	2.05	2.02	1.99	-0.13	-6.1%

Source: National Records of Scotland Household projections

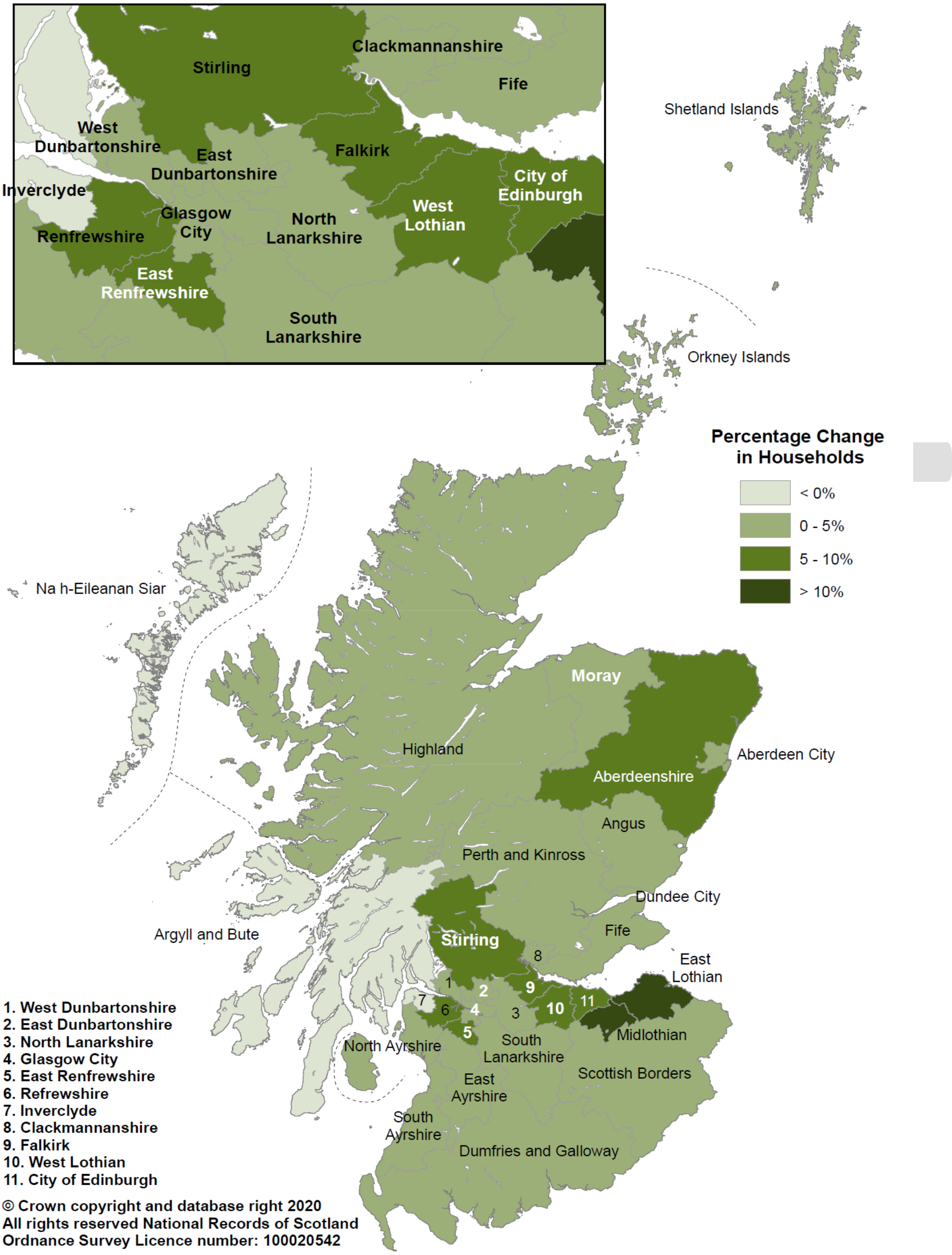
Chart 2.7 below shows that the % decrease in population is greater than the number of households year on year. The population in Clackmannanshire is projected to decrease by 3% between 2021 and 2043, whereas the number of households is projected to increase by 3%.

Chart 2.7 Household vs. Population projections



Source: National Records of Scotland Household projections

Map 2.1 Household Changes in Scotland (2021 – 2043)



Affordability Trends

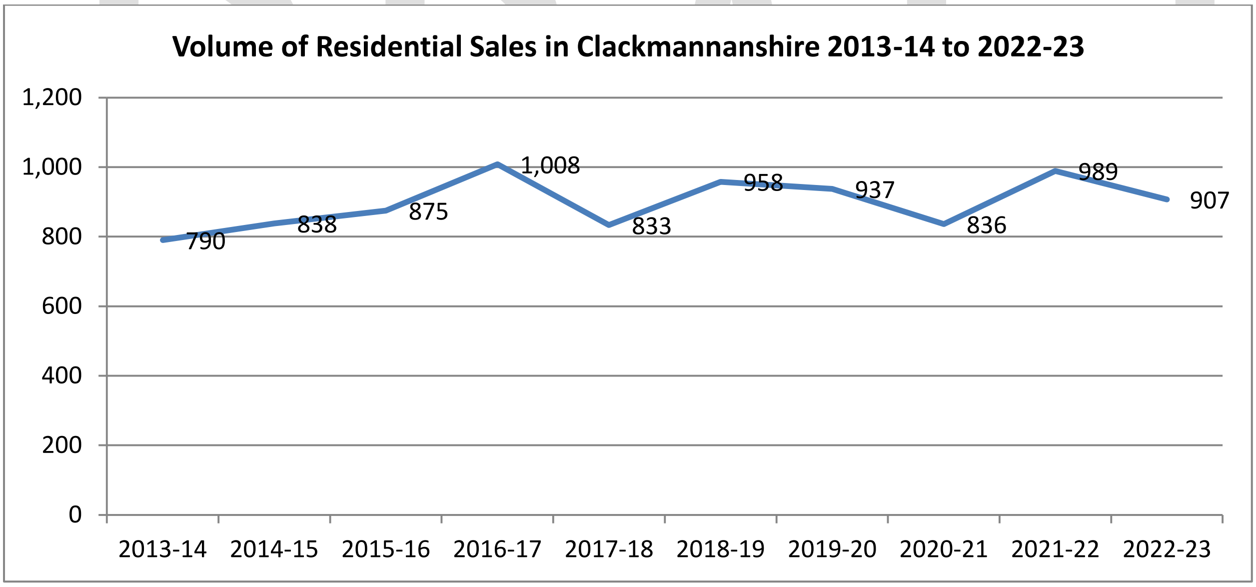
This section looks at the affordability of housing of all tenures across Clackmannanshire. Evidence of housing costs and income levels is gathered to evidence how affordable housing is in the area and identify gaps. The data includes:

- Private house sales data from Centre of Housing Market Analysis (CHMA) and Registers of Scotland, Property Market Report, 2022/23.
- Private rental rates from Local Housing Allowance Rates, Scottish Government private rented information.
- Social rents from Clackmannanshire Council data and The Scottish Housing Regulator.
- Income data from HNDA Tool and Nomis.

Private House Sales and Prices

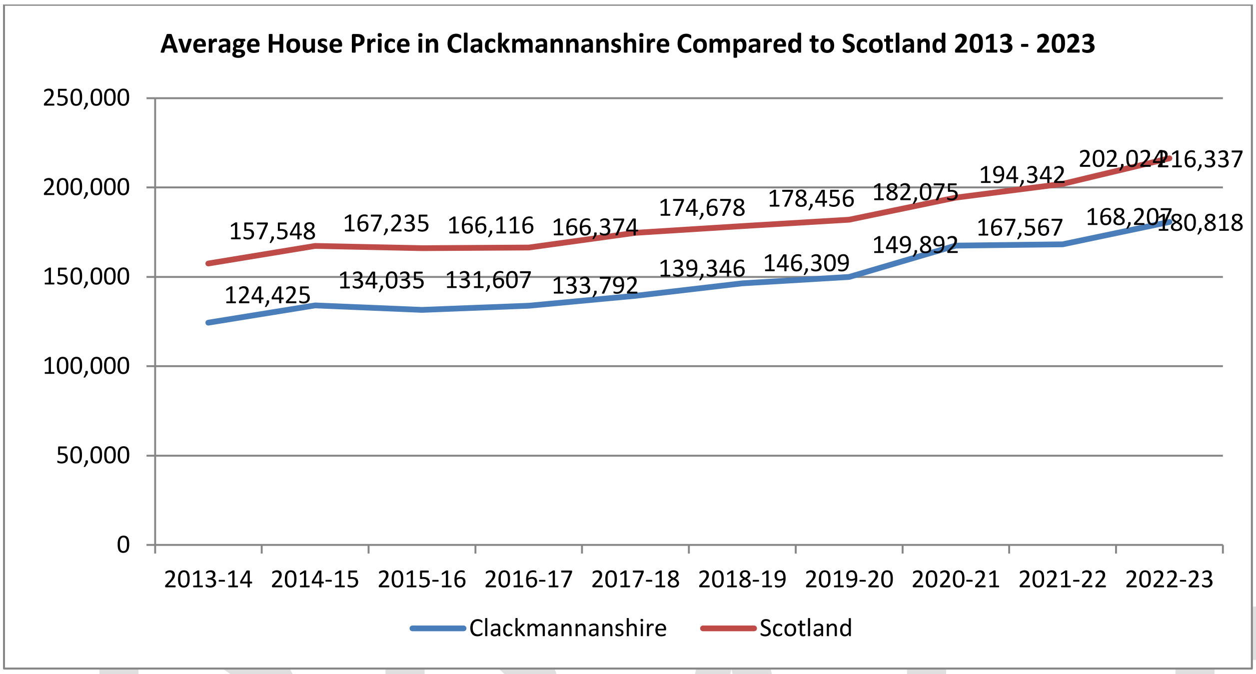
The chart below shows the annual volume of sales over the last 10 years in Clackmannanshire. There is no remarkable trend and the housing market appears relatively stable.

Chart 2.8 Volume of House Sales



Source: Registers of Scotland Property Market Report 2022/23

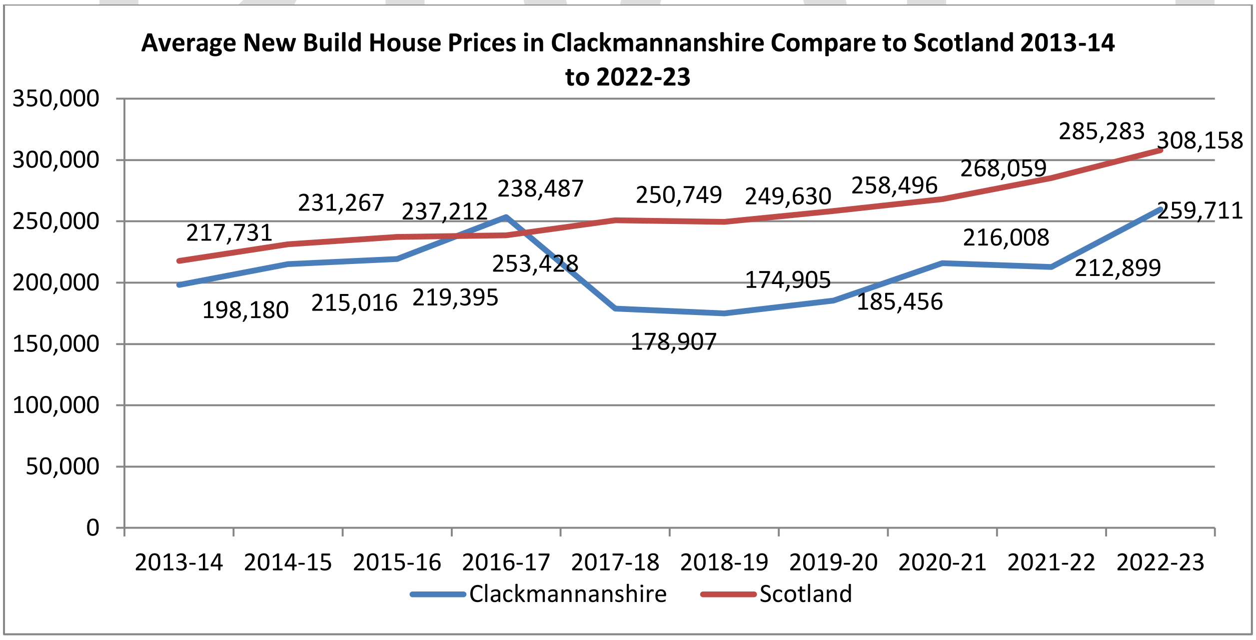
Chart 2.9 Average (Mean) House Price, Clackmannanshire & Scotland



Source: Registers of Scotland Property Market Report 2022/23

In 2016/17, the average (mean) new build in Clackmannanshire was £253,428; this was almost 6% higher than the Scottish average of £238,487. Since 2017/18, the price of new build homes has been consistently lower than the Scottish average.

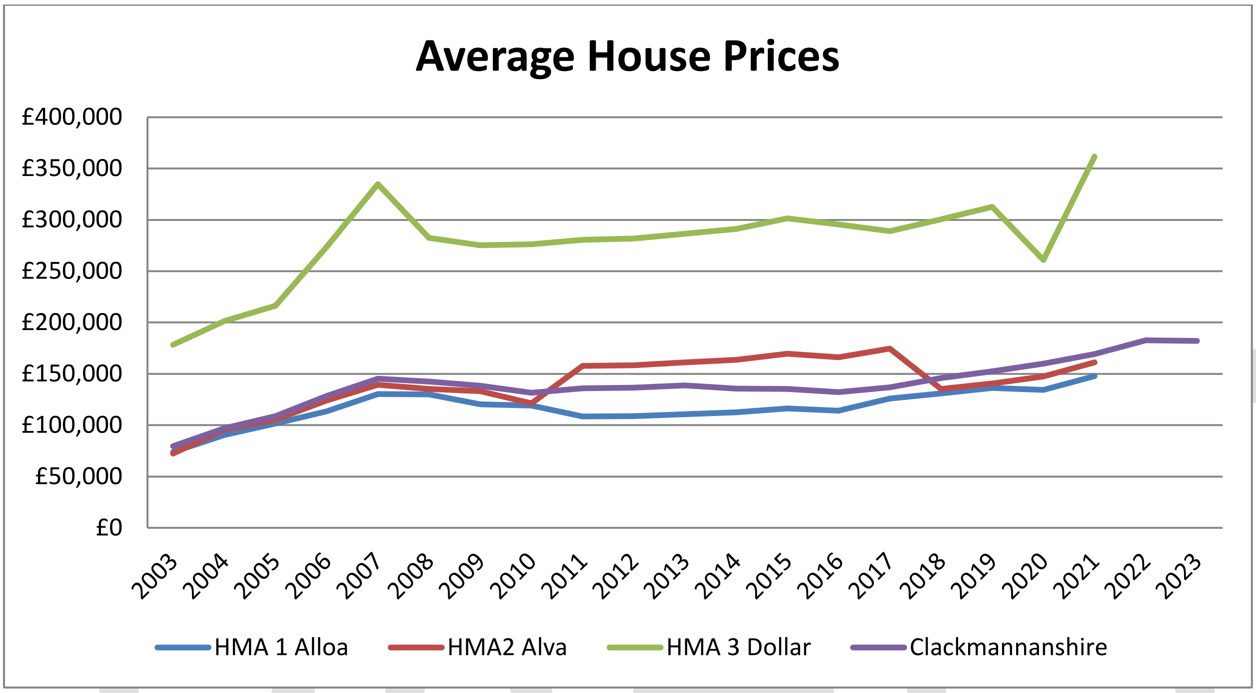
Chart 2.10 Average New Build House Price



Source: Registers of Scotland Property Market Report 2022/23

Average house prices (new and re-sale) have risen in Clackmannanshire by around 130% in the past 20 years, from £79,000 in 2003 to £182,155 in 2023. The Dollar housing market is consistently higher than the rest of Clackmannanshire, with house prices at least 40% more expensive than the rest of Clackmannanshire and higher than the Scottish average house price.

Chart 2.11 Average House prices over time by Housing Market Area



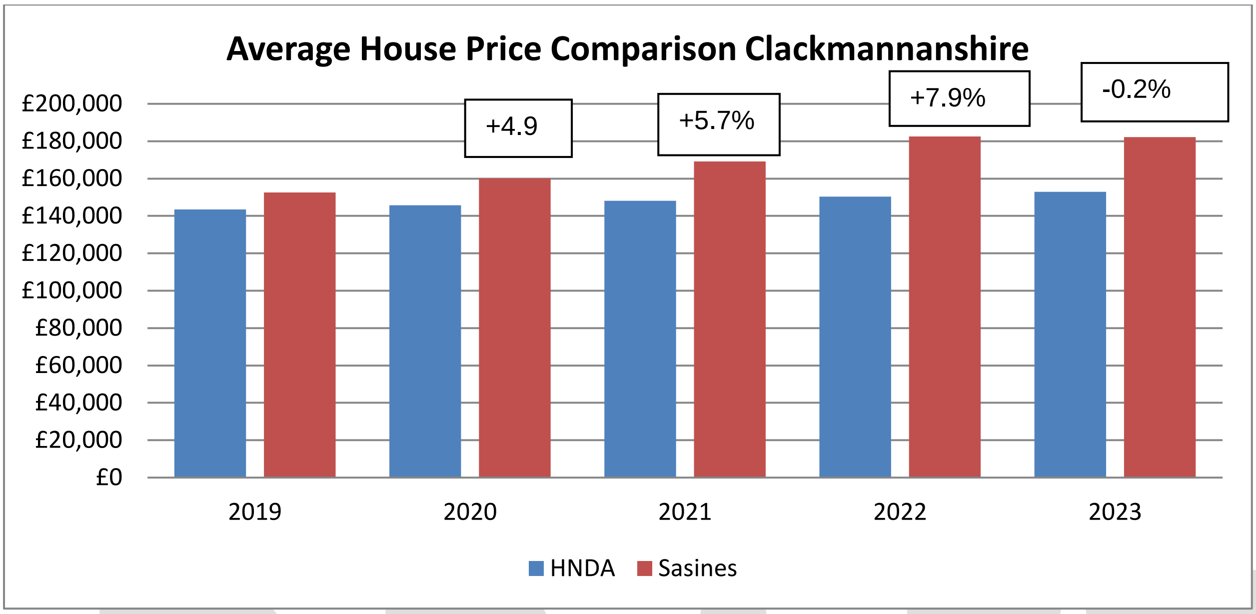
Source: Registers of Scotland Property Market Report 2022/23

Chart 2.12 shows a comparison with the house price assumptions made in the HNDA Tool and the actual prices reported in the Registers of Scotland data.

The assumption in the HNDA is that prices are rising by 1.6% annually. The actual house price rises are shown in the text box in the chart. Actual prices (Registers of Scotland) vs HNDA Tool are around 14% higher.

As the house price reported by Registers of Scotland are higher than loaded to the HNDA tool, it was decided to adjust house prices accordingly to be run through the HNDA tool.

Chart 2.12 – Average House price comparisons



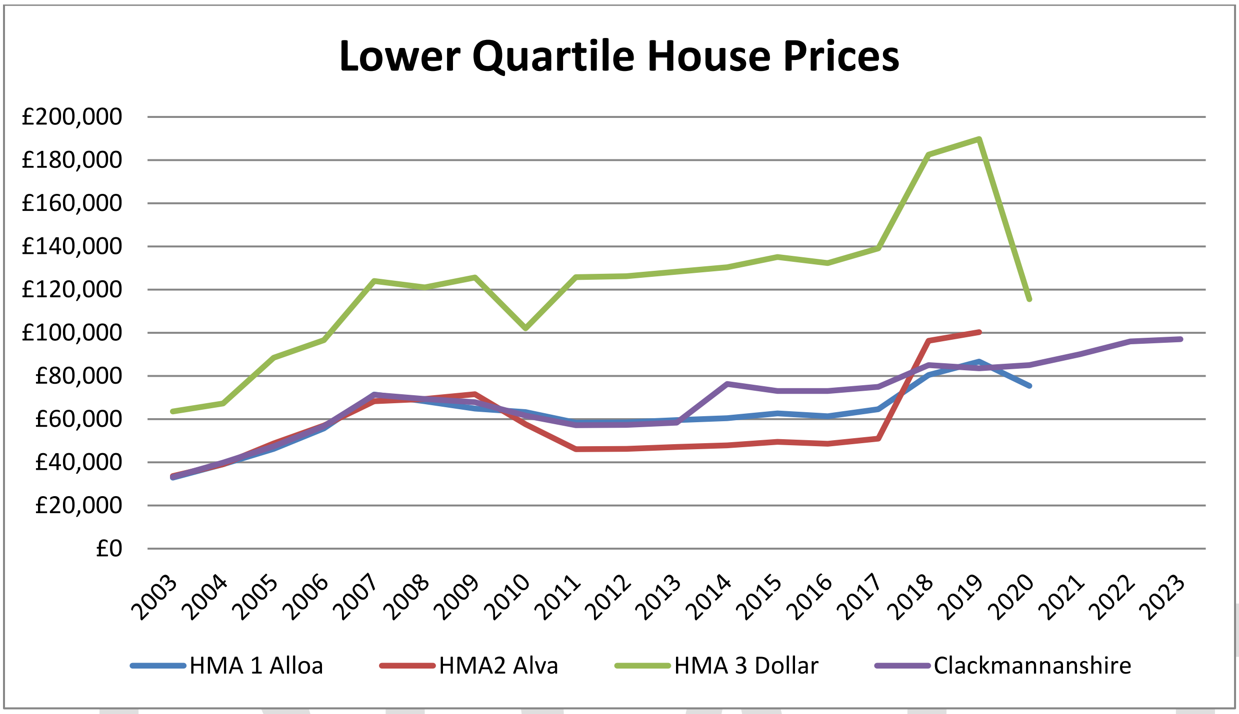
Source: Registers of Scotland and HNDA Tool

The chart at 2.13 shows lower quartile house prices in Clackmannanshire and by HMA, these are generally viewed as starter home prices, often first time buyers market.

Over the past 20 years, prices for first time buyers have increased by 192% from £33,136 in 2003 to £97,000 in 2023. Again, the Dollar market is more similar to the rest of Scotland than Clackmannanshire.

With increased requirement for larger deposits for first time buyers, it is becoming more difficult for buyers to enter the market for the first time, with average Loan to Value for first time buyers at 80%, a deposit of around £20,000 is required on entry level home ownership.

Chart 2.13 Lower Quartile House Prices over time by Housing Market Area

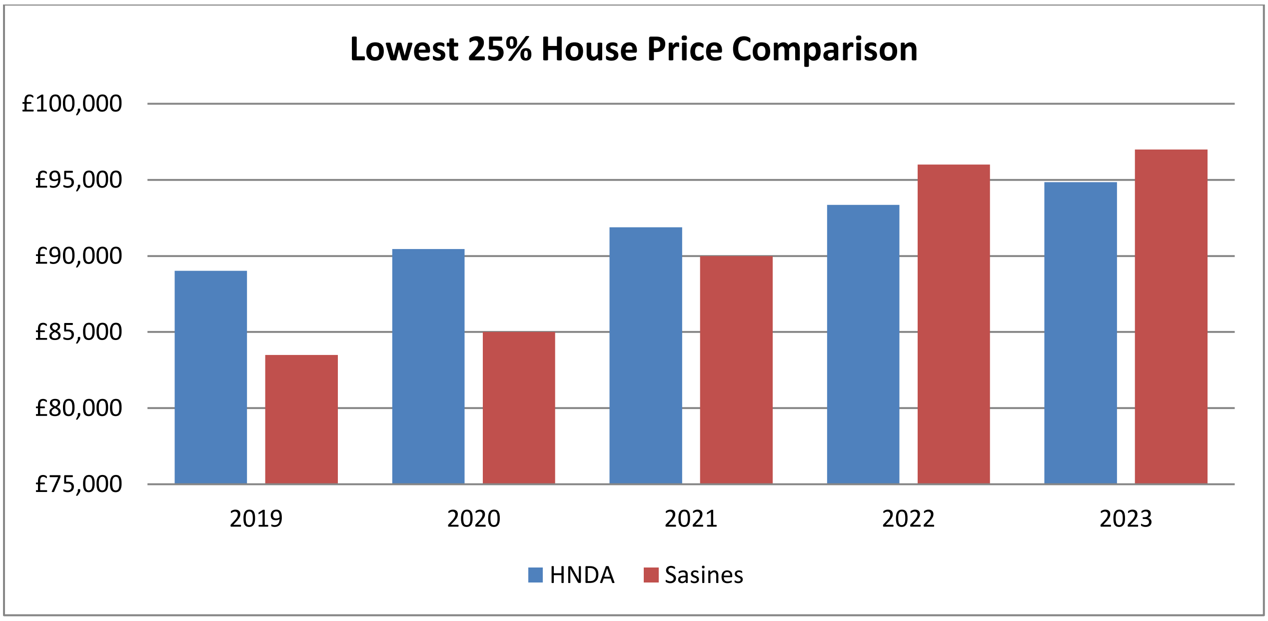


Source: Registers of Scotland

Chart 2.14 shows a comparison with the lower quartile house price assumptions made in the HNDA Tool and the actual prices reported in the Register of Sasines data.

The assumption in the HNDA is that prices are rising by 1.6% annually. Actual prices (sasines) vs HNDA Tool started at a lower price point but, in 2022, this section of the housing market rose at a higher level.

Chart 2.14 Lower Quartile house price comparisons



Source: Registers of Scotland and HNDA Tool

Help to Buy

The Help to Buy (Scotland) for New Build homes was an initiative by the Scottish Government to help both first time buyers and existing homeowners to buy a new build home up to the value of £200,000 from participating house builders. It ran from 2013 to 2022 (applications closed in February 2021) and provided up to 15% of the purchase price of a new build home.

Table 2.10 The number of people receiving funding through the Help to Buy Scheme and the average price paid

Year	Average Purchase Price	Number of Sales
2016-2017	£182,400	20
2017-2018	£171,600	20
2018-2019	£166,500	30
2019-2020	£171,300	20
2020-2021	£174,800	10

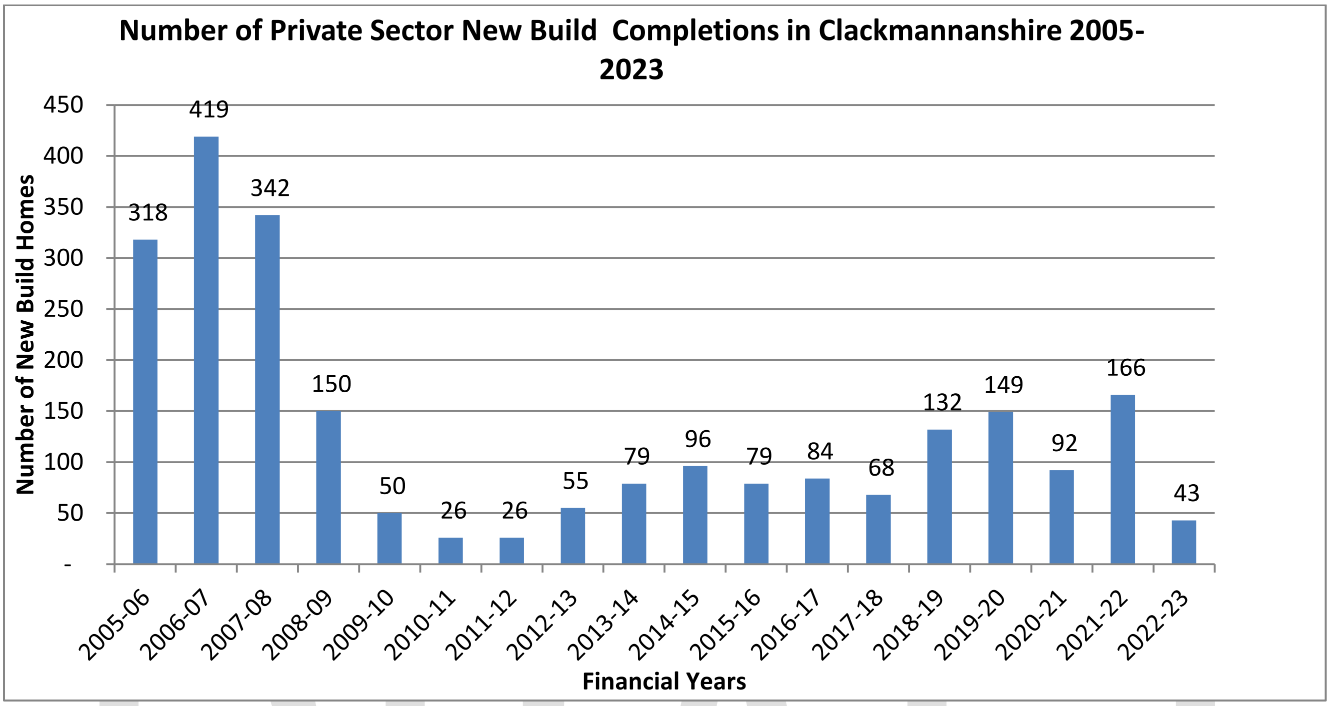
source: Scot Gov - CHMA+-+Help+to+Buy+-+2022-23+-+Final+Tables+-+June+2023

New Build Homes

There were high numbers of private new build completions in Clackmannanshire between 2005 and 2009. The housing market crash in 2008 affected the numbers of completions in the following years. Completions recovered from 2014 and have continued at a more consistent rate.

Post-covid and Brexit, build costs have increased substantially and recent development sites have stalled due to viability.

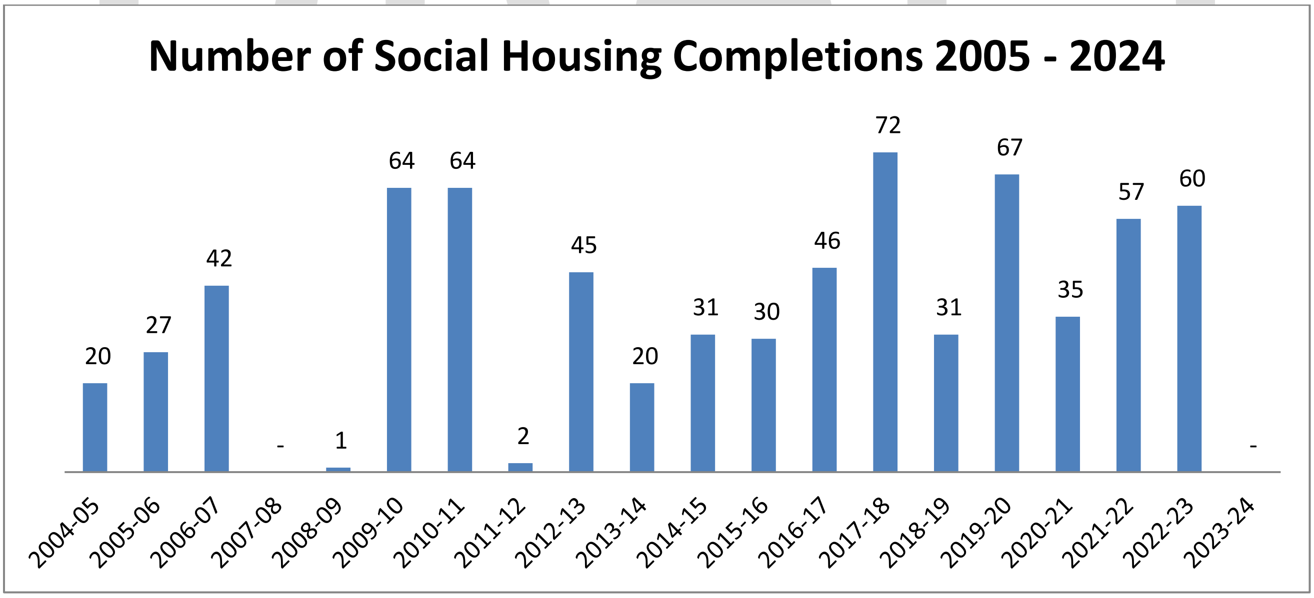
Chart 2.15 Number of Private New Build Completions



Source: NB2 returns by Local Authority Scottish Government Housing Statistics

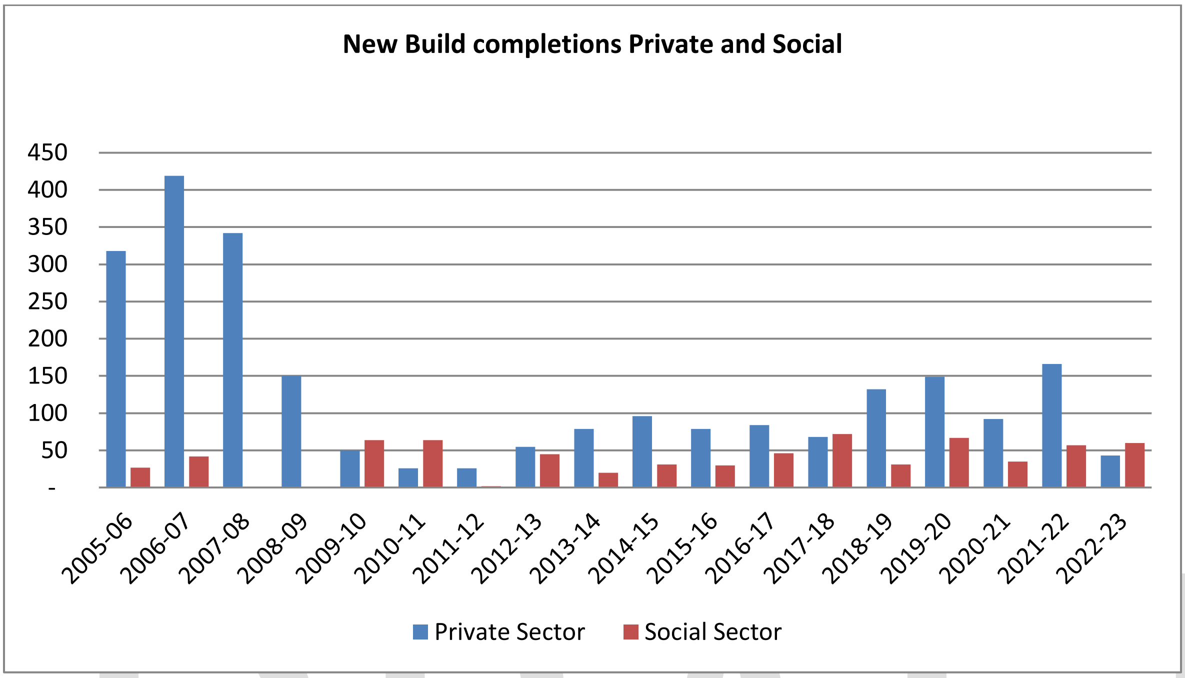
Social house completions have been more consistent over the past 20 years.

Chart 2.16 Social house completions in Clackmannanshire



Source: NB2 returns by Local Authority Scottish Government Housing Statistics

Chart 2.17 All new build completions in Clackmannanshire



Source: NB2 returns by LA to Scottish Government

Private Rented Homes

The private rented sector has an important role in the housing market as it gives more flexibility and the ability to live in preferred areas where buying is not an option.

The information we have on private rent rates is Forth Valley based, taken from Scottish Government rent statistics. These rent rates are what the local housing allowance are based on. It is generally assumed that private renting in Clackmannanshire is cheaper than Stirling and Falkirk, making up the Forth Valley area. Stirling is a University City, making the private rented sector in high student demand. Falkirk has direct transport links to both Edinburgh and Glasgow, making it popular for commuter renting.

Average rents across Scotland and Forth Valley have increased significantly over the past 4 years, around 10% each year between 2020 and 2023.

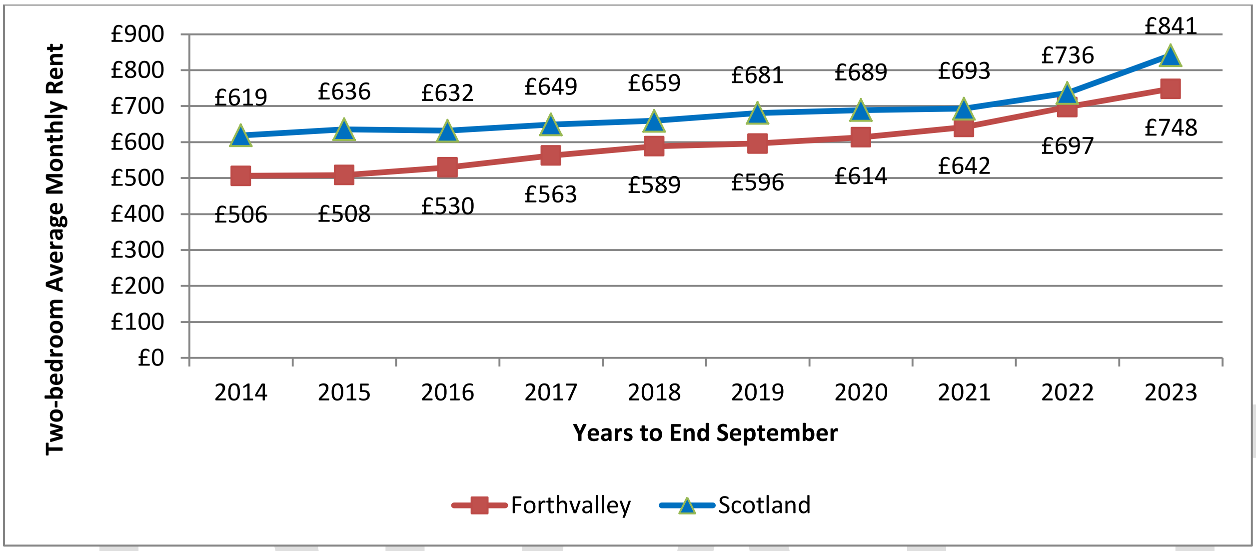
Table 2.11 Average monthly private rented sector rents for Forth Valley and Scotland by bedroom size 2020-2023

	Forth Valley 2020	Forth Valley 2021	Forth Valley 2022	Forth Valley 2023	Scotland 2020	Scotland 2021	Scotland 2022	Scotland 2023
1 Bed Shared	£373	£357	£427	£501	£400	£398	£426	£490
1 Bed	£439	£468	£511	£533	£542	£546	£580	£648
2 Bed	£614	£642	£697	£748	£689	£693	£736	£841
3 Bed	£893	£899	£979	£1,046	£844	£844	£906	£1026
4 Bed	£1,343	£1,225	£1,469	£1,564	£1,342	£1,358	£1,460	£1,656

Source: Scottish Government Private Sector Rent Statistics

Chart 2.18 below shows that the average monthly rent for a two bedroom property in Forth Valley remains at a lower level than Scotland over the past 10 years. Rents in Forth Valley have increased by 48% in Forth Valley and 35% in Scotland. The steepest rises can be seen since 2020, which is most likely due to rise in mortgage interest rates passed on from landlords in tenants' rents.

Chart 2.18 Two bedroom average monthly rent



Source: Scottish Government Private Sector Rent Statistics

Local Housing Allowance Rates

The Local Housing Allowance (LHA) is only paid to private renting tenants and is how housing benefit is calculated and paid. The LHA is intended to go towards the cost of rent and some service charges (factoring fees for example). It doesn't include any utility costs.

The LHA rates stayed at the same from 2020/21 until 2023/24. Rates increased in 2024/25 by 29% for shared rate, 16% for 1 bed, 30% for 2 bed, 23% for 3 bed and 37% for 4 bed.

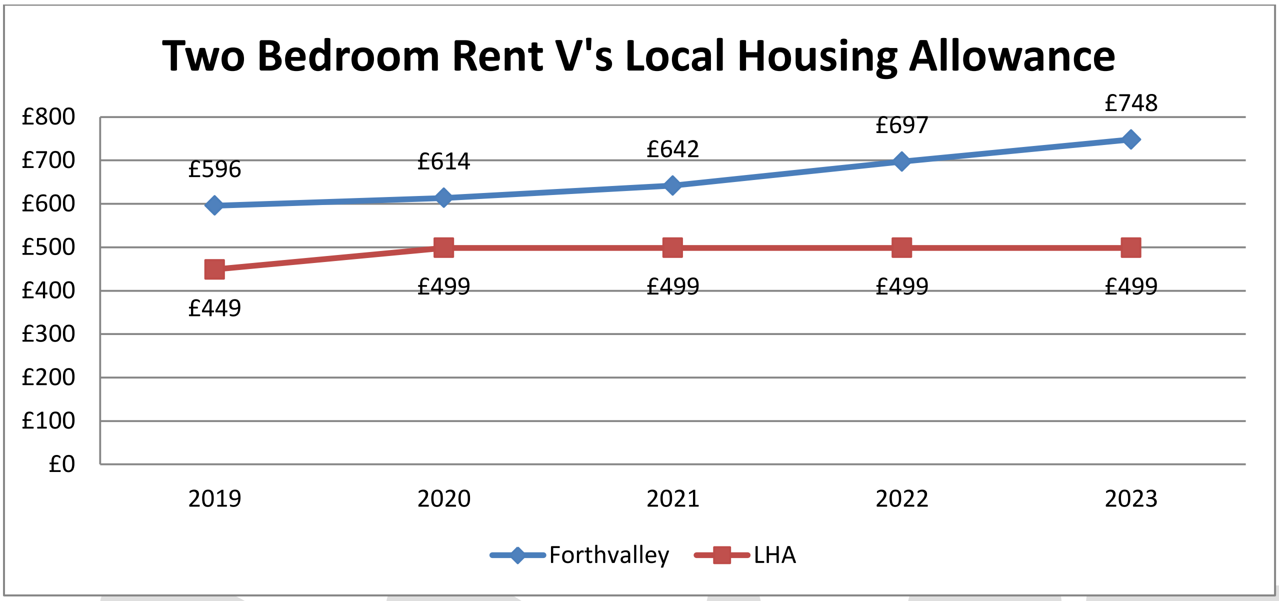
As shown in Chart 2.19, average rents remain higher than the Local Housing Allowance Rates. Where rent is higher, the tenant must make up the difference.

Table 2.12 Local Housing Allowance rate Forth Valley 2019/20 to 2024/25

	Room	1 Bed	2 Bed	3 Bed	4 Bed
Monthly 2019/20	£278.42	£363.61	£448.76	£548.51	£787.80
Monthly 2020/21	£321.19	£393.90	£498.64	£648.22	£947.40
Monthly 2021/22	£321.19	£393.90	£498.64	£648.22	£947.40
Monthly 2022/23	£321.19	£393.90	£498.64	£648.22	£947.40
Monthly 2023/24	£321.19	£393.90	£498.64	£648.22	£947.40
Monthly 2024/25	£413.88	£458.73	£648.22	£797.81	£1,296.45

Source: Scottish Government (Rent Service Scotland)

Chart 2.19 Two Bedroom Average Rent vs Local Housing Allowance



Source: Scottish Government (Rent Service Scotland)

As discussed, where the rent is higher than the LHA, the tenant has to make up the difference in rent. Tables 2.13 to 2.15 show the difference in rent vs. LHA rate. The highest difference is for larger 3 and 4 bedroom homes.

There was the biggest difference in 2023, before the LHA rent was increased, meaning it was increasing difficult for private tenants to access private rented homes between 2022 and 2023, when rents were going up but the LHA remained static. New rates brought in from April 2024 have brought the affordability back in line to 2020 levels.

Table 2.13 Private rents vs. Local Housing Allowance 2020

	Forth Valley 2020	LHA 2020/21	Difference	Difference %
1 Bed Shared	£373	£321.19	£51.81	14%
1 Bed	£439	£393.90	£45.10	10%
2 Bed	£614	£498.64	£115.36	19%
3 Bed	£893	£648.64	£244.36	27%
4 Bed	£1,343	£947.40	£395.60	29%

Source: Scottish Government (Rent Service Scotland)

Table 2.14 Private rents vs. Local Housing Allowance 2023

	Forth Valley 2023	LHA 2023/24	Difference	Difference %
1 Bed Shared	£501	£321.19	£179.81	36%
1 Bed	£533	£393.90	£139.10	26%
2 Bed	£748	£498.64	£249.36	33%
3 Bed	£1,046	£648.64	£397.36	38%
4 Bed	£1,564	£947.40	£616.60	39%

Source: Scottish Government (Rent Service Scotland)

Table 2.15 Private rents vs. Local Housing Allowance 2024

	Forth Valley 2023	LHA 2024/25	Difference	Difference %
1 Bed Shared	£501	£413.88	£87.12	17%
1 Bed	£533	£458.73	£74.27	14%
2 Bed	£748	£648.22	£99.78	13%
3 Bed	£1,046	£797.81	£248.19	24%
4 Bed	£1,564	£1,296.45	£267.55	17%

Source: Scottish Government (Rent Service Scotland)

Private Rents Compared to Income

Tables 2.16 to 2.18 below looks at average rents as at 2023 compared to the lower quartile (30th decile), as estimated for Clackmannanshire in the Housing Need and Demand Tool calculation, to look at how affordable private renting is in Clackmannanshire. Note that the HNDA base income is at 2018 and has been calculated to 2023, based on the HNDA principle projections of household income.

Using the affordability ratio of 25% (spending up to 25% of gross income on housing costs), this shows that even the cheapest, and smallest, private rent is unaffordable to households on the very lowest incomes in Alloa and Hillfoots HMA. The Dollar HMA, with a slightly higher income level, shows that smaller properties are affordable but 2, 3 and 4 bedroom properties remain unaffordable to households on lower incomes in the private rented sector.

Table 2.16 Alloa HMA Private Rented Affordability (lowest income households)

	Monthly Rent Private Rent 2023	Annual Rent	Alloa HMA Lower Quartile income	% Income to housing cost
1 Bed Shared	£501	£6,012	£16,473	36%
1 Bed	£533	£6,396	£16,473	39%
2 Bed	£748	£8,976	£16,473	54%
3 Bed	£1,046	£12,552	£16,473	76%
4 Bed	£1,564	£18,768	£16,473	114%

Source: HNDA Tool & Scottish Government (Rent Service Scotland)

Table 2.17 Hillfoots HMA Private Rented Affordability (lowest income households)

	Monthly Rent Private Rent 2023	Annual Rent	Hillfoots HMA Lower Quartile income	% Income to housing cost
1 Bed Shared	£501	£6,012	£18,827	32%
1 Bed	£533	£6,396	£18,827	34%
2 Bed	£748	£8,976	£18,827	48%
3 Bed	£1,046	£12,552	£18,827	67%
4 Bed	£1,564	£18,768	£18,827	100%

Source: HNDA Tool & Scottish Government (Rent Service Scotland)

Table 2.18 Dollar HMA Private Rented Affordability (lowest income households)

	Monthly Rent Private Rent 2023	Annual Rent	Dollar HMA Lower Quartile income	% Income to housing cost
1 Bed Shared	£501	£6,012	£24,710	24%
1 Bed	£533	£6,396	£24,710	26%
2 Bed	£748	£8,976	£24,710	36%
3 Bed	£1,046	£12,552	£24,710	51%
4 Bed	£1,564	£18,768	£24,710	76%

Source: HNDA Tool & Scottish Government (Rent Service Scotland)

Council Rents Compared to income

Tables 2.19 to 2.21 below looks at Council property rents as at 2024 compared to the lower quartile (30th decile), as estimated for Clackmannanshire in the Housing Need and Demand Tool calculation, to look at how affordable Council rents are in Clackmannanshire. Note that the HNDA base income is at 2018 and has been calculated to 2023, based on the HNDA principle projections of household income.

Using the affordability ratio of 25% (spending up to 25% of gross income on housing costs), this shows that Council rents are just over the threshold of low income households in the Alloa HMA while the Hillfoots are within 25% of gross income and Dollar, at 18% at most, are well within affordable levels of rent.

Table 2.19 Alloa HMA Council Rent Affordability (lowest income households)

	Monthly Council Rent	Annual Rent	Alloa HMA Lower Quartile income	% Income to housing cost
1 Bed Shared	£355	£4,254	£16,473	26%
1 Bed	£363	£4,356	£16,473	26%
2 Bed	£372	£4,463	£16,473	27%
3 Bed	£379	£4,553	£16,473	28%
4 Bed	£389	£4,666	£16,473	28%

Source: HNDA Tool & Clackmannanshire Council Rent rate 2024/25

Table 2.20 Hillfoots HMA Council Rent Affordability (lowest income households)

	Monthly Council Rent	Annual Rent	Hillfoots HMA Lower Quartile income	% Income to housing cost
1 Bed Shared	£355	£4,254	£18,827	23%
1 Bed	£363	£4,356	£18,827	23%
2 Bed	£372	£4,463	£18,827	24%
3 Bed	£379	£4,553	£18,827	24%
4 Bed	£389	£4,666	£18,827	25%

Source: HNDA Tool & Clackmannanshire Council Rent rate 2024/25

Table 2.21 Dollar HMA Council Rent Affordability (lowest income households)

	Monthly Council Rent	Annual Rent	Dollar HMA Lower Quartile income	% Income to housing cost
1 Bed Shared	£355	£4,254	£24,710	17%
1 Bed	£363	£4,356	£24,710	18%
2 Bed	£372	£4,463	£24,710	18%
3 Bed	£379	£4,553	£24,710	18%
4 Bed	£389	£4,666	£24,710	19%

Source: HNDA Tool & Clackmannanshire Council Rent rate 2024/25

Registered Social Landlord Rents Compared to income

Table 2.22 shows the average weekly rent by general needs housing providers in Clackmannanshire in 2023/24. It shows that the housing associations have a much broader rent structure than Council rents and are generally cheaper for smaller properties and 2, 3 and 4 bedroom properties are cheaper rented from the Council than all other RSLs.

Table 2.22 Average weekly rent by general needs housing providers in Clackmannanshire.

Rent	bedsit	1 bed	2 bed	3 bed	4 bed
Clacks Council	£75.84	£77.75	£79.73	£81.78	£84.06
Kingdom	£71.88	£84.11	£93.33	£104.28	£110.11
Paragon	£69.85	£76.14	£84.59	£97.32	£112.20
Ochil View	£84.64	£86.82	£94.65	£102.93	£106.76
Castle rock	£79.90	£90.12	£107.68	£121.71	£136.45
Link Group	£75.65	£89.04	£101.18	£106.25	£120.20

Source: Scottish Housing regulator (SHR), returns 2023/24

Tables 2.23 to 2.25 below looks at Council and the 3 main general needs social housing providers property rents as at 2023 compared to the lower quartile (30th decile), as estimated for Clackmannanshire in the Housing Need and Demand Tool calculation, to look at how affordable social rented rents are in Clackmannanshire. Note that the HNDA base income is at 2018 and has been calculated to 2023, based on the HNDA principle projections of household income.

The Council rents are consistently the lowest and the most affordable over all Housing Market Areas. The highest rents charged by provider are shown in red and shows Ochil View rent rates as the highest across the board. As would be expected, 4 bed properties are the least affordable in the Alloa and Hillfoots HMA but remain within the affordability threshholds in the Dollar HMA.

Table 2.23: Alloa HMA Social Rent Affordability (lowest income households) Main providers 2023/24 rates

	Alloa HMA lower Quartile Income	Clacks Council Annual Rent	% LQ Income to Hsg Cost	Kingdom Annual Rent	% LQ Income to Hsg Cost	Paragon Annual Rent	% LQ Income to Hsg Cost	Ochil View Annual Rent	% LQ Income to Hsg Cost
bedsit	£16,473	£3,640.32	22%	£3,737.76	23%	£3,632.20	22%	£4,401.28	27%
1 bed	£16,473	£3,732.00	23%	£4,373.72	27%	£3,959.28	24%	£4,514.64	27%
2 bed	£16,473	£3,827.04	23%	£4,853.16	29%	£4,398.68	27%	£4,921.80	30%
3 bed	£16,473	£3,925.44	24%	£5,422.56	33%	£5,060.64	31%	£5,352.36	32%
4 bed	£16,473	£4,034.88	24%	£5,725.72	35%	£5,834.40	35%	£5,551.52	34%

Source: SHR returns 2023/24, HNDA Toolkit, Clackmannanshire Council records

Table 2.24: Hillfoots HMA All Social Rent Affordability (lowest income households) main providers 2023/24 based

	Hillfoots HMA lower Quartile Income	Clacks Council Annual Rent	% LQ Income to Hsg Cost	Kingdom Annual Rent	% LQ Income to Hsg Cost	Paragon Annual Rent	% LQ Income to Hsg Cost	Ochil View Annual Rent	% LQ Income to Hsg Cost
bedsit	£18,827	£3,640.32	19%	£3,737.76	20%	£3,632.20	19%	£4,401.28	23%
1 bed	£18,827	£3,732.00	20%	£4,373.72	23%	£3,959.28	21%	£4,514.64	24%
2 bed	£18,827	£3,827.04	20%	£4,853.16	26%	£4,398.68	23%	£4,921.80	26%
3 bed	£18,827	£3,925.44	21%	£5,422.56	29%	£5,060.64	27%	£5,352.36	28%
4 bed	£18,827	£4,034.88	21%	£5,725.72	30%	£5,834.40	31%	£5,551.52	29%

Source: SHR returns 2023/24, HNDA Toolkit, Clackmannanshire Council records

Table 2.25: Dollar HMA All Social Rent Affordability (lowest income households) main providers 2023/24 based

	Dollar Lower Quartile Income	Clacks Council Annual Rent	% LQ Income to Hsg Cost	Kingdom Annual Rent	% LQ Income to Hsg Cost	Paragon Annual Rent	% LQ Income to Hsg Cost	Ochil View Annual Rent	% LQ Income to Hsg Cost
bedsit	£24,710	£3,640.32	15%	£3,737.76	15%	£3,632.20	15%	£4,401.28	18%
1 bed	£24,710	£3,732.00	15%	£4,373.72	18%	£3,959.28	16%	£4,514.64	18%
2 bed	£24,710	£3,827.04	15%	£4,853.16	20%	£4,398.68	18%	£4,921.80	20%
3 bed	£24,710	£3,925.44	16%	£5,422.56	22%	£5,060.64	20%	£5,352.36	22%
4 bed	£24,710	£4,034.88	16%	£5,725.72	23%	£5,834.40	24%	£5,551.52	22%

Source: SHR returns 2023/24, HNDA Toolkit, Clackmannanshire Council records

Income

The household income data is estimated in the HNDA Tool and is available for Clackmannanshire and the HMA areas. Table 2.26 below shows the median (mid value), which for Clackmannanshire in 2024 is £29,408. Alloa has the lowest median income level of £27,063 while Dollar HMA has the highest, and £13,540 higher than in Clackmannanshire as a whole, at £42,948.

Looking at the differences between the lowest 10% of incomes and highest 10% of incomes in Clackmannanshire, there is a difference of £59,674 (84%) between the lowest of £11,459 and highest of £71,133.

Table 2.26: 2024 Household income estimates by deciles and Housing Market Areas

	Alloa 2024	Hillfoots 2024	Dollar 2024	All Clackmannanshire 2024
Median (Mid point)	£27,063	£31,182	£42,948	£29,408
25% (Lower Quartile)	£16,473	£18,827	£24,710	£17,759
Highest 10%	£66,482	£74,718	£97,663	£71,133
Lowest 10%	£10,590	£12,355	£15,297	£11,459

Source: HNDA Toolkit.

Affordability for First Time Buyers

The Bank of Scotland makes regular press releases on first time buyers in Scotland. According to the most recent press release in January 2024[2] analysis by the Bank of Scotland shows the number of first time buyers in Scotland was down 10% in 2023 from the previous year, to 27,339.

The average house price for buyers entering the housing market in 2023 was £188,670, -1% lower than the previous year. Despite this, house prices for first-time buyers remain over £70,000 more expensive, on average, than ten years ago (+60%).

First-time buyers need to put down an average deposit of £39,691, -4% lower than in 2022, this is around 21% of the value of the mortgage loan.   Despite these significant sums, those entering the property market now make up the majority (51%) of all home purchases (with a mortgage) in 2023.

Clackmannanshire is considered one of the more affordable local authority areas for first time buyers with property prices at 3.8 times average income.

The average price paid by first time buyers in Scotland has risen from £118,212 in 2013 to £188,670 in 2023, an increase of 60% over the last decade.

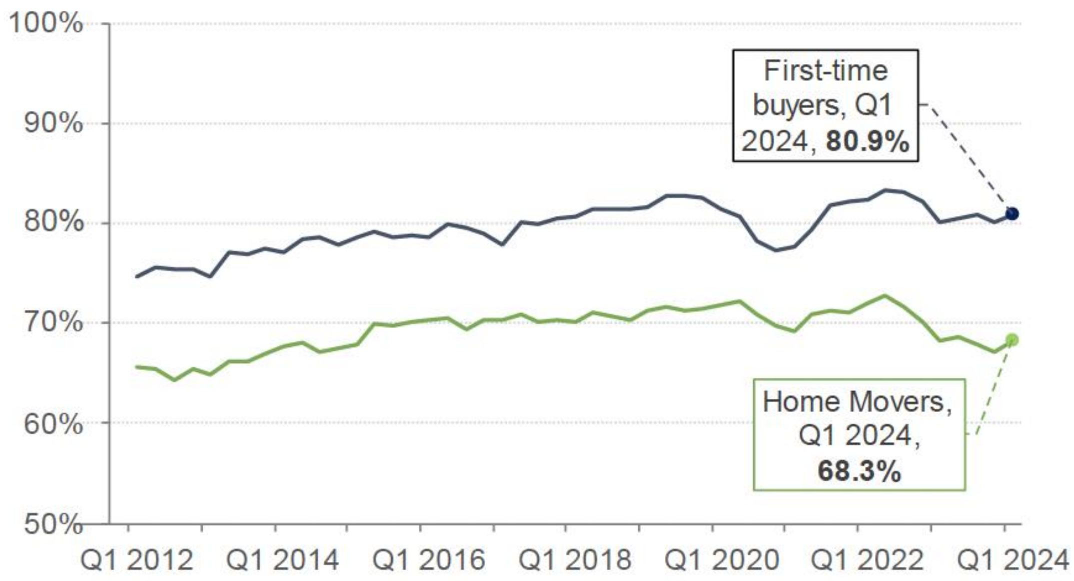
Over the same period, average deposits have risen from £23,228 to £39,691, an increase of almost 71% and from a 19% deposit to a 21% deposit.

[2] Bank of Scotland Press Release January 2024

More recent data, released by UK Finance[3] in June 2024 shows that the ratio of LTV in Scotland for first time buyers is 80.9%, as shown in Chart 2.19, a deposit of 19.1%. The average loan size for a first time buyer in quarter 1 of 2024 is £140.938.

Chart 2.21 shows that first time buyers are paying 19.5% of their income on mortgage payments.

Chart 2.20 Mean Loan-to-Value ratio on new mortgages: Scotland (Quarterly data, to Q1 2024)



Source: UK Finance

Chart 2.21 Average (mean) capital-and-interest-payments-to-income ratio for new mortgages: Scotland (Quarterly data, to Q1 2024)

Source: UK Finance

3 https://www.ukfinance.org.uk/data-and-research/data/key-mortgage-market-data

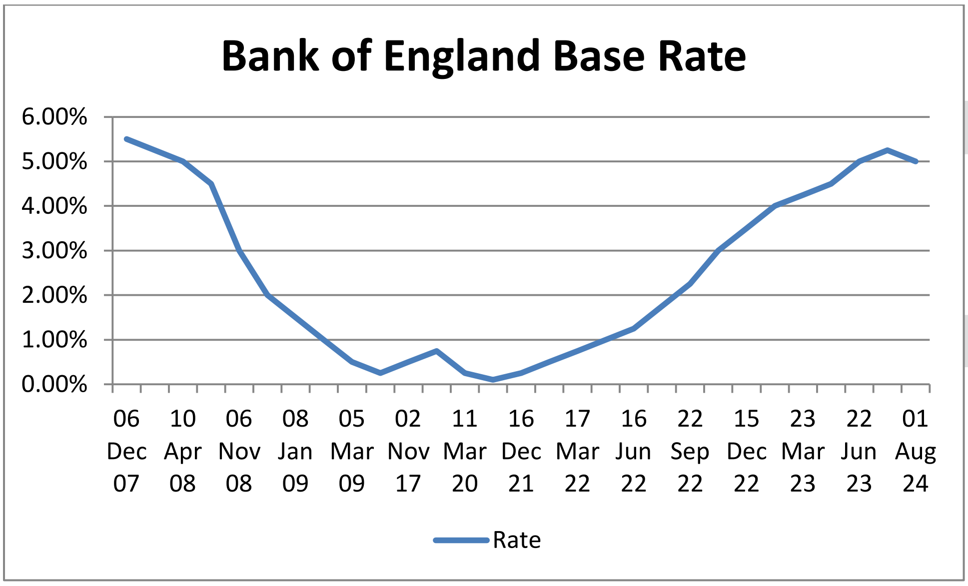
Interest Rates and Mortgages

The Bank of England meets every 6 weeks to agree base rates. The base rate was held at 5% in September 2024, after being cut in August 2024 for the first time in four years. The last time the base rate was as high as 5% was in April 2008. Between 2007 and 2009, the interest rate dropped to 0.5% and stayed around there for 7 years, the lowest ever rate of 0.1% was in place for over a year in 2020 before steadily rising to a recent high of 5.25% in 2023.

Base rates affect the mortgage rates for millions of people in the UK.

Current available mortgage rates

Chart 2.22: Bank of England Base Rate changes 2007 to 2024



Source: Bank Rate history and data | Bank of England Database
https://www.bankofengland.co.uk/boeapps/database/Bank-Rate.asp

Clackmannanshire's Economy

Clackmannanshire nestles at the centre of Scotland. The area has substantial industrial heritage in mining, brewing and textiles. It remains an area with a significant manufacturing base and retains a number of businesses related to the drinks industry including: brewing, yeast making and bottle making.

Clackmannanshire's business base hosts significant international players as well as key locally based employers.

The Council acknowledges that there are economic issues to overcome in the area. There are insufficient jobs in the area for everyone who needs to find work. Those who can travel have been commuting elsewhere. Those who need to work nearer home to balance caring responsibilities often find themselves left behind. Too many people are living in poverty and have poor health. Outcomes for women and girls are particularly poor and some communities face the challenges of living with significant deprivation.

Before the Coronavirus pandemic started the Council had commenced work in partnership with the Scottish Government on a Wellbeing Economy Project. This builds on its existing approach to inclusive growth.

The Council is developing a new economic strategy which will have Wellbeing Economy principles and Community Wealth Building at its heart.

Economic Growth (GVA)

Gross value added (GVA) is the measure of the value of goods and services produced in an area, in the industry or sector of the economy.

Table 2.27 below[1] shows a headcount of the number of individuals employed by businesses based in Clackmannanshire; this has increased from 10,000 in 2011 to 11,000 in 2021, up 10%. The total turnover of businesses in Clackmannanshire has increased by 37%. As a result, the Gross Value Added per head has increased from £40,807 to £69,393, showing an increase in productivity of 70% between 2011 and 2021.

Comparing to Scottish data at Table 2.28 and Chart 20.20 GVA per head in Clackmannanshire grew from a lower rate in 2011 but grew at a higher rate and, in 2021, was around £16,000 more per head, demonstrating that Clackmannanshire has a 30% higher productivity rate than the Scottish average.

Table 2.27 GVA Data for Clackmannanshire 2011 - 2021

Year	Total Employment[1]	Total Employees	Total Turnover (in £ millions)	Gross Value Added at Basic Prices (in £ millions)	Gross Value Added Per Head (in £)
2011	10,000	9,700	£1,098.1	£409.3	£40,807
2012	10,100	9,800	£1,096.1	£450.0	£44,767
2013	10,300	9,900	£1,152.2	£523.9	£51,058
2014	10,800	10,500	£1,169.8	£504.8	£46,671
2015	10,800	10,600	£1,162.0	£525.5	£48,460
2016	10,900	10,600	£1,193.8	£498.9	£45,625
2017	10,900	10,500	£1,231.7	£532.6	£49,040
2018	11,100	10,800	£1,276.8	£556.4	£50,033
2019	11,000	10,700	£1,452.2	£649.5	£59,246
2020	10,400	10,100	£1,189.1	£522.0	£50,228
2021	11,000	10,700	£1,509.1	£763.2	£69,393

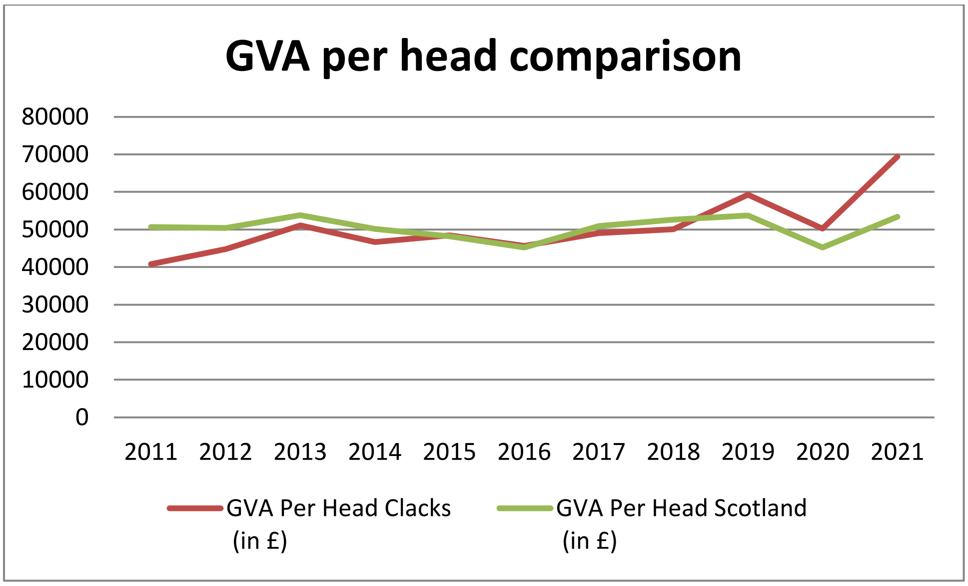
Source: Scottish Government Annual Business Statistics 2021

Table 2.28 GVA Data for Scotland 2011 - 2021

Year	Total Employment (in Thousands)	Total Employees (in Thousands)	Total Turnover (in £ millions)	Gross Value Added at Basic Prices (in £ millions)	Gross Value Added Per Head (in £)
2011	1696.8	1625.6	£236,394	£86,008	£50,690
2012	1677.8	1617.4	£231,972	£84,564	£50,403
2013	1730.8	1666.2	£239,203	£93,120	£53,803
2014	1788.7	1734	£236,211	£89,729	£50,163
2015	1813.8	1762.3	£230,430	£87,375	£48,173
2016	1847	1787.5	£227,717	£83,489	£45,202
2017	1845.7	1791	£241,270	£93,960	£50,906
2018	1863.1	1809.6	£242,362	£98,024	£52,614
2019	1856.8	1808.3	£242,752	£99,788	£53,741
2020	1801.7	1750.4	£207,922	£81,502	£45,235
2021	1861.8	1814.7	£241,663	£99,338	£53,357

Source: Scottish Government Annual Business Statistics 2021

Chart 2.23 GVA per head Clackmannanshire and Scotland



Source: Scottish Government Annual Business Statistics 2021

Employment and Unemployment

Table 2.29 below shows employment in Clackmannanshire 2023/24. It shows that 72.2% of all adults are economically active in Clackmannanshire, slightly lower than the Scottish employment figure of 77.1%, 68.4% of those are in employment, compared to 74.2% in Scotland. Only 4% of those economically active are self employed, half the number in Scotland at 8%.

The percentage of those registered unemployed in Clackmannanshire is 3.8%, similar to 3.7% in Scotland.

Table 2.29 Employment & unemployment Clackmannanshire and Scotland

Employment and unemployment (Apr 2023-Mar 2024)

	Clackmannanshire (Numbers)	Clackmannanshire (%)	Scotland (%)
All People			
Economically Active†	24,700	72.2	77.1
In Employment†	23,400	68.4	74.2
Employees†	21,400	63.6	65.9
Self Employed†	1,800	4.4	8.0
Unemployed (Model-Based)§	900	3.8	3.7
Males			
Economically Active†	10,600	73.5	80.0
In Employment†	9,800	67.2	76.5
Employees†	8,500	59.0	66.2
Self Employed†	#	#	9.9
Unemployed§	#	#	4.2
Females			
Economically Active†	14,000	71.2	74.4
In Employment†	13,600	69.3	72.0
Employees†	12,900	67.0	65.7
Self Employed†	#	#	6.2
Unemployed§	#	#	3.1

Source: ONS annual population survey & https://www.nomisweb.co.uk/reports/lmp/la/1946157409/report.aspx#tabrespop

Sample size too small for reliable estimate

† - numbers are for those aged 16 and over, % are for those aged 16-64

§ - numbers and % are for those aged 16 and over. % is a proportion of economically active

Table 2.30 below shows all people who are neither in employment nor unemployed. This group includes, for example, all those who were looking after a home or retired.

Economic inactivity is 27.8% in Clackmannanshire compared to 22.9% in Scotland. Most noticeably is long term sickness, 43.2% of economic inactivity in Clackmannanshire is due to long term sickness compared to 32.7% in Scotland.

Table 2.30 Economic Inactivity Clackmannanshire and Scotland

Economic inactivity (Apr 2023-Mar 2024)

	Clackmannanshire (Level)	Clackmannanshire (%)	Scotland (%)
All People			
Total	9,000	27.8	22.9
Student	#	#	24.8
Looking After Family/Home	#	#	16.3
Temporary Sick	!	!	2.5
Long-Term Sick	3,900	43.2	32.7
Discouraged	!	!	#
Retired	1,600	17.3	14.5
Other	!	!	8.9
Wants A Job	#	#	16.5
Does Not Want A Job	8,100	89.5	83.5

Table 2.31 below shows occupational groups. It highlights that Clackmannanshire has a smaller percentage of people employed as directors, managers and professional occupations than Scotland. There is a higher percentage of those employed in service and customer service occupations.

Table 2.31 Employment by occupation Clackmannanshire and Scotland

Employment by occupation (Apr 2023-Mar 2024)

	Clackmannanshire (Numbers)	Clackmannanshire (%)	Scotland (%)
Soc 2020 Major Group 1-3	9,100	**39.1**	**50.6**
1 Managers, Directors And Senior Officials	1,600	6.6	8.0
2 Professional Occupations	3,000	12.8	26.4
3 Associate Professional Occupations	4,500	19.4	16.1
Soc 2020 Major Group 4-5	4,600	**19.9**	**18.8**
4 Administrative & Secretarial Occupations	2,600	11.1	9.5
5 Skilled Trades Occupations	2,000	8.8	9.3

Employment by occupation (Apr 2023-Mar 2024)

	Clackmannanshire (Numbers)	Clackmannanshire (%)	Scotland (%)
Soc 2020 Major Group 6-7	5,800	**24.8**	**15.4**
6 Caring, Leisure And Other Service Occupations	3,200	13.8	9.0
7 Sales And Customer Service Occs	2,500	10.8	6.4
Soc 2020 Major Group 8-9	3,800	**16.2**	**15.2**
8 Process Plant & Machine Operatives	1,800	7.9	5.5
9 Elementary Occupations	1,900	8.2	9.7

Source: ONS annual population survey

Notes: Numbers and % are for those of 16+

% is a proportion of all persons in employment

As shown in table 2.32 below, while male weekly full-time earnings are slightly higher than Scotland, female weekly earnings are well below the rest of Scotland and the gender pay gap is much wider in Clackmannanshire than Scotland. In Scotland, on average, male workers are paid 7.4% more while in Clackmannanshire the gap is 19.3%. This suggests that there are a higher percentage of male workers in group 1-3, directors, managers and professional occupations while more females in Clackmannanshire could be employed in lower paid service jobs.

Table 2.32 Earnings in Clackmannanshire and Scotland

Earnings by place of residence (2023)

	Clackmannanshire (Pounds)	Scotland (Pounds)	Great Britain (Pounds)
Gross Weekly Pay			
Full-Time Workers	685.9	702.4	682.6
Male Full-Time Workers	728.3	725.7	728.3
Female Full-Time Workers	587.9	672.0	628.8
Hourly Pay - Excluding Overtime			
Full-Time Workers	16.88	18.09	17.49
Male Full-Time Workers	18.21	18.17	18.15
Female Full-Time Workers	16.20	18.00	16.64

Source: ONS annual survey of hours and earnings - resident analysis

Notes: Median earnings in pounds for employees living in the area.

Earnings by place of residence (2023)	Clackmannanshire (Pounds)	Scotland (Pounds)	Great Britain (Pounds)

While the employment rate in Clackmannanshire is higher than in Scotland, the claimant count is the same as Scotland. This is due to the higher rate of economic inactivity in Clackmannanshire, retired people and those on long term sick in Clackmannanshire make up a larger percentage of the population than across Scotland.

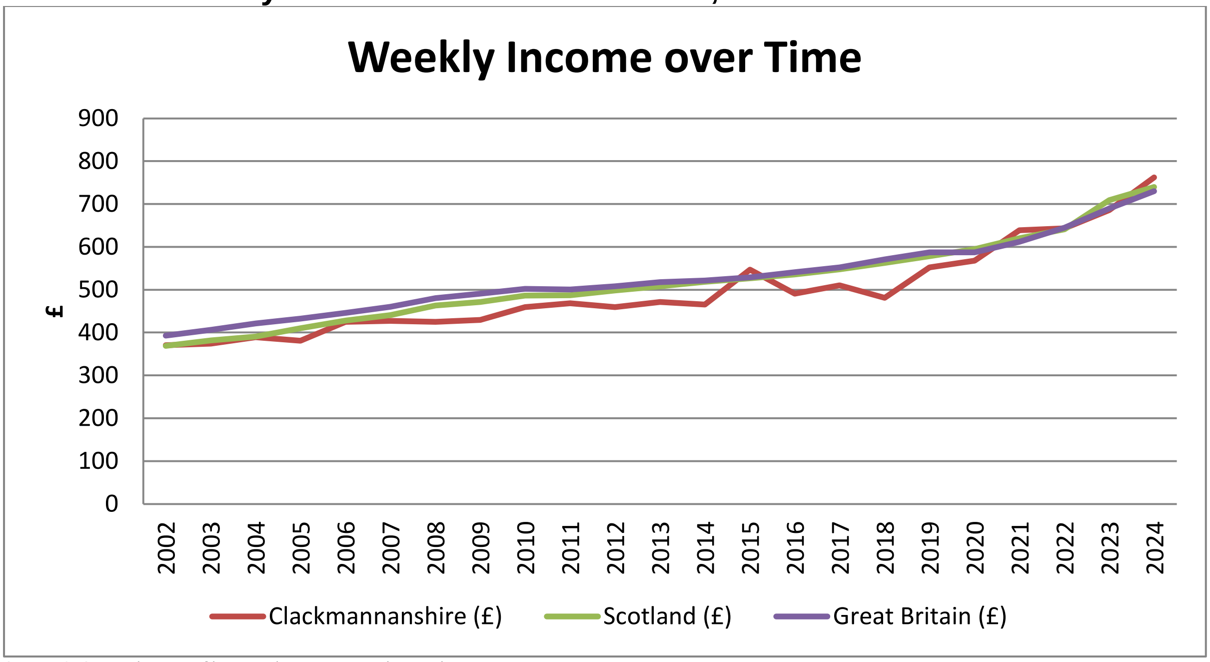
Youth unemployment in Clackmannanshire makes up most of the claimant count in Clackmannanshire and is higher than in Scotland.

Table 2.33 Claimant count

Claimant count by age - not seasonally adjusted (August 2024)

	Clackmannanshire (Level)	Clackmannanshire (%)	Scotland (%)	Great Britain (%)
Aged 16+	1,100	**3.4**	**3.4**	4.3
Aged 16 To 17	10	**0.9**	**0.6**	0.2
Aged 18 To 24	235	**6.2**	**4.6**	5.3
Aged 18 To 21	140	**6.6**	**5.0**	5.5
Aged 25 To 49	625	**4.1**	**3.9**	5.0
Aged 50+	230	**2.0**	**2.3**	**3.2**

Chart 2.24 Weekly incomes Clackmannanshire, Scotland and UK



Source: ONS annual survey of hours and earnings - resident analysis

LHS & Development Plan	Key Issues Identified in the Housing Needs and Demand Assessment
Demographic issues for the local housing markets	**<u>Declining Population</u>** Between 1981 and 1989, the population of Clackmannanshire declined from 48,218 to 47,600. It then steadily increased and stayed at around 48,150 between 1990 and 2003. Between 2003 and 2008 levels of house building were between 300 to 400 completions a year and the population of Clackmannanshire increased from 48,140 in 2003 to 51,500 in 2011. This was an increase of 3,360 people over 8 years (6.9% total increase in total population). The 2018 NRS statistics show a decrease of 1,476 people (-2.8%) in the 25 year period from 51,440 in 2018 to 49,924 in 2043. This shows that the population in Clackmannanshire is influenced by levels of new house building attracting people into Clackmannanshire possibly due to the price of newbuilds in the early 2000's were more affordable than neighbouring Council areas. Going forward, encouraging new housing developments could boost population growth in the future, more so in the private sector, where households are generally more mobile. **<u>Aging Population</u>** The largest age group at the current time is the 45 to 64 age group at 29.5%, this is slightly higher than Scotland at 27% but largely, Clackmannanshire and Scotland have a similar age profile. From population projections in Clackmannanshire and Scotland, it is clear that by 2043, the profile of the older population in Clackmannanshire will be greater than that in Scotland overall. The number of people in the 85+ age group by 2043 will increase by the greatest amount, 95% in Clackmannanshire and 73% in Scotland. Supporting the older population and addressing adaptations needed in existing homes will be essential when planning, not only for affordable homes, as the majority of older households own their own homes, but for private developments. **<u>Smaller, Older Households</u>** There is projected to be only a 3% increase in households in Clackmannanshire between 2018 and 2043 compared to a 10% increase in the whole of Scotland. There is a marked difference between Clackmannanshire and Scotland in the 45-59 age

	group, a reduction of 19% compared to just 2% over Scotland. At the same time, the over 75's are projected to increase by 88% in Clackmannanshire and by 74% in Scotland. Both figures show that the number of older people will increase dramatically a sign of people living longer overall. The percentage decrease in population is greater than the number of households year on year. The population in Clackmannanshire is projected to decrease by 3% between 2021 and 2043, whereas the number of households is projected to increase by 3%. While there will be fewer people, the number of households is projected to rise. It can be assumed from tables predicting an increase in the age of the population that these, smaller households will predominately be older single people or couples.
Affordability Issues for the Local Housing Markets	**<u>Private House Prices</u>** Average house prices in Clackmannanshire are slightly lower than the national average, with the exception of the Dollar HMA which is around or above national averages. However, income levels in the Dollar HMA are also higher than average. The Dollar HMA is, on average, 40% more expensive than the Clackmannanshire average, giving this area a unique profile in terms of affordability. Lower quartile house prices in Clackmannanshire, are generally viewed as starter home prices, often first time buyers market. Over the past 20 years, prices for first time buyers have increased by 192%, compared to 130% for average house prices. With increased requirement for larger deposits for first time buyers, it is becoming more difficult for buyers to enter the market for the first time, with average Loan to Value for first time buyers at 80%, a deposit of around £20,000 is required on entry level home ownership. The HNDA tool projects house prices at a lower level than those seen in the data through Registers of Sasines. A discussion at the Housing Market Partnership group should formally look at this and come to a decision as to what data is entered into the HNDA tool. **<u>Private Renting</u>** The private rented sector in Clackmananshire is based on Forth Valley rent levels. It is generally thought that Clackmannanshire is cheaper than Stirling or Falkirk, but there is a lack of

	information of private rent levels for this area alone. This is something that could be addressed by building up a record of local private rent rates. The Local Housing Allowance (LHA) was increased for 2024/25 for the first time in four years. This addressed some affordability in the private renting sector by bringing the LHA rate more in line with actual rents. There is still a gap between LHA and rents that has to be met by private rented tenants. Private renting is unaffordable for lower quartile income households, with the exception of <2 bedroom properties in the Dollar HMA. **Social Renting (Council and Social Landlords)** The main general needs housing associations have a much broader rent structure than Council rents and are generally cheaper for smaller properties and 2, 3 and 4 bedroom properties are cheaper rented from the Council than all other RSLs. The Council rents are consistently the lowest and the most affordable over all Housing Market Areas. The highest rents charged are the Ochil View rent rates, the highest across the board. As would be expected, 4 bed properties are the least affordable in the Alloa and Hillfoots HMA but remain within the affordability threshholds in the Dollar HMA.
Economic Issues for the Local Housing Markets	There is a marked difference between Clackmannanshire and Scotland in the 45-59 age group, a reduction of 19% compared to just 2% over Scotland. At the same time, the over 75's are projected to increase by 88% in Clackmannanshire and by 74% in Scotland. The sharp decrease of working age adults in the 45-59 year old age group in Clackmannanshire will mean a reduction in economic activity in the area by 2043. The Council acknowledges that there are economic issues to overcome in the area. There are insufficient jobs in the area for everyone who needs to find work. Those who can travel have been commuting elsewhere. Those who need to work nearer home to balance caring responsibilities often find themselves left behind. Too many people are living in poverty and have poor health. Outcomes for women and girls are particularly poor and some communities face the challenges of living with significant deprivation. Gross value added (GVA) is the measure of the value of goods and services produced in an area, in the industry or sector of the

	economy. The Gross Value Added per head has increased from £40,807 to £69,393, in Clackmannanshire showing an increase in productivity of 70% between 2011 and 2021. Comparing to Scottish data GVA per head in Clackmannanshire grew from a lower rate than over Scotland in 2011 but grew at a higher rate and, in 2021, was around £16,000 more per head, demonstrating that Clackmannanshire has a 30% higher productivity rate than the Scottish average.

Chapter 3 Stock

Core Output 4

The aim of this chapter is to profile the local housing stock and to identify stock pressures such as hard to let properties or stock in high demand. It will also look at those in existing housing need whose housing can be met using an in-situ solution to make the home suitable for the current needs of the household such as an adaptation or repair.

The chapter will detail housing issues faced by existing tenants which can be addressed by utilising the existing stock, transfers etc. and will feed into the new Local Housing Strategy to shape decisions around policies for future stock management.

Where any of the issues highlighted would not be addressed with an in-situ solution or suitable transfer, an additional unit of housing is assumed to be required and will be included in the existing need section of the HNDA Tool.

The available existing housing stock will be profiled by size, type, condition, occupancy and turnover to show where housing pressure exists and highlight where alternative management could help to address housing needs of the population.

The following outputs must be included to ensure 'robust and credible' status of the HNDA:

- What existing stock is available in Clackmannanshire to meet local housing needs and identify any under-supply or surplus of housing type;
- Show where existing stock is pressured and could be managed differently to meet housing needs;
- Describe the types and number of in-situ housing solutions that could be used;
- Stock considered by size, type, condition, occupancy (over-crowding, under occupation), concealed households and turnover (re-lets, voids), tenure and location.

The evidence is drawn from various sources including 2022 Census, Scottish House Condition Survey, Scottish Housing Regulator Charter and Clackmannanshire Housing Management System.

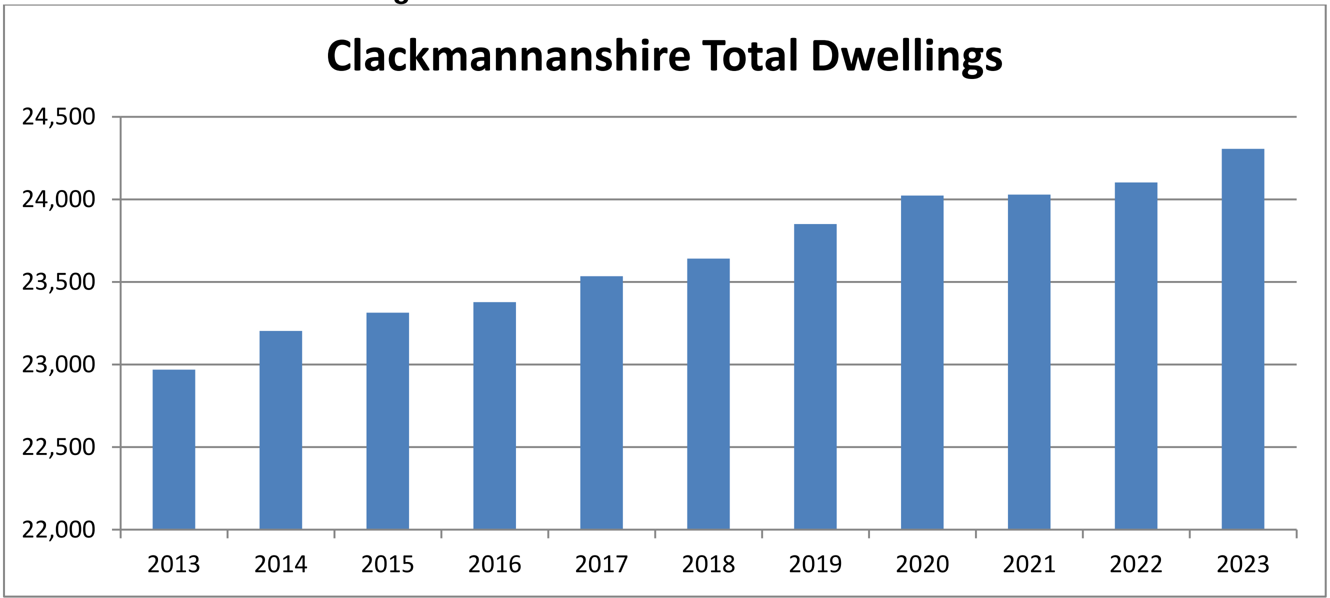
Stock Characteristics

As shown in chart 3.1 below, NRS estimated that in 2023, there were 24,305 dwellings in Clackmannanshire. Over the past 10 years, the number of properties has increased from 22,969 in 2013, an increase of 1,336 homes (5.8%) over the period.

Household estimates from the NRS are based on the number of occupied dwellings obtained from Council Tax billing systems.

The number of occupied dwellings in an area is calculated by subtracting the number of vacant dwellings and second homes from the total number of dwellings. This number is then adjusted from September back to June. Although an occupied dwelling is roughly equivalent to a household, the number of occupied dwellings can differ from the number of households recorded by the Census.

Chart 3.1 Number of dwellings in Clackmannanshire 2013 - 2023



Source: NRS website: Household and Dwellings in Scotland: 2023 (Clackmannanshire)

The most in depth information on breakdown of stock by size, type, location and tenure is found in the 2022 Census. According to this latest census data, in 2022 there were 24,072 occupied households in 2022. The difference can be explained by the way the NRS data is estimated, where as the Census is the number of households that have responded and resident on Census day.

Stock by Tenure

Table 3.1 shows that 15,163 homes in Clackmannanshire, at the 2022 Census, were owner occupied 63%. There are 6,447 Social Rented (Council and RSL) homes, 27%. The private renting sector accounts for 9% of homes at 2,131. The other 1% of homes is shared equity, 144 homes.

The owner occupied sector is similar to that of the rest of Scotland where 63% of homes are owner occupied. In Scotland 22.5% of homes are for social rent, which is less than

Clackmannanshire and the private rented sector across Scotland is larger than Clackmannanshire at 13% privately rented.

Table 3.1 All Stock by Tenure

All occupied households	Owned : Total	Owned: Owned outright	Owned: Owned with a mortgage or loan	Owned: Shared ownership (part owned and part rented)	Owned: Shared Equity (e.g. LIFT or Help-to-Buy)	Social Rented: Council (LA) or Housing Association / Registered Social Landlord	Private rented: Total	Private rented: Private landlord or letting agency	Private rented: Other	Lives Rent Free
24,072	15,163	8,146	6,873	33	111	6,447	2,131	2,045	83	334

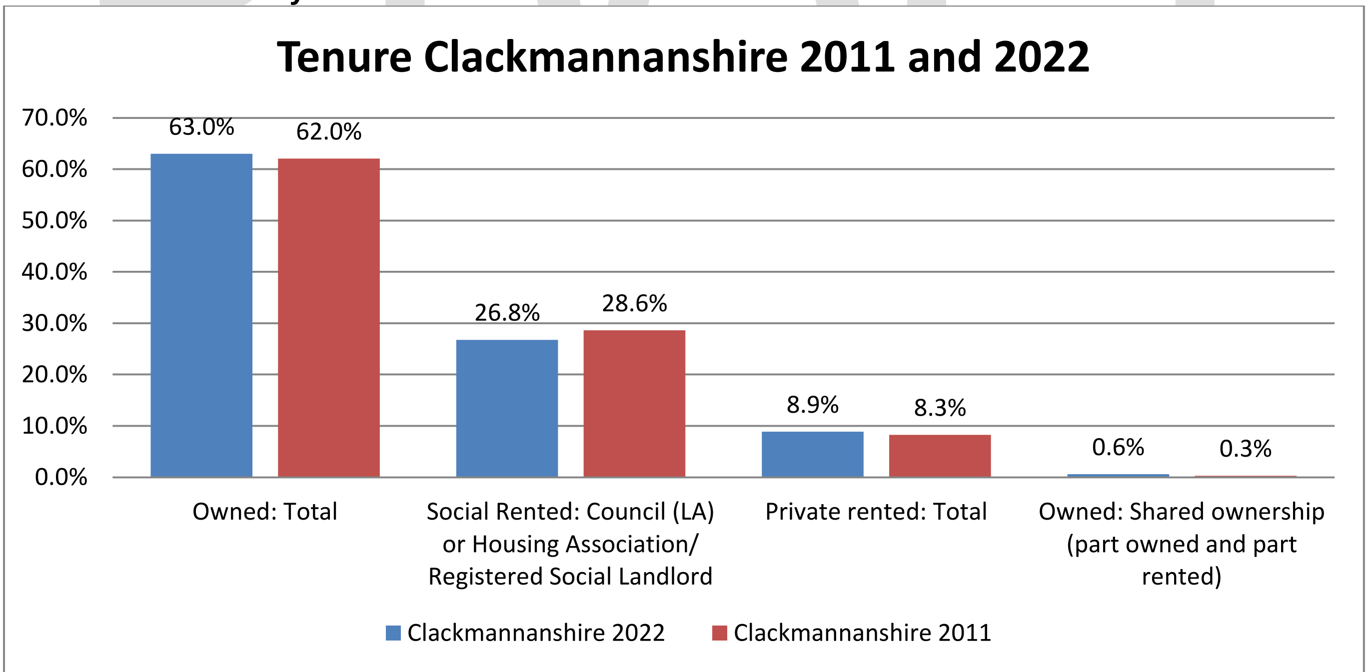
Source: "Scotland's Census 2022 - National Records of Scotland Table UV404 - Household tenure - Households All occupied households"

Please note the Scottish Housing Regulator data from 2022 showed a total of 7,247 social rented homes in Clackmannanshire. This is likely to be more accurate than the Census data and will include temporary accommodation and unlettable properties.

The tenure mix in Clackmannanshire has changed slightly between the 2011 Census and the 2022 Census. Owner occupation has increased from 62% to 63% and social renting has reduced from 28.6% to 26.8%, this could be explained by the right to buy which ceased in Scotland in 2016 and was still an option between the two census periods. As a comparison, the 2001 Census cited 34% of all dwellings in Clackmannanshire were rented from the Council or a Registered Social Landlord (RSL).

The private rented sector marginally increased from 8.3% in 2011 to 8.9% in 2022.

Chart 3.2 All Stock by Tenure 2011 and 2022



Source: "Scotland's Census 2022 - National Records of Scotland Table UV404 - Household tenure - Households All occupied households
Scotland's Census 2011 - National Records of Scotland Table QS405SC - Tenure – Households All households

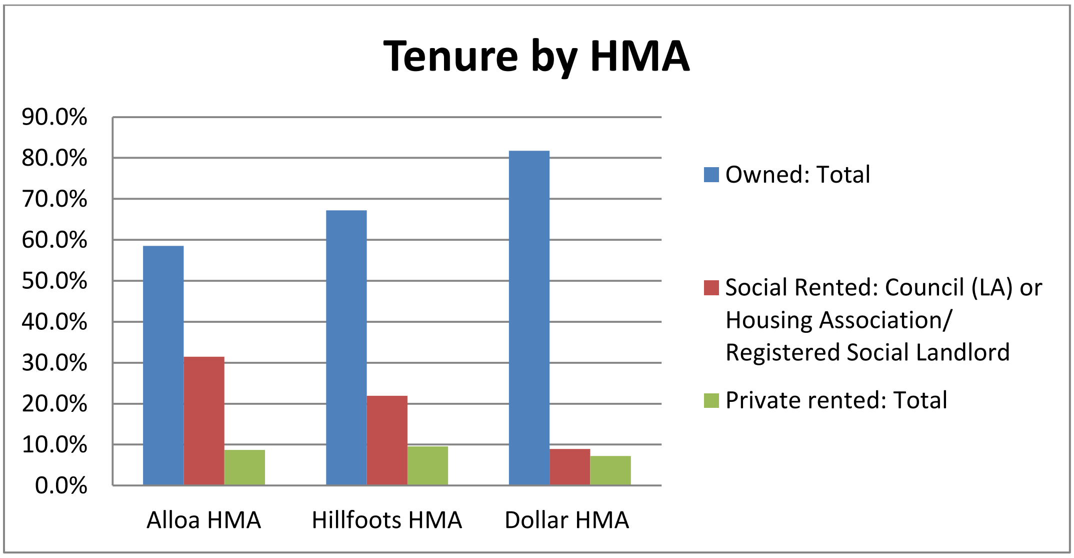
At Housing Market Area (HMA), 81.7% of all homes are owned in the more affluent area of Dollar (HMA3), the lowest percentage of owner occupation is in the Alloa HMA (HMA1) where only 58.5% of all homes are owner occupied and 67.2% of homes in the Hillfoots HMA (HMA2) are owned.

Renting from the Council or an RSL is highest in Alloa HMA at 31.5%, 21.9% of all homes in the Hillfoots HMA are social rented and only 9% in Dollar HMA.

The highest proportion of homes in the private rented sector is the Hillfoots HMA at 9.5%, followed by Alloa HMA at 8.7% and then Dollar HMA at 7.2%.

**Note that chart 3.3 only shows 3 types of tenure, the other proportion is made up with shared equity and living rent free.

Chart 3.3 Stock by Tenure and Housing Market Area (HMA)



Source: Census Settlement - Locality 2022 by Household tenure

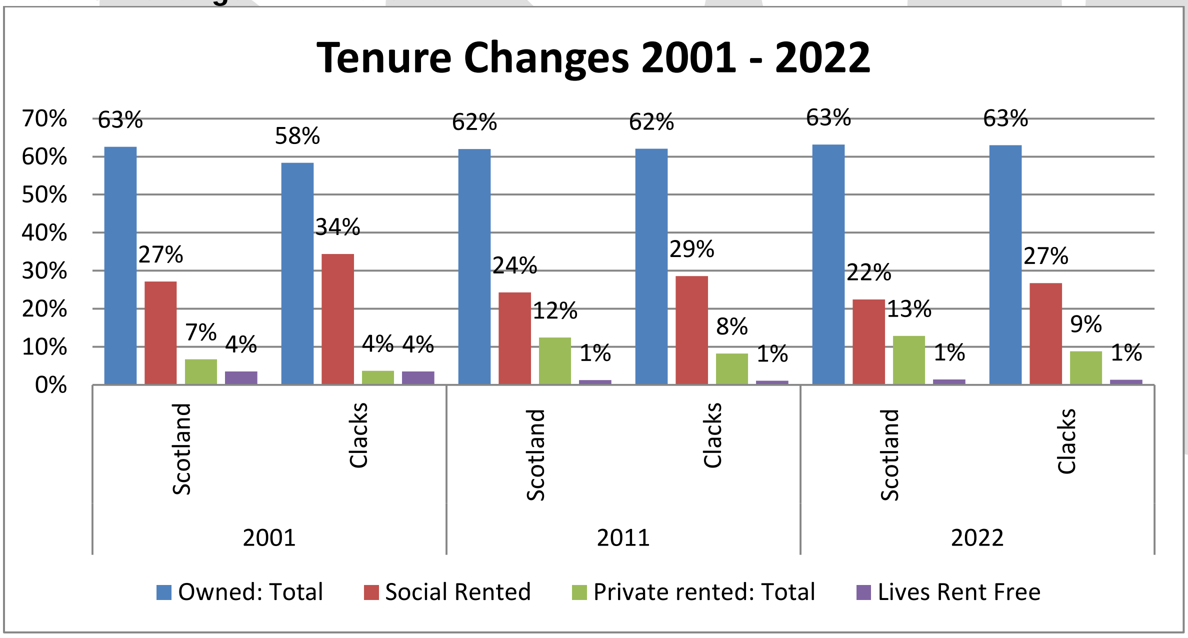
Changes in Tenure

Chart 3.4 shows the changes in housing tenure between 2001 and 2022 in Scotland and in Clackmannanshire. Social renting in Clackmannanshire has reduced from 34% to 27% in the past 20 years. Over the same period, the social rented sector in Scotland has reduced from 27% to 22%.

Owner occupation has remained constant in Scotland at 63%, while the private rented sector has almost doubled from 7% to 13%. The changes in social renting and private renting suggests that right to buy properties have changed from social rented to private rented properties over the past 20 years in Scotland.

Clackmannanshire has a smaller private rented sector than the Scottish average, at 9% of all properties in 2022, compared to 7% in 2001. The owner occupied sector in Clackmannanshire has increased from 58% to 63% over the same period, suggesting influence from the right to buy but, in contrast to Scotland, these homes have remained in owner occupation rather than being rented out privately.

Chart 3.4 Changes in Tenure 2001 - 2022



Source: "Scotland's Census 2022 - National Records of Scotland Table UV404 - Household tenure - Households All occupied households Scotland's Census 2011 - National Records of Scotland Table QS405SC - Tenure – Households All households Scotland's Census 2001

Stock by Type

Homes in Clackmannanshire are mainly houses, 75% of the stock is houses with 25% flats. In Scotland this is 66% houses and 34% flats.

Table 3.2 All stock by house type

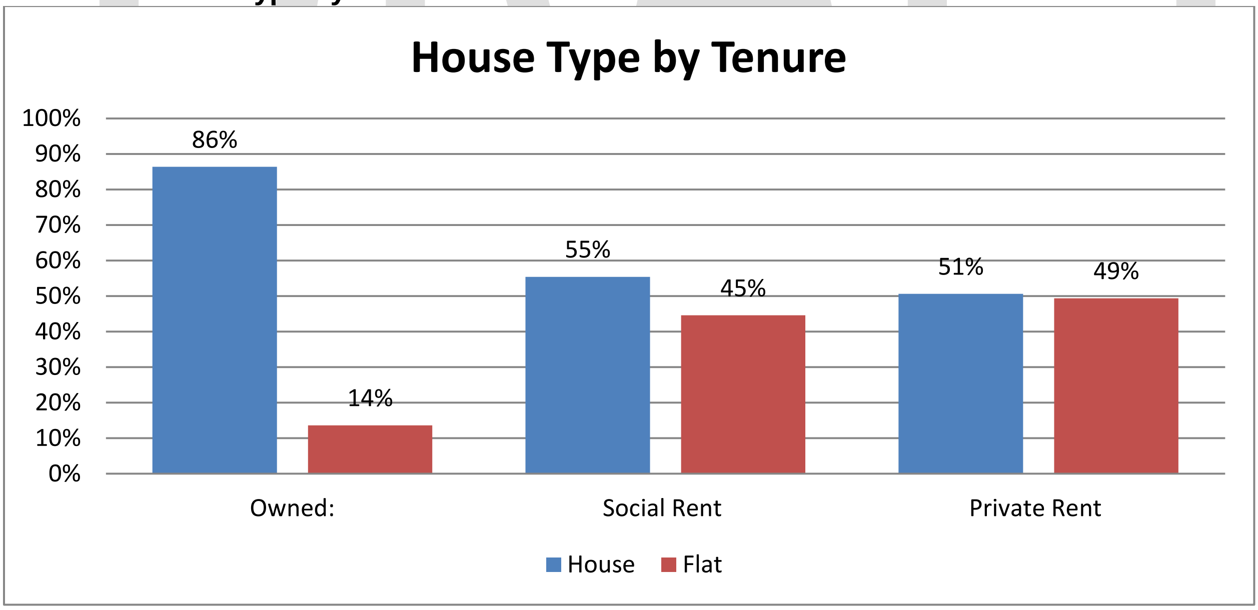
Type of accommodation	All	Whole house or bungalow: Total	Whole house or bungalow: Detached	Whole house or bungalow: Semi-detached	Whole house or bungalow: Terraced (including end-terrace)	Flat, maisonette or apartment: Total	Caravan or other mobile or temporary structure
Clacks	24072	18101	6302	6846	4953	5958	13

Source: "Scotland's Census 2022 - National Records of Scotland Table UV402 - Accommodation type – Households All occupied households"

Stock by tenure is not yet broken down for the 2022 Census, however Chart 3.5 below shows, from 2011 census data, that there are differences between tenures with the owner occupied sector having a larger number of houses, 86%, compared to 55% in the social rented sector and 51% privately rented.

This can show that there is pressure on houses in the social rented sector.

Chart 3.5 House Type by Tenure 2011



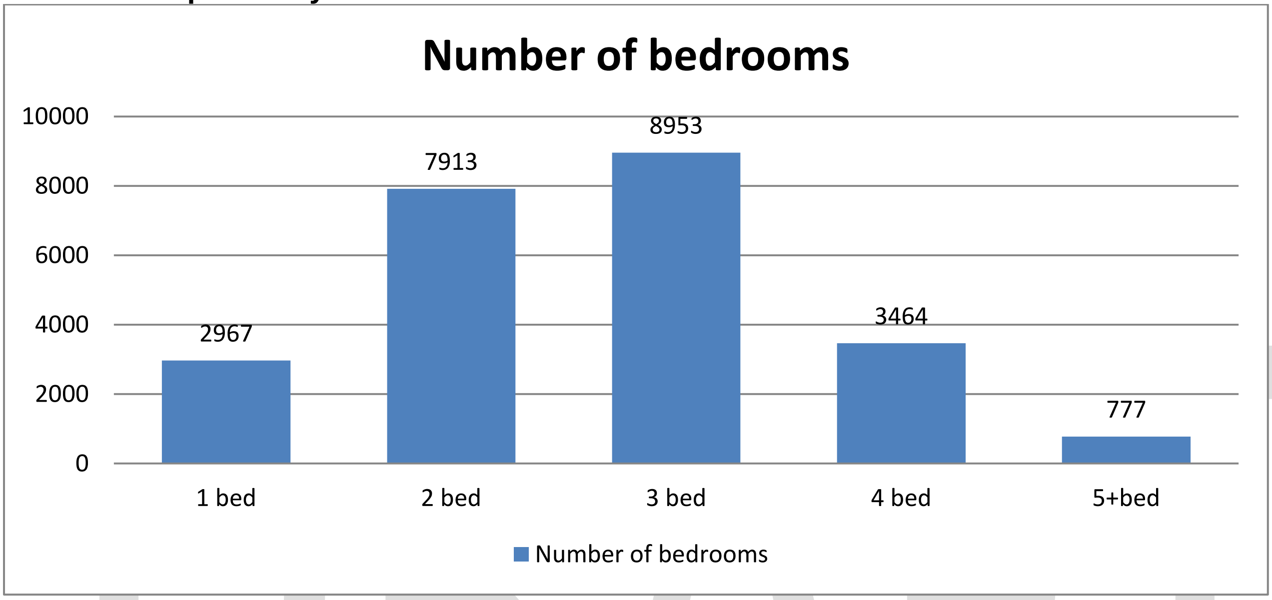
Source: Census 2011, Table DC4406SC

Stock by Size

The Chart below shows the properties in Clackmannanshire by number of bedrooms. The majority of homes have 3 bedrooms, 37%, followed by 2 bedrooms, 33%.

There are 12% and 14% respectively 1 and 4 bedrooms homes. Only 3% of homes have 5 bedrooms or more.

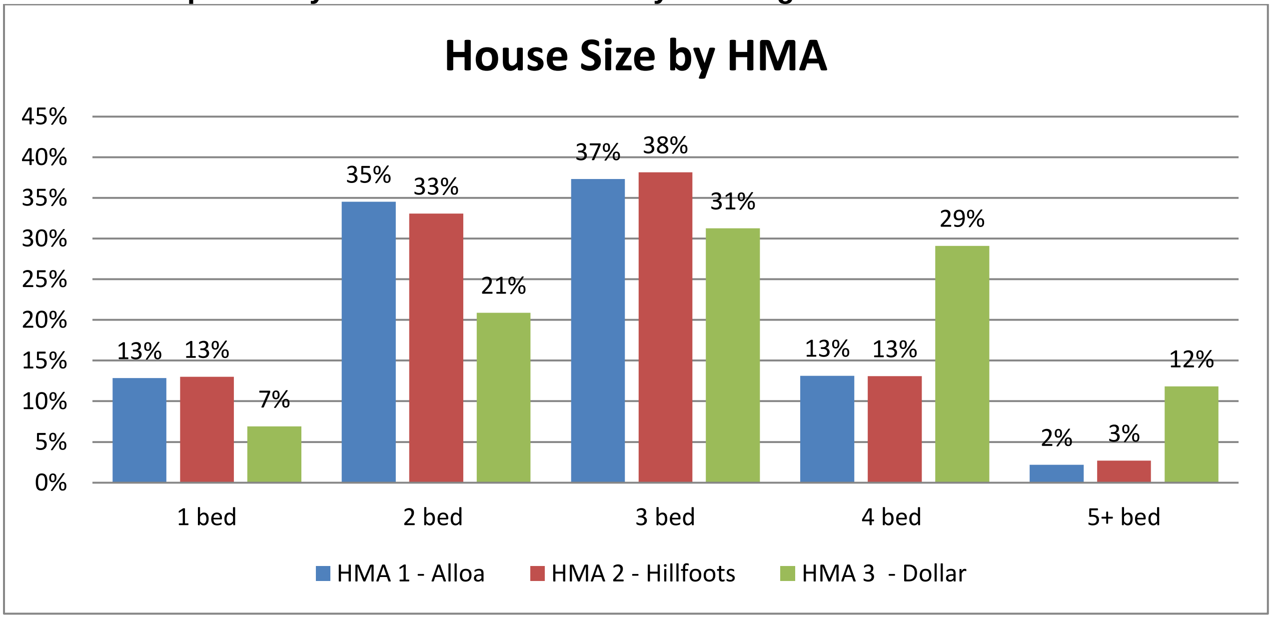
Chart 3.6 Properties by number of bedrooms



Source: "Scotland's Census 2022 - National Records of Scotland Table UV408 - Number of bedrooms all occupied households"

Chart 3.7 below shows the size of homes by Housing Market Area. The Alloa and the Hillfoots areas are broadly similar. However, Dollar has more than double the percentage of 4 bedroom homes and 12% of all homes are 5 bedroom or larger. This highlights the difference in Dollar as a unique area, providing larger and more expensive homes. (Looking back to Chart 2.11 on page 18 shows house prices in Dollar are 40% more expensive than the rest of Clackmannanshire and higher than the Scottish average).

Chart 3.7 Properties by number of bedrooms by Housing Market Area



Source: "Scotland's Census 2022 - National Records of Scotland Table UV408 - Number of bedrooms all occupied households"

House Size by Tenure

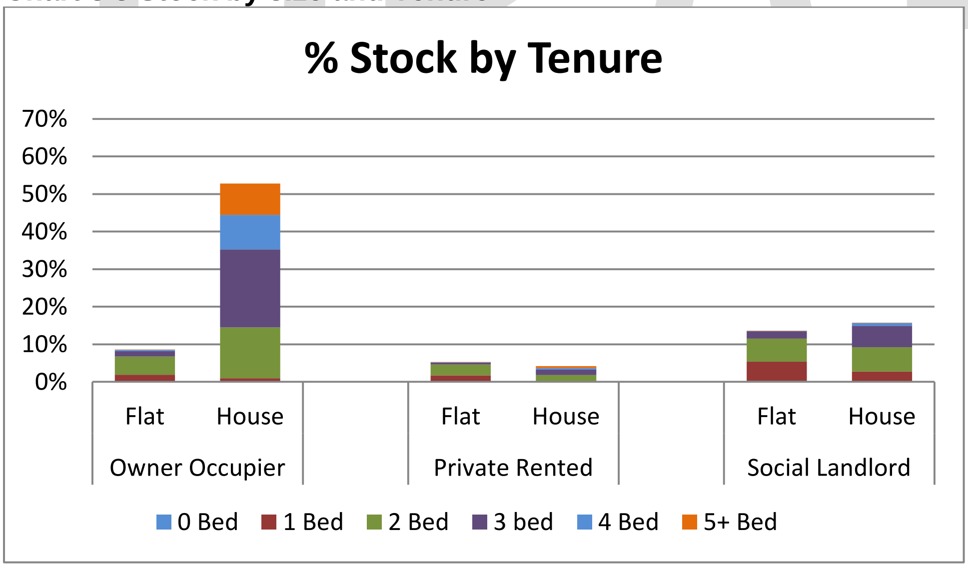
Table 3.3 and chart 3.8 below shows that the highest proportion of homes in Clackmannanshire is owner occupied and has 3 bedrooms. The majority of all stock are houses and have 2 or 3 bedrooms, 40% of all stock across all tenures.

Table 3.3 House Size / Type by Tenure Clackmannanshire

		0 Bed	1 Bed	2 Bed	3 bed	4 Bed	5+ Bed	
Owner Occupier	Flat	<1%	2%	5%	1%	<1%	<1%	10%
	House	<1%	1%	14%	21%	9%	8%	53%
Private Rented	Flat	<1%	2%	3%	1%	<1%	<1%	5%
	House	<1%	<1%	2%	1%	<1%	<1%	4%
Social Landlord	Flat	<1%	5%	6%	2%	<1%	<1%	13%
	House	<1%	3%	6%	6%	1%	<1%	16%

Source: Assessors Data 2022

Chart 3.8 Stock by size and Tenure



Source: Assessors Data 2022

Social Rented Stock

According to the Scottish Housing Regulator's figures, at 31 March 2024, there were 7,423 social rented properties in Clackmannanshire, as shown in table 3.4. The majority of social rented properties are owned by Clackmannanshire Council, 5,045, 68%. The remaining 2,378 properties are owned by 12 Registered Social Landlords (RSLs). Ochil View own 1,271, Paragon 416 and Kingdom 280. The remainder of the stock is made up of mainly specialist housing providers who have less than 100 homes in Clackmannanshire.

Table 3.4 Number and percentage of social rented self-contained stock by type of provision in 2023/24

Social Rented Stock	General Needs No.	General Needs %	Specialist No.	Specialist %	Total No.	Total %
Clackmannanshire Council	4,710	63%	335	5%	5,045	68%
RSLs	1,740	23%	638	9%	2,378	32%
Total	6,450	87%	973	13%	**7,423**	100%

Source: Scottish Housing Regulator Stock data, all social landlords dataset 2023/24

The majority of social rented stock is made up of 2 bedroom properties. As discussed later in the chapter, the majority of people on the current housing waiting list require a one bedroom property.

Table 3.5 Social rented stock 2023/24

Size	Studio	1 bed	2 bed	3 bed	4+ bed	**Total**
	68	1,980	3,223	1,939	213	**7,423**

Source: Scottish Housing Regulator, Stock data, all social landlords dataset 2023/24

Looking at the housing market areas, there is a similar profile of 2 bedroom properties, with the exception of Dollar which has a majority of 1 bedroom properties.

Table 3.6 Council Stock by size and HMA

	Studio	1 bed	2 bed	3 bed	4+bed	**Total**
HMA 1 Alloa	24	971	1,619	922	127	**3,663**
HMA 2 Hillfoots	7	350	602	314	22	**1,295**
HMA 3 Dollar	0	47	35	21	1	**104**
	31	**1,368**	**2,256**	**1,257**	**150**	**5,062**

Source: Council own stock database October 2024 (This figure has been updated since the previously cited Scottish Housing regulator data at 31 March 2024)

There are a total of 973 properties that are suitable for households with a particular housing need. There are different classifications of housing between providers and homes are assessed to meet the specific needs of those on the waiting list.

Adapted housing and specific requirements are discussed in more detail in Chapter 5 of this document.

Table 3.7 Self-contained specialist housing stock by type of provision in Clackmannanshire 2023/24

	Sheltered	Very sheltered	Amenity	Community alarm	Wheelchair	Ambulant disabled	Other specially adapted
Clackmannanshire Council	0	0	0	185	7	141	2
Registered Social Landlord	84	38	365	0	51	100	0
Total	**84**	**38**	**365**	**185**	**58**	**241**	**2**

Source: Scottish Housing Regulator

Table 3.8 Accessible and adapted housing stock by social landlord in Clackmannanshire 2023/24

Social Landlord	Amenity housing	Ambulant disabled	Other specially adapted
Blackwood Homes and Care	0	8	0
Clackmannanshire Council	0	141	2
Kingdom Housing Association Ltd	0	85	0
Link Group Ltd	0	7	0
Ochil View Housing Association Ltd	287	0	0
Trust Housing Association Ltd	78	0	0
Total	**365**	**241**	**2**

Source: Scottish Housing Regulator. *It is important to note that there are additional 61 housing units that are classified as 'amenity' in line with SHR data. However, locally these are regarded as 'Retirement Housing' units and are discussed under Sheltered Accommodation within the 'Supported Provision' section.

Short Term Lets

There are 8 registered HMO properties in Clackmannanshire, these are properties that are let out on an individual room basis and are often used as student accommodation. The licenses are issued by the Council's Environmental Health Team.

There are 64 short term let properties, which can be holiday lets or Air Bnb. Of those, 27 are in the Dollar HMA, 24 in the Hillfoots HMA and 13 in the Alloa HMA.

HMO and short term let properties account for less that 0.3% of all properties in Clackmannanshire, 25 applications per 10,000 dwellings, compared to Scottish average of 91 per 10,000 dwellings.

Stock Characteristics

Summaries of the age profile of the stock in Clackmannanshire differs from the rest of Scotland in that the stock in Clackmannanshire is not as old as only 18% of properties are pre 1945, compared to 30% in Scotland.

Table 3.9 All stock by age

Area	Pre 1945 %	Post 1945 %
Clackmannanshire	18%	82%
Scotland	30%	70%

Source: Scottish House Condition survey, 2017-2019 Local Authority Tables

There are a higher proportion of houses to flats in Clackmannanshire compared to the rest of Scotland and also more properties with three or more bedrooms.

Table 3.10 Summary of stock profile in Clackmannanshire vs Scotland

Area	Pre 1945	Post 1945	House	Flat	1 & 2 beds	3+ beds
Clackmannanshire	**18%**	**82%**	**74%**	**26%**	**45%**	**54%**
Scotland	**30%**	**70%**	**64%**	**36%**	**50%**	**50%**

Source: Scottish House Condition survey, 2017-2019 Local Authority Tables

Disrepair and Below Tolerable Standard Housing

There is no data presented in the latest Scottish House Condition Survey for properties below tolerable standard (BTS) in Clackmannanshire as the sample size is considered too small to give a reliable estimate. This is due to the sample size being less than 30 cases.

The data below is from the Scottish House Condition Survey carried out 2017 -2019 and is an estimate of key indicators at Local Authority level as an average over the three year period.

Any (or Basic) disrepair relates to any damage where a building element requires some repair beyond routine maintenance. For example, a leaking tap would be considered any (or basic) disrepair.

Any disrepair for all stock in Clackmannanshire is 78% which is above the overall Scottish figure of 71%. Disrepair in the social rented sector is 83% compared to 74% in the owner occupied sector.

Urgent disrepair relates to cases requiring immediate repair to prevent further damage or health and safety risk to occupants.

Urgent disrepair in Clackmannanshire is 37% of all stock, slightly higher than the rest of Scotland at 28% of all stock requiring urgent repairs. Urgent repairs in the social sector are 33% of all stock, higher than the national figure of 29%. More urgent repairs are required in the owner occupied sector at 36%, compared to Scotland at only 26%.

Critical element disrepair relates to disrepair to building elements central to weather-tightness, structural stability and preventing deterioration of the property. Urgent disrepair relates to cases requiring immediate repair to prevent further damage or health and safety risk to occupants.

All stock with critical element disrepair is 29%, higher than Scotland at 20%. Critical element disrepair relates to 21% of social rented stock and 30% of owner occupied stock. This is 20% and 18% respectively in Scotland.

Extensive disrepair relates to cases where the damage covers at least a fifth (20%) or more of the building element area.

All stock extensive disrepair in Clackmannanshire is 5%, around the same as Scotland at 6%. There is no indicator for social housing, shown by ***** in the below tables, (sample below 30 cases) and the owner occupied sector has 5% of stock in this category, the same as Scotland.

Table 3.11 BTS and Disrepair Clackmannanshire vs Scotland

Stock Indicator	BTS	Any Disrepair	Urgent Disrepair	Critical Element Disrepair	Extensive Disrepair
All Stock Clackmannanshire	*	78%	37%	29%	5%
All Stock Scotland	2%	71%	28%	20%	6%
Social Housing Clackmannanshire	*	83%	33%	21%	*
Social Housing Scotland	1%	76%	29%	20%	6%
Owner Occupied Clackmannanshire	*	74%	36%	30%	5%
Owner Occupied Scotland	1%	67%	26%	18%	5%

Source: Scottish House Condition Survey 2017 -2019, Local Authority Tables
*sample too small

House condition by age of property can be seen in the table 3.12 below. Homes constructed pre 1945 have higher levels of disrepair over all categories and are consistently higher than Scottish average.

Table 3.12 BTS and Disrepair Clackmannanshire vs Scotland by Age

	Pre 1945 Clackmannanshire	Pre 1945 Scotland	Post 1945 Clackmannanshire	Post 1945 Scotland
BTS	*	3%	*	1%
Any Disrepair	90%	84%	75%	65%
Urgent Disrepair	49%	38%	35%	24%
Critical Element Disrepair	46%	29%	26%	16%
Extensive Disrepair	*	8%	5%	5%

Source: Scottish House Condition Survey 2017 -2019, Local Authority Tables
*sample too small

Looking at the types of properties in disrepair is useful to show that flats generally have a higher level of repair needs than houses. This reflects difficulties in getting common repairs carried out in flatted properties.

Table 3.13 BTS and Disrepair Clackmannanshire vs Scotland by Property Type

	Flat Clackmannanshire	Flat Scotland	House Clackmannanshire	House Scotland
BTS	*	1%	*	2%
Any Disrepair	78%	78%	78%	66%
Urgent Disrepair	40%	34%	37%	25%
Critical Element Disrepair	32%	24%	28%	18%
Extensive Disrepair	9%	8%	4%	5%

Source: Scottish House Condition Survey 2017 -2019, Local Authority Tables

The table below shows that there is higher percentage of families rather than older household homes that have repair needs. This could be due to older households having paid off mortgages and having savings to pay for ongoing repairs to their homes.

Table 3.14 BTS and Disrepair Clackmannanshire vs Scotland by Household Type

	Older Household Clackmannanshire	Older Household Scotland	Families Clackmannanshire	Families Scotland
BTS	*	1%	*	1%
Any Disrepair	81%	65%	81%	71%
Urgent Disrepair	35%	25%	39%	29%
Critical Element Disrepair	26%	18%	32%	19%
Extensive Disrepair	*	1%	*	1%

Source: Scottish House Condition Survey 2017 -2019, Local Authority Tables

Scottish Housing Quality Standard (SHQS)

According to the Scottish House Conditions survey, 24% of all stock in Clackmannanshire fails the SHQS, 24% of owner occupied homes and 22% of social rented stock. This compares to 41% over Scotland, 41% of owner occupied and 38% of social rented stock.

According to the 2023/24 information published by the Scottish Housing Regulator, the Scottish average to meet the SHQS is 84.4% of all social rented stock in Scotland. This information is likely to be more accurate for the social rented sector as information is gathered from all Councils and RSLs in Scotland annually. Table 3.15 below lists the social landlords operating in Clackmannanshire and the percentage of their stock meeting SHQS.

The average percentage of social rented stock in Clackmannanshire meeting SHQS is 90.3%. This is well above the figures quoted in the Scottish Household Survey and gives a more accurate picture, as is not based on sample and is more up to date.

Table 3.15 Social Stock Meeting SHQS

Landlord Name	Stock in Clackmannanshire at 2023/24	% meeting SHQS
Clackmannanshire Council	5,045	93.5%
Ochil View Housing Association	1,271	93%
Paragon Housing Association	416	90.6%
Kingdom Housing Association	280	94%
Blackwood Housing Association	16	92.9%
Link Group Ltd	81	91.9%
Trust Housing Association	118	85.1%
Cairn Housing Association	5	73.1%
Castle Rock Edinvar Housing Association	83	81.5%
Hanover Housing Association	86	88.5%
Key Housing Association	10	99.6%
Wheatley Group	12	99.5%
	7,423	**90.3% Average**

Source: Scottish Housing Regulator, Stock data, all social landlords dataset 2023/24

Stock Pressures

Looking at stock pressure in Clackmannanshire will look at the following data:

- Occupancy - under-occupancy and over-crowding
- Concealed Households
- Stock Turnover - re-lets and voids

Over crowding and concealed households highlight a need for additional housing as they are not counted as a current household and are not included in future household projections. They do not have a home to release when they do go on to form a separate household, this is

generally where individuals or family units are living in another household, due to affordability or lack of housing opportunities, including adult children who wish to move out.
Stock turnover is an indictor of the level of demand in certain areas. High demand areas for social housing can show up in waiting lists and in owner occupation by how quickly homes are bought and sold.

Occupancy

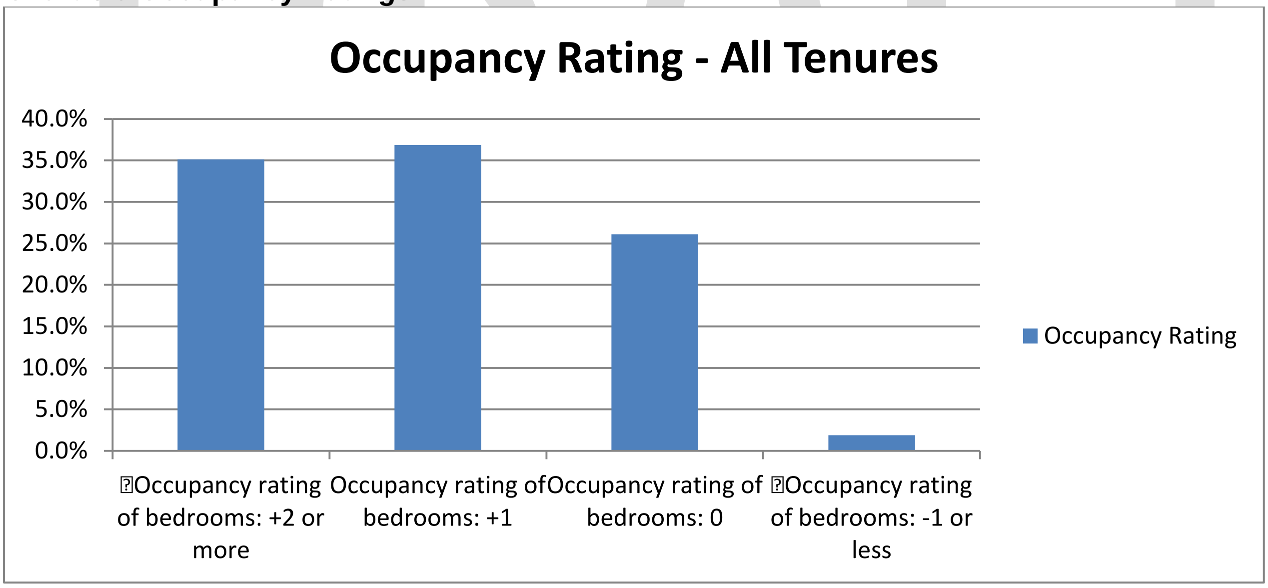
If a household has more bedrooms than it needs, it is described as under-occupied. It will have occupancy rating of +1 or higher. A rating of +1 means one more bedroom than required. A rating of +2 means two more bedrooms than required.

If a household has fewer bedrooms than it needs, it is described as overcrowded. It will have an occupancy rating of -1 or lower. A rating of -1 means one fewer bedroom than required.

The 2022 Census data shows the occupancy rate across all tenures. At the time of writing, the 2022 Census occupancy data is not broken down by tenure type, so the 2011 Census data will be used to provide this information. Information is also drawn from the waiting list data held by the Council, as of October 2024.

Information from the 2022 Census shows that 35% of all households have 2 or more extra bedrooms, 37% have one more than needed, 26% have the number of bedrooms required and only 2% have fewer bedrooms than required. This amounts to 422 households having fewer bedrooms than required and who are overcrowded or contain a concealed household.

Chart 3.9 Occupancy Ratings



Source:Scotland's Census 2022 - National Records of Scotland Table UV415 - Occupancy rating for bedrooms All occupied households

From the Councils waiting list (October 2024), 184 applicants have points for some level of overcrowding, this is 7% of all current applicants. Of those, 108 are waiting list applicants, who do not have another home to give up and therefore an additional house is required. Applicants applying for a new home due to overcrowding without a tenancy to give up are most likely (79%) to be under 40 years of age.

Table 3.16 Council Waiting List with overcrowding points at October 2024

Age Group	Waiting list	Transfer list	Total
16 - 29	19	10	29
30 - 39	41	40	81
40 - 49	34	20	54
50+	14	6	20

Source: Council waiting list October 2024

Some of these applicants will be included in the Occupancy rating shown in the Census data.

Census 2022 shows 422 households have fewer bedrooms than required.
Waiting list shows 184 require new home due to over-crowding.
Conclude that 238 households in the private sector are overcrowded.

Table 3.10 below shows that under occupation is more common in the owner occupied sector, 84% of all owner occupied homes have more bedrooms than required by the household, 57% of those have 2 or more extra rooms. Only 3% of owners have 1 or more rooms less than required.

58% of private renters have one or more bedroom than required and 11% have one or more bedroom less than required so are overcrowded.

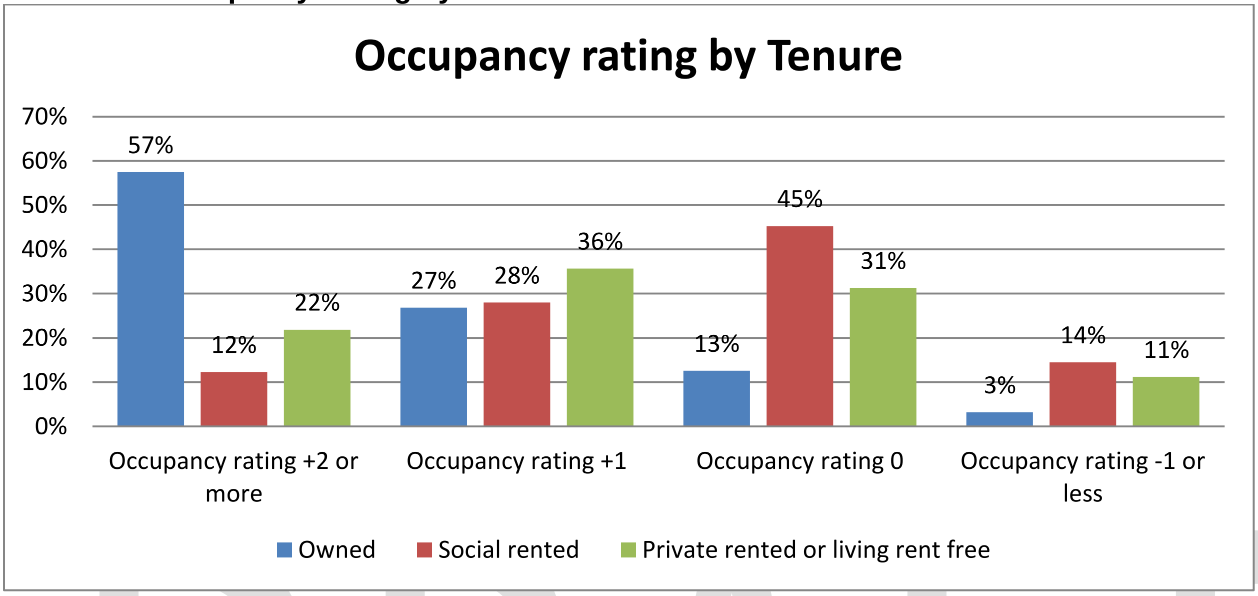
40% of all homes in the social rented sector are under occupied, 12% of households have two or more bedrooms than required and 28% one more bedroom than required. Just under half of all social rented homes are the right size for the household and 14% are under occupied.

The private sector overall has a higher rate of surplus bedrooms, compared to the social sector. Tenant in the social sector will qualify for an appropriate sized home, led by allocation policy of the Council or RSL, while owner occupiers have a greater degree of choice, based on preference and what is affordable.

To enable better use of social stock, incentivise those households with additional bedrooms to downsize. There has to be attractive alternative choices for this to be effective.

In terms of numbers of overcrowded properties in the social sector, 941 households were shown to be overcrowded according to the 2011 Census. The Council waiting list at October 2024 shows 184 applicants with overcrowding points.

Chart 3.10 Occupancy Rating by Tenure

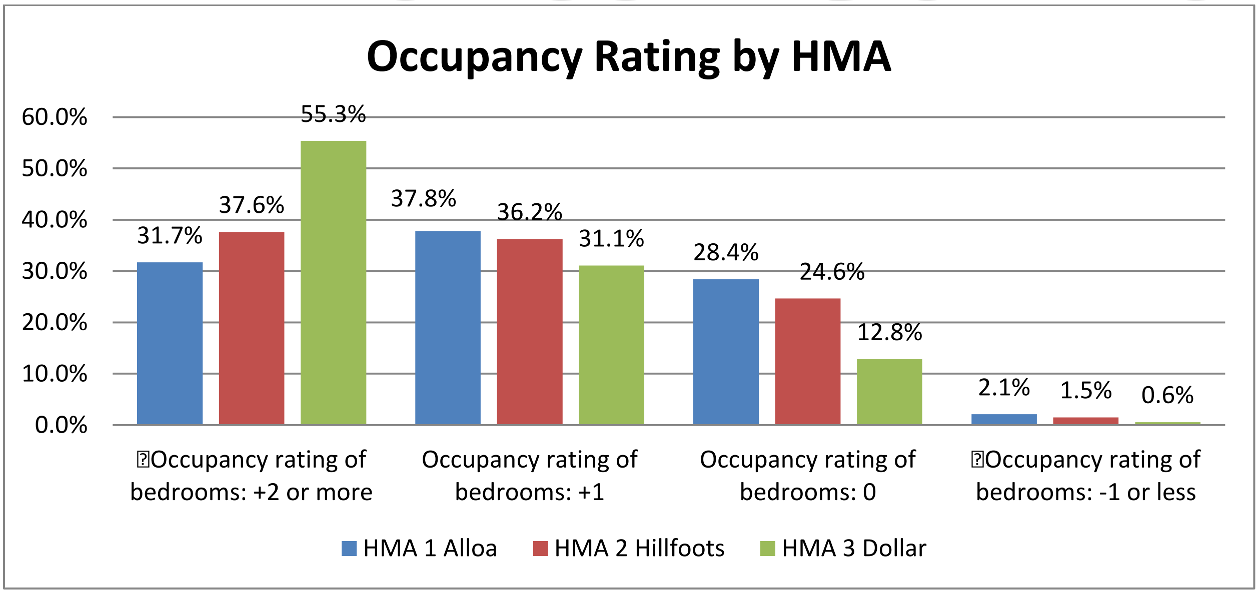


Source: Scotland's Census 2011 - National Records of Scotland Table LC4106SC - Tenure by occupancy rating (rooms) (1)
All households

There are fewest households over crowded in the Dollar HMA, at 0.6%, and the highest number of households having 2 or more bedrooms than required. This is due, in most part, to the higher percentage of owner occupation in this area.

Over crowded households are highest in Alloa HMA at 2.1% and Hillfoots at 1.5%. This is for all tenures.

Chart 3.11 Occupancy Rate by HMA – All Tenures

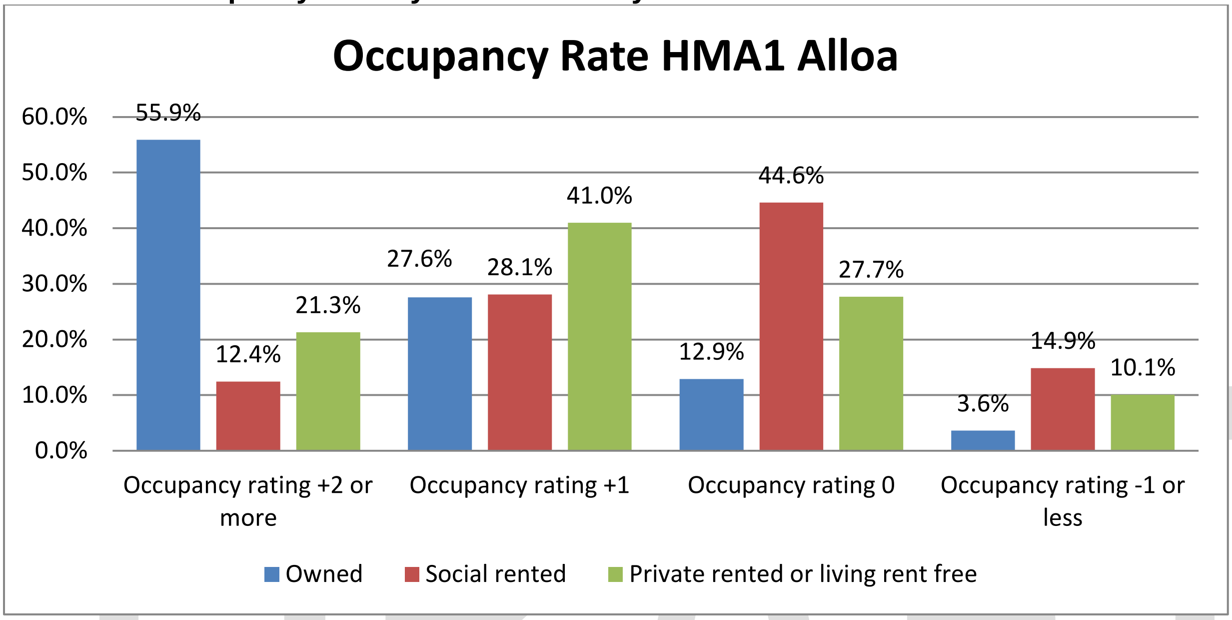


Source: Scotland's Census 2011 - National Records of Scotland Table LC4106SC - Tenure by occupancy rating (rooms) (1)
All households

In Alloa, a total of 83.5% households in the owner occupied sector have 1 or more bedrooms than required, compared to 40.5% of social rented tenants. 14.9% of all social rented properties are over crowded.

This shows a mis-match in social rented stock that could be relieved by a targeted allocation policy to make it attractive for under occupied households to move to a more suitable home.

Chart 3.12 Occupancy Rate by HMA 1 Alloa by Tenure

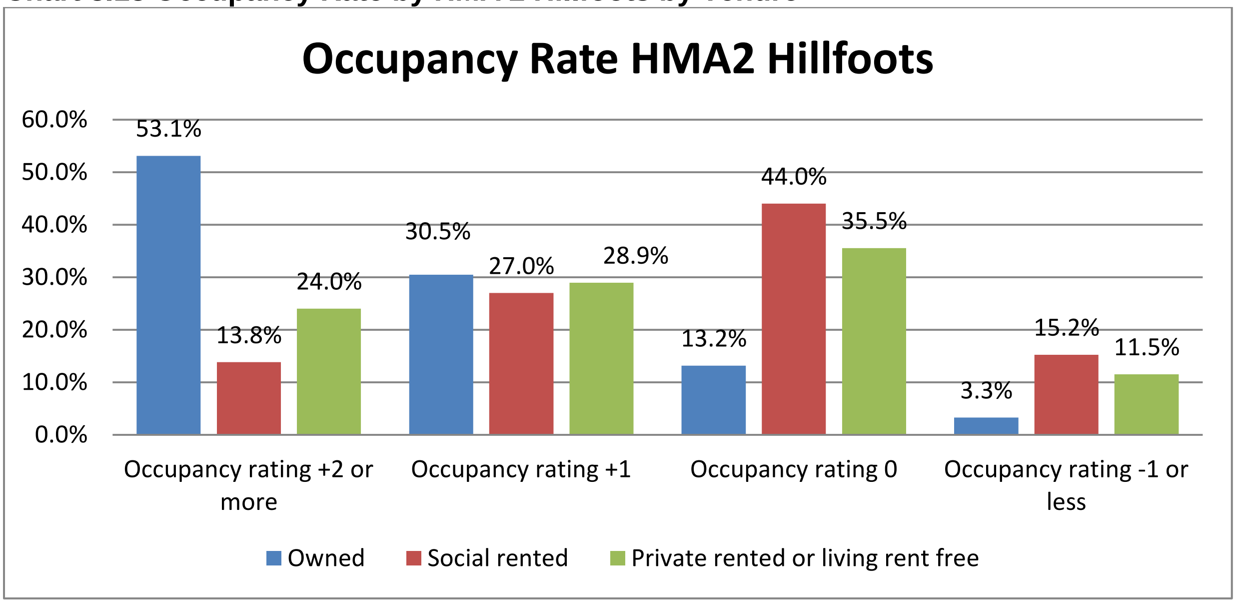


Source: Scotland's Census 2011 - National Records of Scotland Table LC4106SC - Tenure by occupancy rating (rooms) (1) All households

In Hillfoots HMA, at total of 83.6% households in the owner occupied sector have 1 or more bedrooms than required, compared to 40.8% of social rented tenants. 15.2% of all social rented properties are overcrowded.

This shows a mis-match in social rented stock that could be relieved by a targeted allocation policy to make it attractive for under occupied households to move to a more suitable home.

Chart 3.13 Occupancy Rate by HMA 2 Hillfoots by Tenure

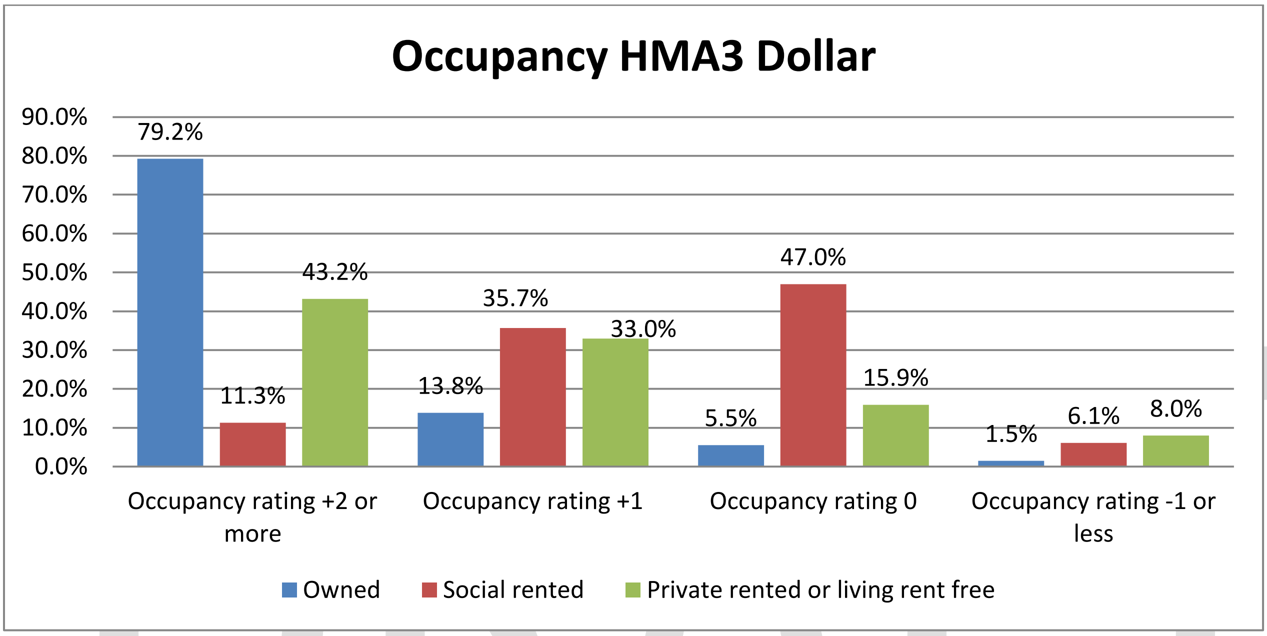


Source: Scotland's Census 2011 - National Records of Scotland Table LC4106SC - Tenure by occupancy rating (rooms) (1) All households

In Dollar HMA, at total of 93% households in the owner occupied sector have 1 or more bedrooms than required, compared to 47% of social rented tenants. 6.1% of all social rented properties are overcrowded.

This shows a mis-match in social rented stock that could be relieved by a targeted allocation policy to make it attractive for under occupied households to move to a more suitable home.

Chart 3.14 Occupancy Rate by HMA 3 Dollar by Tenure



Source: Scotland's Census 2011 - National Records of Scotland Table LC4106SC - Tenure by occupancy rating (rooms) (1) All households

Stock by Occupied and Unoccupied Properties

According to the 2011 Census, the most up to date Census data for this information, table 3.17 below shows homes that are occupied and the total vacant. It also shows the number classified as holiday accommodation or second homes. A total of 3.9% of stock was unoccupied in 2011 and 1.5% classified as a holiday or second home.

Tullibody and Menstrie have the highest % of occupied houses, while Coalsnaughton had the highest % of unoccupied homes. It is worth noting that unoccupied stock could be new build properties not yet occupied and this may skew the figures in Census data.

Table 3.17 Occupied, Second Homes and Vacant stock at 2011 Census

Occupancy status	**All household spaces**	**Occupied household spaces**	**Total Unoccupied household spaces**	**Unoccupied household spaces: Second residence/holiday accommodation**	**Unoccupied household spaces: Vacant**
Settlement/Locality 2010					
Alloa	9812	9389 **95.7%**	423 **4.3%**	173 **1.8%**	250 **2.5%**
Tullibody	3702	3635 **98.2%**	67 **1.8%**	23 **0.6%**	44 **1.2%**
Clackmannan	1563	1511 **96.7%**	52 **3.3%**	16 **1%**	36 **2.3%**
Tillicoultry	2527	2430 **96.2%**	97 **3.8%**	37 **1.5%**	60 **2.3%**
Coalsnaughton	437	409 **93.6%**	28 **6.4%**	9 **2%**	19 **4.4%**

Menstrie	1237	1208 **97.7%**	29 **2.3%**	4 **0.3%**	25 **2%**
Alva	2356	2244 **95.2%**	112 **4.7%**	44 **1.9%**	68 **2.8%**
Dollar	1239	1166 **94.1%**	73 **5.9%**	32 **2.6%**	41 **3.3%**

Source: Scotland's Census 2011 - National Records of Scotland Table QS417SC - Household spaces all household spaces

More up to date information taken from Scottish Government information on vacant stock published in September 2024 is shown in Table 3.18. The data shows that 262 or 1% of all homes in Clackmannanshire were empty for 6 months or more as of September 2024, this is in comparison to 2.8% in Scotland overall. This data shows only 38 second homes and there is no information on holiday homes.

Table 3.18 Empty homes in Clackmannanshire and Scotland, September 2024

Local Authority	**Dwellings Estimate**	**Second homes**	**Second homes rate per 10,000 dwellings**	**Empty homes (>6 months)**	**Empty homes (>6 months) rate per 10,000 dwellings**	**Long term empty homes (>12 months)**	**Long term empty homes (>12 months) rate per 10,000 dwellings**
Scotland	**2,721,225**	**21,606**	**79.4**	**43,538**	**160.0**	**31,596**	**116.1**
Clackmannanshire	25,277	38	15.0	162	64.1	100	39.6

Source: Scottish Government, Communities Analysis Division, Housing, Homelessness & Regeneration Analysis Unit, Housing Statistics and Analysis Team

The 2011 Census data defines a concealed household as a household with more than one family, where the family does not include the Head of Household reference person. The table shows as at 2011, there were 141 concealed households in Clackmannanshire. Around half of all concealed families, 75, have dependent children. The percentage of **all** households with a concealed family is 0.6%.

Table 3.19 Concealed Households Census 2011

	All Families	Concealed families: Total	Concealed families: No children	Concealed families: With dependent children	Concealed families: All children non-dependent
FRP aged 24 and under	544	43	8	35	0
FRP aged 25 to 34	2074	37	10	27	0
FRP aged 35 to 49	5290	16	1	11	4
FRP aged 50 to 64	4535	21	13	2	6

FRP aged 65 and over	2863	24	21	0	3
All families in households	**15,306**	**141**	**53**	**75**	**13**
All single households	**7,428**	**-**	**-**	**-**	**-**
Total Households	**22,734**	**0.6%**	**0.2%**	**0.3%**	**>0.1%**

Source: Scotland's Census 2011 - National Records of Scotland Table LC1110SCdz - Family composition by age of Family Reference Person (FRP) all families in households

Lets

At October 2024, there were 2,660 people on the council waiting list. Of those, 2,121 are waiting list applicants, meaning that the net need for new housing is 2,121 as these applicants do not have another social rent to give up.

The table below is a summary of the number of Council lets between 2021 and 2025 by bedroom size. Two bedroom properties make up the majority of re-lets followed by one bedroom properties. An average of 361 lets are made annually, around a 7% turnover rate.

Table 3.20 Council lets by year and bedroom size

Year	1 bed	2 bed	3 bed	4 bed	5 bed	Total Lets	Total stock	% Turnover
2021/22	126	161	55	11	0	**353**	**4,974**	**7%**
2022/23	129	170	47	6	0	**352**	**5,007**	**7%**
2023/24	155	154	59	4	1	**373**	**5,045**	**7.4%**
2024/25	141	167	52	8	0	**368**	**5,062**	**7.3%**

Source: Clackmannanshire Council Information System

Ochil View is the largest RSL in Clackmannanshire with a current total of 1,271 properties. The table below is a summary of the number of Ochil View lets between 2022 and 2025 by bedroom size. Two bedroom properties make up the majority of re-lets followed by one bedroom properties. On average 94 lets are made annually, with an average turnover of 7.4%, similar to Council figures.

Table 3.21 Ochil View HA lets by year and bedroom size

Year	1 bed	2 bed	3 bed	4 bed	5 bed	Total Lets	Total stock	% Turnover
2022/23	44	46	16	1	0	**107**	**1,258**	**8.5%**
2023/24	33	48	16	1	0	**98**	**1,271**	**7.7%**
2024/25	33	34	11	0	0	**78**	**1,271**	**6.1%**

Source: Ochil View Information System

The tables below show the council stock turnover over the last 4 years by Housing Market Areas. A lower percentage rate turnover indicates where the housing pressure may be.

There is no obvious pressure by housing market area, Dollar had the lowest turnover between 2022/23 to 2024/25 but as there are only 104 properties in this area, the figures can be skewed by the low number of lets made in general.

Table 3.22 Council lets by year and HMA 1 Alloa

Year	1 bed	2 bed	3 bed	4 bed +	Total	Total stock (at 2024/25)	% Turnover
2021/22	89	116	41	10	**256**	**3,662**	**7%**
2022/23	86	133	35	5	**259**	**3,662**	**7%**
2023/24	114	108	36	4	**262**	**3,662**	**7.1%**
2024/25	103	116	35	7	**261**	**3,662**	**7.1%**

Source: Clackmannanshire Council Information System

Table 3.23 Council lets by year and HMA 2 Hillfoots

Year	1 bed	2 bed	3 bed	4 bed +	Total	Total Stock (at 2024/25)	% Turnover
2021/22	32	43	12	1	**88**	**1,295**	**6.8%**
2022/23	40	36	11	1	**88**	**1,295**	**6.8%**
2023/24	37	46	21	1	**105**	**1,295**	**8.1%**
2024/25	36	50	17	1	**104**	**1,295**	**8%**

Source: Clackmannanshire Council Information System

Table 3.24 Council lets by year and HMA 3 Dollar

Year	1 bed	2 bed	3 bed	4 bed +	Total	Total Stock (at 2024/25)	% Turnover
2021/22	5	2	2	0	**9**	**104**	**8.6%**
2022/23	2	2	1	0	**5**	**104**	**4.8%**
2023/24	4	0	2	0	**6**	**104**	**5.8%**
2024/25	2	1	0	0	**3**	**104**	**2.9%**

Source: Clackmannanshire Council Information System

Turnover by house type

Ochil View has 569 houses and 702 flats.

Looking at turnover by house type, houses have the lowest turnover, showing a pressure on this type of home, particularly in the Alloa HMA, but a similar picture in the Hillfoots and Dollar. This would suggest that new supply should prioritise building houses over flats as flats have the highest turnover rate consistently.

Table 3.25 Council lets by House Type HMA 1 Alloa

Year	Flat	Turnover	House	Turnover	Bungalow	Turnover
2021/22	151	9.6%	70	4.3%	35	7.4%
2022/23	156	9.9%	63	3.9%	40	8.4%
2023/24	154	9.8%	62	3.8%	46	9.7%
2024/25	161	10.2%	71	4.4%	29	6.1%
Total Stock at 2024/25	**1,571**		**1,617**		**474**	
Average Turnover		**9.9%**		**4.1%**		**7.9%**

Source: Clackmannanshire Council Information System

Table 3.26 Council lets by House Type HMA 2 Hillfoots

Year	Flat	Turnover	House	Turnover	Bungalow	Turnover
2021/22	69	9.6%	15	3.3%	4	3.2%
2022/23	58	8.0%	19	4.3%	11	8.7%
2023/24	76	10.5%	24	5.4%	5	4.0%
2024/25	76	10.5%	22	4.9%	6	4.8%
Total Stock at 2024/25	**721**		**448**		**126**	
Average Turnover		**9.6%**		**4.5%**		**5.2%**

Source: Clackmannanshire Council Information System

Table 3.27 Council lets by House Type HMA 3 Dollar

Year	Flat	Turnover	House	Turnover	Bungalow	Turnover
2021/22	2	12.5%	2	4.3%	5	11.9%
2022/23	1	6.3%	3	6.5%	1	2.4%
2023/24	1	6.3%	2	4.3%	3	7.1%
2024/25	1	6.3%	1	2.2%	1	2.4%
Total Stock at 2024/25	**16**		**46**		**42**	
Average Turnover		**7.8%**		**4.3%**		**6.0%**

Source: Clackmannanshire Council Information System

Turnover by Applicant Type

The majority of lets over the past 4 years have been made to waiting list tenants, an average of 83% of all Council lets have been made to waiting list applicants, these are households who don't have a tenancy to give up and therefore an additional home is required.

Table 3.28 Council lets by applicant

Year	Waiting List	%	Transfer	%	Total Lets
2021/22	302	86%	51	14%	**353**
2022/23	277	79%	75	21%	**352**
2023/24	301	81%	72	19%	**373**
2024/25	315	86%	53	14%	**368**

Source: Clackmannanshire Council Information System

Homeless lets make up around 63% of total lets annually, the majority are waiting list applicants.

Table 3.29 Homeless Council lets

Year	Homeless Waiting List	Homeless Transfer	Total Lets
2021/22	207	9	**216**
2022/23	206	13	**219**
2023/24	229	8	**237**
2024/25	237	11	**248**

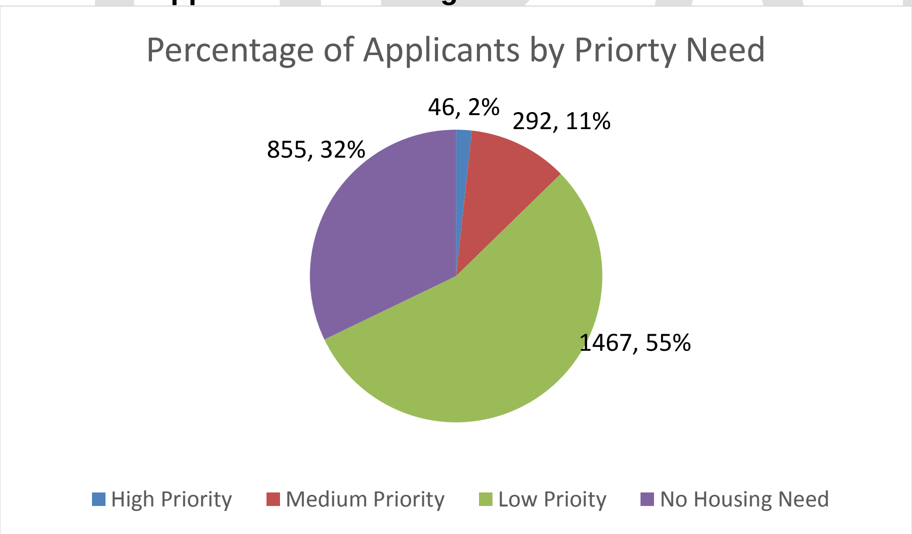
Source: Clackmannanshire Council Information System

Need for Social Housing

The need for social housing is identified by the number of people on the waiting list who have been awarded priority points and are therefore 'in need' of a new home. As of October 2024, there were 2,660 people on the Council waiting list, of those, 1,805 are in some sort of housing need and 855 have no need and are considered on the waiting list 'just in case'.

Housing need outstrips the supply with 1,805 people on the waiting list in need and an average of 361 annual lets.

Chart 3.15 Applicants on Waiting List – October 2024

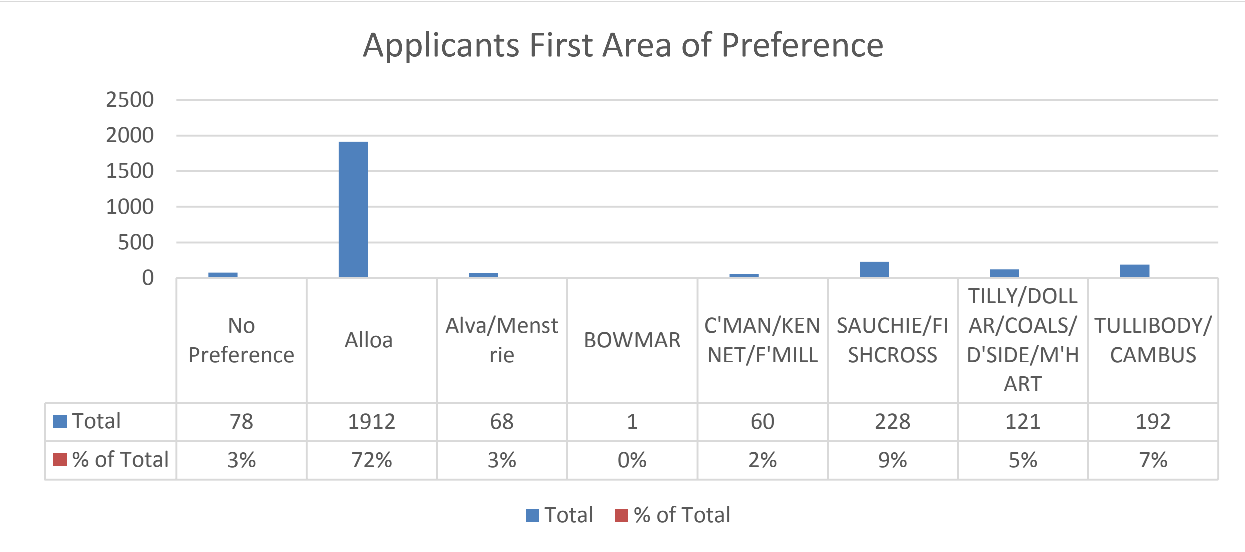


Source: Clackmannanshire Council Information System

The chart below shows that 90% of all applicants have a first preference to live in the Alloa HMA, 8% for Hillfoots and Dollar HMA.

In terms of relets, 72% of all annual relets are in Alloa HMA and 28% in Hillfoots and Dollar HMAs. This shows a mis-match and indicates a pressure on housing in the Alloa HMA.

Chart 3.16 Applicants first preference area



Source: Clackmannanshire Council Information System

Applicant to Let Ratios

In order to look at the need for specific house sizes the applicant to let ratios indicate the property sizes that are the most pressured. The ratio is the number of applicants on the waiting list for every let so a ratio of 4 means that there are 4 applicants for every home that becomes available. This is only for size of property; houses will have a higher ratio than flats for example.

The majority of people on the waiting list, 1,584, require a one bedroom property, 314 would like a bungalow and 529 a house. There are only 639 1 bed bungalow/houses in Clackmannanshire, with a 7% turnover, 45 become available each year – one property to every 18 people on the WL.

The table 3.x shows that there is high pressure on 1, 4 and 5+ bedroom homes. Only one 5 bedroom home has been let in 4 years and there are no 6 or 7 bedrooms homes in the Council stock.

Table 3.30 Applicants to Let Ratio – all applicants

Bedrooms Required	Applicants	Average turnover 2021/22 to 2024/25	Ratio
1	1,584	138	11.5
2	664	163	4
3	306	53	5.8
4	85	8	10.6
5	17	0.25 (1 let in 4 years)	68
6	3	0	
7	1	0	
Grand Total	**2,661**	**362**	**7.3**

Source: Clackmannanshire Council Information System

Households in housing need, as Council waiting list policy, again shows a pressure on 1 bed properties and larger 4+ bedrooms.

Table 3.31 Applicants to Let Ratio – Applicants in Housing Need

Bedrooms Required	Applicants	Average turnover 2021/22 to 2024/25	Ratio
1	1,154	138	8.4
2	352	163	2.2
3	209	53	3.9
4	71	8	8.9
5	16	0.25 (1 let in 4 years)	64
6	3	0	
7	1	0	
Grand Total	**1,805**	**362**	**5**

Source: Clackmannanshire Council Information System

Table 3.32 below shows all non-transfer applicants in housing need, these applicants do not have a tenancy to give up and this is therefore the net housing need which shows new additional homes that need to be built. Pressures are shown for 1 bedroom homes and for large 5 bedroom homes.

Table 3.32 Applicants to Let Ratio – Applicants in Housing Need (non transfer)

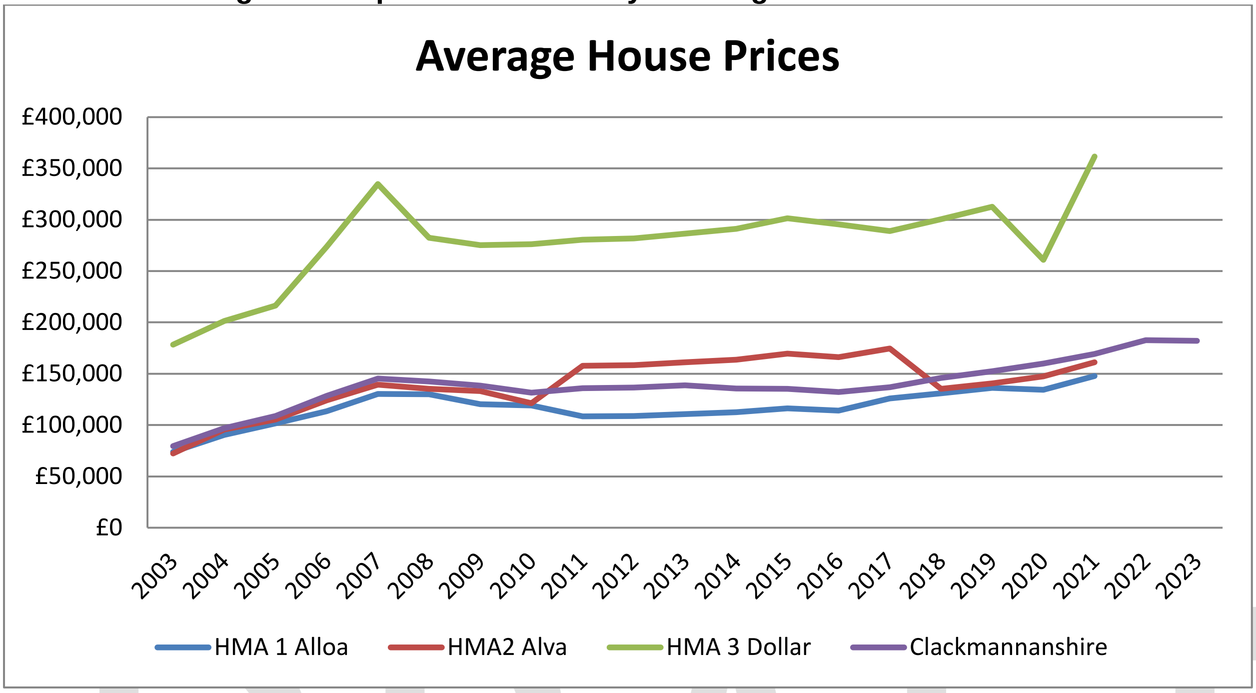
Bedrooms Required	Applicants	Average turnover 2021/22 to 2024/25	Ratio
1	994	138	7.2
2	277	163	1.7
3	129	53	2.4
4	42	8	5.6
5	11	0.25 (1 let in 4 years)	44
6	2	0	
7	0	0	
Grand Total	**1,455**	**362**	**4**

Source: Clackmannanshire Council Information System

Private Housing Pressure

As discussed in Chapter 2, average house prices are highest in the Dollar HMA. According to local estate agents, 3 bedroom homes are most in demand and Clackmannanshire, excluding Dollar, provides better value for money than neighbouring Stirling. This may attract buyers from Stirling and into Clackmannanshire, especially the new build market.

Chart 3.17 Average House prices over time by Housing Market Area



Source: Registers of Scotland

Low Demand and Voids

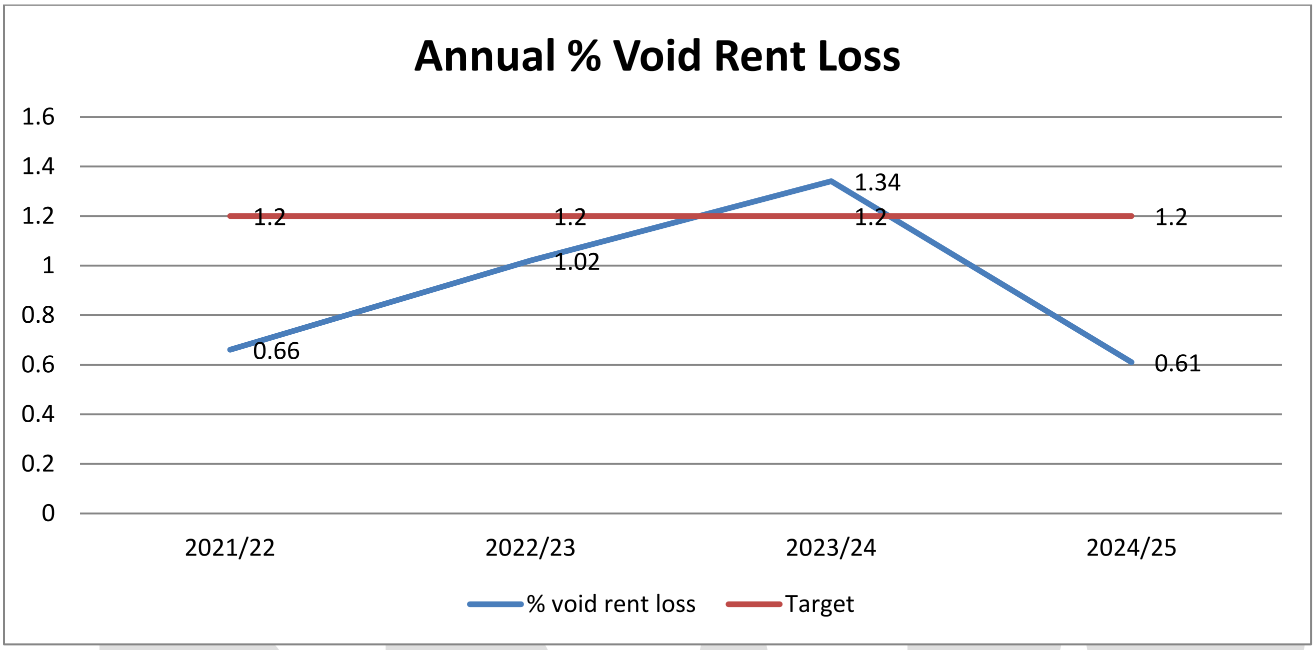
In data reported on the Annual Returns to the Scottish Regulator, there are no low demand properties in Clackmannanshire. This is verified by housing staff and is based on the following criteria:

- Small or no waiting list for a property
- Tenancy offers frequently refused on the basis of the property
- High than normal turnover rates

Clackmannanshire Council takes on average 57.4 days to re-let voids compared to Scottish Average of 56.8 days.

Void rent loss shows the rent not collected because of voids, as seen on Chart 3.18 below, Clackmannanshire Council has been lower than the Scottish average target in 3 of the past 4 years. This shows that the Council is managing its void stock effectively and minimising the periods that stock is empty.

Chart 3.18 Clackmannanshire Council void rent loss



Source: Clackmannanshire Council Information System, Scottish Housing Regulator

Stock Management

In-situ Housing Solutions

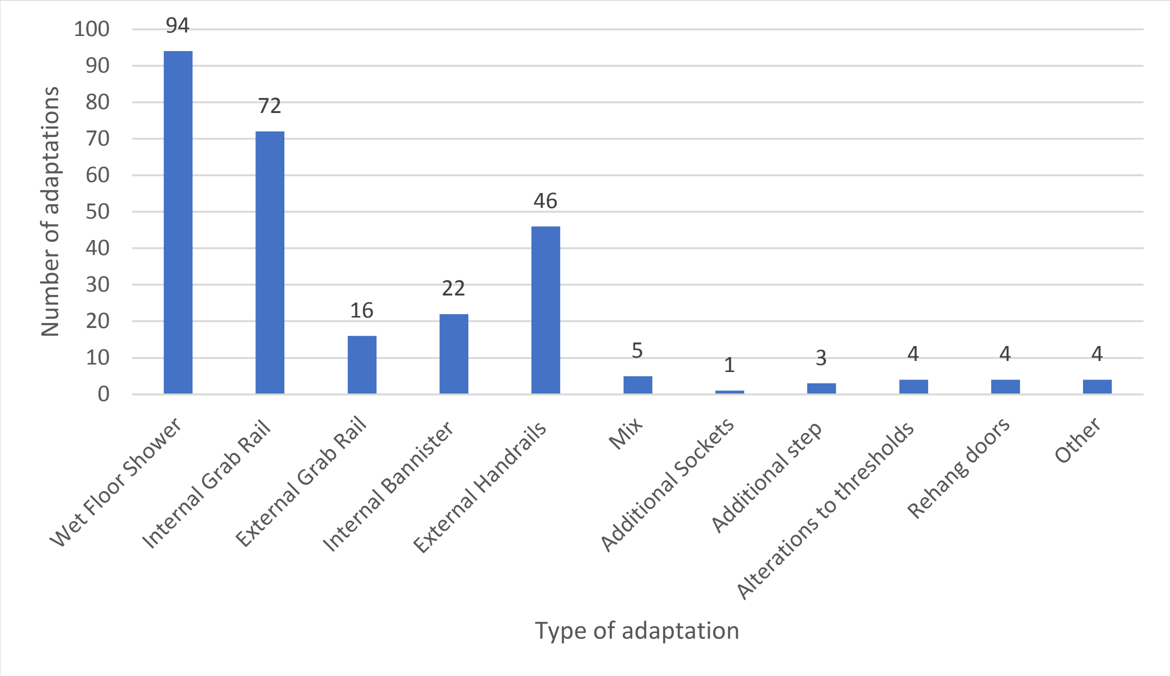
Making best use of the existing housing stock can be managed through good allocation policies and through the use of transfer and mutual exchange policies. Existing tenants whose current home becomes unsuitable can request a transfer on the housing waiting list, they could become overcrowded or under occupied and another home will be more suitable. These transfer requests are not counted towards net housing need as they will have another tenancy to give up to house another household on the waiting list.

Mutual exchanges are where tenants actively find their own move by swapping their home with another tenant and cut out the need for an active waiting list application. Swaps can be made between Council areas and Council and RSL tenants. In 2023/24 a total of 37 tenants swapped their home using the mutual exchange scheme in Clackmannanshire.
Managing stock and avoiding households living in unsuitable accommodation can, in some circumstances be solved by providing an adaptation. This avoids a move and provides the current home with the facilities required to enable functionally accessible housing which corresponds to the mobility characteristics of individual household. Property adaptation requirements include low level appliances, stair rails and barrier-free alterations.

Adaptations can be split into minor and major. Minor adaptations are simple to install and do not require structural changes to the property. In contrast, major adaptations require major works carried out and/or structural changes to the property. Current Clackmannanshire Council adaptations policy states that Clackmannanshire Council tenants can self-refer for adaptations to be carried out to their homes.

As chart 3.19 demonstrates, the Council carried out a total of 271 adaptations to its stock in the 2023/24 financial year. There were 94 major adaptations carried out, all of which constituted of wet floor shower installations. The other 177 adaptations were minor adaptations, with 72 internal grab rails, 46 external handrails, 22 internal bannisters and 16 external grab rails installed.

Chart 3.19 Adaptations carried out to Clackmannanshire Council stock in 2023/24



Source: Clackmannanshire Council Information System

As table 3.33 presents, Clackmannanshire Council saw a year-on-year increase to its adaptation budget, along with an increase in the number of adaptations carried out. 2022/23 saw 212 adaptations carried out with an allocated budget of £250,000 and an actual spend of £211,778, resulting in underspend of £38,222. In comparison, 2023/24 saw £773,554 spent on adaptations, resulting in a £203,544 overspend in terms of the allocated budget of £570,000 for the financial year.

The stark increase in overspend may be partially explained by the Council's need to hire external contractors in 2023/24 which helped to clear the backlog of adaptation works that were paused over the pandemic.

Table 3.33 Budget, spend and number of adaptations carried out to Council stock by financial year

Year	£ Budget	£ Actual Spend	£ Variance	No of Adaptations
2023/24	570,000	773,544	-203,544	271
2022/23	250,000	211,778	38,222	212
2021/22	50,000	52,955	-2,955	183

Source: Clackmannanshire Council Information System

As table 3.34 below presents, from 2021/22 to 2023/24, the Council has successfully managed to reduce the number of households waiting for adaptations from 131 to 67, equating to a 49% reduction.

Table 3.34 Number of households waiting for adaptations to their home by financial year

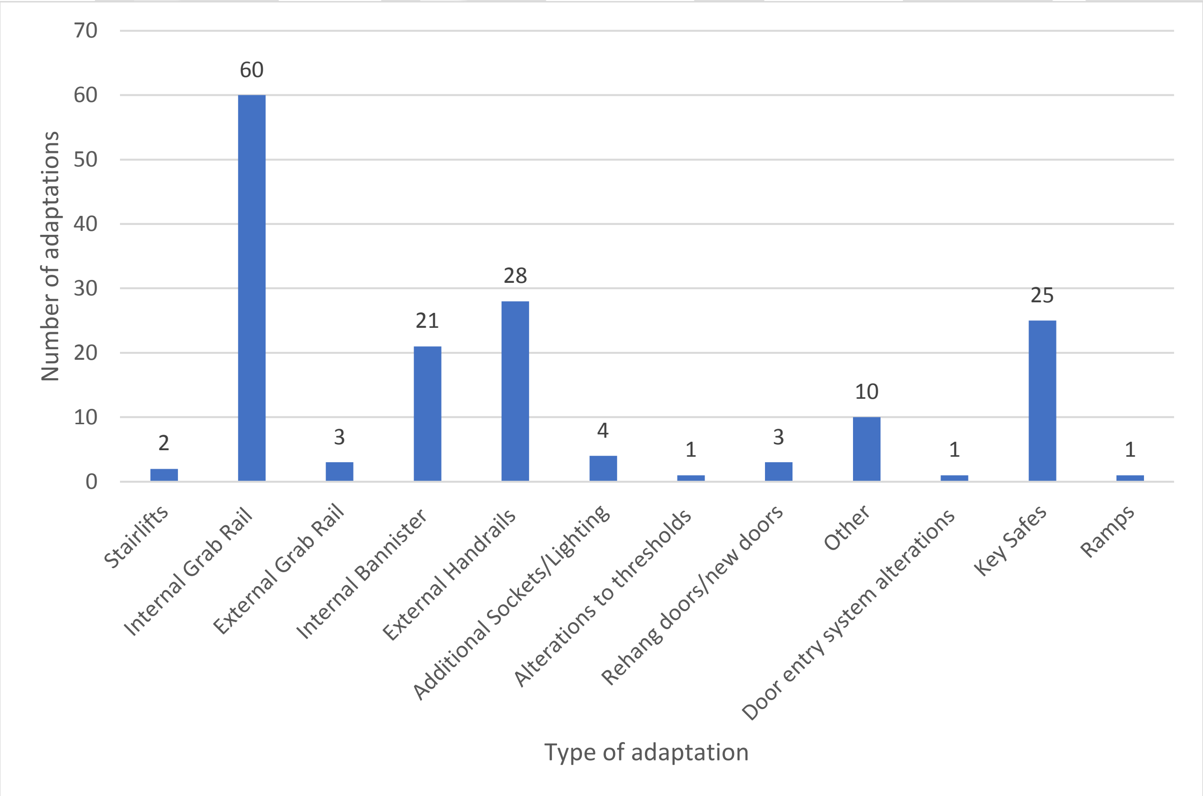
	2021/22	2022/23	2023/24	% Change over 3 years
Number of households	131	96	67	-49%

Source: Scottish Housing Regulator

Charts 3.20 and 3.21 show the numbers and types of adaptations carried out to the registered social landlord stock that operate across Clackmannanshire. It must be noted that the information could not be supplied at a local authority level from every registered social landlord and includes adaptations carried out to the stock across the wider Clackmannanshire and Stirling Health and Social Care Partnership area. Nonetheless, the majority of adaptations were carried out by RSLs which hold a large stock portfolio within Clackmannanshire.

There were a total of 159 minor adaptations carried and 81 major adaptations from 2021/22 to 2023/24 across the stock of all registered social landlords who operate in Clackmannanshire. The vast majority of minor adaptations were internal handrails (60), external handrails (28) and key safes (25).

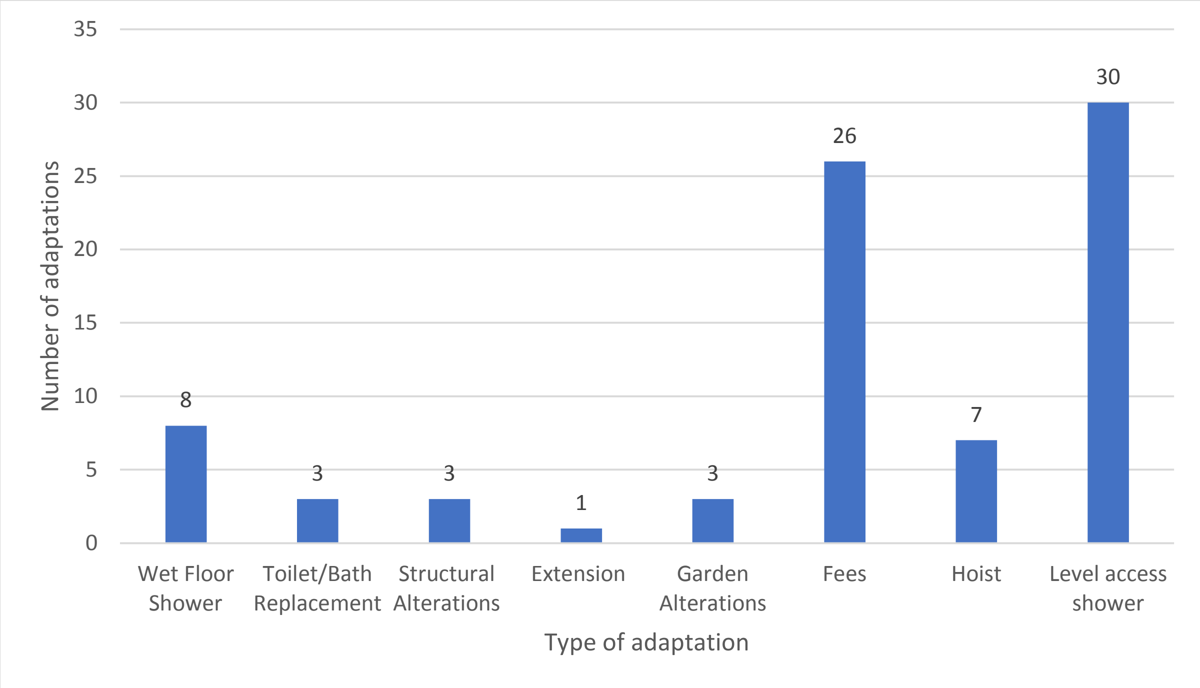
Chart 3.20 Minor adaptations carried out to RSL stock by type of adaptation 2021/22 – 2023/24



Source: Clackmannanshire Information System

As chart 3.21 below shows, the majority of major adaptations included level access showers, followed by fee payments for architectural as well as other professional works, and wet floor shower installations.

Chart 3.21 Major adaptations carried out to RSL stock by type of adaptation 2021/22 – 2023/24



Source: Clackmannanshire Information System

Table 3.35 shows that, according to the Scottish Household survey, around 3% or 1,000 households in Clackmannanshire require some form of disabled adaptation to their property. This figure is consistent throughout Forth Valley area and Scotland in general.

While this indicates a current unmet need for adapted properties for 1,000 households, further considerations should be given to the tenure type for the required households. Some of these requirements will have been addressed through the figures from Council and RSL adaptations shown above.

Table 3.35 Households reporting requiring disabled adaptations by local authority across all tenures 2017-2019

	Clackmannanshire	Falkirk	Stirling	Scotland
No. of all households	1,000	2,000	1,000	82,000
% of households	3%	3%	2%	3%

Source: Scottish House Condition Survey

Buy Back Properties

The Council has had a buy back scheme in operation since 2015 which is a quick way of increasing the affordable housing supply. It also allows the Council to purchase properties in flatted blocks where they re-gain a majority share to enable upgrades and repairs to be carried out. In total, 126 properties have been bought during the duration of the scheme.

The Scottish Government provides grant funding of up to £50k, or 50% of price paid, through the Affordable Housing Grant. The off the shelf scheme runs along side the new build program, and so the number of properties are dependent on grant availability once new build schemes have been prioritised. This scheme has helped to add to stock over the past few years while new build costs have increased and some sites have stalled due to viability.

Table 3.36 Number of properties bought back

Year	Number
2015/16	15
2016/17	14
2017/18	6
2018/19	15
2019/20	9
2020/21	8
2021/22	8
2022/23	31
2023/24	20
TOTAL	**126**

Source: Clackmannanshire Information system

LHS & Development Plan	Key Issues Identified in the Housing Needs and Demand Assessment
Housing Condition (Quality)	According to the Scottish House Condition Survey, 2017-2019, any disrepair for all stock in Clackmannanshire is 78% which is above the overall Scottish figure of 71%. Disrepair in the social rented sector is 83% compared to 74% in the owner occupied sector. **(Any (or Basic) disrepair relates to any damage where a building element requires some repair beyond routine maintenance. For example, a leaking tap would be considered any (or basic) disrepair.)** Looking at the types of properties in disrepair is useful to show that flats generally have a higher level of repair needs than houses. This reflects difficulties in getting common repairs carried out in flatted properties. There is higher percentage of families rather than older household homes that have repair needs. This could be due to older households having paid off mortgages and having savings to pay for ongoing repairs to their homes. There is no data presented in the latest Scottish House Condition Survey for properties below tolerable standard (BTS) in Clackmannanshire as the sample size is considered too small to give a reliable estimate. This is due to the sample size being less than 30 cases. Scottish Housing Quality Standard relates to social housing only and the Scottish Regulator Data shows over stock is 90.3% compliant. The Council is the largest provider of social renting and the stock is 93.5% compliant currently.
Housing Stock Pressures	There is a mismatch between supply and need for social housing in Clackmannanshire. Looking at net need, there are 5 waiting list applicants, with a housing need for every property becoming available. The majority of housing need is for a one bedroom property, and for those applicants, there are 7.2 waiting list applicants for every one bedroom property becoming available. There is a need for larger properties of 4+ bedrooms. In the past 5 years only 9 properties with 4 or 5 bedrooms have become available. There are 10 applicants for every 4 bed property and there are 17 applicants waiting for a 5 bedroom home with only one becoming available in the last 5 years. Houses have a lower turnover than flats in all areas. 3, 4 and 5 bedrooms houses have the lowest turnover. There is the greatest demand for 3 bedrooms houses and while there are

	fewer applicants in need of 4+ bedrooms, there are so few properties available that there is a real need for a number of larger properties to be added to the stock. In accordance with the definitions given by the Scottish Housing Regulator, Clackmannanshire does not have any low demand stock.
Size, type, tenure and location of future social housing supply	Requirements for larger family homes. Looking at where current tenants having 2 or more bedrooms than required could free up some larger properties. Targeting buy back properties with 4 or more bedrooms, or purchasing properties that could be converted is something the Council could consider. New build developments should include some larger family house types. There are no real pressure points in terms of Housing Market Areas, all areas have requirements for larger homes.
Sustaining Communities e.g. using tenure diversification / regeneration	

Chapter 4 Estimating Future Housing Need and Demand

Core Output 2

The aim of this chapter is estimate future additional housing units. The additional units will be broken down into four tenures discussed in previous chapters based on households' likely ability to afford:

- Owner occupation
- Private rented sector
- Mid market rent
- Social rent

Estimates should be reported for each five year period of a twenty year projection and the cumulative total at the end of the twenty year projection. The geography chosen should fit with those used in the Local Housing Strategy (LHS) and the Local Development Plan (LDP).

The HNDA tool will be used to calculate these projections and the inputs will be based on clear evidence gathered in the HNDA on demographics, existing housing needs, house prices, income and affordability.

All assumptions, judgements and scenarios are well reasoned and transparent.

Method

This chapter will go through the following steps in turn and set out the choice of scenarios based on previous work in the document and discussions and agreements made with the Housing Market Partnership Group.

Step 1 - Choose a range of future demographic scenarios that best reflect what may happen in local Housing Market Areas.

Step 2 - Estimate the number of households in existing need that will require a new home and decide how many years it will take to clear / address the housing need.

Step 3 - Choose a range of scenarios which best reflects what may happen to future local house prices, rent prices and incomes.

Step 4 - Use affordability assumptions to split total additional housing requirements by tenure – how likely households could afford owner occupation, private rent, mid market rent or social housing.

Step 5 - Consider how the HNDA tool estimates will inform housing policy (LHS) and planning decisions (LDP).

Step 1 – Demographic Scenarios

This stage involves the choice of demographic scenarios to use and input into the HNDA Tool. The CHMA strongly recommends using the National Records of Scotland (NRS) household projections as the official and robust source of information. The HNDA Tool contains the 2018 based NRS principal and variant projections and the following Chapter will discuss the choice of the variants and reasons and methodology around these choices.

There is an option within the guidance to use in-house household projections, this is considered far too resource intensive and as outlined, the NRS information is the official source. The Housing Market Partnership has discussed and agreed the use of this data.

Information from Chapter 2, Key Market Drivers shows that between 1990 and 2003, the population of Clackmannanshire stayed at around 48,150. Between 2003 and 2011 the population of Clackmannanshire increased from 48,140 in 2003 to 51,500 in 2011. This was an increase of 3,360 people over 8 years (6.9% increase in total population).

Between 2011 and 2025, the population has decreased from 51,500 to 51,346, a decrease of 154 people or -0.3% of the population in the past 14 years.

The 2018 NRS population projections suggest that the population will continue to decline to 49,924 to 2043. This suggests the net loss of population of 1,422, -2.7% between 2025 and 2043.

The 2018 principle household projections suggest that, despite declining population figures, there will be an increase of 76 households between 2025 and 2043, +0.3%.

This suggested decrease in the numbers of people but increase in the numbers of households would indicate that the size of the households will decrease to 2043 with more single people and couple households who may require smaller house sizes. This is further demonstrated in tables 4.1 and 4.2 below showing a the change in the profile of households from fewer younger households and an increase in older households.

The Table at 4.1 below shows the Low, Principle and High Migration figures as a comparison.

Table 4.1 Household projections for Clackmannshire by Variant (2018 based)

	2018	2028	2043	Change (%) 2018-2028	Change (%) 2018-2043
Low Migration	23,670	24,319	24,145	2.7%	2.0%
Principal Projection	23,670	24,384	24,408	3.0%	3.1%
High Migration	23,670	24,448	24,698	3.3%	4.3%

Source: National Records of Scotland Household projections

Table 4.2 Household Projections by Age Group of Head of Household 2018 and 2043, Clackmannanshire and Scotland (Principle projections)

Age Group	**Clacks 2018**	**Clacks 2043**	**Clacks % Change**
16-29	1,876	1,618	-14%
30-44	5,088	5,104	0%
45-59	7,731	6,257	-19%
60-74	5,603	5,099	-9%
75+	3,372	6,329	88%
Total	23,670	24,407	3%

Source: National Records of Scotland Household projections

The Housing Market Partnership discussed the NRS projections and gave some comment on their use

NRS itself acknowledges the limitations of its projections, and states that they are not policy-based forecasts of what the Scottish Government expects to happen. They do not try to forecast possible future changes that may alter these trends. For example:

- *economic change (e.g. recession patterns will be projected to continue even in a boom)*
- *social changes (e.g. migration policies, birth rates)*
- *imbalances between housing supply and demand (whatever the cause)*
- *the potential impact of the COVID-19 pandemic (such as on housing choices and options)*

Commenting on the reliance of the projections on past-trends, Professor Glen Bramley has said: "…this raises the very real possibility of the effects of historic under-supply of new housing being perpetuated. If household growth has been artificially suppressed by the undersupply of new housing, then basing future need calculations on those lower growth figures will by necessity under-estimate that need.".

A further reason to reduce reliance on the NRS household projections when planning for the homes Scotland will need in the future, is that they have proven to be poor projections of what happens in practice. A comparison of projections and completions in Midlothian provides an example. Midlothian chose to increase its housing land supply in its current LDP, resulting in a significant increase in housing completions between 2012 and 2019, supporting real-life demand and choice for new household formation, and outstripping the level of household growth set out in previous projections that had reflected a previous period of under-delivery. Midlothian could have chosen to plan for fewer homes, using the low projections as evidence. Had it done so, it would have been under-planning for new homes and suppressing the ability of new households to form. The increase in housing completions and new households that Midlothian's proactive approach to land supply supported is now reflected in the 2018-based household projections, showing strong projection household formation compared to other authority areas where planning and other factors have suppressed household formation.

To recognise and counteract the inherent weaknesses of the projection-reliant estimates, HFS recommended that local authorities model the high migration scenario and consider whether that represented a better fit with local and national policy and recent development rates given that the 2018-based household projections would still be influenced by reduced household growth post-recession and high-migration scenarios are more likely to be aligned to the requirement for councils to set ambitious Local Housing Land Requirements..

Projected household size data is also important to consider.

The guidance suggests a range of estimates are produced and therefore the Housing Market partnership agreed that projections would show principle projections and high migration variants.

<u>Step 2 - Existing housing need & years to address the need</u>

The estimate of housing need is the requirement for **additional** housing units and not housing need that can be addressed in-situ, such as housing adaptations or housing management, such as transferring to a larger or smaller home.

This section considers a range of methods to look at existing housing need in Clackmannanshire. All were discussed with the Housing Market Partnership and run through the HNDA Tool for output data.

Older style HNDA reports were extensive and gathered evidence of housing need through quantitative and qualitative data gathering. While Councils no longer have resources available to go through this type of exercise, it is worth testing a few alternative methods of identifying existing housing need which can be discussed with the Housing Market Partnership to reach a conclusion on an accurate picture of housing needs in Clackmannanshire.

All Scenarios were discussed at the HMP meeting on 2 July 2025 and conclusions drawn are shown.

<u>Scenario A</u>

The HNDA tool contains a pre-loaded estimate of existing housing need which includes a count of homeless households in temporary accommodation plus overcrowded and concealed households (HoTOC). These households are deemed to be in need of a new unit of housing.

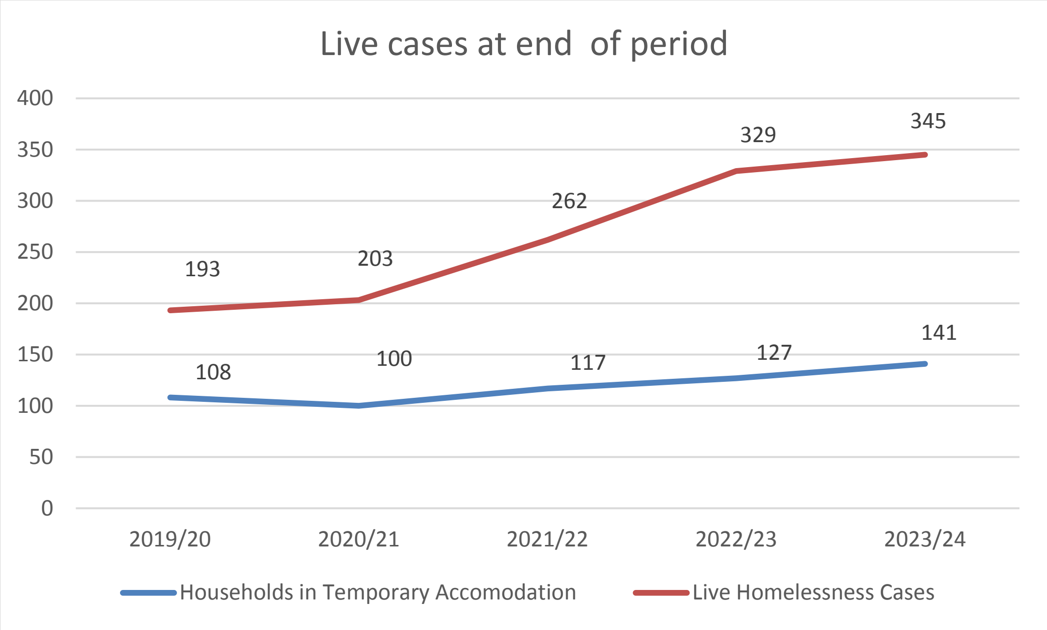
The HNDA tool default for the number of households in housing need is set at 150 households. This is seen as a robust and credible method for identifying existing need and would be a supported method.

HMP feedback on Scenario A, 150 people currently in housing need:

In 2024/25 there were 616 homeless presentations and 148 households in homeless accommodation as of 30 September 2024. The figure of 150 is unlikely to capture the full picture of housing need. As such, Scenario A is ruled out.

Graph 4.1 demonstrates that there are considerably more live homelessness cases in comparison to the number of households in temporary accommodation, with 345 live cases and 141 homeless households in temporary accommodation in 2023/24. From 2019/20 to 2023/24, there has been an increase in 79% live homelessness cases and 31% increase in a number of homeless households in temporary accommodation. The figures suggest that against the backdrop of increasing homeless presentations, the Council struggles to clear homelessness cases, offer temporary accommodation to homeless households and provide suitable permanent accommodation.

Graph 4.1 Number of households in temporary accommodation in comparison to number of live cases



Source: Scottish Government. Homelessness Statistics

Scenario B

Homes for Scotland have published a report which illustrates:

'*how existing housing need in Scotland is both more complex and far higher than those that are homeless in temporary accommodation and those that are both overcrowded and concealed, while rightly at the forefront of the conversation, there are additional, less visible forms of housing need that must also be considered.*'[4]

The Homes for Scotland Report methodology was to undertake online surveys and the findings of the survey are presented below.

The online tool used, ScotPulse, has a membership of over 47,000 adults (aged 16+) in Scotland, meaning it can produce reliable and robust estimates at a national and, in most cases, at local/regional levels.

These numbers can be applied to the total sample size (13,690) to calculate that:

- *14.9% had at least one concealed household;*
- *7.4% indicated they were struggling financially due to high housing costs;*
- *4.9% were found to be living in overcrowded accommodation;*
- *3.4% were in properties that required specialised housing adaptation or support but did not have them; and*
- *3.4% were found to live in 'unfit' properties.*

[4] Existing Housing Need in Scotland: A Survey commissioned by Homes for Scotland: Report by Diffley Partnership and Rettie & Co. January 2024

The sample results of this report can be extrapolated to Clackmannanshire's 24,472[5] households to show the housing need in the area, using the Homes for Scotland methodology and findings:

● 3,646 households had at least one concealed household;

● 1,810 households indicated they were struggling financially due to high housing costs;

● 1,199 households were found to be living in overcrowded accommodation;

● 832 households were in properties that required specialised housing adaptation or support but did not have them; and

● 832 households were found to live in 'unfit' properties.

This shows that **8,319** households in Clackmannanshire have some sort of housing need. However, the estimate of housing need is the requirement for **additional** housing units and not housing need that can be addressed in-situ, such as housing adaptations or housing management, such as transferring to a larger or smaller home.

Using the same methodology as Homes for Scotland, the % of in-situ solutions has been applied to calculate net housing need for Clackmannanshire

Table 4.3. Net housing need using Homes for Scotland Methodology

Number Households (Gross Housing Need)	**Reason**	**New units required (net housing need)**	**Solution**
3,646	Concealed Household	3,646	New unit of housing
1,810	Struggling financially	1,086 (40% could afford own solution)	40% could afford own solution
1,199	Overcrowded	1,199	New unit of housing
832	Specialist Adaptations	166	80% could solve in-situ
832	In unfit properties	91	89% could solve in-situ
8,319		**6,188**	
	In Homeless Temporary Accommodation	148	New unit of housing
		6,336	

Source: Existing Housing Need in Scotland: A Survey commissioned by Homes for Scotland: Report by Diffley Partnership and Rettie & Co. January 2024

Add on those in temporary accommodation in Clackmannanshire which was 148 households at 30 September 2024.[6] Taking the total for Scenario B to 6,336 in housing need.

[5] Census 2022

[6] Scottish Government, Directorate For Tackling Child Poverty And Social Justice, Communities Analysis Division: Housing, Homelessness & Regeneration Analysis, Homelessness Statistics & Analysis team, Tables for Homelessness in Scotland,update to 30 September 2024

HMP feedback, for Scenario B to 6,336 households currently in housing need:

This methodology does not take into account housing management solutions for some overcrowded households which could be solved by housing management (transfer)

The method appears to over count those struggling financially as, arguably they could all be suitably housed via transfer as they have a home to give up. The HNDA tool has an affordability calculator, so would automatically adjust income levels to suitable housing tenure.

As such, this methodology has been ruled out due to probable over-counting and not taking full cognisance to transfer or in-situ solutions.

Scenario C

This scenario looks at figures from the Council's waiting list. The figures include homeless applicants and applicants with over crowding points.

The estimate of housing need is the requirement for **additional** housing units and not housing need that can be addressed in-situ, such as housing adaptations or housing management, such as transferring to a larger or smaller home.

Applicants on the waiting list who are transfer tenants (who have a home to give up) are discounted as an additional unit would not be required. The non transfer waiting list applicants are counted as this will capture an element of hidden households or newly forming households where there is no other home to give up.

In November 2024, there were 2,660 people on the council waiting list. Table 4.4 below shows the breakdown of waiting list applicants at that time.

Table 4.4 Waiting list applicants - November 2024

All Applicants	Transfer Applicants	Waiting list Applicants	Waiting List Applicant in 'housing need'	Waiting List Applicants with zero points 'no housing need'
2,660	539	2,121	1,455	666

Source: Council database

Need a bit more work to break down by reason

HMP feedback, for Scenario C to 1,455 households currently in housing need:

Looking at all waiting list applicants is likely to capture some of the wider housing demand identified by the Homes for Scotland method, particularly those who are struggling financially but are deemed as being adequately housed. Although they will have a home to give up, will not be counted as transfer as are in private sector.

In terms of numbers of overcrowded properties in the social sector, 1.9% or 465 households were shown to be overcrowded according to the 2021 Census. The Council waiting list at October 2024 shows 184 applicants with overcrowding points.

<u>Step 3 – Future Housing cost</u>

This stage involves the choice of future housing costs to use and input into the HNDA Tool. Drawing on discussions with the Housing Market Partnership on data presented in chapter 2, the choice of the variants and reasons around these choices will be discussed.

Affordability

House prices in Clackmannanshire continue to be under the Scottish average but are above the levels shown in the HNDA Tool. This would support adjusting the prices in the tool to reflect higher current prices, then use the default growth option in the tool to track a similar growth to the rest of Scotland going forward.

<u>Amendment to House Prices</u>

The Mean house price in 2024 in Clackmannanshire is £185,231, the HNDA tool has been amended to reflect this and the price increase amended to 3.5% as per change average rises in the area

<u>Amendment to higher rent rate growth</u>

Average rents across Scotland and Forth Valley have increased significantly over the past 4 years, around 10% each year between 2020 and 2023, this suggests the use of a moderately high growth rate going forward would be appropriate.

Rent levels at May 2025 were £882, up 4.6% from May 2024, the HNDA tool has been amended to reflect this (£220 weekly rent rate).

Income

There has been an increase in income growth in Clackmannanshire in recent years going from under Scottish average to above or similar to Scottish average (Chart 2.24).

<u>Amendment to income levels and growth</u>

Average weekly income at 2024 in Scotland was £740, compared to £762 in Clackmannanshire (Source: ONS annual survey of hours and earnings - resident analysis). Income in Clackmannanshire is therefore 2.8% higher than that of Scotland and should be amended accordingly.

<u>Step 4 – Affordability Assumptions</u>

The HNDA tool is set up to analyse affordability (income divided by house prices and rent prices) at the 25th percentile of income, house price and rent price. The 25th percentile has been chosen as historically it is seen to represent where first time buyers can enter the market and is where housing need and demand is critical.

The HMP group agreed to keep the Tool at 25%.

Within this, the HMP agreed that the proportion which will rent in the private sector and those who will require social housing remained in line with the HNDA Tool.

- If a household spends less than 25% of their income on rent, the Tool assumes they can afford to rent in the private sector. This threshold has been used historically as the affordability measure for affordability for private renting.
- If a household spends 25% to 35% of their income in rent the Tool assumes they can afford mid market rent.
- If a household spends more than 35% of their income, which includes housing benefit, on rent, the Tool assumes they will require social rent.

Agreed Scenario Testing for the HNDA Tool

Table 4.5 agreed scenario testing

	Demographic (Step 1)	Housing Need (Step 2)	House Price (Step 3)	Rent Rates (Step 3)	Income Growth (Step 3)	Income Distribution (Step 4)	Years to Clear
Scenario 1	Principal	Waiting List Non Transfer Tenants	Higher Growth (adjusted from HNDA input figures)	Moderately high growth	Moderate Growth	No Change	5
Scenario 2	High	Waiting List Non Transfer Tenants	Higher Growth (adjusted from HNDA input figures)	Moderately high growth	Moderate Growth	No Change	5

Table 4.6 Agreed Assumptions

Assumption	
Use the NRS Household projections	YES
Use the income data in the Tool	NO Income 2.8% higher in Clacks vs Scotland
Use HoTOC for existing need	NO Use Waiting list data as agreed
Number of years to clear existing need	5 years
Use of affordability assumptions	YES
House price affordability	3.9 x income first time buyers 3.2 x income movers
% who buy	60%
MMR Threshold	25% to 35% income
Social Rent Threshold	>35% income

Tool Results

The HNDA Tool results are shown in tables below to represent the two scenarios. These are shown for Clackmannanshire and then for the three Housing Market Areas, Alloa, Hillfoots and Dollar.
The results show an estimate of the number of additional new units of housing required per annum by social rent, mid market rent, private rent and owner occupation.

HNDA Tool Results for Scenario 1 – Principle Projections 5 years to clear backlog need

Table 4.7 – Scenario 1 All areas

Tenure	2025-2029 Per annum	2030-2034 Per annum	2035-2039 Per annum	2040-2044 Per annum	20 year Total	20 year Per annum
Social Rent	228	-1	1	0	1,140	57
MMR Rent	24	-1	1	0	120	6
Private Rent	18	-1	1	0	90	4
Buyers	36	-2	1	1	180	9
Total	**306**	**-6**	**4**	**1**	**1,525***	**76***

*differences due to rounding

Table 4.8 – Scenario 1 Alloa Housing Market Area

Tenure	2025-2029 Per annum	2030-2034 Per annum	2035-2039 Per annum	2040-2044 Per annum	20 year Total	20 year Per annum
Social Rent	139	-1	1	0	695	35
MMR Rent	16	-1	0	0	80	1
Private Rent	6	0	0	0	30	0.5
Buyers	25	-1	1	1	130	6.5
Total	**186**	**-3**	**2**	**1**	**935**	**47***

*differences due to rounding

Table 4.9 – Scenario 1 Hillfoots Housing Market Area

Tenure	2025-2029 Per annum	2030-2034 Per annum	2035-2039 Per annum	2040-2044 Per annum	20 year Total	20 year Per annum
Social Rent	75	0	0	0	375	19
MMR Rent	7	0	0	0	35	2
Private Rent	10	-1	0	0	45	2
Buyers	8	0	0	0	40	2
Total	**100**	**-1**	**0**	**0**	**495**	**25***

*differences due to rounding

Table 4.10 – Scenario 1 Dollar Housing Market Area

Tenure	2025-2029 Per annum	2030-2034 Per annum	2035-2039 Per annum	2040-2044 Per annum	20 year Total	20 year Per annum
Social Rent	14	0	0	0	70	3.5
MMR Rent	1	0	0	0	5	0.25
Private Rent	2	-1	0	0	5	0.25
Buyers	3	0	0	0	15	0.75
Total	**20**	**-1**	**0**	**0**	**495**	**5***

*differences due to rounding

HNDA Tool Results for Scenario 2 – High Projections 5 years to clear backlog

Table 4.11 – Scenario 2 All areas

Tenure	2025-2029 Per annum	2030-2034 Per annum	2035-2039 Per annum	2040-2044 Per annum	20 year Total	20 year Per annum
Social Rent	236	2	5	3	1,230	61
MMR Rent	25	2	5	4	180	9
Private Rent	19	2	4	4	145	7
Buyers	37	3	8	7	275	14
Total	**317**	**9**	**21**	**18**	**1,830**	**92***

*differences due to rounding

Table 4.12 – Scenario 2 Alloa Housing Market Area

Tenure	2025-2029 Per annum	2030-2034 Per annum	2035-2039 Per annum	2040-2044 Per annum	20 year Total	20 year Per annum
Social Rent	144	1	3	2	750	37
MMR Rent	16	1	3	3	115	6
Private Rent	6	1	2	1	45	2
Buyers	26	2	5	5	190	10
Total	**192**	**5**	**13**	**11**	**1,100**	**55***

*differences due to rounding

Table 4.13 – Scenario 2 Hillfoots Housing Market Area

Tenure	2025-2029 Per annum	2030-2034 Per annum	2035-2039 Per annum	2040-2044 Per annum	20 year Total	20 year Per annum
Social Rent	78	1	1	1	405	20
MMR Rent	8	1	1	1	55	3
Private Rent	11	1	2	2	80	4
Buyers	8	1	2	2	65	3
Total	**105**	**4**	**6**	**6**	**605**	**30***

*differences due to rounding

Table 4.14 – Scenario 2 Dollar Housing Market Area

Tenure	2025-2029 Per annum	2030-2034 Per annum	2035-2039 Per annum	2040-2044 Per annum	20 year Total	20 year Per annum
Social Rent	15	1	1	1	90	4
MMR Rent	1	1	1	1	20	1
Private Rent	2	1	2	2	35	2
Buyers	3	1	2	2	40	2
Total	**21**	**4**	**6**	**6**	**185**	**9***

*differences due to rounding

LHS & Development Plan	Key Issues Identified in the Housing Needs and Demand Assessment
Future Need for additional housing broken down by households who are likely to afford: • Owner Occupation • Private Rent • Below Market Rent • Social Rent	After discussions with the Housing Market Partnership, it was agreed that the existing housing need figure of 1,455 would be used in the tool. This is based on the waiting list figures, adjusted to show non transfer applicants in housing need (with applicant points). House prices and rent prices in Clackmannanshire are showing higher than those pre-loaded into the HNDA tool and have therefore been adjusted to reflect the position. It was agreed that these figures would be run through 2 scenarios of Principle population growth and High population growth, based on NRS figures. The HNDA figures are presented at Clackmannanshire Council level and at the 3 HMA sub group areas. The housing need is broken into, owner occupation, private rent, below market rent and social rent. Using principle projections, a housing estimate of 306 new housing units per year, years 1-5 and a housing estimate of 76 per year over years 1-20. Using high projections, a housing estimate of 317 new housing units per year, years 1-5 and a housing estimate of 92 per year over years 1-20. Over years 1-20 all tenure types are identified as being needed with 83% being in the social or below market rent sectors and 17% in the owner occupied or private rented sectors. Setting the land targets in the Local Development Plan will require an additional flexible land allowance to be applied which is expected to be 25%, this will also need to meet the minimum housing requirement in the NPF4. The HNDA shows a need for all tenures, which should be reflected in the LDP. The allocation of housing land will support the delivery of owner occupation and social rent. The need for social and mid market rent outweighs that of owner occupation and private rent over all 3 HMA sub areas.

Chapter 5: Specialist Provision

This chapter examines the current as well as future provision, need and demand for housing and housing-related specialist provision within Clackmannanshire. Specialist Provision refers to three broad categories of need covering six types of housing or housing-related provision as detailed in table 5.1. These provisions aim to support independent living for as long as possible and help to enable people to live well and with dignity.

The HNDA Guidance document highlights that most individuals will have similar housing needs, irrespective of their individual illness, health condition or equality characteristics. It is important to focus on understanding, and if possible, quantifying the implications for future housing and housing-related specialist provision.

Table 5.1 Housing and housing-related specialist provision

Category of Housing Need	Type of Housing Provision
Property Needs	1. Accessible and adapted housing 2. Wheelchair housing 3. Non-permanent housing e.g. for students, migrant workers, asylum seekers, refugees
Care and Support Needs	4. Supported provision e.g. care homes, sheltered housing, hostels and refuges 5. Care/ support services for independent living
Locational or Land Needs	6. Site provision e.g. sites/ pitches for Gypsy/ Travellers and sites for Travelling Showpeople, city centre locations for student accommodation

To evidence the above and examine current specialist provision, the following core individual groups should be considered:

- Older People
- Disabled People
- People with a mental health condition
- People with a learning disability
- Homeless People
- People fleeing/at risk of domestic abuse
- People requiring non-permanent accommodation, e.g. homeless people, students, migrant workers, asylum seekers, refugees, care leavers, ex-offenders
- Armed forces communities
- Minority ethnic people (including Gypsy/Travellers)

- Travelling Showpeople

By the end of this chapter, the Core Output 3 should be satisfied. The Specialist Provision will satisfy the following:

- Identifies the contribution that Specialist Provision plays in enabling people to live well, with dignity and independently for as long as possible.
- Identifies any gap(s)/ shortfall(s) in the provision and the future level and type of provision required.
- Considers evidence regarding property needs, care and support needs and locational/ land needs.
- Undertakes consultation with all appropriate stakeholders who represent the views of those people who this chapter may impact upon and reports on the findings of such consultation.
- Gives due consideration to the provisions of the Equality Act (2010) .

National Legislative and Policy Context

Some national policies and legislation are relevant to and covers multiple sections of the chapter and to avoid duplication are listed below as follows:

- A Fairer Scotland for Older People: framework for action, Scottish Government (2019)
- Age, Home and Community: A strategy for Housing for Scotland's Older People (2012-2021)
- Equality Act 2010
- Housing to 2040
- The Independent Review of Adult Social Care in Scotland (2021)
- National Health and Wellbeing Outcomes Framework
- National Performance Framework (NPF) 4
- New Dementia Strategy for Scotland: Everyone's Story, Scottish Government (2023)
- Relevant Adjustments to Common Parts (Disabled Persons) (Scotland) Regulations
- Scottish Building Standards and Housing for Varying Needs, Scottish Government (2018)
- Scottish Government: A Fairer Scotland for Disabled People
- United Nations Convention (2005) on the Rights of Persons with Disabilities

Local Policy Context

The following local policies and strategies are relevant across multiple sections within Specialist Provision Chapter and will be listed here:

- Clackmannanshire and Stirling Health and Social Care Partnership Health Improvement Plan 2024-26

- Clackmannanshire and Stirling Health and Social Care Partnership Strategic Needs Assessment 2023/24-2033/24
- Clackmannanshire and Stirling Integration Joint Board Strategic Commissioning Plan 2023-2033
- Clackmannanshire Alliance Wellbeing Local Outcomes Improvement Plan 2024-2034
- Clackmannanshire Council Strategic Housing Investment Plan 2025-2030
- Clackmannanshire Local Development Plan, 2015
- Clackmannanshire Local Development Plan, Supplementary Guidance 5, 2015
- Clackmannanshire Council Rapid Rehousing Transition Plan 2018-2024
- Clackmannanshire Council's Strategic Housing Investment Plan (SHIP) 2025-2030

External Stakeholder Consultation & Engagement

Following the research undertaken to inform the Specialist Provision chapter, a stakeholder consultation event took place to validate the initial findings of the chapter, discuss gaps in the current provision and inform future need and provision. Participant external stakeholders were as follows:

- Clackmannanshire & Stirling Health and Social Care Partnership;
- NHS Forth Valley;
- Hanover Housing Association;
- Kingdom Housing Association;
- Link Housing Association;
- Ochil View Housing Association;
- Paragon Housing Association.

Full consultation event findings can be found in appendix 1.

Age, Health and Disability Profile

Age, health and disability in themselves are not direct markers for the need of specialist housing provision. While it is hard to make future predictions for the need of further supply of specialist housing, recent historic changes in the age, disability and health profile of the population may indicate current unmet needs of hard-to-reach population groups. In particular, age, health and disability are relevant when discussing housing and housing-related specialist provision sections for adapted and wheelchair housing, supported provision as well as care and support needs for independent living. What follows is a brief overview of the recent changes in the general age, health and disability profile across the population in Clackmannanshire.

Ageing Population

The census data reveals that from 2011 to 2022 Clackmannanshire saw a 25% increase in individuals aged 65 – 74, 43% increase in individuals aged 75 – 84 and 23% increase in population aged 85 and over.

Table 5.2 Number of people in Clackmannanshire aged 65+

	All people	Aged 65-74 years	Aged 75-84 years	85+ years
2011	51,442	4,874	2,525	813
2022	51,800	6,100	3,600	1,000
% Change	1%	25%	43%	23%

Source: Scottish Census 2011 & 2022

As set out in table 2.2 of chapter 2, individuals aged 65 and over comprised 20.8% of Clackmannanshire’s population in 2021. However, chart 2.2 shows that by 2043 the number of people in the 75 – 84 age group is projected to increase by 59% and the population of individuals aged 85 and over will increase by 95%.

Table 5.3 Tenure by age of Household Reference Person

	Owned			Social Rented			Private Rented (or living rent free)		
Age	2011	2022	% Change	2011	2022	% Change	2011	2022	% Change
16-34	1,497	1,549	3%	1,324	1,444	9.1%	823	789	-4.1%
35-49	4,333	3,221	-26%	1,843	1,575	-14.5%	711	636	-10.5%
50-64	4,579	5,157	13%	1,617	1,874	15.9%	328	572	74.4%
65+	3,697	5,235	42%	1,718	1,558	-9.3%	264	323	22.3%
Total	14,106	15,162	7%	6,502	6,451	-0.8%	2,126	2,320	9.1%

Source: Scottish Census 2011 & 2022

Table 5.3 demonstrates that there has been an overall increase in the number of people owning as well as privately renting their homes. In particular, there has been a 42% increase in owner occupiers aged 65 and over. The same age category saw a 22.3% increase in the number of individuals within the private rented sector.

Table 5.4 Tenure by age of Household Reference Person as a proportion of all households by age group

Age	Owned			Social Rented			Private Rented (or living rent free)		
	2011	2022	% Change	2011	2022	% Change	2011	2022	% Change
16-34	41.1%	42.5%	1.4%	36.3%	38.2%	1.8%	22.6%	20.9%	-1.7%
35-49	62.9%	59.3%	-3.6%	26.8%	29.0%	2.2%	10.3%	11.7%	1.4%
50-64	70.2%	67.8%	-2.4%	24.8%	24.6%	-0.1%	5.0%	7.5%	2.5%
65+	65.1%	73.6%	8.5%	30.3%	21.9%	-8.4%	4.6%	4.5%	-0.1%

Source: Scottish Census 2011 & 2022

As table 5.4 shows, almost 74% of all household aged 65 and over were owner occupiers in 2022, signifying an 8.5% rise from 2011. Correspondingly, there has been a stark 8.4% decrease in the number of 65+ households living in the social rented sector accommodation, with 21.9% of all of the 65+ households renting from social landlords.

The large rise in the current as well as the projected growth in Clackmannanshire’s ageing population suggests that there may be an increased pressure in the needs and demands for the provision of adapted and wheelchair-accessible housing and social care services associated with limited mobility, physical disability, dementia and other physical and mental health needs arising from old age. Furthermore, the census data suggests that there has been an increase in the number of households aged 65 and over who are owner occupiers. This may require further considerations and increased focus on supporting older owner occupier households with additional support needs.

Health and Disability

Table 5.5 Self-reported general health in Clackmannanshire

	All			Female			Male		
	2011	2022	% Change	2011	2022	% Change	2011	2022	% Change
Very good	50.7%	44.9%	-5.80%	50.0%	43.5%	-6.5%	51.4%	46.3%	5.1%
Good	31.0%	32.1%	1.10%	31.0%	32.5%	1.5%	30.9%	31.8%	-0.9%
Fair	12.7%	15.4%	2.70%	13.2%	16%	2.8%	12.2%	14.7%	-2.5%
Bad	4.4%	5.9%	1.50%	4.5%	6.3%	1.8%	4.3%	5.4%	-1.1%
Very bad	1.2%	1.7%	0.50%	1.3%	1.8%	0.5%	1.1%	1.7%	-0.6%

Source: Scottish Census 2011 & 2022

Table 5.5 presents the changes in self-reported general health across Clackmannanshire from 2011 to 2022. In general, there has been a 4.7% decrease in the population assessing their health as ‘good’ or ‘very good’ from 2011 to 2022, with 7.6% of the population having self-reported ‘bad’ or ‘very bad’ health. Female population had worse self-reported health in 2022, with 8.2% of females having ‘bad’ or ‘very bad; health, compared to 7.1% of males.
In contrast, table 5.6 below shows that while general health has also worsened nationally, Scotland saw an overall better self-reported health than Clackmannanshire, both for females and males.

Table 5.6 Self-reported general health in Scotland

	All			Female			Male		
	2011	2022	% Change	2011	2022	% Change	2011	2022	% Change
Very good	52.5%	48%	-4.50%	51.4%	46.6%	-4.8%	53.6%	49.3%	4.3%
Good	29.7%	30.9%	1.20%	29.9%	30.9%	1.0%	29.6%	30.8%	-1.2%
Fair	12.2%	14.2%	2.00%	12.9%	14.9%	2.0%	11.4%	13.5%	-2.1%
Bad	4.3%	5.3%	1.00%	4.5%	5.8%	1.3%	4.1%	4.8%	-0.7%
Very bad	1.3%	1.6%	0.30%	1.4%	1.7%	0.3%	1.3%	1.5%	-0.2%

Source: Scottish Census 2011 & 2022

Table 5.7 shows that both Clackmannanshire and Scotland in general saw a percentage increase in the population with long-term health conditions. Nonetheless, Clackmannanshire saw a larger increase across all conditions, with a staggering 7.8% increase in mental health conditions and 3.4% in physical disabilities. Overall, 22.3% of population had a long-term illness, disease or condition in Clackmannanshire in 2022.

Table 5.7 % of population who has a long-term health condition by condition type

	Clackmannanshire			Scotland		
	2011	2022	% Change	2011	2022	% Change
Long-term illness, disease or condition	19.1%	22.3%	**3.2%**	18.7%	21.4%	**2.7%**
Mental health condition	4.6%	12.4%	**7.8%**	4.4%	11.3%	**6.9%**
Physical disability	7.2%	10.6%	**3.4%**	6.7%	9.7%	**3%**
Blindness or visual impairment	2.2%	2.6%	**0.4%**	2.4%	2.5%	**0.1%**
Deafness or hearing impairment	6.8%	7.7%	**0.9%**	6.6%	7.1%	**0.5%**

Source: Scottish Census 2011 & 2022

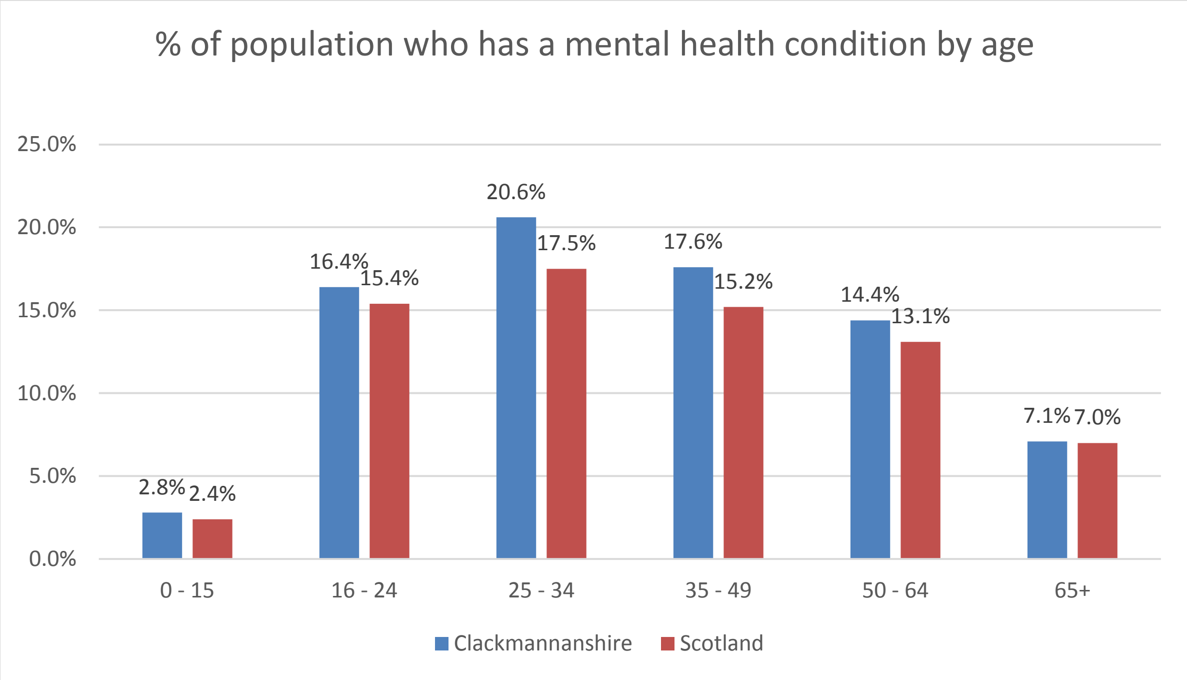
As table 5.8 below shows, there has been a 5.8% increase in the number of people whose day-to-day activities were limited due to a long-term health condition or disability across Clackmannanshire with 26% of people experiencing limitations to their daily activities by varying degrees in 2022.

Table 5.8 % of people whose day-to-day activities are limited due to long-term health condition or disability

	All			Female			Male		
	2011	2022	% Change	2011	2022	% Change	2011	2022	% Change
Limited a lot	9.9%	11.7%	1.8%	10.5%	12.6%	2.1%	9.3%	10.7%	1.4%
Limited a little	10.3%	14.3%	4.0%	10.7%	14.9%	4.2%	9.9%	13.6%	3.7%
Not limited	79.8%	74.0%	-5.8%	78.8%	72.5%	-6.3%	80.8%	75.6%	-5.2%
Total limited	**20.2%**	**26.0%**	**5.8%**	**21.2%**	**27.5%**	**6.3%**	**19.2%**	**24.3%**	**5.1%**

Source: Scottish Census 2011 & 2022

Graph 5.1 % of population who has a mental health condition by age in 2022



Source: Scottish Census 2022

As mentioned in table 5.7, there has been a stark increase in the frequency of mental health conditions in 2022, with 12.4% of population reporting a mental health condition in Clackmannanshire. The figures in graph 5.1 reveal that younger people are more likely to experience mental health issues. In 2022, 20.6% of people aged 25 – 34 has a mental health condition, followed by 17.6% of individuals aged 35 – 49 and 16.4% in the 16 – 24 age band. The Scottish average saw similar age trends, however, the overall prevalence of mental health condition across the age groups was still lower than in Clackmannanshire.

Table 5.9 % Population prescribed drugs for anxiety/depressions/psychosis

Area	2017/18	2018/19	2019/20	2020/21	2021/22
Clackmannanshire	21.8%	21.9%	21.8%	20.9%	22.0%
Scotland	18.8%	19.3%	19.7%	19.3%	20.1%

Source: Public Health Scotland 2021/22

Latest available information from Public Health Scotland (table 5.9) shows that 22% of individuals across Clackmannanshire have been prescribed drugs to treat anxiety, depression or psychosis in 2021/22. While the figure has remained steady from 2017/18 to 2021/22, it may indicate that a substantial proportion of population may have moderate to severe mental health conditions, requiring medications to be treated.

If probable suicides are to be taken as an indicator of untreated mental health conditions, be it due to lack of direct medical care or lack of support, table 5.10 below shows that from 2019-2021, Clackmannanshire had a slightly higher rate of probable suicides per 100,000 population than the national average with 15.7 probable suicides per 100,000 population, compared to 14.6 nationally. Males were almost 3 times as likely to commit suicide in Clackmannanshire with 23.7 males and 8.2 females per 100,000.

Table 5.10 Probable suicides in 2019-2021 per 100,000 population (age-standardised)

Area	All	Female	Male
Clackmannanshire	15.7	8.2	23.7
Scotland	14.6	7.4	22.3

Source: National Records of Scotland 2021

In general, recent historic changes have shown worsening trends in both physical and mental health of the population, alongside a rapidly ageing population. All of these factors are likely to have an impact on health and social care service and increase the demand for specialist housing and housing-related provision.

1. Accessible and Adapted Housing

National Policies

National policy places emphasis on shifting the balance of care by supporting and enabling people to live independently at home for as long as they want and are able to do so. The provision of accessible and adapted housing is underpinned by the following national policies:

- Evaluation of Adapting for Change, Craigforth (2017)
- Housing and disabled people: Scotland's hidden crisis, EHRC (2017)
- Housing for Varying Needs: a design guide, Scottish Homes (1998)
- Guidance for setting of Local Housing Strategy target to support the Delivery of more wheelchair accessible housing, Scottish Government (2019)
- Making the connection: Guide to assessing the housing related needs of older and disabled people, Gillian Young/Newhaven (2015)
- Relevant Adjustments to Common Parts (Disabled Persons) (Scotland) Regulations (2020)
- We Say: Our place, Our Space – The evidence on disabled people's housing issues from Scotland's Disabled People's Summit (2017)

Local Policies and Strategies

- Clackmannanshire Council Private Sector Housing Assistance Scheme
- Clackmannanshire Council's Strategic Housing Investment Plan (SHIP) 2025-2030

SHIP is the main strategic document which sets out the targets for affordable housing development across Clackmannanshire, including adapted and fully wheelchair accessible housing. The current iteration of SHIP has established a target for 7% of all social housing to be suitable for individuals with a physical disability, including wheelchair users.

The Council intends to utilise the affordable housing supply programme to purchase specialist/adapted housing. It currently does not have a dedicated new build programme, however, as part of its off-the-shelf purchase programme, the Council aims to target accessible or easily adaptable properties for purchase to increase its overall adapted and fully wheelchair accessible stock.

Property Needs

The provision of accessible housing and carrying out the necessary adaptations can offer financial savings for more costly alternatives such as admissions to care homes, the provision of care at home services and by reducing the risk of accidents and subsequent admissions to hospitals. It can also offer social benefit by reducing the dependency on people-based services such as care at home services.[7] [8] To enable functionally accessible housing which corresponds to the mobility characteristics of individual households, property needs include low level appliances, stair rails and barrier-free properties.

accessible and adapted housing which is functionally accessible depending on the mobility characteristics of individual households, property needs include low level appliances, stair rails and barriers-free properties.

Client Groups (Suitable For)

Adapted and accessible housing is relevant for individuals whose current accommodation does not meet their physical and/or medical needs or individuals with limited mobility and/or dexterity who can remain in mainstream housing, with or without the relevant care or support.

Evidence

Evidence will examine the need for and the provision of accessible and adapted properties as well as the demands and the provision of in-situ adaptations.

Accessible and Adapted Housing

Within Clackmannanshire there are a range of accessible housing options available to assist in meeting the needs of people with limited mobility. Following reclassification and changes in use for some of the accommodation, the majority of properties in the social rented sector in Clackmannanshire are classed as mainstream or general needs housing. The mainstream category now includes ground floor accessible properties, some amenity housing and ambulant disabled housing. In some instances, the classification has changed due to changes in accommodation policy which now allows a wider and more flexible use of accommodation to ensure the maximum and most efficient use of available stock. In general, it is planned that all new built housing in the social rented sector will be designed to lifetime/varying needs standards.

[7] Adaptations Working Group Paper: Planning Ahead, Scottish Government 2012
[8] Evaluation of Adapting for Change, Craigforth 2017

Table 5.11 Number and percentage of social rented self-contained stock by type of provision in 2023/24

Social Rented Stock	General Needs No.	General Needs %	Specialist No.	Specialist %	Total No.	Total %
Clackmannanshire Council	4710	63%	335	5%	5045	68%
RSLs	1740	23%	638	9%	2378	32%
Total	6450	87%	973	13%	7423	100%

Source: Scottish Housing Regulator 2024

Table 5.11 shows that 87% of all self-contained social rented stock across Clackmannanshire in 2023/24 was general needs housing. There were 973 properties or 13% of all self-contained stock that was classified as specialist, the majority of which was provided by registered social landlords.
As not every landlord keeps up-to-date information on the adaptations carried out to their general needs stock, it is difficult to build an accurate picture of all adapted properties, such as where the tenant has moved out and the adaptation has been removed or where the tenant has moved out, but the adaptation has been left in.

Table 5.12 Self-contained specialist housing stock by type of provision in Clackmannanshire 2023/24

	Sheltered	Very sheltered	Amenity	Community alarm	Wheelchair	Ambulant disabled	Other specially adapted
Clackmannanshire Council	0	0	0	185	7	141	2
Registered Social Landlord	84	38	365	0	51	100	0
Total	84	38	365	185	58	241	2

Source: Scottish Housing Regulator 2024

Table 5.12 shows specialist housing stock by type of provision. Specialist housing provision includes wheelchair adapted housing which will be discussed in section 2 of the chapter 'Wheelchair Accessible Housing', sheltered and very sheltered housing which is discussed in section 4 of the chapter 'Supported Accommodation' and community alarm housing with interlinked personal alarms which is discussed in section 5 'Care and Support for Independent Living'.

For the purposes of accessible and adapted housing provision, properties may include amenity housing for people with particular needs, ambulant disabled properties adapted for people with disabilities other than wheelchair users, as well as other specially adapted properties.

Table 5.13 Accessible and adapted housing stock by social landlord in Clackmannanshire 2023/24

Social Landlord	Amenity housing	Ambulant disabled	Other specially adapted
Blackwood Homes and Care	0	8	0
Clackmannanshire Council	0	141	2
Kingdom Housing Association Ltd	0	85	0
Link Group Ltd	0	7	0
Ochil View Housing Association Ltd	287	0	0
Trust Housing Association Ltd	17*	0	0
Total	**304**	**241**	**2**

*Source: Scottish Housing Regulator 2024. *It is important to note that there are additional 61 housing units that are classified as 'amenity' in line with SHR data. However, locally these are regarded as 'Retirement Housing' units and are discussed under Sheltered Accommodation within the 'Supported Provision' section.*

As table 5.13 presents, amenity housing was provided by 2 RSLs, with 94% of it supplied by Ochil View HA. Clackmannanshire Council provided 26% of all accessible and adapted housing, the vast majority of which is ambulant disabled housing.

Together with Ochil View Housing Association, Clackmannanshire Council operates a Common Housing Register (CHR), meaning that housing applications can be accessed and assessed by both organisations. As Clackmannanshire Council and Ochil View HA are the largest social landlords by the number of housing units held across Clackmannanshire (85% of all self-contained stock across the area – 68% Clackmannanshire Council and 17% Ochil View HA), the CHR can help to inform the demand and unmet needs for adapted and accessible housing across the socially rented sector within the area.

In line with Clackmannanshire Council's Housing Allocation Policy, an applicant may be assessed as having medical need and may be awarded with medical need points accordingly where they or a member of their household has health, mobility or care needs and the household will benefit from a move to alternative accommodation. However, the applicant will not be awarded with medical need points where the move does not alleviate the medical need, or where the need can be met with appropriate alternations or adaptations to the property or by additional services and support.

Depending on the household's medical need, the applicant may be awarded points for severe or moderate medical need. Severe health/care award will be made where the applicant cannot be reasonably expected to occupy their current permanent accommodation due to their needs. This may include cases where the applicant's independence is severely restricted due to their current accommodation. In comparison, moderate medical need will be awarded where the applicant requires to move from their current accommodation due to their condition yet can continue occupying it for a limited period of time.

Table 5.14 Clackmannanshire Council housing waiting list by applicants with assessed medical need as at November 2024

Type of Need	Waiting List Applicants No	Waiting List Applicants %	Transfer Applicants No	Transfer List Applicants %	All Applicants
Moderate Medical	272	64%	155	36%	427
Severe Medical	20	67%	10	33%	30
Total (Medical)	292	64%	165	36%	457
Total (All needs)	2121	80%	539	20%	2660

Source: Clackmannanshire Council Information System November 2024

Table 5.14 displays that as of November 2024 there were a total of 457 applicants with medical need points waiting for Council or Ochil View housing, representing 17% of all housing applicants. 427 or 93% of medical need applicants had a moderate medical need, with the rest assessed as having severe medical need. 36% of medical need applicants were transfer applicants, already living in Council housing, but wishing to transfer to another Council property. Waiting list data may then suggest that there is a substantial number of people whose current property is unsuitable due to their medical condition. It may be assumed that 36% of all applicants with an assessed medical need, representing 31% of all transfer applicants currently live in Council housing that does not meet their medical needs.

Table 5.15 Clackmannanshire Council housing waiting list by number of applicants with health/medical requirements and number of bedrooms required at November 2024

	1 Bedroom	2 Bedrooms	3 Bedrooms	4 Bedrooms	5+ Bedrooms	Total
Ground Floor	36	19	3	0	0	58
Level Access Shower	216	52	22	6	1	297
Sheltered	14	0	0	0	0	14
Wheelchair	24	8	4	0	1	37
Total	**290**	**79**	**29**	**6**	**2**	**406**

Source: Clackmannanshire Council Information System November 2024

Table 5.15 shows that as at November 2024 there were a total of 406 Clackmannanshire Council housing applicants who had indicated particular medical requirements, but who were not necessarily assessed and awarded medical/health points in line with the Allocations Policy. Majority of applicants (297) with health/medical requirements required level access shower, followed by 58 applicants who required ground floor properties and 37 who needed appropriate wheelchair accommodation.

Of those with identified health/medical requirements, over 71% required 1 bedroom accommodation, followed by 79 applicant households with the need for 2-bedroom properties and 37 applicants who needed 3+ bedroom homes.

Table 5.16 Turnover of ambulant disabled/amenity properties by landlord in 2023/24

Landlord	Ambulant Disabled/Amenity
Clackmannanshire Council	6
Ochil View HA	29
Link HA	2
Trust HA	2
Total	**39**

Source: Local Social Landlord Information Systems September 2024

As noted in table 5.16, 2023/24 financial year saw a total turnover of 39 ambulant disabled/amenity properties across all social landlords in Clackmannanshire.

In addition, Clackmannanshire Council's Information System shows that further 72 lets were made to applicants with assessed medical need in 2023/24 financial year, other than ambulant disabled/amenity housing. Furthermore, from 1 January 2020 to 31 December 2024, there were a total of 209 lets made to applicants with health/medical requirements with an average of 624 days spent on the allocations waiting list.

Comparing the available data to the total number of 547 of ambulant disabled, amenity and other specially adapted and accessible housing units across the social rented sector in Clackmannanshire (table 5.13 above), as well as 457 applicants on the Common Housing Register with assessed medical need (table 5.14 above), the evidence shows that the demand for adapted and accessible housing across Clackmannanshire is currently not being reasonably met.

Disabled Adaptations

Amongst other indicators, the Scottish House Condition Survey estimates need and demand for adapted properties and adaptations across different tenures in Clackmannanshire based on a sample of 220 cases.

Table 5.17 Households with one or more long-term sick or disabled person by tenure type and local authority 2017-2019

Area	**Owned No.**	**Owned %**	**Social Rent No.**	**Social Rent %**	**Private Rent No.**	**Private Rent %**	**All Tenures No.**	**All Tenures %**
Clackmannanshire	3,000	25%	4,000	58%	*	*	8,000	36%
Falkirk	11,000	23%	12,000	62%	*	*	24,000	33%
Stirling	5,000	18%	5,000	58%	*	*	10,000	26%
Scotland	590,000	39%	398,000	62%	99,000	32%	1,087,000	44%

*Source: Scottish House Condition Survey 2017-2019. *Sample size too small for accurate estimate*

Table 5.17 indicates that there is an estimated 36% of households with one or more long-term sick or disabled person in Clackmannanshire. The figure is higher compared to the neighbouring local authorities in the Forth Valley area but is lower than the Scottish average of 44% households. Long-term sickness or disabilities are significantly more prominent in the socially rented sector (58% of all households), compared to owner occupiers (25%).

When compared to the overall percentage of people with long-term illness, disease or condition as seen in the table 5.7 and reported in the 2022 census, the Scottish House Condition Survey reports more households with a long-term sick or disabled person.

Table 5.18 Households with one or more long-term sick or disabled person by household type and local authority 2017-2019

Area	Older No.	Older%	Families No.	Families %	Other No.	Other %
Clackmannanshire	4,000	53%	1,000	29%	4,000	28%
Falkirk	9,000	34%	2,000	11%	6,000	21%
Stirling	5,000	42%	1,000	14%	4,000	22%
Scotland	487,000	61%	171,000	29%	429,000	39%

Source: Scottish House Condition Survey 2017-2019

The majority of households with long-term sickness or disability are older (53% of all households), followed by families (29%) and other types of households (28%). The same trend can be seen in other Forth Valley local authorities and Scotland in general.

Given the large projected increase in the population of individuals aged 75 and over by 2043, it is likely that instances of frailty, long-term sickness and disability among older households will also increase.

Table 5.19 Households with one more long-term sick or disabled person by number of bedrooms within the property 2017-2019

Area	2 or fewer bedrooms No.	2 or fewer bedrooms %	3+ bedrooms No.	3+ bedrooms %	All No.	All %
Clackmannanshire	5,000	49%	3,000	24%	8,000	36%
Falkirk	14,000	46%	10,000	24%	24,000	33%
Stirling	5,000	33%	5,000	22%	10,000	26%
Scotland	583,000	47%	504,000	41%	1,087,000	44%

Source: Scottish House Condition Survey 2017-2019

In Clackmannanshire, there is a significant difference between the proportion of households living in smaller dwellings and those in larger dwellings that experience long-term sickness and disability. Almost half of the households living in properties with 2 or fewer bedrooms experience long-term sickness or disability, compared to 24% of households in 3+ bedroom dwellings. Comparatively, the Scottish trends does not indicate a significant difference between households in smaller and larger dwellings.

It is worth to note that the size of accommodation may have an impact on the need for additional space and/or rooms for carers, necessary equipment and space to allow for adaptations.

Table 5.20 Households reporting their current accommodation restricting daily activities by tenure type and local authority 2017-2019

Area	Owned	Owned %	Social Rent No.	Social Rent %	Private Rent No.	Private Rent %	All Tenures No.	All Tenures %
Clackmannanshire	1,000	4%	1,000	17%	*	*	2,000	8%
Falkirk	2,000	4%	4,000	22%	*	*	7,000	9%
Stirling	1,000	3%	1,000	7%	*	*	2,000	4%
Scotland	68,000	4%	89,000	14%	10,000	3%	167,000	7%

*Source: Scottish House Condition Survey 2017-2019. *Sample size too small for accurate estimates*

Table 5.20 demonstrates that 2,000 or 8% of all households in Clackmannanshire report that their current accommodation restricts their day-to-day activities. This is similar to the proportion of households in Falkirk and Scotland overall, but is higher than in Stirling. Households living in the social rented sector are significantly more likely to be limited in their daily activities (17%) compared to owner occupiers (4%).

Table 5.21 Households reporting their current accommodation restricting daily activities by number of bedrooms and local authority 2017-2019

Area	2 or fewer bedrooms No.	2 or fewer bedrooms %	3+ bedrooms No.	3+ bedroom dwellings %	All No.	All %
Clackmannanshire	1,000	10%	1,000	7%	2,000	8%
Falkirk	5,000	16%	2,000	4%	7,000	9%
Stirling	1,000	6%	1,000	3%	2,000	4%
Scotland	93,000	8%	74,000	6%	167,000	7%

Source: Scottish House Condition Survey 2017-2019

Households living in smaller dwellings with 2 or fewer bedroom are slightly more likely to be limited in their daily activities compared to those living in larger 3+ bedroom dwellings.

Table 5.22 Disabled adaptations by tenure and local authority 2017-2019

Area	Owned	Owned %	Social Rent No.	Social Rent %	Private Rent No.	Private Rent %	All Tenures No.	All Tenures %
Clackmannanshire	2,000	11%	3,000	36%	*	*	5,000	20%
Falkirk	7,000	15%	9,000	46%	*	*	17,000	23%
Stirling	3,000	9%	2,000	21%	*	*	5,000	12%
Scotland	255,000	17%	213,000	33%	48,000	15%	516,000	21%

*Source: Scottish House Condition Survey 2017-2019. *Sample size too small for accurate results*

According to Table 5.22, around 5,000 or 20% of all households in Clackmannanshire have adaptations carried out to their properties. This corresponds to Falkirk's and Scotland's figures overall, but is larger than in Stirling. Households in social rented sector are much more likely to have adaptations carried out to their properties (36%) than owner occupiers (11%).

However, it is important to note that this does mean that owner occupiers are less likely to require adaptations compared to social renters. Considerations should be given to older households which are more likely to be owner occupiers and may be capital rich, but income poor. As discussed later in the section, the Council is required to carry out disabled adaptations to private owner households in line with its Scheme of Assistance as set out in Housing (Scotland) Act 2006.

Table 5.23 Disabled adaptations by number of bedrooms within the property and local authority across all tenures2017-2019

Area	2 or fewer bedrooms No.	2 or fewer bedrooms %	3+ bedrooms No.	3+ bedrooms %	All No.	All %
Clackmannanshire	3,000	28%	2,000	13%	5,000	20%
Falkirk	10,000	34%	6,000	15%	17,000	23%
Stirling	2,000	12%	3,000	11%	5,000	12%
Scotland	306,400	25%	209,000	17%	516,000	21%

Source: Scottish House Condition Survey 2017-2019

Households living in smaller properties with 2 or fewer bedrooms are more likely to have adaptations carried out than those living in larger dwellings with 3 or more bedrooms. Similar proportions can be seen Scotland-wide.

Table 5.24 Households reporting requiring disabled adaptations by local authority across all tenures 2017-2019

	Clackmannanshire	Falkirk	Stirling	Scotland
No. of all households	1,000	2,000	1,000	82,000
% of households	3%	3%	2%	3%

Source: Scottish House Condition Survey 2017-2019

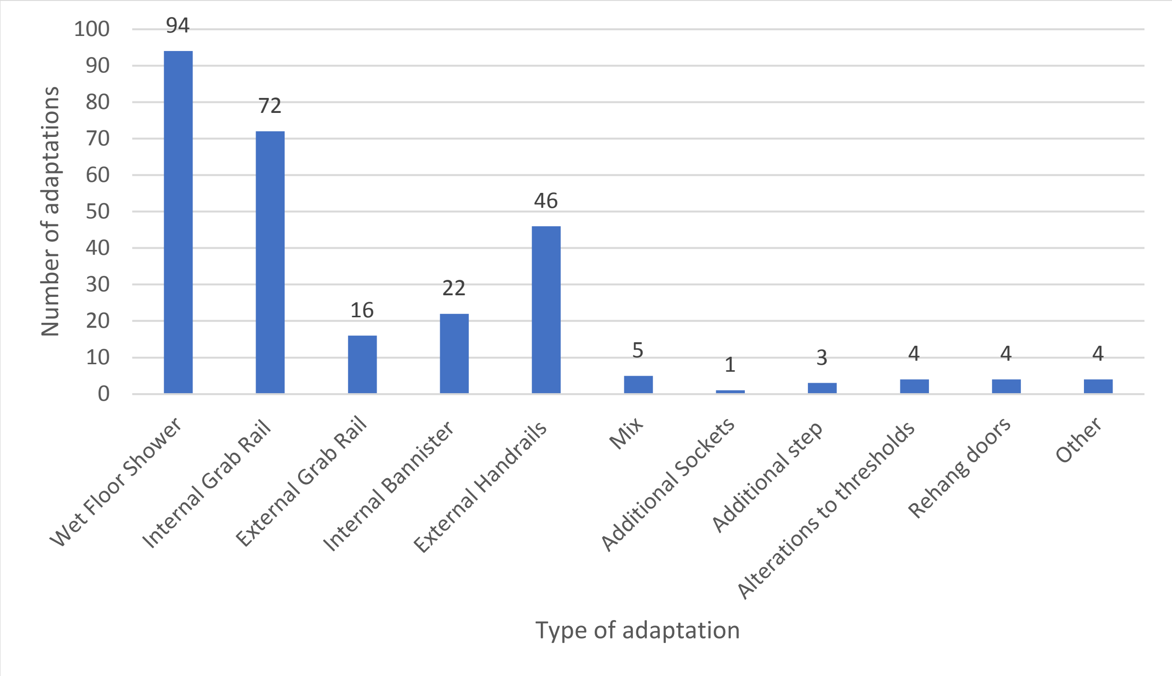
Table 5.24 shows that around 3% or 1,000 households in Clackmannanshire require some form of disabled adaptation to their property. This figure is consistent throughout Forth Valley area and Scotland in general.
While this indicates a current unmet need for adapted properties for 1,000 households, further considerations should be given to the tenure type for the required households.

Council and RSL Housing Adaptations

To support a more flexible and independent lifestyle, Clackmannanshire Council and Registered Social Landlords across Clackmannanshire area carry out adaptations to its properties. Adaptations can be split into minor and major. Minor adaptations are simple to install and do not require structural changes to the property. In contrast, major adaptations require major works carried out and/or structural changes to the property. Current Clackmannanshire Council adaptations policy states that Clackmannanshire Council tenants can self-refer for adaptations to be carried out to their homes.

As graph 5.2 demonstrates, the Council carried out a total of 271 adaptations to its stock in the 2023/24 financial year. There were 94 major adaptations carried out, all of which constituted of wet floor shower installations. The other 177 adaptations were minor adaptations, with 72 internal grab rails, 46 external handrails, 22 internal bannisters and 16 external grab rails installed.

Graph 5.2 Adaptations carried out to Clackmannanshire Council stock in 2023/24



Source: Clackmannanshire Council Information System September 2024

Table 5.25 Budget, spend and number of adaptations carried out to Council stock by financial year

Year	£ Budget	£ Actual Spend	£ Variance	No of Adaptations
2023/24	570,000	773,544	-203,544	271
2022/23	250,000	211,778	38,222	212
2021/22	50,000	52,955	-2,955	183

Source: Clackmannanshire Council Information System September 2024

As table 5.25 presents, Clackmannanshire Council saw a year-on-year increase to its adaptation budget, along with an increase in the number of adaptations carried out. 2022/23 saw 212 adaptations carried out with an allocated budget of £250,000 and an actual spend of £211,778, resulting in an underspend of £38,222. In comparison, the 2023/24 saw £773,554 spent on adaptations, resulting in a £203,544 overspend in terms of the allocated budget of £570,000 for the financial year.

The stark increase in overspend may be partially explained by the Council's need to hire external contractors in 2023/24 which helped to clear the backlog of adaptation works that were paused over the pandemic. As table 5. below presents, from 2021/22 to 2023/24, the Council has successfully managed to reduce the number of households waiting for adaptations from 131 to 67, equating to a 49% reduction.

Table 5.26 Number of households waiting for adaptations to their home by financial year

	2021/22	2022/23	2023/24	% Change over 3 years
Number of households	131	96	67	-49%

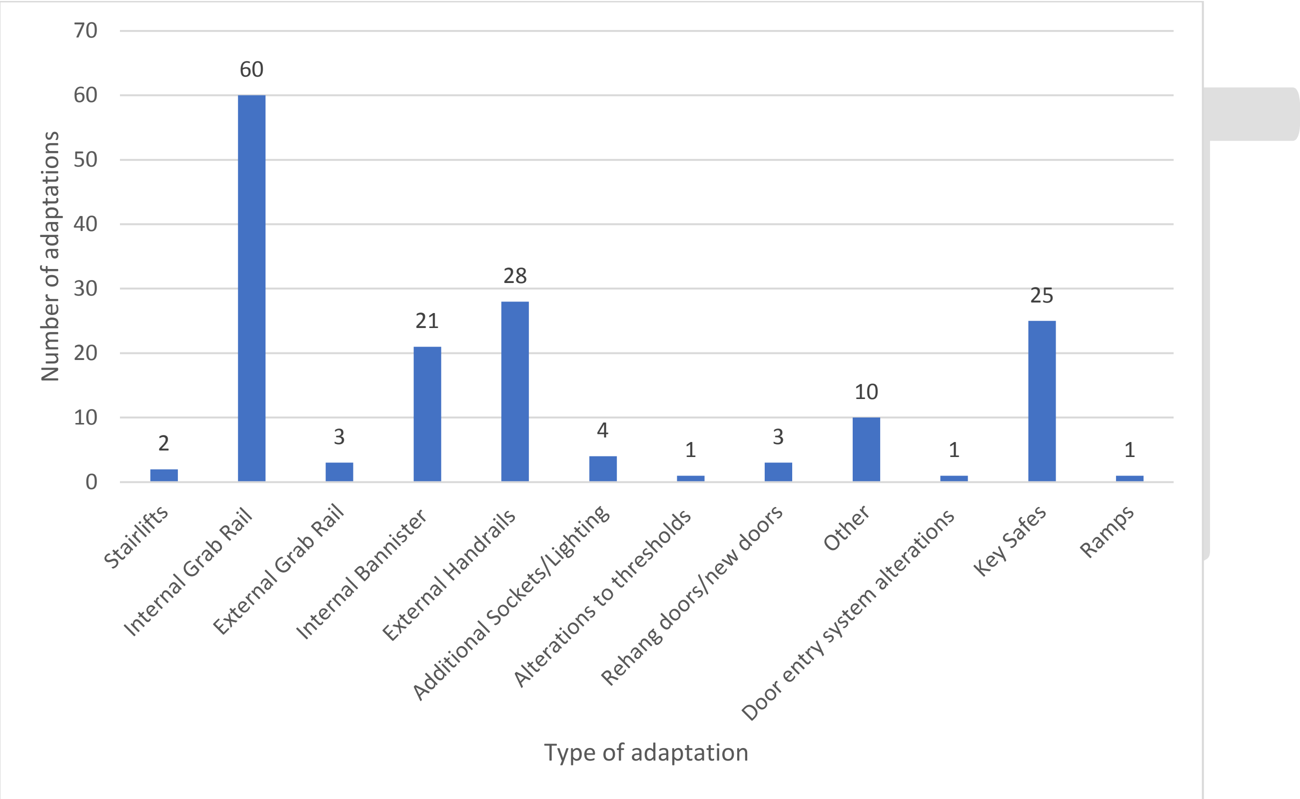
Source: Scottish Housing Regulator 2024

As of October 2024, there were 21 Clackmannanshire Council tenants who were waiting for an adaptation to their property. All outstanding adaptations are major wet floor shower installations.

Graphs 5.3 and 5.4 show the numbers and types of adaptations carried out to the registered social landlord stock who operate across Clackmannanshire. It must be noted that the information could not be supplied at a local authority level from every registered social landlord and includes adaptations carried out to the stock across the wider Clackmannanshire and Stirling Health and Social Care Partnership area. Nonetheless, the majority of adaptations were carried out by RSLs which hold a large stock portfolio within Clackmannanshire.

There were a total of 159 minor adaptations carried and 81 major adaptations from 2021/22 to 2023/24 across the stock of all registered social landlords who operate in Clackmannanshire. The vast majority of minor adaptations were internal handrails (60), external handrails (28) and key safes (25).

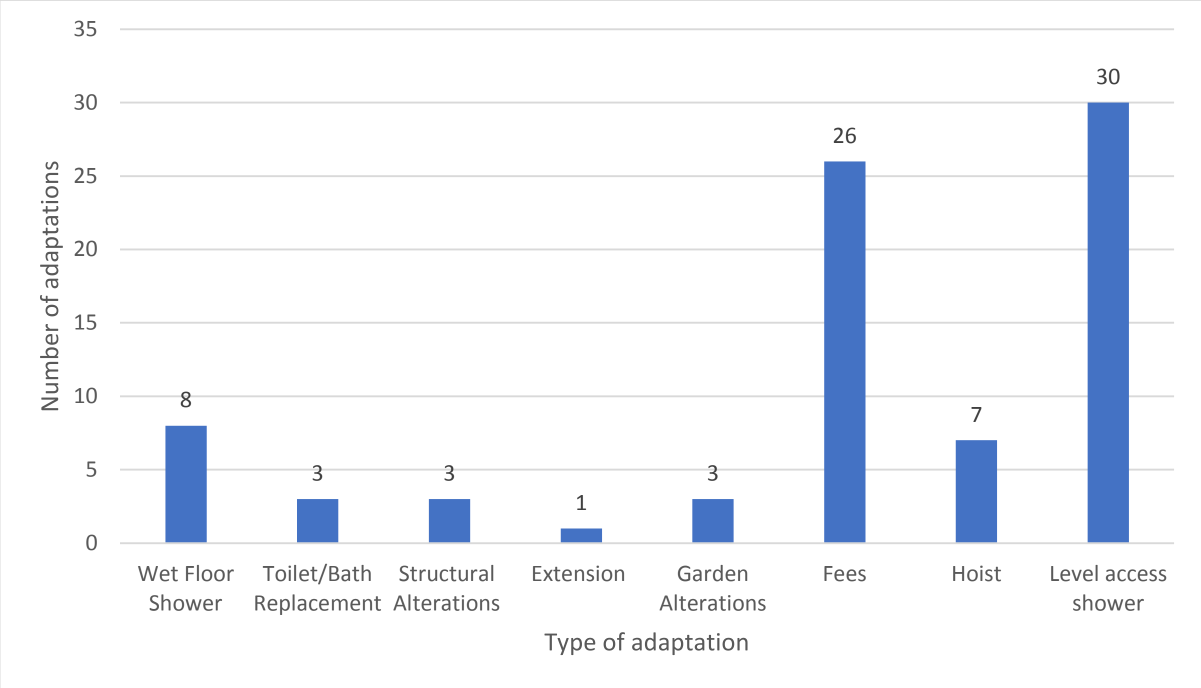
Graph 5.3 Minor adaptations carried out to RSL stock by type of adaptation 2021/22 – 2023/24



Source: Clackmannanshire Information System September 2024

As graph 5.4 below shows, the majority of major adaptations included level access showers, followed by fee payments for architectural as well as other professional works, and wet floor shower installations.

Graph 5.4 Major adaptations carried out to RSL stock by type of adaptation 2021/22 – 2023/24



Source: Clackmannanshire Information System September 2024

Private Housing Scheme of Assistance

The Housing (Scotland) Act 2006 introduced a new Scheme of Assistance which changed how local authorities can offer homeowners assistance with repairs and improvements to their properties and replaced the previous system of private sector home improvement grants.

Under the new Scheme of Assistance, known locally as the Private Housing Assistance Scheme, all local authorities are required to provide a grant to homeowners who experience a disability or an illness and who meet the criteria of eligible adaptations in order to help them remain safe and independent in their home. The grant will cover a minimum of 80% of the approved costs of eligible adaptations, rising to 100% depending on the individual circumstances and the person's income.

Table 5.27 Number of Private Sector Housing Grants under the Scheme of Assistance 2019/20-2023/24

	2019/20	2020/21	2021/22	2022/23	2023/24	% Change
Number of Adaptations	13	6	24	19	43	231%
Amount of Grant Claimed	£70,973	£41,647	£125,042	£122,547	£100,310	29%

Source: Clackmannanshire Council Information System September 2024

From 2019/20 to 2023/24, there was a 231% increase in a number of disabled adaptations carried out to private sector households with an overall 29% increase in grant amount claimed under the Council's Private Sector Assistance Scheme.

Table 5.28 Budget, spend and number of adaptations under the Scheme of Assistance by financial year

Year	£ Budget	£ Actual Spend	£ Variance	No of adaptations
2023/24	159,000	100,310	58,690	43
2022/23	159,000	108,493	50,507	19
2021/22	159,000	73,867	85,133	24

Source: Clackmannanshire Council Information System September 2024

As table 5.28 presents, the budget for private sector housing adaptations has remained the same from 2021/22 to 2023/24. In 2023/24 there was a large increase in the number of adaptations with an overall of 43 adaptations carried out, accounting for £100,310 spent. Against the backdrop of the allocated budget, this has resulted in 36.91% of the year's budget being unspent.

Table 5.29 Private Sector Housing Grants Waiting List by Applicant Age as of October 2024

Applicant age	2021/22	2022/23	2023/24	2024/25	**Total**
Under 44	*	*	*	*	**3**
45 - 59	*	*	*	4	**6**
60 - 69	*	*	*	6	**9**
70 - 79	*	*	6	*	**11**
80 - 89	*	*	6	6	**16**
90+	*	*	*	*	**5**
Total	**3**	**8**	**19**	**20**	**50**

Source: Clackmannanshire Council Information System September 2024. Some numbers are omitted for disclosure control purposes.

Table 5.29 shows that as of October 2024, there were 50 private sector housing grant applications yet to be assessed, dating back to the 2021/22 financial period. The largest proportion of applicants fell into the 80 – 89 age range with 16 applications in total, followed by the 70 – 79 age group (11 applications). There was a total of 9 applicants who were below 60 years old.

The backlog of adaptations, coupled with the lack of spend may be explained by staffing issues and lack of resources across the organisation which would enable to assess the applications and carry out the necessary adaptations. Clackmannanshire Council is currently working together with partners across Clackmannanshire and Stirling HSCP to address this current gap in provision of the necessary services.

Table 5.30 Private Sector Housing Grant Waiting List by Applicant Requirement as of October 2024

Type of Adaptation	2021/22	2022/23	2023/24	2024/25	Total
Level access shower	2	8	18	19	47
Stair Lift	*	*	*	*	2
Garage Conversion	*	*	*	*	1

Source: Clackmannanshire Council Information System October 2024. Some numbers are omitted for disclosure control purposes.

The vast majority of applicants on the waiting list still to be assessed requested a level access shower adaptation with 47 applications, followed by 2 stair lift installation and 1 garage conversion applications.

Gaps and shortfalls in need and provision

The data shows that there is a significant shortfall in the provision of accessible and adapted housing across Clackmannanshire, with the number of households indicating a need for accessible housing far outweighing the yearly turnover rates of accessible and adapted properties across Clackmannanshire, as noted by 457 applicants with assessed medical need on CHR as of November 2024, 78 lets made to Council applicants assessed with a medical need and a turnover of 30 ambulant disabled/amenity properties across all social landlords in Clackmannanshire in 2023/24.

This is also reflected by the significant time spent on the housing list waiting for a suitable property to come up with applicants waiting an average of 624 spent on Clackmannanshire Council's allocations waiting list.

Scottish House Condition Survey reveals that there 2,000 of all households have their daily activities restricted due to their current accommodation and an approximate 1,000 households requiring adaptations to their properties. Whilst the number of Council tenants requiring adaptations has been decreasing, there has been a significant gap in the provision of adaptations to private sector households as part of the Scheme of Assistance with 50 applications yet to be assessed. Engagement with partner stakeholders has revealed that social landlords find it difficult to fund property adaptations due to cuts and delays associated with funding for disabled adaptations.

The research undertaken also shows that there is a lack of information on households requiring accessible and adapted housing by tenure type. In particular, there is a lack of information on the needs for adapted housing and in-situ solutions for owner occupiers as well as the private rented sector. Furthermore, there is a lack of up-to-date data on the number of in-situ adaptations carried out within mainstream housing by social landlords or the data is not adequately maintained.

Future requirements

In light of a rapidly ageing population and the growing prevalence of long-term disabilities and illnesses, the demand for adapted and accessible housing is expected to continue rising. According to CHR data (Table 5.14), there were 457 applicants with medical priority points awaiting either Council or Ochil View housing. As these two providers account for approximately 85% of all self-contained housing stock in Clackmannanshire, extrapolating this figure across the entire social rented sector suggests that around 526 applicants are waiting for accessible or adapted homes where their housing needs cannot be met through in-situ solutions.

Considering 72 lets made to applicants assessed with medical need by the Council (besides ambulant disabled/amenity housing), the annual turnover of just 39 ambulant disabled and amenity properties, and 26 sheltered or very sheltered accommodation units across the sector in 2023/24, this leaves an estimated 389 applicants with ongoing, unmet housing needs linked to medical conditions—a number that is likely to grow.

However, it is important to note that this does not directly translate into a need for 389 additional units. Moves by households may release properties that are suitable for others with differing medical needs, thus partially alleviating demand. A review of the housing waiting list is needed to better understand how void properties can be more effectively matched to applicants with medical needs, and to determine how many additional housing units are required for cases where in-situ solutions are not viable.

In terms of in-situ solutions, SHCS reveals that 1,000 households require medical adaptations to their properties. Taking into account 271 adaptations carried out to Council stock, 240 adaptations carried out to RSL stock as well as 43 adaptations carried out to private sector households as part of the Scheme of Assistance, the data reveals that there are approximately 446 households still requiring adaptations to their homes – a number that is likely to keep increasing with changes in demographics.

In addition, as discussed earlier in the section, not every landlord keeps up-to-date information on the adaptations carried out to their general needs stock, and as such, it is difficult to build an accurate picture of all adapted properties, such as where the tenant has moved out and the adaptation has been removed or where the tenant has moved out, but the adaptation has been left in. Therefore, there is a need to establish a register to track the number and types of adaptations made to mainstream housing properties. This would enable more effective matching of adapted homes to households with specific needs, and support the fair allocation of accessible and adapted housing.

External stakeholder consultation and engagement

Full consultation findings can be found in appendix x. In researching and analysing this section, along with the stakeholders established at the beginning of the chapter, the following stakeholder groups were engaged with:

- Older Adults' Forum Clackmannanshire
- Alzheimer's Scotland

Stakeholder consultations have revealed a clear and pressing need for accessible housing, with particular emphasis on the availability of smaller accessible units. Early engagement with private sector developers is essential to support the delivery of affordable and accessible housing across Clackmannanshire. To address the housing needs of older and disabled individuals, stronger collaboration is needed between the Scottish Government, local authorities, and private developers.

In addition, partner stakeholders emphasised the importance of property adaptations in enabling people to remain in their homes for longer, supporting in-situ solutions that help to future-proof housing. This view was echoed by client groups, who also expressed concern about the difficulty in accessing appropriate adaptations. In particular, owner occupier households reported significant delays in accessing occupational therapy assessments, which are essential to carry out the necessary adaptations in a timely manner.

2. Wheelchair Accessible Housing

National Policies

- Evaluation of Adapting for Change, Craigforth (2017)
- Housing and disabled people: Scotland's hidden crisis, EHRC (2017)
- Housing for Varying Needs: a design guide, Scottish Homes (1998)
- Guidance for setting of Local Housing Strategy target to support the Delivery of more wheelchair accessible housing, Scottish Government (2019)
- Making the connection: Guide to assessing the housing related needs of older and disabled people, Gillian Young/Newhaven (2015)
- Mind the Step: an estimation of housing need among wheelchair users in Scotland, CIH/Horizon Housing (2012)
- Relevant Adjustments to Common Parts (Disabled Persons) (Scotland) Regulations (2020)
- Still minding the step? A new estimation of the housing needs of wheelchair users in Scotland, CIH/Horizon Housing (2018)
- We Say: Our place, Our Space – The evidence on disabled people's housing issues from Scotland's Disabled People's Summit (2017)
- Wheelchair accessible housing target: guidance note: MHDGN, Scottish Government (2019)

Local Policies and Strategies

- Clackmannanshire Council Private Sector Housing Assistance Scheme
- Clackmannanshire Council's Strategic Housing Investment Plan (SHIP) 2025-2030

Property Needs

There is no one single definition of wheelchair-suitable housing. However, as described in Housing for Varying Needs Design Guide, wheelchair accessible housing should provide a step-free environment, space for wheelchair to circulate and access all rooms, a kitchen and bathroom that suits the occupant's needs, fittings and services that are within the reach and easy to use. This may include low level appliances, wider door openings, barrier-free bathroom and/or shower access, outside space with wider entrance and suitable surfaces.

Client Groups (Suitable for)

Wheelchair accessible housing is suitable for wheelchair users and their families, including families with disabled children and young adults, disabled parents with dependent children, and disabled adults.

Evidence

Table 5.31 Number of wheelchair housing units in Clackmannanshire by Social Landlord in 2023/24

Landlord Name	Total self-contained units	Number of wheelchair housing units	% of all housing units
Blackwood Homes and Care	16	8	50.0%
Castle Rock Edinvar Housing Association Ltd	83	1	1.2%
Clackmannanshire Council	5034	7	0.1%
Key Housing Association Ltd	10	5	50.0%
Kingdom Housing Association Ltd	231	6	2.6%
Ochil View Housing Association Ltd	1271	31	2.4%
Total	**6645**	**58**	**0.9%**

Source: Scottish Housing Regulator 2024

In 2023/24 reporting period, there were a total of 58 fully adapted wheelchair housing units in Clackmannanshire provided by social landlords – 5 registered social landlords and Clackmannanshire Council. In total, this represents just under 1% of all self-contained social landlord stock across Clackmannanshire.

The majority of wheelchair housing across Clackmannanshire was provided by Ochil View Housing Association (53% of all wheelchair-adapted housing units), followed by Blackwood Homes and Care (14%) and Clackmannanshire Council (12%).
As discussed previously, table 5.14 indicates that there are currently 37 Council housing applicants from the common housing register who have indicated a need for wheelchair-accessible housing.

Table 5.32 Council housing applicants with identified requirement for wheelchair-adapted housing by type of need awarded and number of bedrooms required as at November 2024

Type of Need	1 Bedroom	2 Bedrooms	3 Bedrooms	5 Bedrooms	Total
Insecure Accommodation	*	*	*	*	1
Moderate Medical	20	*	4	*	27
Severe Medical	4	4	*	*	9
Total	**24**	**8**	**4**	**1**	**37**

Source: Clackmannanshire Council Information System November 2024. Some numbers are omitted for disclosure control purposes.

As table 5.32 shows the majority of applicants who require wheelchair-accessible properties were awarded with moderate medical need (27), followed by 9 with severe medical need and 1 applicant household who currently lives in insecure accommodation. Reiterating the definition of severe medical need award as set out in Adapted and Accessible Housing, severe health/care award will be given where the applicant cannot continue on living in their current permanent accommodation due to their condition. Taking this definition into account, it can be reasonably assumed that there are currently 9 wheelchair user applicant households with severe unmet need.

The majority of applicants required 1-bedroom properties, followed by 8 household who needed 2-bedroom accommodation and 5 who required 3+ bedroom wheelchair-accessible housing.

Turnover of wheelchair-adapted properties

Turnover for wheelchair-adapted properties is low. Data from local RSLs indicates that there has been no turnover of wheelchair-adapted properties in 2023/24. The Council's Information System shows that Clackmannanshire Council saw 1 wheelchair-adapted property vacated in 2023/24, and no turnover in 2022/23 or 2021/22.

In addition, over the span of 5 years from 1 January 2020 to 31 December 2024, there were a total of 10 Council lets made for wheelchair housing, with an average of 412 days spent on the allocations waiting list per applicant.

Gaps and shortfalls in need and provision

At present, there is no nationally held statistics on the number of wheelchair housing units within the private sector, both for owner occupiers and the private rented sector. Therefore, it is difficult to estimate the current landscape of wheelchair housing within the private sector across Clackmannanshire.

Furthermore, there is no credible national or local data on the number of wheelchair users or on the shortfall in the provision of wheelchair-accessible housing across Scotland or Clackmannanshire.

'Still Minding the Step? A new estimation of the housing needs of wheelchair users' is a report published by CIH Scotland and Horizon Housing Association which reviews the current state of wheelchair adapted housing in Scotland and presents a national estimate of unmet housing need among wheelchair users in Scotland.[9]

Using the data and the ratios from Scottish Household Survey (SHS) and English Housing Survey (EHS) as the basis, the report established a methodology to calculate the number of households with wheelchair users and a number of wheelchair user households with unmet housing need. The methodology for calculations can be seen in table 5. below.
The report estimates that in 2018 there were 87,340 households with a wheelchair user in Scotland (3.6% of all households) and 17,226 of wheelchair user households in Scotland with unmet housing need (19.7% of all wheelchair user households).

Table 5.33 Calculating the unmet need for wheelchair housing in Scotland

Steps	Calculation
1: Calculate the number of indoor user households	Assume EHS ratio of 0.4% of all households
2: Calculate the number of outdoor user households	Assume EHS ratio 2.3% of all households
2b: Calculate the number of wheelchair user households using wheelchairs all the time	Assume EHS ratio of 0.9% of all households

[9] Still minding the step? A new estimate on of the housing needs of wheelchair users in Scotland. CIH and Horizon Housing Association 2018

	Indoor user households + outdoor user households + fulltime user households = total number of wheelchair user households
3: Calculate the unmet housing need among indoor wheelchair user households	Assume 25.6% (all of those in SHS requiring adaptations and accommodation unsuitable)
4: Calculate the unmet housing need among outdoor wheelchair user households	Assume 19% (all of those EHS requiring adaptations and accommodation unsuitable)
4b: Calculate the unmet housing need among wheelchair user households using wheelchairs all the time	Assume 19% (all of those in EHS requiring adaptations and accommodation unsuitable)
5: Calculate all unmet need among wheelchair	Unmet need for indoor user households + unmet need for outdoor user households + unmet need for fulltime user households

Source: Still minding the step? A new estimation of the housing needs of wheelchair users in Scotland 2018

Using the principal projections found in NRS Household Projections for Scotland (table 5.34), the methodology in 'Still Minding the Step?' was applied to determine the number of households with a wheelchair user and a number of wheelchair user households with unmet housing need within Clackmannanshire.

Table 5.34 Household projections for Clackmannanshire and Scotland (2018-based)

Area	2018 Total Households	2024 Projected Households	2043 Projected Households	Change 2018 - 2043	% Change
Clackmannanshire	23,674	24,278	24,408	734	3%
Scotland	2,477,276	2,561,602	2,714,739	237,463	10%

Source: Household Projections for Scotland (2018-based). National Records of Scotland

Assuming that 3.6% of all households contain at least one wheelchair user, table 5.35 shows in 2018 there were 852 wheelchair user households in Clackmannanshire and 874 projected households in 2024. It is estimated that there will be an increase of 26 households (3%) with at least one wheelchair user from 2018 to 2043.

Table 5.35 Wheelchair household estimates for Clackmannanshire and Scotland

Area	2018 Total Households	2024 Projected Households	2043 Projected Households	Change 2018 - 2043	% Change
Clackmannanshire	852	874	879	26	3%
Scotland	89,182	92218	97,731	8,549	10%

Altogether, the report by Horizon Housing estimates a backlog of 19.7% of all wheelchair user households with unmet housing need. Assuming the same ratio, this represents 168 wheelchair user households with unmet housing need in 2018 across Clackmannanshire, projected to rise to 173 in 2043.

Table 5.36 Estimates for wheelchair user households with unmet housing need

Area	2018 Total Households	2024 Projected Households	2043 Projected Households	Change 2018 - 2043	% Change
Clackmannanshire	168	172	173	5	3%
Scotland	17,569	18167	19,253	1,684	10%

To account for variables and different methodologies used in the Scottish Household Survey and English Housing Survey, ‘Still Minding the Step’ proposes 3 different outcomes based on different levels of unmet need:

- Baseline unmet need assuming ratios established in table 5.33;
- High unmet need where the unmet need is 1.3% higher than the baseline estimate;
- Low unmet need where the unmet need is 2% lower than the baseline estimate.

Table 5.37 Application of ranges to wheelchair user households in Clackmannanshire

		2018 Households		2043 Projected Households	
	% Change	Wheelchair User	Unmet Need	Wheelchair User	Unmet Need
Baseline	0	852	168	879	173
Total number of wheelchair users and unmet need + 1.3%	1.3%	863	170	890	175
Total number of wheelchair users and unmet need -2.0% lower	-2.0%	835	165	861	170

Applying the same methodology to Clackmannanshire, calculating higher and lower rates of unmet need results in a variable of 5 wheelchair user households. A higher estimate of unmet need would result in 170 wheelchair user households with unmet need in 2018, contrasting to 165 wheelchair user households if lower estimate was taken into account.

The estimates calculated using the ‘Still Minding the Step’ methodology should be used when comparing the data available from social landlords. The baseline projected estimate of 874 wheelchair-user households should be compared with the 58 existing wheelchair-adapted properties across the social rented sector in Clackmannanshire in 2024. Likewise, assuming that the Council’s housing waiting list represents the majority of households requiring social housing across Clackmannanshire, there are 37 wheelchair-user households requiring wheelchair-adapted housing within the social rented sector, compared to the overall projected estimate of 172 wheelchair user households with unmet need across Clackmannanshire in 2024. This information suggests that the majority of wheelchair-user households and wheelchair-user households with unmet need are within the private sector – be it owner occupiers or within the private rented sector.

Future requirements

As stated in the 'Still Minding the Step?' report, it is difficult to provide an estimate of future need for wheelchair adapted housing, as it is unlikely that the number of wheelchair users will grow at a constant rate. Instead, the rate is likely to be affected by the health of the population, the prevalence of illnesses and disabilities, increased life expectancy and ageing population, as well as improvements in healthcare.

Nonetheless, contrasting the current provision of wheelchair accessible housing across the social rented sector with the estimates for number of wheelchair user households with unmet housing needs and the number of households requiring wheelchair housing clearly show unmet current and future demand for additional wheelchair adapted accommodation units, with a baseline estimate of 173 and upper estimate of 175 households requiring wheelchair accessible housing in 2043.

The estimates will be considered when setting supply targets for accessible housing units in the SHIP in order to take into account wheelchair user households across Clackmannanshire. Furthermore, the information will be used to inform the development of the Local Housing Strategy.

External stakeholder consultation and engagement

Full consultation findings can be found in appendix 1. Consultation on wheelchair accessible housing was undertaken in tandem with consultation on accessible and adapted housing, with the following stakeholder groups engaged with:

- Alzheimer's Scotland
- Clackmannanshire & Stirling HSCP
- Local RSLs
- NHS Forth Valley
- Older Adults' Forum Clackmannanshire

3. Non-Permanent Housing

National Policies

- Children and Young People (Scotland) Act 2014
- Domestic Abuse (Protection) Act 2001
- Equally Safe: Scotland's Strategy for Preventing and Eradicating Violence Against Women and Girls (2023)
- Homelessness etc. (Scotland) Act 2003
- The Homeless persons (Provision of Non-permanent Accommodation) (Scotland) Regulations 2010
- The Homeless Persons (Unsuitable Accommodation) (Scotland) Order 2014
- Housing (Scotland) Act 2001
- Scottish Quality Standards – Housing Advice, Information and Support for People In and Leaving Prison (SHORE) Standards (2024)
- UK Refugee Resettlement: Policy Guidance (2021)

Local Policies and Strategies

- Clackmannanshire Council Armed Forces Community Covenant 2020
- Clackmannanshire Council Housing Allocations Policy 2019
- Keeping The Promise Plan 2023-2026

Rapid Rehousing Transition Plan

Clackmannanshire Council's Rapid Rehousing Transition Plan (RRTP) explores how the Council will aim to minimise the amount of time homeless households spend in temporary accommodation and rehouse them to suitable permanent accommodation as quickly as possible.

The RRTP is an integral part of the Strategic Housing Investment Plan and aligns with the core principles and aims of the Local Outcomes Improvement Plan. The document highlights the current levels of homelessness as well as the available services used to tackle homelessness in Clackmannanshire. It establishes an action plan which focuses on the reduction of homelessness by employing preventative and early intervention measures which address the complex needs of individuals and diverts service users from the point of crisis. Where homelessness is inevitable, the focus is on the provision and maintenance of quality temporary accommodation that is fit for purpose.

Property Needs

Non-permanent housing must meet the needs of different households and individual requirements. The provision of non-permanent housing should include good quality temporary accommodation for single people and single families. Accommodation includes self-contained, dispersed temporary flats and houses, accommodation with concierge services and supported accommodation units.

Client Groups (Suitable For)

Non-permanent housing in Clackmannanshire must be suitable for various groups, including households experiencing homelessness, ex-offenders, veterans leaving armed forces, young people leaving care, students, people fleeing domestic abuse as well as asylum seekers and refugees. The evidence will assess the housing provision and needs for each of these groups.

Evidence

Homeless Households

Clackmannanshire Homeless Temporary Accommodation Provision as of October 2024

As of October 2024, Clackmannanshire Council owned 92 fully furnished dispersed temporary accommodation units and 48 temporary accommodation units with concierge service. The Council leased 2 units from registered social landlords and rented 4 self-contained flats within Clackmannanshire and 15 outwith Clackmannanshire on a nightly basis as required. The Council intends to reduce the use of non-Council owned accommodation to a minimum.

Table 5.38 Homeless Presentations

	2019/2020	2020/2021	2021/2022	2022/2023	2023/2024	% Change over 5 years
Clackmannanshire	523	501	551	593	616	18%
Scotland	37061	34367	35792	39308	40685	10%

Source: Scottish Government. Homelessness Statistics 2024

Over the 5-year period between 201920 and 2023/24, Clackmannanshire Council saw an 18% increase in homeless presentations, compared to the Scottish average of 10%. 2020/21 saw a reduction in applications, however this has been steadily increasing since 2021/22. As of March 31, 2024, there were 616 homeless applications. Using NRS household estimates, compared to all households in Clackmannanshire, this equates to 253 households per 10,000 population. In comparison, the Scottish average stands at 160 homeless households per 10,000, making Clackmannanshire the local authority with the 3rd highest rate of households presenting as homeless, just after West Dunbartonshire with 256 households per 10,000 and Glasgow City with 260 households per 10,000. This means that Clackmannanshire has a disproportionately large number of homeless presentations per capita compared to other local authorities of similar size.

Table 5.39 Live homelessness cases per 1,000 population

	2019/20	2020/21	2021/22	2022/23	2023/24	% Change over 5 years
Clackmannanshire	3.74	3.96	5.08	6.35	6.67	78%
Scotland	4.16	4.47	4.69	5.41	5.85	40%

Source: Scottish Government. Homelessness Statistics 2024

Table 5.39 shows that from 2019/20 to 2023/24 there has been a 78% increase in the amount of live homelessness cases in Clackmannanshire per capita. The increase should be noted against the 40% increase within the same time period nationally. Before 2021/22, there were fewer homelessness cases in Clackmannanshire per 1,000 population compared to Scotland. However, 2021/22 onwards, Clackmannanshire overtook Scotland, with 6.67 live homelessness cases in Clackmannanshire compared to 5.85 cases nationally in 2023/24 alone. The large jump in the rates of live cases can be mirrored against the rates of homeless presentations within Clackmannanshire.

Table 5.40 Homeless presentations by sex and age group

	2019/20		2020/21		2021/22		2022/23		2023/24	
Age	**Male**	**Female**	**Male**	**Female**	**Male**	**Female**	**Male**	**Female**	**Male**	**Female**
16 - 24	81	70	58	71	62	82	63	91	69	75
25 - 34	101	76	104	77	106	94	104	78	110	82
35 - 44	51	47	70	43	52	49	67	62	104	41
45 - 54	28	27	31	21	39	27	43	42	30	40
55 - 64	16	14	11	11	18	18	17	15	27	15
65+	6	6	4	2	6	1	4	7	10	13
All	**283**	**240**	**278**	**225**	**283**	**271**	**298**	**295**	**350**	**266**

Source: Clackmannanshire Council Information System October 2024

Table 5.40 shows that over the five-year period, the majority of homeless applications came from male households. In 2023/24, most applicants were males aged 25-34, followed by males aged 35-44 and females aged 16-24. Between 2019/20 and 2023/24, applications from male households increased by 24%, while those from female households rose by 11%. Notably, the number of male applicants aged 35-44 surged by 104%, and female applicants aged 16-24 saw a steady year-on-year increase, totalling 7% over the five years.

Table 5.41 Applications by household type

Applicants by household type	2019/2020	2020/2021	2021/2022	2022/2023	2023/2024	% Change over 5 years
Single Person	383	359	356	398	426	11%
Single Parent	85	93	111	115	122	44%
Couple	29	27	41	28	28	-3%
Couple with Children	21	19	41	41	32	52%
Other	3	1	1	3	3	0%
Other with Children	2	2	1	8	5	150%
Total	523	501	551	593	616	18%

Source: Scottish Government. Homelessness Statistics 2024

As table 5.41 presents, the majority of presentations were from single person households, followed by single parent households and couples with children. The last 5 years also saw a 44% jump in single parent applicants and 52% increase in couples with children which indicates a requirement for provision of larger temporary accommodation units which can house larger households.

Table 5.42 Single person homeless applications by sex

Household Type	Sex	2019/2020	2020/2021	2021/2022	2022/2023	2023/2024
Single Person	Male	259	251	245	268	312
	Female	124	108	111	130	114
	All	383	359	356	398	426

Source: Clackmannanshire Council Information System October 2024

To break down single person homeless applications further, throughout the 5-year period, majority of single person applicants were male, with 73% of all single person households in 2023/24 being male. The continuing trend of applicants from single person households who are predominantly young males aged 25-34 or 35-44 may suggest a need to focus on the provision on good quality single person temporary accommodation.

Table 5.43 Reason for application

Reason for application	2019/20	2020/21	2021/22	2022/23	2023/24	% Change over 5 years
Dispute within household / relationship breakdown: non-violent	136	155	170	159	180	32%
Asked to leave	142	123	135	145	119	-16%
Other reason for leaving accommodation / household	42	34	38	53	63	50%
Fleeing non-domestic violence	28	34	37	28	39	39%
Other action by landlord resulting in the termination of the tenancy	40	20	41	31	37	-8%
Dispute within household: violent or abusive	47	40	41	48	37	-21%
Other	88	95	89	129	141	65%
Total	523	501	551	593	616	18%

Source: Scottish Government. Homelessness Statistics 2024

Across the 5-year period, the most frequently cited reason for presenting as homeless were due to a relationship breakdown or a non-violent dispute within household, followed by being asked to leave current accommodation. Compared to the previous periods, 2023/24 saw an increase in presentations made due to disputes within household/relationship breakdown, fleeing non-domestic violence as well as other reasons.

Table 5.44 Applicants with self-identified support needs following assessment

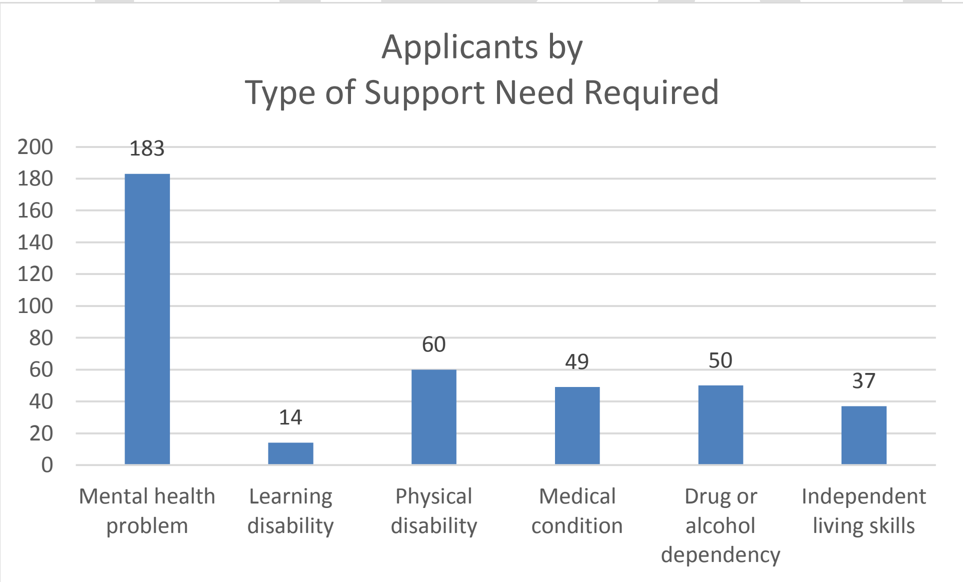
Applicants with support needs	2019/2020	2020/2021	2021/2022	2022/2023	2023/2024	% Change over 5 years
No support needs	230	258	305	343	387	68%
1 support need identified	168	129	159	147	132	-21%
2 support needs identified	87	59	55	43	62	-29%
3+ support need identified	47	44	29	49	41	-13%
Total applicants	532	490	548	582	622	17%

Source: Clackmannanshire Council Information System October 2024

There has been a steady reduction in applicants with self-identified support needs over the 5-year period following the assessment, with 38% of applicants stating support needs in 2023/24, compared to 41% in 2022/23 and 44% in 2021/22.

As graph 5.5 presents, in 2023/24, majority of needs were associated with mental health problems (183 applicants), followed by physical disability (60), drug and alcohol dependency (50) and medical conditions (49). Note that applicants can have more than one support need.

Graph 5.5 Applicants by type of support needs as of 31 March 2024 (multiple responses allowed)



Source: Clackmannanshire Council Information System October 2024

Under the Housing Support Regulations, local authorities must conduct a housing support assessment for homeless applicants who are unintentionally homeless or threatened with homelessness where there is a reason to believe that the applicants need the housing support services. Following the support needs assessment, 21 households were provided with homeless support in 2023/24, compared to 53 households in 2022/23, 59 households in 2021/22, 83 households in 2020/21 and 81 applicants in 2019/2020.

Table 5.45 Number of homeless households supported under housing support regulations

	2019/20	2020/21	2021/22	2022/23	2023/24	% Change in last 5 years
Supported households	81	83	59	53	21	-74%

Source: Clackmannanshire Council Information System October 2024

Clackmannanshire Council's Housing Support services was closed for any new referrals from May 2023 to January 2024 whilst awaiting registration with the Care Inspectorate, reflecting the sharp drop in the provision of support between 2022/23 and 2023/24. Since re-opening, the provision of support services to homeless households is estimated to increase.

Provision of Temporary Accommodation

Table 5.46 Number of households entering and exiting temporary accommodation

	2019/20	**2020/21**	**2021/22**	**2022/23**	**2023/24**
Households entered	306	272	295	262	291
Households exited	304	278	265	241	265
Net difference	**2**	**-6**	**30**	**21**	**26**

Source: Scottish Government. Homelessness Statistics 2024

Table 5.46 illustrates that, between 2019/20 and 2023/24, the number of households entering temporary accommodation generally exceeded those exiting. This trend may be attributed to the high number of homelessness presentations in Clackmannanshire and the limited availability of affordable permanent mainstream housing. An exception occurred in 2020/21, likely due to a prioritisation of homeless applicants for rehousing into permanent accommodation during the Covid-19 pandemic.

Over the 5 years, applicants have been more likely to arrange their own temporary accommodation (Table 5.47). Between 2021/22 and 2023/24, Clackmannanshire Council provided 43% of all temporary accommodation placements, a decrease of 3**%,** compared to 2019/20 and 2020/21.

Table 5.47 Temporary accommodation provision (Multiple Responses Allowed)

	2019/2020	**2020/2021**	**2021/2022**	**2022/2023**	**2023/2024**
Arranged by applicant no.	428	418	417	413	490
Arranged by applicant %	53.6%	53.9%	56.7%	56.7%	56.5%
Provided by local authority no.	371	357	318	316	378
Provided by local authority %	46.4%	46.1%	43.3%	43.3%	43.5%
Total no.	799	775	735	729	868

Source: Clackmannanshire Council Information System October 2024. Multiple responses allowed.

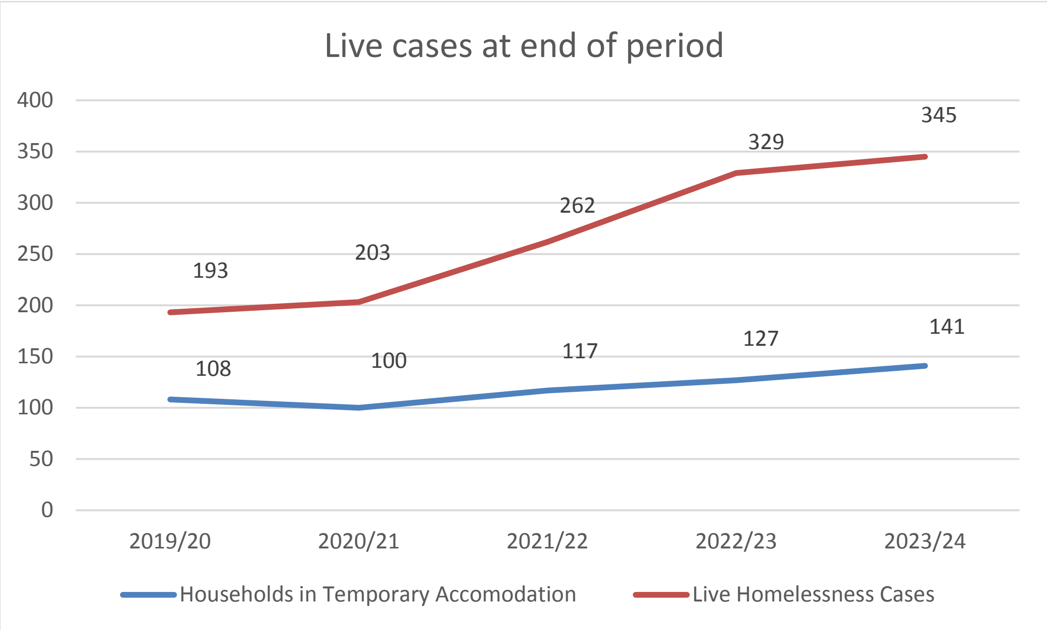
Overall, refusals of temporary accommodation offers have seen a large decrease throughout the 5 years. 2023/24 period saw 60 refusals, compared to 95 refusals in 2022/23 and 130 rejections in 2021/22. This can be contrasted with the increase in the rejection of offers throughout Scotland from 2019/20 to 2023/24.

Table 5.48 Offers of temporary accommodation refused by applicants

Local Authority	2019/20	2020/21	2021/22	2022/23	2023/24
Clackmannanshire	95	125	130	95	60
Scotland	5630	7385	7100	7145	6775

Source: Scottish Government. Homelessness Statistics 2024

Graph 5.6 Number of households in temporary accommodation in comparison to number of live cases



Source: Scottish Government. Homelessness Statistics 2024

Graph 5.6 demonstrates that there are considerably more live homelessness cases in comparison to the number of households in temporary accommodation, with 345 live cases and 141 homeless households in temporary accommodation in 2023/24. From 2019/20 to 2023/24, there has been an increase in 79% live homelessness cases and 31% increase in a number of homeless households in temporary accommodation. When comparing the two figures, 56% of live cases were in temporary accommodation in 2019/20, down to 41% in 2023/24.

The figures may suggest that, amid rising homeless presentations, the Council faces challenges in resolving homelessness cases, providing temporary accommodation, and securing suitable permanent accommodation.

Table 5.49 Temporary Accommodation Provision (multiple responses allowed)

	2019/2020	2020/2021	2021/2022	2022/2023	2023/2024
Council ordinary dwelling	277	241	230	222	224
Housing association / RSL dwelling	0	0	0	0	1
Hostel - Council owned	0	0	0	0	0
Hostel - RSL	0	0	0	0	0
Hostel - other	0	0	0	0	0
Bed and breakfast	0	37	14	29	62
Women's refuge	0	0	0	0	0
Private sector lease	0	0	0	0	0
Other placed by authority	94	79	74	65	91
Total	371	357	318	316	378

Source: Clackmannanshire Council Information System October 2024

As table 5.49 presents, there was an overall total of 378 placements to different temporary accommodation units by the local authority in 2023/24, compared to 316 in 2022/23, 318 in 2021/22, 357 in 2020/21 and 371 in 2019/20. Where possible, Clackmannanshire Council has sought to reduce the number of placements that homeless households have to go through before being rehoused to suitable permanent accommodation. Historically, this has been achieved by placing homeless households into the Council's dispersed furnished temporary accommodation units within the boundaries of the local authority. However, from 2020/21 to 2023/24, there has been 68% increase in the use of bed and breakfast accommodation as well as 15% increase in 'other' types of accommodation units used, including out-of-area accommodation units. In particular, the 2023/24 period saw an increase in 33 placements to bed and breakfast accommodation as well as 26 more placements to 'other' types of accommodation compared to the previous year.

The growth of the use bed and breakfast and other types of accommodation can be attributed to increased pressures to house homeless households due to an increase in homeless presentations and the lack of available dispersed temporary accommodation units within the Council's housing stock.

In 2014, the Scottish Government introduced Homeless Persons (Unsuitable Accommodation) Order, which introduced minimum standards for the provision of temporary accommodation to homeless households with children or pregnant women. In 2020, the Order was extended to all homeless households. Along with 'basic' and physical standards of temporary accommodation, the Order establishes that homeless households should not be placed in 'unsuitable' temporary accommodation. Accommodation is unsuitable if it is shared and/or outwith the local authority area. Where households are in unsuitable accommodation for more than 7 nights, the local authority is deemed in breach of the Order.

Table 5.50 Number of temporary accommodation placements that have been in breach of Unsuitable Accommodation Order

Local Authority	2021/22	2022/23	2023/24	No. Change in last 3 years	% Change in last 3 years
Clackmannanshire	35	90	110	75	214%
Scotland	2020	5240	7400	2160	266%

Source: Scottish Government. Homelessness Statistics 2024

As table 5.50 shows, there has been a 214% increase in the number of breaches of the Unsuitable Accommodation Order between 2021/22 to 2023/24. The 2022/23 saw a jump in 55 breaches compared to the previous year, whereas 2023/24 saw an additional increase in 20 breaches from 2022/23. In comparison, Scotland saw an overall increase in breaches by 266% within the same 3-year period. The increase in Clackmannanshire's figures may be partially attributed to Clackmannanshire's small geographical area size and the need to use accommodation units within neighbouring local authorities in order to meets its duties to house homeless households under the Housing (Scotland) Act 1987.

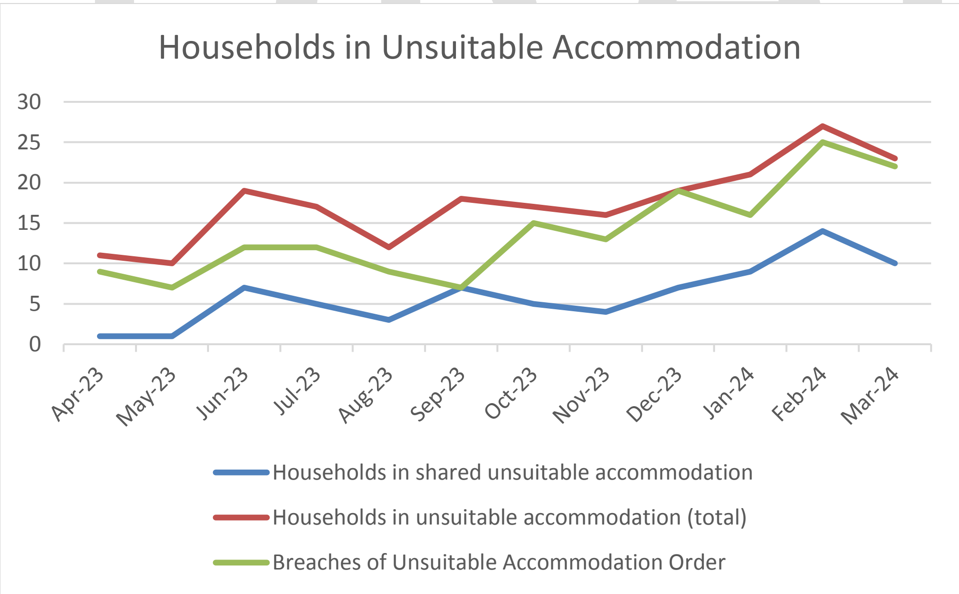
As Table 5.51 below illustrates, the majority of households in unsuitable accommodation as of March 2024 were placed in self-contained flats within Stirling, followed by 7 households in bed and breakfast accommodation in Stirling and Falkirk. Only 3 households were in unsuitable bed and breakfast accommodation within Clackmannanshire.

Table 5.51 Number of households in unsuitable accommodation by type of accommodation as of March 2024

Stirling (self-contained flat)	Stirling (B&B)	Falkirk (B&B)	Kirkcaldy (B&B)	Alloa (B&B)	Total
13	5	2	0	3	23

Source: Clackmannanshire Council Information System October 2024

Graph 5.7 Number of households in unsuitable accommodation by type of accommodation and number of accommodation units in breach of Unsuitable Accommodation Order at the end of the month



Source: Clackmannanshire Council Information System October 2024

As seen in graph 5.7, throughout the 2023/24 financial year, there has been a steady increase in the number unsuitable accommodation units used with 23 units used by the end of the year, contrasted to 11 units at the start of the year. Throughout the year, the majority of the unsuitable units were found to be in the breach of the Unsuitable Accommodation Order, with the exception of September 2023, where 7 of the 18 units were in breach of the Order.

The trends in the use of unsuitable accommodation units and the large number of breaches suggest that Clackmannanshire Council struggles to alleviate pressures in the demand for its own temporary accommodation stock in order to be able to successfully place homeless households within ‘suitable’ temporary accommodation within 7 days.

Table 5.52 Average total time (days) spent in temporary accommodation

	2019/20	**2020/21**	**2021/22**	**2022/23**	**2023/24**	**% Change over 5 years**
Clackmannanshire	140	130	153	178	159	14%
Scotland	188	206	213	225	226	20%

Source: Scottish Government. Homelessness Statistics 2024

Nonetheless, as table 5.52 illustrates, homeless households within Clackmannanshire have consistently spent less time in temporary accommodation compared to the national average. Although there has been an overall 14% increase in the average number of days spent in temporary accommodation over the 5 years, this can be contrasted with the Scottish average of 20%. The 2023/24 period alone saw a total of 159 days spent in temporary accommodation, compared to 226 days in Scotland. Furthermore, 2023/24 saw a decrease in 19 days spent in temporary accommodation compared to the previous year.

The trends in the average total time spent in temporary accommodation may suggest that although Clackmannanshire Council may struggle to find suitable temporary accommodation within 7 days of households presenting as homeless, the Council has a more streamlined and efficient process for rehousing households into permanent accommodation compared to other local authorities in Scotland.

Prison Leavers

The Scottish Government promotes SHORE standards to ensure that everyone who is subject to a prison sentence has sustainable housing upon release from prison. SHORE standards recognise the impact that housing plays in supporting individuals’ reintegration into communities not only by meeting the individuals’ immediate housing needs, but also by improving access to other public services and ultimately supporting desistance from future re-offending.

To help meet the needs of people upon liberation, the requirement for better joint working and information sharing between statutory housing providers, community justice partners and other third sector organisations and services is highlighted. Working together with housing, healthcare, welfare and employment services, it is crucial that the necessary support is offered in a timely and efficient manner at the beginning and during the sentence as well as before and after release from prison to ensure the appropriate provision of housing and housing-related support and ultimately help ex-offenders sustain their tenancies.

Locally, people upon release from prison are supported by voluntary or statutory throughcare services depending on the type of the sentence. If individuals are eligible and opt for voluntary throughcare, Criminal Justice Social Work will aim to offer guidance and practical support to offenders, including assistance with housing and housing benefit applications prior to release and will maintain regular contact with the prisoners. Unless there are significant concerns identified regarding the person, at which point collaborative approach is sought after as soon as practicably possible, Criminal Justice Service will aim to liaise with the Housing Service 2 to 3 months prior to liberation to identify the offenders’ housing needs.

Ex-offenders returning to Clackmannanshire may come from a number of different prisons with HMP Barlinnie, HMP Glenochil and HMP Low Moss being the most common sources for adult offenders, and HMP and YOI Polmont for young offenders.

Conversations with Criminal Justice Social Work have revealed that the majority of people leaving prison do not know or are not sure where they are going to go upon release from prison, denoting a lack of secure housing options for ex-offenders.

Table 5.53 presents the number of homeless applications upon direct release from prison. From 2019/20 to 2023/24 there has been a steady number of homeless applications from prison leavers, with 27 applications in 2023/24. This represented 4% of all homeless presentations in 2023/24.

Table 5.53 Homeless applications from people leaving prison

Homeless applications by accommodation arrived from	2019/2020	2020/2021	2021/2022	2022/2023	2023/2024
People leaving prison	26	26	21	33	27
All	523	501	551	593	616

Source: Clackmannanshire Council Information System October 2024

As table 5.54 below shows, the vast majority of prison leaver households presenting as homeless throughout the 5-year period were male, indicating a need for housing and support targeted at males.

Table 5.54 Homeless applications from people leaving prison by gender

Gender	2019/20	2020/21	2021/22	2022/23	2023/24
Male	25	25	20	30	25
Female	0	0	0	5	0
All	25	25	20	35	25

Source: Scottish Government. Homeless Statistics 2024. Numbers rounded for disclosure control purposes

However, it is important to consider that while people may not know where they are heading after liberation, it does not necessarily mean that they will immediately present as homeless, as they may present as homeless after some time has lapsed. Some prison leaver households may return to live with their partners, relatives or families, others, and particularly those with short-term sentences, may still have permanent tenancies to return to. Lastly, some may choose to live with their friends for a while, after which they decide to present as homeless. Those in the latter category do not fall into prison leaver homeless application statistics.

Overall, discussions with the Criminal Justice Social Work have shown that there is a 'good working relationship' with the Housing Service with the aim of securing the best housing outcomes for prison leavers. Nonetheless, it was felt that more could be done to prevent the 'revolving door' scenario, whereby prison leavers are not able to sustain their temporary or permanent tenancies in the long-term, and either end up homeless again and/or re-offend, resulting in another prison sentence. In particular, tenancy sustainment was a highlighted issue for prison leaver with complex needs and/or additional mental health issues.

Where prison leavers are assessed as homeless, Clackmannanshire Council's Housing Service aims to provide the most appropriate temporary accommodation units. While placed in temporary accommodation, prison leavers can stay in it anywhere between 6 to 18 months before being offered secure tenancy and permanent accommodation.

Although the temporary accommodation units are self-contained and have all of the required amenities, there have been suggestions that these can be too large and too overwhelming for prison leavers to maintain. It was indicated that there is a need of purpose-built homeless accommodation units for people leaving prison which would encourage the sustainment of temporary accommodation more easily and help develop skills to successfully transition to and maintain their permanent tenancies. Such temporary accommodation could include simple, easy-to-clean and easy-to-maintain, furnished bedsits with all of the necessary amenities.

Veterans Leaving Armed Forces

Table 5.55 Number of UK Armed Forces Veterans

	All people aged 16 and over	UK Armed Forces Veteran	% of population who are UK Armed Forces Veterans
Clackmannanshire	43,065	2,138	5.0%
Scotland	4,548,589	176,084	3.9%

Source: Scottish Census 2022

As of 2022, there were 2,138 individuals or 5% of all population aged 16 and over who were UK armed forces veterans in Clackmannanshire. Nationally, this figure stood at 3.9%, making Clackmannanshire proportionally a local authority with the 7th highest population of veterans in Scotland.

As table 5.56 below presents, 8.3% or 1,990 of all households in 2022 in Clackmannanshire contained at least one UK armed forces veteran, compared to 6.7% in Scotland overall.

Table 5.56 Households containing at least one UK Armed Forces Veteran

	All Households	Contains at least one UK Armed Forces Veteran	% of all households containing at least one UK Armed Forces Veteran
Clackmannanshire	24,072	1,990	8.3%
Scotland	2,509,269	166,992	6.7%

Source: Scottish Census 2022

Table 5.57 Homeless applications by military service status

	2019/2020	2020/2021	2021/2022	2022/2023	2023/2024
All previously in armed forces	18	16	23	25	24
Less than 5 years ago	1	4	8	7	4
5 or more years ago	17	12	15	18	20
Never been in armed services	502	483	525	568	590
Not known/refused	3	2	3	0	2
All applications	523	501	551	593	616

Source: Clackmannanshire Council Information System October 2024

Table 5.57 shows that that from 2019/20 to 2023/24, the number of households presenting as homeless which contain at least one household member who has previously served in the UK armed forces has remained relatively stable, with the average of 21.2 applications per year. Taking into account 2022 census data, this equates to 1.1% of all veteran households presenting as homeless.

As Table 5.58 below presents, in 2023/24, 3.9% of all households presenting as homeless had a household member who has previously served in the armed forces, although only 0.6% households were in the armed forces 5 years prior to presenting as homeless.

Table 5.58 Homeless applications by military service status as a proportion of all homeless applications

	2019/2020	2020/2021	2021/2022	2022/2023	2023/2024
All applications	100%	100%	100%	100%	100%
All previously in armed forces	3.4%	3.2%	4.2%	4.2%	3.9%
Less than 5 years ago	0.2%	0.8%	1.5%	1.2%	0.6%
5 or more years ago	3.3%	2.4%	2.7%	3.0%	3.2%

Source: Clackmannanshire Council Information System October 2024

In comparison to the local figures, the national figures (table 5.58 below) show that throughout the same 5-year period, around 2% of all homeless applicants had an armed forces background, which is slightly smaller than comparing to Clackmannanshire. Nonetheless, only 0.5% of all homeless households in 2023/24 were in armed forces less than 5 years prior to homeless applications, which is statistically similar to Clackmannanshire. In proportion of all veteran households, on average 0.51% of all veteran households in Scotland have presented as homeless over the last 5 years.

Table 5.59 Homeless applications by military service status as a proportion of all homeless applications in Scotland

	2019/20	2020/21	2021/22	2022/23	2023/24
All	100%	100%	100%	100%	100%
All previously in armed forces as	2.5%	2.4%	2.2%	2.1%	2.3%
Less than 5 years ago	0.6%	0.6%	0.5%	0.5%	0.5%
5 or more years ago	1.9%	1.8%	1.7%	1.6%	1.8%

Source: Scottish Government. Homelessness Statistics 2024

From 2019/20 to 2023/24, only three households in Clackmannanshire presented as homeless directly from armed forces accommodation.

Clackmannanshire Council aims to ensure that former armed forces personnel leaving military service and returning to Clackmannanshire are not disadvantaged. In line with the Clackmannanshire Council's Allocation Policy, armed forces veterans returning from military service who apply for Council housing are treated as a priority group and are placed into the higher level available (band 1) to help them secure permanent housing as soon as possible.

The low numbers of households with at least one ex-service personnel presenting as homeless, low levels of homeless presentations directly from armed forces accommodation units and

Clackmannanshire's Allocations Policy priorities indicate that the needs of armed forces veteran community housing needs are currently being met

Young People Leaving Care

Table 5.60 Former looked after status for households presenting as homeless

	2019/2020	2020/2021	2021/2022	2022/2023	2023/2024	% Change over 5 years
All previously looked after	42	24	32	22	20	-52%
Less than 5 years ago	10	7	18	16	9	-10%
5 or more years ago	32	17	14	6	11	-66%

Source: Clackmannanshire Council Information System October 2024

As table 5.60 above presents, the overall number of households with a household member who has previously been looked after has decreased from 42 in 2019/20 to 20 in 2023/24. In 2019/20, 2% of all households presenting as homeless had a household member who was looked after less than 5 years before the date of the application, whereas in 2022/23 and 2023/24 this figure stood at 3% and 1% respectively.

Table 5.61 presents that from 2019/2020 to 2022/23 there was a 313% increase in number of individuals leaving care, with 33 care leavers in 2022/23, compared to 8 in 2019/20. In comparison, the number of care leavers nationally increased by 120% throughout the same period.

Table 5.61 Number of care leavers as of 31st July

	2019/20	2020/21	2021/22	2022/23	% Change in last 5 years
Clackmannanshire	8	12	22	33	313%
Scotland	1,207	1,405	2,771	2,657	120%

Source: Scottish Government. Children's social work statistics 2023. Please note that 2022 figures have been revised since the previous year due to changes to data as part of improved year-on-year reconciliation checks. Figures for 2023/24 period were not published at the time of the undertaken research.

As a corporate parent, Clackmannanshire Council aims to ensure best possible outcomes for its care leavers by providing settled accommodation and support which would enable care leavers to develop independent living skills, sustain their tenancies and successfully transition to adulthood. The Council aims to ensure that young people leaving care are provided with suitable housing accommodation, with the long-term aim of a planned move to secure settled accommodation, avoiding the homeless route entirely.

According to Clackmannanshire Council's Information System, from 2019/20 to 2023/24 there was a total of 3 individuals who were looked after by the Council and who made a homeless application directly from children's residential accommodation.

Where possible, the Council tries to avoid housing care leavers into temporary accommodation units. In line with the Clackmannanshire Council's Allocation Policy, care leavers, at the point of leaving care, are treated as a priority group for Council housing and are placed in the highest priority level available to help them secure permanent housing as soon as possible. However, in cases where the use of temporary accommodation is unavoidable, the Council takes a multi-agency approach to housing and supporting young people leaving care and where possible, takes individual views into account.

Table 5.62 Young people leaving care who were placed into temporary accommodation by the local authority during the financial year

	2019/2020	2020/21	2021/22	2022/23	2023/24
Number of young people	5	0	10	5	0
Average duration of placement (days)	78.6	589	134.7	164.7*	83.5

*Source: Clackmannanshire Council Information System. Number are rounded for disclosure control purposes. *Includes one ongoing placement as of October 2024.*

As table 5.62 shows, from 2019/2020 to 2023/24, there were a total of 20 young people leaving care who were placed into temporary accommodation by Clackmannanshire Council, the majority of whom have since been rehoused and have moved on to permanent accommodation. Throughout the 5-year period, the average duration of the placement was 133 days.

It is important to note that some young people had more than one placement and some of the longer placements were due to the Council being advised that the young person was not ready to move on to permanent accommodation or that they had very specific needs that could not be immediately met.

People Fleeing Domestic Abuse

Table 5.63 Number and rate of domestic abuse incidents per 10,000 population

	Clackmannanshire No.	Clackmannanshire rate	Scotland No.	Scotland Rate
2018/19	700	136.2	60,641	111.5
2019/20	781	151.5	62,907	115.1
2020/21	808	157.5	65,251	119.4
2021/22	755	146.5	64,807	118.3
2022/23	656	126.8	61,934	113.7
% Change over 5 years	-6%		2%	

Source: Scottish Government. Criminal Justice Statistics 2023

The latest Scottish Government statistics show that from 2018/19 to 2022/23, there has been a 6% reduction in the number of recorded domestic abuse incidents in Clackmannanshire, compared to a 2% increase nationally. Historically, Clackmannanshire has had a much larger recorded rate of domestic abuse incidents with the average rate of 143.7 incidents per 10,000 in the 5 years, compared to 115.6 incidents per 10,000 across Scotland.

However, it is likely that the actual rate of domestic abuse is much higher, both in Clackmannanshire and throughout Scotland.

Table 5.64 shows the number of homeless applications due to a violent or abusive dispute within a household. In 2023/24, this figure stood at 37 applications, representing 6% of overall homeless applications and 23% reduction from the previous financial year. It is important to note that the year-on-year percentage may be skewed by the relatively low figures overall.

Table 5.64 Homeless applications from households fleeing domestic abuse in Clackmannanshire

2019/2020	2020/2021	2021/2022	2022/2023	2023/2024	% Change over 5 years	% of all applications for 2023/24
47	40	41	48	37	-21%	6%

Clackmannanshire Council Information System October 2024

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Clackmannanshire Women's Aid

Clackmannanshire is home to Clackmannanshire Women's Aid, a registered charity funded by Clackmannanshire Council and the Scottish Government and an affiliate to Scottish Women's Aid. Clackmannanshire Women's Aid offers person-centred specialist services, including practical and emotional support, information and safe refuge to women, children and young people impacted by domestic abuse.

Women's Aid refuge offers safe and secure accommodation. The refuge consists of a block of four 3-bedroom flats, leased from Ochil View Housing Association. One flat provides office base for staff, a playroom for support sessions with children and young people, a room for meeting women, a storeroom as well as a kitchen and a bathroom. There are further two flats that are HMO licensed and may be potentially shared with access to communal spaces and private bedrooms, with the capacity to house up to six women and children, and a toddler, in each flat. However, Women's Aid have stated that it is extremely rare for the need to accommodate to full capacity.

Lastly, there is one fully adapted ground floor self-contained flat for persons with disabilities which can cater for a family or a single woman, with space for a carer. The flat may also be used for clients with more complex needs who are not suited to shared accommodation.

Two out of the three refuge flats were out of use from December 2022 to March 2024, following burst pipes causing substantial water damage. To account for the lack of available refuge accommodation during the period, the most up-to-date information for the 2024/25 reporting period up to November 2024 when the data was released, was taken into account in order to build a more accurate picture of the use of refuge accommodation.

All in all, from 2021/22 financial year up to November 2024, Clackmannanshire Women's Aid has provided refuge support to a total of 24 women and 16 children. The average client age was 42 years old, ranging from under 20 years old to over 70. As of November 2024, the 2024/25 reporting period already saw the largest number of clients provided with refugee accommodation compared to the previous years, including the 2021/22 year when all accommodation units were in use.

Table 5.65 Average length of stay in Women's Refuge by financial year

	2021/22	2022/23	2023/24	01/04/24-01/11/24
Average length of stay (days)	268	159	160	98

Source: Clackmannanshire Women's Aid September 2024

As table 5.65 shows, the average duration of the stay was 171 days, although this ranged from 268 days in 2021/22 reporting period to 98 days in the 2024/25 reporting period up to November 2024. The differences in the duration of the stay may be explained by the overall small number of clients supported per financial year, thus skewing the results. Evidence shows that clients stay in women's refuge for similar periods of time before being rehoused to permanent accommodation when compared to homeless households staying in temporary accommodation.

Beside refugee accommodation, Clackmannanshire Women's Aid also provides office-based and outreach services, Follow On service which supports the transition out of refuge accommodation into secure tenancies as well as independent domestic abuse advocate (IDAA) service.

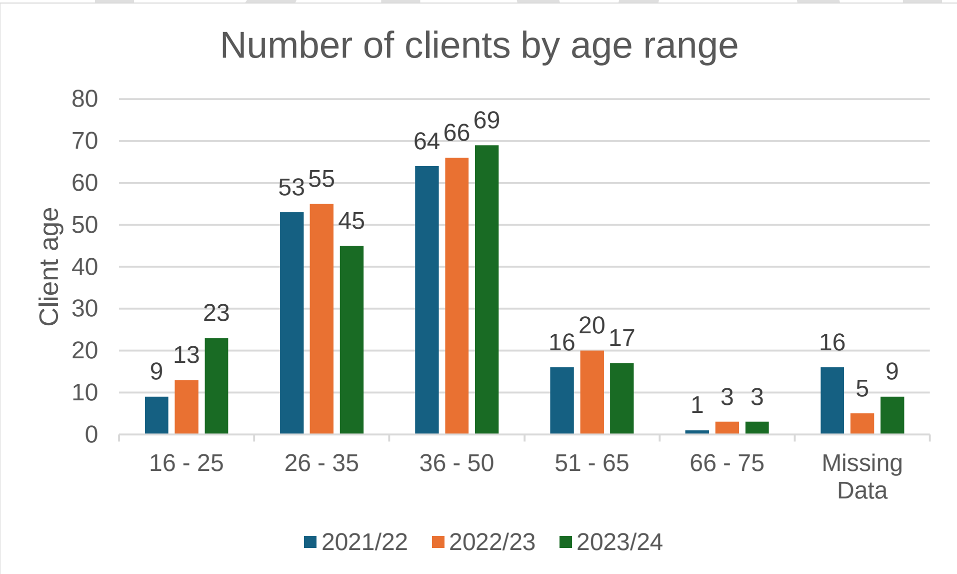
Table 5.66 Number of Women's Aid clients by type of support by financial year

Type of support	2021/22	2022/23	2023/24
Office-based	109	72	88
Outreach	28	43	49
IDAA	25	55	50
Follow	4	4	0
Total	171	174	187

Source: Clackmannanshire Women's Aid September 2024

Table 5.66 presents the number of women's aid clients by type of support they receive. From 2021/22 to 2023/24, the majority of women received office-based support, followed by similar number of clients for outreach and IDAA services. In total, there were 187 women supported in 2023/24, equating to a 9% rise from 2021/22.

Graph 5.8 Number of clients by age range by financial year



Source: Clackmannanshire Women's Aid September 2024

As graph 5.8 demonstrates, throughout the 3 years, the majority of women supported fell into the 36 – 50 age range, followed by the 26 – 35 age group. The 2023/24 reporting year saw an increase in the number of clients 25 and under.

Table 5.67 below shows that the average length of case varied from 4.23 months in 2022/23 to 5.83 months in 2023/24. In addition, throughout the 3 years, over 50% of women who were offered and provided with support required repeat support further down the line. In 2023/24, 53% of all cases were repeat cases, whereas in 2022/23 this figure stood at 68%. This suggests that while relevant person-centred and trauma-informed support may be given to women experiencing domestic abuse, the domestic abuse and the impacts of domestic abuse are ongoing, and further intervention, including different housing approaches may be required to reduce the recurrence of domestic abuse and the impacts of domestic abuse.

Table 5.67 Average length of support and repeat cases by financial year

	2021/22	2022/23	2023/24
Average case length (months)	5.07	4.23	5.83
Repeat Cases (No)	98	118	90
Total cases (No)	187	174	171

Source: Clackmannanshire Women's Aid September 2024

Where women do not want longer-term ongoing support, they may also be offered with short-term help with one-off enquiries. Throughout the 3-year period, there has been a continuous decrease in women supported with one-off queries. In 2023/24, 67 women received short-term work support, corresponding to a 36% decrease from 2021/22.

Table 5.68 Number of short-term work clients and repeat cases by financial year

	2021/22	2022/23	2023/24
Short Term Work (No)	105	88	67
Repeat cases (No)	22	8	*

Source: Clackmannanshire Women's Aid September 2024. Some numbers are omitted for disclosure control purposes.

Safe Space Pilot

Together with SACRO, in October 2024 Clackmannanshire Council's Housing and Justice Services have initiated a two-year, multi-agency 'Safe Space' pilot programme intended to offer early intervention support for women fleeing domestic abuse. The programme aims to increase emphasis on creating housing-focused outcomes for victims.

Safe Space will adopt a person-centred approach which focuses on the needs and preferences of domestic abuse survivors in order to help them achieve secure and sustainable housing outcomes. This includes supporting women to remain in their homes where it is appropriate and where women have expressed their wish to do so. However, if survivors of domestic abuse prefer to move or where it is imperative for their safety, Safe Space worker will work with relevant partner agencies and organisations to support women through the journey until suitable permanent home is found.

Students

According to the Scottish Census 2022, there were a total of 2,304 students aged 16 and over living in Clackmannanshire. The population of students has reduced by 4% or 88 students when compared to the 2011 Census.

As table 5.69 illustrates, the vast majority of students in Clackmannanshire in 2011 lived with their parents, with only 45 or 2% of all students living in student accommodation.

Table 5.69 Full-time students by student accommodation type 2011

Living with parents	1,776
Living in a communal establishment: Total	57
Living in a communal establishment: Educational establishments	45
Living in a communal establishment: Other	12
Living in all student household	45
Student living alone	97
Other household type	420
All full-time students aged 16 and over	**2,392**

Source: Scottish Census 2011

Table 5.70 Distance travelled to place of study by study address 2022

Distance travelled	16 - 17	18+	All students	% of All students
Mainly study from home	152	467	619	29%
Less than 2 km	261	76	337	16%
2km less than 5km	321	61	382	18%
5km to less than 10km	123	169	292	13%
10km to less than 20 km	75	162	237	11%
20km and over	26	263	289	13%
Other - No fixed place of study or studying outside the UK	2	12	14	1%

Source: Scottish Census 2022

According to the 2022 Census as seen in table 5.70 above, 62% of the students in Clackmannanshire reported travelling less than 5km and 75% of all students travelling less than 10km to their study of place from their term-time address.

Clackmannanshire is home to the Forth Valley College's Alloa campus. As table 5.71 below shows, from 2020/21 to 2022/23, the majority of students who have enrolled and attended studies at the Alloa campus came from Clackmannanshire as well as the neighbouring local authorities of Stirling, Falkirk and Fife. In 2022/23 academic year, 57% of the students attending courses at the Alloa campus indicated Clackmannanshire as the area of their permanent domicile. Combining the figures to include students from Stirling and Falkirk, 94% of all students lived in the Forth Valley area in 2022/23.

It is worth noting that both Stirling and Falkirk have their own Forth Valley College campuses, which may suggest that Forth Valley College students travel to and from different campuses across the Forth Valley area.

Table 5.71 Enrolments on courses at Forth Valley College Alloa campus by academic year and Council area of permanent domicile

Local Authority	2020-21	2021-22	2022-23
Clackmannanshire	530	560	545
Stirling	170	140	190
Falkirk	240	205	170
Fife	35	45	25
Perth and Kinross	0	10	10
City of Edinburgh	5	15	5
East Dunbartonshire	0	10	5
North Lanarkshire	10	15	5
West Lothian	15	15	5
Aberdeen City	0	5	0
Glasgow City	10	10	0
Midlothian	0	5	0
South Lanarkshire	5	5	0
Total	**1020**	**1040**	**960**

Source: Scottish Funding Council. Further Education Statistics September 2024. Numbers are rounded for disclosure control purposes

As of October 2024 (table 5.72 below), there were a total of 553 students enrolled and attending classes within the Alloa branch in the 2024/25 academic year, with the number predicted to increase as the term progresses. Discussions with the College have revealed that the vast majority of students are living at their home address within Clackmannanshire, with only handful of students indicating that their term-time address is different from their home address, albeit being located in the same area.

Table 5.72 Forth Valley College – Alloa Campus Enrolments as of October 2024

Mode of Attendance	Enrolments
Full Time	309
Part Time	230
Distance Learning	14
Total	**553**

Source: Forth Valley College Information System October 2024

Historic census data on student accommodation trends, the short distances travelled to the study of place, and the majority of students living at their home address within Forth Valley Area during the term-time all indicate that there is sufficient housing for students within Clackmannanshire. Term-time, non-permanent student accommodation is not required at this point in time. This may change in the future, especially with the large student population associated with Stirling University within the neighbouring local authority of Stirling.

Asylum Seekers and Refugees

As part of the Home Office supported resettlement programmes, Clackmannanshire has hosted and provided accommodation for people and households fleeing from regions of conflict and instability.

In accordance with the UK resettlement schemes, in 2015 as amended in 2019 and 2021, Clackmannanshire Council approved Syrian and Afghanistan Resettlement Schemes to cover current and future UK resettlement programmes up to 31st March 2027, and to welcome, support and house a total of 48 families from areas of conflict.

Historically, Clackmannanshire Council has supported and housed 24 Syrian Households under the Vulnerable Persons Resettlement Scheme, 1 Iraqi household via UK Refugee Resettlement Scheme and 2 families through the Afghan Relocations and Assistance Policy. Upon arrival to Clackmannanshire, these households were immediately placed to permanent Council accommodation and received support by the Housing Support team.

As of October 2024, 3 families resettled through aforementioned schemes were provided with the required support.

Homes for Ukraine and Super Sponsor Schemes

Following the war in Ukraine in 2022, a resettlement scheme was launched supported by the Home Office which allows households in the UK who have undergone a veto process to 'sponsor' and provide accommodation for displaced Ukrainian households.

From February 2022 as part of the resettlement scheme, 41 households or 82 people in total have been provided with accommodation in Clackmannanshire. As of October 2024, out of the 41 households, 11 families have moved out of Clackmannanshire and 30 households still remain in in the area, comprising a total of 61 individuals.

Out of the 30 families, 7 families are still living with their sponsor hosts. Other 6 households have moved on to live in a secure tenancy provided by Clackmannanshire Council, 4 households live in accommodation provided by Registered Social Landlords, 6 households live in other rented accommodation, including the private sector. There are 7 households living in temporary accommodation.

Table 5.73 Number of Ukrainian households who presented as homeless and outcomes of applications as of October 2024

Number of homeless applications	18
Of those:	
Rehoused in Council/RSL tenancy	9
In temporary accommodation	6
Open application but not in temporary accommodation	*
Returned to Ukraine	*

Source: Clackmannanshire Council Information System October 2024

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Due to the nature of the resettlement scheme which relies on sponsor households hosting and housing displaced Ukrainian families, there is a possibility of host-hostee relationship breakdowns. Since the start of the resettlement scheme, there have been a total of 18 Ukrainian households who have presented as homeless. Clackmannanshire Council employs the same process for the application and assessment for Ukrainian households as for other households applying as homeless across Clackmannanshire and as such, same outcomes can be expected for both displaced Ukrainian and non-Ukrainian households which present as homeless.

All in all, due to the nature of displaced individuals fleeing war and other instabilities, it is difficult to anticipate and determine the future need for housing for this client group. However, the Council will continue to support displaced persons in line with the policies and practices issued by the Home Office and the Scottish Government.

Gaps and shortfalls in need and provision

Evidence and discussions carried out suggest that there is fundamental mismatch between the demand and supply of temporary accommodation to meet the needs of homeless households, and a noted lack of effective outreach support to assist individuals with multiple and/or complex needs. Furthermore, discussions with the Criminal Justice Social Work have shown that there is a need for purpose-built temporary accommodation for prison leavers.

Evidence from Women’s Aid also shows that whilst shelters for women fleeing domestic abuse are rarely used to full capacity, other services to support victims of domestic abuse have seen high level of repeat cases and repeat support provided.

Historically, temporary accommodation aimed at housing homeless households has been found to keep reaching full capacity. In 2023/24, there were more households entering than exiting temporary accommodation placements with 291 entering and 265 exiting temporary placements in 2023/24. Research also shows that at the end of the financial year in 2023/24 there were 345 live homelessness cases and 141 households in temporary accommodation, compared to 193 live homelessness cases and 108 households in 2019/20.

Furthermore, there has been an increase in the use of unsuitable accommodation and the number of breaches of unsuitable accommodation order with 110 breaches recorded in 2023/24, further implying an unmet demand of temporary accommodation units across Clackmannanshire.

Nonetheless, in light of the pressures to meet the temporary housing demands of homeless households, there are concerted efforts to reduce the length of stay within homeless accommodation, with an average of 159 days spent in temporary accommodation across Clackmannanshire, compared to 226 days across Scotland.

Future requirements

It is difficult to estimate the future demand of households reaching crisis stage and requiring temporary accommodation to meet their immediate housing needs. Nonetheless, the data has shown a continuous increase in the number of homeless presentations from 2019/20 to 2023/24 with 616 presentations in 2023/24. It may be assumed then that the number of homeless presentations and subsequent temporary accommodation placements will continue to increase in the upcoming years. Given the increase in the number of breaches of Unsuitable Accommodation Order and taking into account the number of households in temporary accommodation in 2023/24, over 141 temporary accommodation units will be required going forward.

Furthermore, there is a need to consider the needs of households with multiple and complex needs who may struggle to sustain their accommodation and who cycle in-and-out of temporary placements. Work is currently being undertaken by Clackmannanshire & Stirling HSCP to address the gap in the provision of services and explore effective outreach programmes which would enable more effective sustainment of tenancies.

To align with Clackmannanshire Council's The Promise Plan, services across the Council aim to ensure that young people at the point of leaving care are not placed in temporary accommodation, and are instead offered appropriate permanent housing with the relevant support to promote independent living and tenancy sustainment. Going forward, it is necessary that the temporary accommodation route is effectively avoided for all care leaver households by effective collaboration between all responsible Council services.

External stakeholder consultation and engagement

Together with the stakeholder involved in consultation event as noted by appendix x, in developing this section, the following external stakeholders were consulted:

- Clackmannanshire Women's Aid;
- Forth Valley College;
- Clackmannanshire Criminal Justice Service Social work.

Information on the satisfaction of temporary accommodation was taken in consideration following temporary accommodation exit survey.

Overall, the consultations have revealed that the current homeless prevention system does not meet the needs of individuals with complex needs who repeatedly present as homelessness, and there is a further need to consider interim 'middle ground; accommodation to meet the needs of individuals who find it difficult to sustain permanent tenancies.

4. Supported Provision

National Policies

- Care Homes for Adults – The Design Guide, Care Inspectorate (2021)
- Coming Home Implementation Report, Scottish Government (2022)
- My Health – My Care – My Home. Healthcare Framework for Adults Living in Care Homes (2022)
- Learning/Intellectual Disability and Autism Towards Transformation, Scottish Government (2021)
- Regulation of Care (Scotland) Act 2001

Local Policies and Strategies

- Clackmannanshire and Stirling Autism Strategy 2015-2025

Property Needs

Supported provision encompasses a range of housing options to address the specific needs of different client groups. In Clackmannanshire this consist of care homes, sheltered housing and very sheltered housing. Both at national and local levels, there has been a policy shift away from the reliance and use of care homes to the provision of supported housing that is based within the community.

Care and Support Needs

Appropriate care and support which caters to the individual clients' needs are imperative to the provision of supported accommodation. Care and support will be tied to the property and may be provided on-site by health care and/or social work professionals such as key workers, wardens, nurses, social workers, care assistants or third sector and community partner support workers.

Client Groups (Suitable For)

Supported provision is suitable for individuals who can live independently for the most part but require varying degrees of support which is linked to the property. Clients may include older people as well as disabled people, including those with learning and/or physical disabilities. While homeless households and people fleeing domestic abuse may also benefit from supported provision, housing for these client groups is covered and explored within the previous section 'non-permanent housing'.

Learning Disabilities

Table 5.74 Adults with learning disabilities in 2019

	Total	Adults per 1,000 population
Clackmannanshire	272	6.4
Scotland	23,584	5.2

Source: Learning Disability Statistics Scotland 2019

As of 2019, there were 272 adults living in Clackmannanshire with learning disabilities. This represents a rate of 6.4 adults per 1,000 population and is higher than the Scottish average rate of 5.2 adults with learning disabilities per 1,000 population.

Table 5.75 below shows that out of 272 adults, 60 have an additional autism diagnosis. This represents 22.10% of all people with a learning disability.

Table 5.75 Adults with learning disabilities who are also have autism spectrum diagnosis in 2019

	Total	AS diagnosis as % of all adults with learning disability
Clackmannanshire	60	22.10%
Scotland	4,383	18.60%

Source: Learning Disability Statistics Scotland 2019

Table 5.76 Accommodation type for adults with learning disabilities in 2019

	Mainstream Accommodation	Supported Accommodation	Registered Adult Care Homes	Other	Not known	All Adults
Clackmannanshire	181	23	28	18	22	272
Scotland	14,584	3,466	1,837	921	2776	23,584

Source: Learning Disability Statistics Scotland 2019

Table 5.76 shows accommodation type for adults with learning disabilities. In Clackmannanshire, the vast majority of adults (67%) live in mainstream accommodation (67%), 10% live in a care home and 8% live in supported accommodation. Compared to local figures, only 61% of adults with learning disabilities live in mainstream accommodation, 15% in supported accommodation and 8% in care homes.

As table 5.77 below presents, 56.3% or 153 adults with learning disabilities live with a family carer. This may imply that while majority of individuals with learning disabilities live in mainstream housing, they require some form of assistance with daily living arrangements.
Further information would be beneficial to explore the extent to which support is required, and whether their needs are addressed, and how independent are their living circumstances.

Table 5.77 Adults with learning disabilities who live with a family carer in 2019

Area	Adults who live with a family carer	Adults who do not live with a family carer	Not known	Lives with family carer as % of all adults
Clackmannanshire	153	115	4	56.3%
Scotland	7,393	10,175	6,016	31.3%

Source: Learning Disability Statistics Scotland 2019

Delayed Discharges

A delayed hospital discharge occurs where a patient who is ready for discharge from inpatient hospital care continues to occupy a hospital bed beyond the date they are ready for discharge. Delayed discharges may occur for multiple reasons, often reflecting specific demands and unmet needs of clients. Data from Public Health Scotland (table 5.78) indicates that, in Clackmannanshire, the most common causes are waiting for the availability of a suitable placement upon discharge or for the completion of appropriate care arrangements.

Table 5.78 Average number of delays at monthly census point by reason for delay

Delay Reason	2021/22		2022/23		2023/24	
	Scotland	Clacks	Scotland	Clacks	Scotland	Clacks
All Standard Delay Reasons	1,062	10	1,314	6	1,325	8
Assessment	171	1	244	1	258	2
Awaiting place availability	331	3	426	3	473	4
Awaiting completion of care arrangements	520	7	601	2	543	2
Other	40	-	44	-	50	-
All Complex Reasons	436	3	495	6	507	5
All Delay Reasons	**1,497**	**13**	**1,810**	**12**	**1,832**	**13**

Source: Public Health Scotland 2024. Delayed discharges in NHSScotland. Annual Summary by Local Authority of Residence

Table 5.79 Hospital discharges for 18+ age group by financial year

	2021/22		2022/23		2023/24	
	Scotland	Clacks	Scotland	Clacks	Scotland	Clacks
Total number of delayed discharges to home or placement	17,184	182	18,157	154	17,834	111
Total number of discharges from hospital	552,056	5,756	543,174	5,855	571,934	6,204
Proportion of all hospital discharges delayed prior to discharge	3%	3%	3%	3%	3%	2%

Source: Public Health Scotland 2024. Delayed discharges in NHSScotland. Annual Summary by Local Authority of Residence

Table 5.79 shows that from 2021/22 to 2023/24 Clackmannanshire saw a continuous reduction in delayed discharges compared to the overall number of hospital discharges, which in itself continued to increase. In 2021/22, delayed discharges represented 3% of all hospital discharges, compared to 2% in 2023/24.

Table 5.80 Delayed discharge occupied bed days (all delay reasons) by specialty

	2021/22	2022/23	2023/24
Delayed bed days attributed to mental health specialties	1,248	987	1,577
Delayed bed days attributed to other specialties (not including mental health)	3,784	3,996	2,999
% of delayed bed days attributed to mental health specialties	**25%**	**20%**	**34%**
% of delayed bed days attributed to other specialties (not including mental health)	**75%**	**80%**	**66%**

Source: Public Health Scotland 2024. Delayed discharges in NHSScotland. Annual Summary by Local Authority of Residence

Table 5.80 presents that in 2023/24, 66% of all delayed discharge bed days were linked to other, non-mental health specialist, totalling 2,999 days. Throughout the 3-year period, delayed discharge saw an increase from 25% in 2021/22 to 34% increase in 2023/24.

As table 5.81 below presents, throughout the 3 financial years, the average length of stay in the hospital prior to delay has been constant both across Scotland and Clackmannanshire, albeit stays in Clackmannanshire were significantly longer than across Scotland. In comparison, average length of delay was similar both in Scotland and Clackmannanshire. Across Clackmannanshire, this was 11 days in 2021/22, reducing to 7 days in 2023/24.

Table 5.81 Average (median) length of stay and length of delay (days) by financial year

	2021/22		2022/23		2023/24	
	Scotland	Clacks	Scotland	Clacks	Scotland	Clacks
Average length of delay at point of discharge	9	11	11	11	10	7
Average length of stay prior to delay at point of discharge	22	37	27	40	25	37

Source: Public Health Scotland 2024. Delayed discharges in NHSScotland. Annual Summary by Local Authority of Residence

Evidence

Evidence will examine the provision for each of the property types available in Clackmannanshire.

Care Homes

Table 5.82 below presents the number of care homes and registered places within care homes across Clackmannanshire and Scotland from 2019 to 2023. In Clackmannanshire, the figure for care homes has remained relatively stable with one care home for clients with learning disabilities deregistered in 2022. Nationally, over the same time period, there has been a 19% reduction in the number of care homes.

Table 5.82 Number of cares homes and registered places by area

	Year at 31 March					
	2019	**2020***	**2021**	**2022**	**2023**	**% Change over 5 years**
Clackmannanshire care homes	11	n/a	11	10	10	-9%
Clackmannanshire registered places	389	n/a	386	378	376	-3%
Scotland care homes	1,102	n/a	1,068	1,051	1,037	-19%
Scotland registered places	41,032	n/a	40,609	40,579	40,502	-1%

*Source: Public Health Scotland 2023. Care home census for adults in Scotland. *Census was not carried out due to COVID-19 pandemic*

2019 to 2023 saw a steady year-on-year reduction of registered places both across Clackmannanshire and Scotland in general. In Clackmannanshire, there was a 3% decrease over the 5-year span, compared to 1% decrease nationally.

As seen in the table 5.83 below, in 2023, the majority of care homes were run by private service providers, followed by 2 public care homes and 2 care homes run by voluntary or third sector providers. 6 of the care homes were dedicated to older people, 2 to clients with additional mental health needs, 1 to clients with learning disabilities and 1 to clients with physical and sensory impairments.

Table 5.83 Number of care homes by client group and service provider in Clackmannanshire as at 31 March 2023

Client Group	Private	Public	Voluntary
Older People	4	2	0
Learning Disabilities	0	0	1
Mental Health	1	0	1
Physical and Sensory Impairment	1	0	0
Total	**6**	**2**	**2**

Source: Public Health Scotland 2023. Care home census for adults in Scotland

Table 5.84 shows that from 2019 to 2023, the majority of registered places were delivered by private service providers. The voluntary sector was the only provider to see a year-on-year reduction of registered places, with an overall 22% decrease throughout the 5-year period.

Table 5.84 Number of registered places by service provider in Clackmannanshire

	Year at 31 March				
	2019	**2020***	**2021**	**2022**	**2023**
Public	52	n/a	52	52	52
Private	280	n/a	280	280	280
Voluntary	57	n/a	54	46	44

*Source: Public Health Scotland 2023. Care home census for adults in Scotland. *Census was not carried out due to COVID-19 pandemic*

Table 5.85 Number of registered places by client group in Clackmannanshire as at 31 March 2023

	Older People	**Learning Disabilities**	**Mental Health**	**Physical and Sensory Impairment**
Number of clients	282	30	27	37

Source: Public Health Scotland 2023. Care home census for adults in Scotland

In 2023, the vast majority of registered places (75%) were located within care homes for older people, followed by 10% for clients with physical and sensory impairments, 8% for clients with learning disabilities, and 7% of clients with mental health needs.

Table 5.86 Number of residents by resident type in Clackmannanshire

	2019	**2020***	**2021**	**2022**	**2023****	**% Change over 5 years**
Long stay residents	343	n/a	293	294	n/a	n/a
Short stay and respite residents	17	n/a	9	20	n/a	n/a
Total number of residents	360	n/a	302	314	294	-22.4%

*Source: Public Health Scotland 2023. Care home census for adults in Scotland. *Census was not carried out due to COVID-19 pandemic.*
***Data not available due to incomplete data returns*

From 2019 to 2023 there has been a 22.4% reduction in the number of residents within care homes across Clackmannanshire. In 2022, 94% of the residents were long stay residents.

Table 5.87 below shows that throughout 5 years, the average age of residents has decreased slightly both across Clackmannanshire and nationally, albeit Clackmannanshire saw wider year-on-year fluctuation in the age of the residents. Compared to national figures, care homes residents in Clackmannanshire tend to be much younger.

Table 5.87 Average age of care home residents by area

Area	Year at 31 March				
	2019	**2020***	**2021**	**2022**	**2023**
Clackmannanshire	78	n/a	74	70	76
Scotland	82	n/a	81	81	81

Source: Public Health Scotland 2023. Care home census for adults in Scotland

Table 5.88 Care home % occupancy rates in Clackmannanshire

Client group	Year at 31 March					
	2019	2020*	2021	2022	2023	% Change over 5 years
Learning Disabilities	72%	n/a	85%	84%	90%	18%
Mental Health Problems	96%	n/a	85%	93%	93%	-3%
Older People	94%	n/a	78%	83%	77%	-17%
Physical and Sensory Impairment	100%	n/a	70%	73%	65%	-35%
All Adults	93%	n/a	78%	83%	78%	-15%

*Source: Public Health Scotland 2023. Care home census for adults in Scotland. *Census was not carried out due to COVID-19 pandemic*

Over the 5 years, care home occupancy rates for all client groups have decreased by 15%. The largest reduction (35%) was seen in care homes for adults with physical and sensory impairments. Care home occupancy rate for clients with learning disabilities saw the only increase, with 18% growth over the 5 years. The increase in occupancy may be a result of the decreasing rate of registered places as well as a reduction in the number of care homes for adults with learning disabilities.

Sheltered Housing and Very Sheltered Housing

As table 5.11 indicates, there were 973 self-contained specialist housing units supplied by social landlords across Clackmannanshire in 2023/24.

For the purposes of supported provision, specialist accommodation in Clackmannanshire includes sheltered, sometimes regarded as ‘retirement housing’ and very sheltered housing units, sometimes referred to as ‘housing with care’. Sheltered provision usually includes properties with secure door entry, communal lounge area and on-site warden and/or an emergency call services. Very sheltered housing may offer the same services as sheltered housing, but with higher degree of on-site care and support as well as additional services such as meal services.

In Clackmannanshire sheltered and very sheltered housing is offered and provided by registered social landlords with developments found in Alloa, Alva, Tillicoultry and Tullibody. Table 5.89 below shows that in 2023/24 there were a total of 183 sheltered and very sheltered housing units, accounting for 19% of all self-contained specialist housing provision in Clackmannanshire. In addition, there were 2 very sheltered non-self-contained HMO units, consisting of a total of 10 bedspaces.

Table 5.89 Sheltered/Very Sheltered housing stock by social landlord in Clackmannanshire 2023/24

Landlord	Retirement/Sheltered	Housing with Care/Very sheltered	Very sheltered (non self-contained)
Ark Housing Association Ltd	0	0	2
Hanover (Scotland) Housing Association Ltd	84	0	0
Trust Housing Association Ltd	61*	38	0
Total	**145**	**38**	**2**

*Source: Scottish Housing Regulator 2024. *According to SHR data, the units are classified as amenity housing, but locally they are known as retirement housing units and as such are counted towards sheltered accommodation.*

As noted in table 5.90, as of September 2024, there were a total of 146 applicants waiting for retirement/sheltered housing properties and 2 applicants on Trust HA application list waiting for very sheltered accommodation.

Table 5.90 Number of applicants for self-contained sheltered/very sheltered housing as of September 2024

Landlord	Retirement/Sheltered	Housing with Care/Very sheltered
Hanover Housing Association	105	*
Trust Housing Association	41	*
Total	**146**	**2**

Source: Registered Social Landlord Information Systems September 2024. Some numbers are omitted for disclosure control purposes.

Table 5.91 Turnover of self-contained sheltered/very sheltered housing by landlord 2023/24

Landlord	Retirement/Sheltered	Housing with Care/Very Sheltered
Trust Housing Association	7	6
Hanover Housing Association	13	0

Source: Registered Social Landlord Information Systems 2024

Table 5.91 shows that in 2023/24 financial year, there was a turnover of 20 sheltered accommodation units and 6 very sheltered accommodation units.
The information suggests that the demand for very sheltered/'housing with care' accommodation is being appropriately met at this point in time, with a low number of applicants, compared to the number of available properties and turnover rate. In comparison, sheltered housing is a more popular choice of accommodation, with the turnover rate unable to keep up with the demand as noted by the large number of applicants on the waiting list.

Other Housing Models

Currently, there is no supported provision across Clackmannanshire beyond very sheltered housing and there are no supported accommodation units for clients with complex and/or additional needs.

Research shows that there is no "one size fits all" approach to specialist housing which can fulfil all requirements for client groups living independently, including older people and people with additional/complex needs.[10] However, evidence suggests that the Housing with Care model offers greater care and independence to clients as well as provides value for money to the public. It can also facilitate cost savings as well as reduce the pressure on the health and social care sector by delivering support and intervention on-site and thus reducing the risk of hospitalisation, promoting the use of primary care services, and where hospitalisation does occur – supporting timely and effective discharge from hospitals.[11]

There are a number of different innovative and alternative supported provision types which provide person-centred care and enable people to live independently for as long possible and stay at home within the community, as opposed to within a clinical care setting.

This includes a 'Step Up, Step Down' housing which offers interim housing with care for people who cannot remain at home due to their care and support needs. Interim housing helps to prevent unplanned admissions to hospitals and supports timely discharge before the person can return to their own home.

'Core and Cluster' housing model provides a number of self-contained properties which are located or 'clustered' together, and a 'core' community building at the centre with the necessary staff facilities. The 'core' may contain a number of health and wellbeing services which can offer community-based activities, and which can be made available to wider community groups and businesses.[12]

Extra Care Housing model does not have a universal definition but may be described as one step above very sheltered housing.[13] The accommodation is self-contained, with higher degrees of on-site tenancy and housing support and flexible personal care.

Utilising affordable extra care housing model, Health and Social Care Moray piloted a new nursing model for older people with complex needs. [14] HSC Moray delivered reablement-based inpatient care which was used to support recovery and reduce the risk of hospitalisation of the clients cared in the apartments. The evaluation of the service model has shown that it can provide a better client and carer experience, better experience for staff as well as benefits to the health and care system. Early pilot results show a reduction in the number of hospital admissions as well as the reduction in the length of hospital stays.[15]

Gaps and shortfalls in need and provision

Waiting list and turnover data for sheltered and very sheltered housing suggests that the demand for sheltered accommodation exceeds the current availability of stock, with 146 housing applicants waiting for retirement/sheltered housing as of September 2024 compared to a turnover 20 retirement/sheltered units in 2023/24.

[10] Housing Scotland: Models of housing with care and support. SFHA 2020
[11] Ibid
[12] Housing With Care and Support Strategy 2020-2023. Dumfries and Galloway Integration Joint Board
[13] Models of Care (Housing) for Older People Living Independently in the Community – A Literature Review. NHS Highland Public Health 2018
[14] Evaluation of a new service model. Forres Neighbourhood Care Team, Health and Social Care Moray. The Evidence and Evaluation for Improvement team (EEvIT). Healthcare Improvement Scotland 2019
[15] Ibid

Furthermore, discussions with client groups have revealed the desire to remain in the community for as long as possible. To enable this, there is a need for alternative housing models, such as 'halfway' homes to meet the intermediate needs of the ageing population, and bridge the gap between independent living and a requirement for more intensive care. Sheltered housing was widely acknowledged and valued for supporting independent living, but clients felt that Clackmannanshire lacked sufficient sheltered housing as well as other alternative models of housing to meet the needs of older people.

Consultations with partner stakeholder from the HSCP have also highlighted a significant gap in the provision of specialist housing, particularly for clients with learning disabilities. This has been evidenced by significant delayed hospital discharges and out-of-area hospital placements due to multiple and complex needs of individuals.

Future requirements

There has been a policy shift at both national and local levels which aims to promote care within the community rather than the provision care home-based support. This has been reflected by the decreasing number of care home residents and occupancy rates, with a 78% occupancy rate in 2023. In addition, Clackmannanshire & Stirling HSCP stakeholders have noted that there is no particular need for future care home places, rather the focus should be on offering more community-based support and consider the provision of alternative housing models to meet the needs of individuals with multiple and complex needs. This includes considerations for 'core and cluster' model of care or bespoke housing 'villages'. However, work needs to be undertaken to quantity the number of individuals who would be benefiting from the provision of bespoke housing solution as well as establish a clear pathway for funding to do so.

Likewise, client groups have noted a need for more sheltered housing accommodation to meet the needs of older and disabled individuals, in light of the policy decisions aimed at promoting independent living.

External stakeholder consultation and engagement

Full consultation findings can be found in appendix 1. Following stakeholder groups were consulted with:

- Alzheimer's Scotland
- Clackmannanshire & Stirling HSCP
- Local RSLs
- NHS Forth Valley
- Older Adults' Forum Clackmannanshire

5. Care and Support Services for Independent Living at Home

National Policies

- Carers (Scotland) Act 2016
- Community Care and Health (Scotland) Act 2002
- Community Care (Personal Care and Nursing Care) (Scotland) Amendment Regulations 2019
- Creating Hope Together. Scotland's Suicide Prevention Strategy 2022-2032
- National Cares Strategy, Scottish Government (2022)
- Scotland Care (Self-directed Support) (Scotland) Act 2013

Local Policies and Strategies

- Clackmannanshire Council's Housing Contribution Statement 2016-2019
- Clackmannanshire and Stirling Health and Social Care Partnership Carer Strategy 2019-2022
- Clackmannanshire and Stirling Health and Social Care Partnership Short Breaks Services Statement

Care and Support Needs

There are various care and support services available to meet service users' needs, including telecare, care at home services, carers, including unpaid carers, social workers, community alarm as well as aids and equipment.

Client Groups (Suitable For)

Care and support services are suitable for people who are living at home, but require additional assistance, support or care services in order to continue to live independently. This may include people with physical disabilities, older people requiring assistance with disabilities associated with ageing, people with mental health problems, people with addictions and substance misuse issues.

Dementia

The new dementia strategy for Scotland: Everyone's Story aims to create an environment that enables people with dementia to live their best lives by providing people with dementia as well as their care partners/unpaid carers with quality care and support. People with dementia should be empowered to remain in their own homes as for as long they want to by receiving the right care at home which meets their needs and wishes.

A report published by the Scottish Government in 2016[16] estimated that there would be a year-on-year increase of individuals diagnosed with Alzheimer's and other dementias from 2017 to

[16] Scottish Government. Estimated and Projected Diagnosis Rates for Dementia in Scotland

2020. In 2016, this figure stood at 955 individuals diagnosed with dementia in Forth Valley area, rising to 1,087 individuals in 2020.
Alzheimer Scotland estimates that there are around 90,000 people living with dementia in Scotland. The research carried out by the organisation estimates that in 2017 there were 837 individuals in total (300 males and 537 females) living with dementia in Clackmannanshire.[17]

Table 5.92 Alzheimer's disease and other dementias deaths

Area	2019	2020	2021	2022	2023
Clackmannanshire	60	64	67	69	66
Scotland	6,421	6,352	6,046	6,277	6,491

Source: National Records of Scotland 2023

Over 5 years from 2019 to 2023, Clackmannanshire saw 326 dementia deaths. This equates to the highest rate of dementia deaths in Scotland with 150.8 deaths per 100,000 population, compared to 123.5 deaths per 100,000 population in Scotland overall.

Table 5.93 Percentage of people referred for dementia post-diagnostic support who received a minimum of one year's support by integration authority area

	Clackmannanshire and Stirling No.	Clackmannanshire and Stirling %	Scotland No.	Scotland %
2018/19	138	77.1%	4,957	74.9%
2019/20	151	88.7%	5,048	81.1%
2020/21	143	90.2%	4,137	81.9%
2021/22	203	93.1%	5,534	78.7%
Change 2018/19 - 2021/22	**65**	**15.9%**	**577**	**3.8%**

Source: Public Health Scotland 2022. Dementia post-diagnostic support

Post-diagnostic support (PDS) service is available to everyone newly diagnosed with dementia for a minimum of one year. The service aims to provide person-centred and trauma-informed support to people with dementia and those who care for them and may cover practical housing-related issues as well as emotional support.

As table 5 presents, from 2018/19 to 2021/22 there has been a 15.9% increase in people newly diagnosed with dementia receiving PDS in Clackmannanshire and Stirling HSCP area, compared to 3.8% increase in Scotland overall. As of 2021/22, 93.1% of dementia patients received PDS in Clackmannanshire and Stirling, compared to only 78.7% nationally.

[17] Alzheimer Scotland. Statistics: Estimated number of people with dementia in Scotland 2017

Social Care Provision

Table 5.94 People Supported by Social Care Services

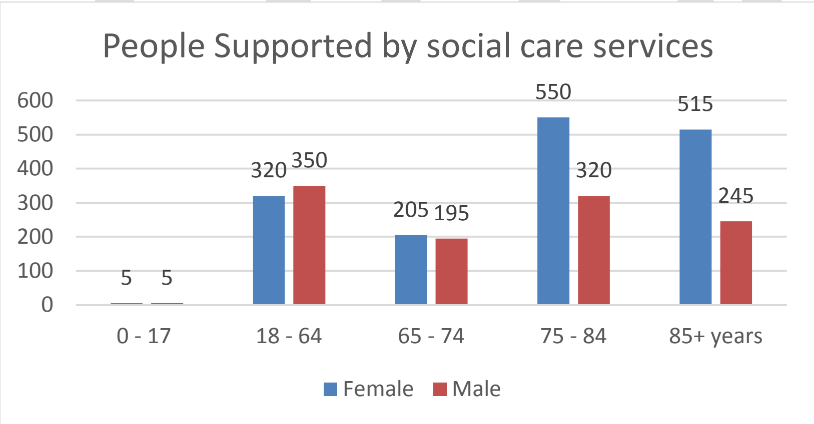
	Clackmannanshire	Clackmannanshire rate per 1,000	Scotland No.	Scotland rate per 1,000
2017/18	2770	53.8	230,115	42.4
2018/19	2640	51.4	246,200	45.3
2019/20	2650	51.4	237,840	43.5
2020/21	2790	54.4	232,855	42.6
2021/22	2710	52.6	237,940	43.4

Source: Public Health Scotland 2022. Insights in social care: statistics for Scotland

Table 5.94 shows that from 2017/18 to 2021/22, there has been a 2% decrease in the provision of social care services, compared to a 3% increase nationally.

Nonetheless, Clackmannanshire's population were significantly more likely to be receiving care services throughout the 5 years, with a rate of 52.6 individuals receiving care per 1,000 population, compared to the Scottish average of 43.4 individuals per 1,000 population in 2021/22.

Graph 5.9 People Supported by Social Care Services by age and sex in 2021/22



Source: Public Health Scotland 2022. Insights in social care: statistics for Scotland

As graph 5.9 shows, in 2021/22, there were more women than men receiving social care support. The vast majority of individuals receiving social care services were aged 65 and over with only 25% of social care recipients aged 64 and under. Taking into account Clackmannanshire's ageing population, the trend is likely to continue and the number of over 65-year-old clients is likely to increase.

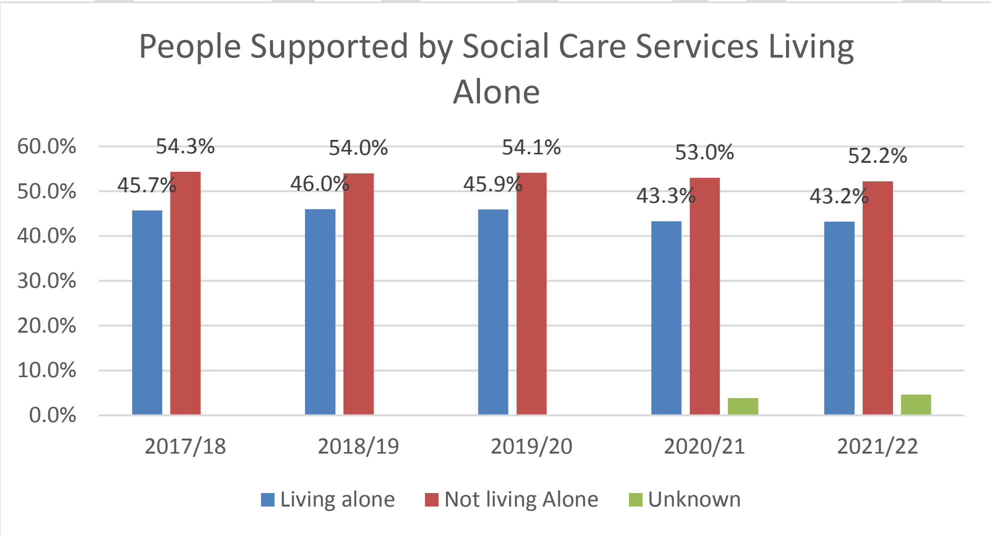
Table 5.95 People supported by social care services by client group in 2021/22

	Clackmannanshire	Clackmannanshire rate per 1,000	Scotland	Scotland rate per 1,000
Dementia	385	142.1	12,825	61.5
Elderly/Frail	935	345	93,330	447.4
Learning Disabilities	245	90.4	19,430	93.1
Mental Health	240	88.6	14,660	70.3
Physical and Sensory Disability	1815	669.7	70,805	339.4
Other	265	97.8	37,540	179.9
Not Recorded	5	1.8	25,470	122.1

Source: Public Health Scotland 2022. Insights in social care: statistics for Scotland

In Clackmannanshire, social care clients were most likely to receive support for physical and sensory disabilities, followed by support requirements associated with old age/frailty, and dementia. In comparison to the national figures, clients in Clackmannanshire were almost twice as likely to receive care associated with physical and sensory disabilities as well as dementia. However, Clackmannanshire saw fewer elderly/frail clients and clients with learning disabilities when comparing to national rates per 1,000 population.

Graph 5.10 % of People supported by social care services who live alone



Source: Public Health Scotland 2022. Insights in social care: statistics for Scotland

From 2017/18 to 2021/22, there has been a small decrease in a number of social care clients who live alone with 43.2% of clients living alone in 2021/22. The decrease should be noted against the national policy aimed at increasing independent living which allows people to stay at home as long as they can and want. Whilst living alone is not a direct marker of independent living, an increase of clients living with other people may be reflective of an increase on reliance of family members and other unpaid carers to support people with social care needs.

Self-directed Support

Self-directed support (SDS) was introduced by the Scottish Government in 2013 with the aim of allowing individuals eligible for social care support to make informed choices and plan on how they want to receive social care. SDS allows social care clients to be involved in the needs assessment process, along with the local authority carrying out the assessment.

Table 5.96 below shows that from 2017/18 to 2021/22, Clackmannanshire has consistently performed better in offering clients SDS. From 2020/21 onwards, all recorded social care client received social care services and/or support through SDS approach.

Table 5.96 Number and percentage of people that received social care services or support through self-directed support by financial year

	Clackmannanshire No.	Clackmannanshire %	Scotland No.	Scotland %
2017/18	2565	99.6%	93,900	77.1%
2018/19	2530	99.6%	102,905	81.3%
2019/20	2565	99.8%	99,245	81.5%
2020/21	2530	100.0%	105,785	85.2%
2021/22	2535	100.0%	108,745	88.5%

Source: Public Health Scotland 2022. Insights in social care: statistics for Scotland

Table 5.97 Provision of self-directed support by number of clients and option chosen

	2017/18	2018/19	2019/20	2020/21	2021/22
Option 1	50	40	40	35	40
Option 2	50	55	60	45	55
Option 3	2545	2510	2550	2510	2510
Option 4	75	75	80	55	60
Any SDS	2565	2530	2565	2530	2535

Source: Public Health Scotland 2022. Insights in social care: statistics for Scotland

There are 4 different self-directed support options available for clients with an assessed need:

- Option 1: Support is taken as a direct payment for the client to pay for their own support;
- Option 2: The client directs the available support;
- Option 3: The client chooses to allow the Council to arrange and determine their services;
- Option 4: The client chooses a mix of these options for different types of support.

As table 5.97 presents, over the 5 years, the majority of social care clients have consistently opted for the Council to arrange the support for them (option 3), followed by a mixture of options (option 4), directing own's support (option 2) and finally – receiving direct payments (option 1).

In 2021/22, the majority of SDS needs (table 5.98 below) were associated with the provision of equipment and temporary adaptations, personal care, meals, other types of support need and social, educational and recreational needs.

Table 5.98 Self-directed support clients by assessed support need (multiple categories allowed)

	2017/18	2018/19	2019/20	2020/21	2021/22	% Change over 5 years
Domestic Care	195	170	180	165	180	-8%
Equipment and Temporary Adaptations	1950	1990	2000	1970	1970	1%
Health Care	275	245	265	270	290	5%
Housing Support	10	175	185	170	185	1750%
Meals	1165	1090	1120	1115	1080	-7%
Personal Care	1405	1385	1465	1450	1410	0%
Respite	180	145	140	70	70	-61%
Social Educational Recreational	630	550	580	515	515	-18%
Other	630	550	580	525	535	-15%
Not Known	30	40	35	0	0	

Source: Public Health Scotland 2022. Insights in social care: statistics for Scotland

Care at Home and Personal Care

In comparison to the national figures, Clackmannanshire consistently supported more people with care at home services per 1,000 population throughout the 5-year period (table 5.99). In 2022/23, per capita, 15.6 individuals received care at home services in Clackmannanshire in contrast to the rate of 10.8 individuals in Scotland overall.

Table 5.99 Rate of number of people supported with care at home services per 1,000 population during census week (as at March)

	2018/19	2019/20	2020/21	2021/22	2022/23
Clackmannanshire	15.1	15.3	15.7	15.4	15.6
Scotland	11	10.8	10.9	10.6	10.8

Source: Public Health Scotland 2023. Insights in social care: statistics for Scotland

Table 5.100 Number of people supported with care at home services and number of care hours provided in Clackmannanshire

	2018/19	2019/20	2020/21	2021/22	2022/23	% Change over 5 years
Number of people	775	790	805	795	805	4%
Number of total hours	10,360	10,415	11,940	12,395	14,950	44%

Source: Public Health Scotland 2023. Insights in social care: statistics for Scotland

Table 5.100 shows that there has been a 4% increase in the number of people supported with care at home services and a 44% rise in the total of number of care hours provided from 2018/19 to 2022/23.

As table 5.101 below presents, the number of clients receiving over 10 hours of weekly care at home has increased by 27%, and the number of clients receiving fewer than 10 hours has decreased by 36%. This may imply that although the number of care at home clients has not drastically increased, clients have more social care requirements and/or more complex needs.

Table 5.101 Average weekly received care hours for people receiving care at home services

	2018/19	2019/20	2020/21	2021/22	2022/23	% Change over 5 years
0 - <2 hours	75	90	80	85	75	0%
2 - <4 hours	135	125	130	110	95	-30%
4- <10 hours	255	265	260	260	240	-6%
10+ hours	310	310	330	340	395	27%

Source: Public Health Scotland 2023. Insights in social care: statistics for Scotland

Table 5.102 Number and % of people aged 65+ with high care needs who are cared at home during financial year

	Clackmannanshire No.	Clackmannanshire %	Scotland No.	Scotland
2018/19	200	47.6%	16115	34.7%
2019/20	195	46.4%	16230	35.5%
2020/21	210	50.6%	16945	37.6%
2021/22	215	49.4%	16040	36.8%
2022/23	245	52.1%	16375	36.7%
Change over 5 years	45	4.5%	260	2%

Scottish Government 2023. Community Care Statistics

Table 5.102 reveals that there has been an increase in individuals with high care needs being cared at home with a 4.5% rise from 2018/19 to 2022/23. In Clackmannanshire, 52.1% of individuals with high care needs aged 65 and over were cared at home in 2022/23, whereas nationally this figure stood at 36.7%.

The abovementioned figures should be noted against the projected growth in ageing population and the associated rise in age-related care needs. With the policies in place to promote independent living at home, it is likely that the number of care at home clients will also rise. If one assumes that individual clients will have more needs or more complex needs, this is likely to have an impact on the effective delivery of care at home services and increased pressures on the social care staff to provide the said services.

Table 5.103 Number of people receiving care at home services by client group during census week

	2018/19	2019/20	2020/21	2021/22	2022/23	% Change over 5 years
Dementia	115	115	100	110	110	-4%
Elderly/Frail	340	310	275	250	220	-35%
Learning Disability	180	175	105	110	120	-33%
Mental Health	105	95	95	105	100	-5%
Physical/Sensory Disability	570	575	525	515	525	-8%
Other	90	95	75	85	90	0%

Source: Public Health Scotland 2023. Insights in social care: statistics for Scotland

As table 5.103 shows, from 2018/19 to 2022/23, the majority of the provided care at home services were associated with clients' physical and/or sensory disabilities, followed by old age/frailty, dementia and learning disabilities. Figures for the provision of care at home services by client group generally reflect the overall provision of social care services noted in table 5.95.

Before 2019, free personal care was available to individuals over the age of 65, however this has now been extended to all clients regardless of their age. Personal care includes support with daily personal living tasks and personal hygiene.

Table 5.104 Number of Care at Home clients receiving free personal care services and number of personal care hours received during the last week of the financial year

	Clackmannanshire clients no.	Clackmannanshire hours no.	Scotland clients no.	Scotland hours no.
2018/19	680	7800	58910	545600
2019/20	700	7900	57910	584000
2020/21	690	8300	59030	592900
2021/22	650	8600	55710	579200
2022/23	670	10500	57610	615400
% Change over 5 years	-1%	35%	-2%	13%

Source: Scottish Government 2023. Free Personal and Nursing Care

As table 5.104 illustrates, in Clackmannanshire there has been an overall 1% reduction in the number of care at home clients receiving personal care, yet the number of personal care hours received has risen by 35% from 2018/19 to 2022/23. By comparison, Scotland saw an overall 2% decrease in personal care clients, but a 13% increase in the number of care hours provided.

Table 5.105 Number of Care at Home clients receiving free personal care services and number of personal care hours received by age group in Clackmannanshire

	65+ yr clients no.	**65+ yr hours no.**	**18-64 yr clients no.**	**18-64 yr hours no.**
2018/19	570	5600	110	2200
2019/20	570	5500	130	2400
2020/21	550	5900	140	2400
2021/22	510	5700	140	2900
2022/23	500	6600	170	3900
% Change over 5 years	-12%	18%	55%	77%

Source: Scottish Government 2023. Free Personal and Nursing Care

Breaking down by age group, clients aged 65 and over comprised 84% of all free personal care recipients in 2018/19, decreasing to 75% in 2022/23. Over the 5-year period, there has been a 12% decrease in the number of clients over the age of 65 receiving free personal care, yet the number of personal care hours received has increased by 18%. In contrast, there has been a 55% rise in clients aged 18-64 receiving care, with a rise of 77% in personal care hours provided.

Aids and Equipment

Discussions with Clackmannanshire Equipment Service have informed that the majority of adult social care clients require some form of aids and equipment provided to them. Aids and equipment is provided on loan basis and following the assessment of need by Adult Care Services, aids and equipment can be delivered and/or installed between 1-5 days depending on the urgency of client need.

On average month, the service delivers between 200-250 individual pieces of equipment. Equipment can include toileting and specialist toileting equipment such as commodes, toilet frames and bio bidets, specialist shower chairs and bathing equipment such as bath lifts, bath boards, household equipment such as perching stools and walking trolleys, standard and specialist seating, stand aid and sensory equipment as well as hoists, stairlifts, slings and rails.
Taking SDS figures into account (table 5.98), there were around 1970 individuals supported with various aids and equipment across Clackmannanshire in 2021/22.

Unpaid Carers

In Scotland, there are more people caring full time for relatives or friends than there are staff working in either the NHS or in social care. [18] The Scottish Government estimates that unpaid care in Scotland is worth approximately £13.1 billion per year.[19] Unpaid carers play an invaluable and frequently undervalued role in the provision of health and social care, alleviating the heavy pressures within the official system, reducing the need for health and social care support, and allowing for cared-for persons to remain at home.

With increased life expectancy and rapidly ageing population, it is estimated that the demands and pressures on health and social care services will also grow, making the role and the

[18] National Carers Strategy 2022. Scottish Government
[19] National Care Service (Scotland) Bill (2022). Financial Memorandum

contribution that unpaid carers make to the health and social care services even more important.

The National Carers Strategy 2022-26 sets out a comprehensive set of actions to support and promote the rights of unpaid carers. Ultimately, the strategy aims to ensure that carers are recognised and valued for the contribution they make, and that they are enabled to provide effective support for the people they care, whilst leading full, varied and balanced lives.

Table 5.106 % of population who provide unpaid care in Clackmannanshire

Clackmannanshire	2011 No.	2011%	2022 No.	2022%	% Change 2011-2022
1 - 19 hours	2452	5.1%	3464	6.9%	1.8%
20 - 34 hours	443	0.9%	645	1.3%	0.4%
35 - 49 hours	412	0.8%	650	1.3%	0.5%
50+ hours	1386	2.9%	1638	3.2%	0.3%
Total Provision	4693	9.7%	6397	12.7%	3.0%

Source: Scottish Census 2011 & 2022

Census data demonstrates that from 2011 to 2022 there has been a 3% increase in the number of people who provide unpaid care in Clackmannanshire, with 6,397 individuals or 12.7% of overall population providing unpaid care in 2022. The majority of unpaid carers deliver 1 – 19 hours of support, followed by 1,638 unpaid carers or 3.2% of the total population who give over 50 hours of care.
In comparison to the national figures, Clackmannanshire has a slightly larger population of people providing unpaid care. The Scottish picture reveals (table 5.107 below) that there has been a 2.1% increase in unpaid carers from 2011 to 2022 with 11.9% of the Scottish population delivering unpaid care services.

Table 5.107 % of population who provide unpaid care in Scotland

Scotland	2011 No.	2011%	2022 No.	2022%	% Change 2011-2022
1 - 19 hours	273,333	5.5%	350,671	6.6%	1.1%
20 - 34 hours	46,315	0.9%	61,869	1.2%	0.3%
35 - 49 hours	40,501	0.8%	62,855	1.2%	0.4%
50+ hours	132,082	2.6%	152,324	2.9%	0.3%
Total Provision	273,333	9.8%	350,671	11.9%	2.1%

Source: Scottish Census 2011 & 2022

Table 5.108 Provision of unpaid care by sex

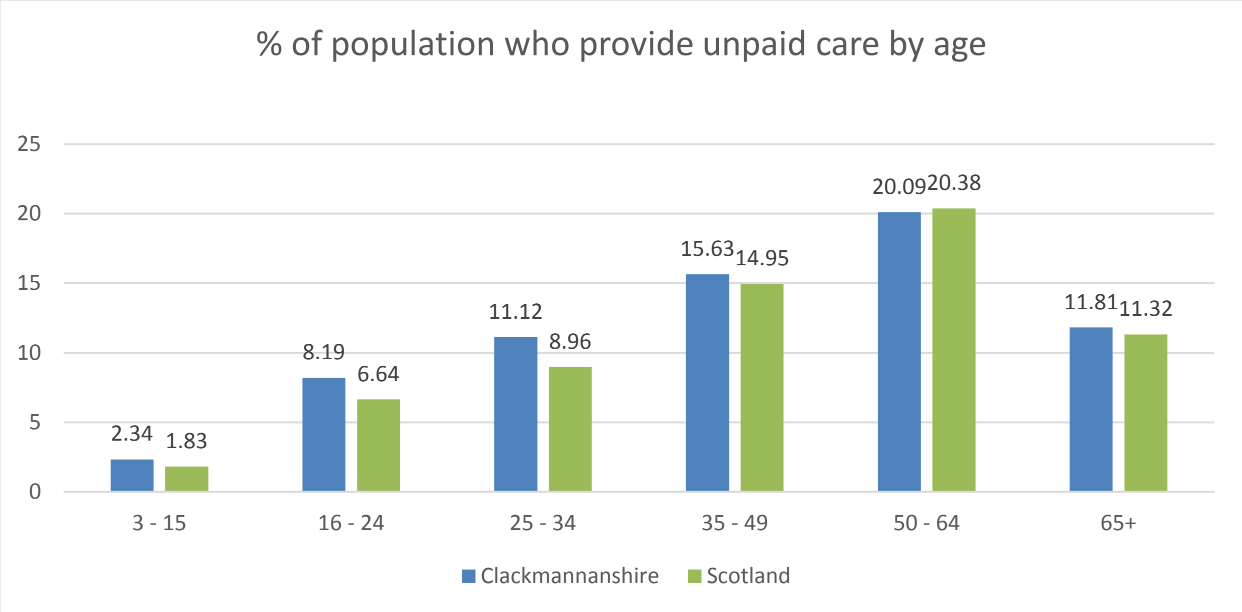
		2011 No.	2011%	2022 No.	2022%	% Change 2011-2022
Clackmannanshire	Female	2763	11%	3816	14.8%	3.8%
	Male	1930	8.2%	2581	10.4%	2.2%
Scotland	Female	291,623	11.3%	369,161	13.5%	2.2%
	Male	200,608	8.3%	258,554	10.1%	1.8%

Source: Scottish Census 2011 & 2022

Across both Clackmannanshire and Scotland, there are more unpaid carers who are female than male. Nonetheless, there has been increase in percentage of both male and female carers.

As of 2022, 14.8% of female population and 10.4% of male population provide unpaid care in Clackmannanshire.

Graph 5.11 % of population who provide unpaid care by age group in 2022



Source: Scottish Census 2022

Graph 5.11 shows that both in Clackmannanshire and in Scotland, the majority of unpaid carers fall into the 50 – 64 age band, followed by carers aged 25 – 34 and carers aged 65 and over. In Clackmannanshire, 20.1% of all people aged 50 – 64, 15.6% of people aged 35 – 49 and 11.8% of people aged over 65 were providing unpaid care in 2022. 10.5% of all individuals were either young adult carers or young carers, aged between 3 and 24.

It is important to note that 31.9% of all adults aged 50 and over provide some form of unpaid care. Against the backdrop of the ageing population, it is likely that alongside the increase in the number of older cared-for adults, so will the population of older unpaid carers will increase. In light of the projected increase in the demand of health and social care services, going forward it is pivotal that the needs of unpaid carers are adequately addressed, and that they are appropriately supported. That way, unpaid carers themselves can continue on providing quality care while potentially having to acknowledge and address their own age-related care needs.

Locally, the Clackmannanshire and Stirling Health and Social Care Partnership have developed a local Carer Strategy 2019 – 2022 and are currently in the process of developing a revised strategy. The strategy set out five priority areas with the key focus on recognising the contribution of carers, including carers in decision-making, supporting carers with the focus on their health and wellbeing as well as creating carer aware communities.

The Clackmannanshire and Stirling HSCP works together with local carers and carer centres to provide the needed assistance, from ensuring the vast array of universal services are known to carers and those they care for, commissioning carer support services, and setting out the levels of access to funding for additional support which depends on the level of individual need.

Across Clackmannanshire, unpaid carers are supported by a local Carers Centre. The Carers Centre supports Young Carers aged 8 – 18, Young Adult Carers aged 16 – 25 and Adult Carers aged 19 and over. Unpaid carers can register with the Centre to access a range of available services that can help them in their caring role. Assistance may include relevant advice and information, emotional support, carer support groups or peer groups, community-based short breaks and respite care, hospital-based carer support, training and employment services and access to Forth Valley Carers Card.

Discussions with the HSCP have revealed that the needs of unpaid carers are diverse and subsequently, there is no one-size-fits-all approach to assist carers or cared-for persons. It was highlighted that while there are numerous services available to assist carers in their roles, there is a lack of knowledge regarding these and/or how to access them.

As such, over the past few years the HSCP have focused on increasing the visibility of available help. Working together with partner organisations and unpaid carers, in May 2024 the HSCP developed an unpaid carer support pack, highlighting the available support to unpaid carers across the area.

It was also noted that many unpaid carers across Clackmannanshire may not self-identify as carers, often reaching out for support only at a crisis point. This reluctance to seek help limits their access to crucial advice, information, and support services that they may be entitled to. Consequently, it can be challenging to reach unpaid carers and to provide timely interventions tailored to their needs.

Clackmannanshire and Stirling HSCP have partnered with Mobilise – an organisation dedicated to providing free online support to unpaid carers. Using geotargeting, Mobilise produce digital campaigns applying preventative and early intervention approach to reach carers, offer the appropriate information and advice as well as practical and emotional carer support within a across Clackmannanshire and Stirling HSCP.

Mobilise aims to encourage unpaid carers to self-identify as such and offers mini self-assessments to identify owns' needs and access the relevant advice and support. In addition, the website can be used to access telephone support as well as connect with the community of other carers.

Furthermore, some carers in contact with the HSCP, and who live and care within Clackmannanshire, have indicated their concerns about inequitable provision of carer support across Clackmannanshire and Stirling. To address these concerns and accommodate the needs of carers, the HSCP have been working to increase the visibility and the availability of locally available in-person support, with the local Carers Centre being visible at community access points across Clackmannanshire, such as the Speirs Centre in Alloa, and Alva's Community Access Point within the library.

Additionally, evidence shows that the cost-of-living crisis has had a significant adverse impact on those providing unpaid care. Over a quarter of all carers are struggling to make ends meet, over 1 in 5 are struggling to afford the cost of food and heat their homes, and a third of carers are spending at least 20% of their income on energy.[20] To address and mitigate these impacts, Clackmannanshire and Stirling HSCP commissions the Unpaid Carer-specific project facilitated by Citizens Advice Bureau which focuses on welfare rights and income maximisation for unpaid carers.

[20] Carers Scotland. State of Caring in Scotland 2022. A cost-of-living crisis for unpaid carers in Scotland

Technology-enabled care

Technology-enabled care (TEC) can help people with care and support needs maintain their independence as well as reduce carer anxiety by alerting call centres and carers in a case of an emergency. TEC can include devices such as community alarms, monitoring systems (telecare) and key safes.

Table 5.109 (below). demonstrates that the use of TEC in Clackmannanshire has remained relatively stable from 2018/19 to 2022/23. The majority of people supported by TEC receive either just community alarms or a mixture of both telecare and community alarms, although the percentage of individuals receiving telecare services has slightly decreased.

Table 5.109 Number of people receiving community alarms and/or telecare services in Clackmannanshire

	2018/19	2019/20	2020/21	2021/22	2022/23	% Change over 5 years
Telecare Only	45	60	45	40	40	-11.1%
Community Alarm Only	1400	1375	1365	1400	1420	1.4%
Both Telecare and Community Alarm	435	455	465	465	415	-4.6%
Total	1880	1895	1875	1900	1875	-0.3%

Source: Public Health Scotland 2023. Insights in social care: statistics for Scotland

Locally, Clackmannanshire Council operates a Mobile Emergency Care Service (MECS) which enables cared-for individuals and their carers to call for assistance in an emergency. The service aims to maintain and/or increase people’s independence by providing and installing the required telecare unit. MECS is provided by Social Services and operates a 24/7 responder service to meet the needs of the clients. The MECS system has recently been upgraded to provide for a more efficient telecare.

As of October 2024, Clackmannanshire Council’s MECS supported 1,449 service users with 7,338 individual pieces of telecare equipment. Depending on the needs of the client, MECS equipment may include smoke alarms, heat alarms, door contacts, bed monitors, epilepsy monitors or fall detectors.

From October 2023 to November 2024, there were a total of 434 referrals to the service – 38 self-referrals and 396 referrals from hospitals, social work or unpaid carer/family members.
Although historical waiting list data is unavailable, the most recent figures indicate that there is not a significant backlog of clients awaiting assessment or installation. As of January 2025, 6 individuals were waiting to be assessed, and 11 clients were awaiting the installation of various MECS equipment. The data highlights that MECS is a vital service, providing essential telecare equipment tailored to individual needs.

Support Services

In Clackmannanshire, there is a large number of different services and organisation, both public and third sector, which can offer relevant information and advice as well as emotional and/or practical support to people with the aim of helping them lead and maintain independent and fulfilling lives.

Public Sector Support

Clackmannanshire Council offers and provides short-term as well as medium-term tenancy-sustainment services for vulnerable households.

Housing Support

Housing Support team helps homeless households as well as current vulnerable Council tenants who may require additional support.

Depending on the individual circumstances, clients may be supported with moving and settling into a new tenancy, applying for the right benefits and grants, personal budgeting and debt advice, helping to engage with other relevant support services.

For homeless households, assistance can include help managing temporary accommodation and preparing to move to mainstream, permanent accommodation as well as setting up and managing Council tenancies.

Safeguarding through Rapid Intervention (STRIVE)

STRIVE is a multi-agency team which offers short-term support to households and individuals who have multiple and complex needs, arising from addiction, welfare and wellbeing issues and who are at the edge of statutory intervention. STRIVE is comprised of Clackmannanshire Council's Housing, Education, Justice as well as Money Advice and Child Care services, with Police Scotland, Health and Social Partnership and the Third Sector Interface as partner agencies.

STRIVE employs an early intervention, person-centred approach to assist vulnerable residents and individuals in crisis, with the ultimate aim of reducing police involvement, preventing homelessness and preventing the need for further, statutory intervention. The service aims to address and enable mental health and wellbeing as well as trauma support, improve financial security and access to further education and employability, reduce alcohol and drug use, support people fleeing domestic violence abuse, as well as assist individuals in undertaking day-to-day household tasks.

Practitioners involved in STRIVE have indicated that the project has had a positive impact on reducing siloed working by enabling effective information sharing and increasing the understanding of other services' remits and roles which benefits both the wider teams as well as the communities who may use the service.

Having dedicated sources, the project employs a whole-systems approach to tackle issues at an early stage with subsequent costs savings and enabling collaborative working with the person being supported. It was found that STRIVE's partnership approach and close links with other services have enabled the supported clients to be proactive in getting the support they require which is tailored to their individual needs.

Table 5.110 Number of referrals as of December 2024 by calendar year

	2020/21	2021/20	2022/23	2023/24	2024/25 to date	% Change over 5 years
Number of referrals	166	145	103	136	125	-25%

Source: Clackmannanshire Council Information System December 2024

Table 5.110 shows that the STRIVE programme has consistently supported over 100 people each year. Although, the numbers of referrals have dipped slightly since the inception of the programme in 2020/21, the last two financial years have seen similar numbers in referrals.

Discussions with the project manager have revealed that from January 2023, there have only been 21 repeat referrals to STRIVE, which indicates that that the programme has been successful in offering the right support at the right time and reducing the need for further intervention at a later point in time.

Table 5.111 Number of referrals and opened cases from November 2023 to July 2024

	Referrals	Opened cases
Number of cases	93	33

Source: Clackmannanshire Council Information System December 2024

A snapshot analysis of referrals, opened cases, reasons and outcomes of the case, have shown that from 1st of November 2023 to 31st July 2024, there were a total 93 referrals made, and 33 cases opened.

All referrals are pre-screened before being opened as a full case. Not all referrals will be opened, as it is often found that the most relevant services/agencies are already working with the client to achieve the best outcomes for the person. However, in some instances, a case will not be opened due to the lack of available support. In particular, gaps have been highlighted in the provision of support where an individual is seeking treatment or help for mental health reasons, or drug and/or alcohol misuse and addiction.

Suggestions to improve the programme have included having more open communications and in-depth inclusion of outside agencies that could address the service gaps and connect individuals directly.

Table 5.112 Reasons for opening a case from November 2023 to July 2024 (multiple choices allowed)

Reason	Number of cases
Financial Advice	16
Domestic Abuse	14
Housing Issue/Tenancy Sustainment	9
Potential Adult Welfare Issues	7
Mental Health Concerns	12

Source: Clackmannanshire Council Information System December 2024

As table 5.112 shows, the main reasons for opening the case were due to financial concerns, domestic abuse concerns, housing/tenancy sustainment issues and risk of homelessness as well as mental health concerns and adult welfare issues, including drug and/or alcohol misuse and addiction issues.

Table 5.113 Recorded outcomes for cases opened from November 2023 to July 2024 (multiple choices allowed)

Outcome	Number of cases
Improved financial situation	14
Housing Advice/Tenancy Sustainment Advice	11
Home Energy Advice	4
Homelessness and Housing Options Advice	5
Provision of Essential Household Items	24
Emergency Mental Health Support	3

Source: Clackmannanshire Council Information System December 2024

For cases that closed, the most outcomes were the provision of essential household items, including ring doorbells for additional safety and mobile phones to enable support from partner agencies, followed by improved financial situation due to income maximisation and debt relief as well as the appropriate housing advice, leading to a reduction in the likelihood of eviction.

Third Sector Support

Clackmannanshire Third Sector Interface (CTSI) hosts a platform for third sector organisations to develop and promote their work and holds a list of all available third sector organisations across the area which people can use to find relevant services to match their needs.

Depending on the needs of individuals, services may range from homelessness, tenancy-sustainment or addiction support to health and wellbeing services, financial and debt advice and advocacy. Services may include long-standing support as well as short-term projects.
Some of the organisations and projects include:

Citizen Advice Bureau's housing projects which aim to improve tenancy sustainment and prevent homelessness by assisting people with rent arrears and other debts

- Housing Debt project offers debt and income maximisation service for Clackmannanshire Council tenants.
- Clackmannanshire Landlord and Tenant Advice, Mediation and Support Service helps private sector tenants with income maximisation and debt advice, energy efficiency advice, mediation and representation in courts and tribunals.

Central Advocacy Partners and Forth Valley Advocacy

- Independent advocacy services for older people, people with additional needs, including individuals with learning disabilities, autism, adults with mental health issues and individuals in care settings.

Community Link Worker (CLW) Programme managed by CTSI

- Offers 1-to-1 assistance to people attending their GP and who require support with social or other issues. CLW can support people in improving their health and wellbeing, and enable people to self-manage health conditions.

Transform Forth Valley support people and their families impacted by substance use issues and/or societal, financial or health inequalities across Forth Valley area by employing a preventative and early intervention approach. In Clackmannanshire, services include addiction support, housing support as well as self-neglect and hoarding service.
Independent Living Association (ILA) Forth Valley helps people with applying, choosing and receiving the right social care package from the Council via SDS

- ILA can explain the SDS process to individuals so that they can make informed and empowered decision to ensure that the social care meets their own personal needs and outcomes.

Handyperson Project (Stirlingshire and Clackmannanshire) which supports older people and people with disabilities by completing small and minor maintenance jobs across the two areas.

Gaps and shortfalls in need and provision

Evidence shows that there has been a 4% increase in the number of people supported with care at home services and a 44% rise in the total number of care at home hours provided, suggesting an increase in the multiple and complex needs of clients. In addition, there has been a 3% increase in the number of individuals providing unpaid care across Clackmannanshire, majority of whom are aged 50-64, indicating increased pressures on unpaid carers to provide the relevant support.

Discussions with HSCP partners have highlighted the need to better promote existing support available to unpaid carers and ensure they are able to access the services to which they may be entitled. There is a need for more timely, targeted interventions that are tailored to the individual needs of carers.

In addition, conversations with client groups receiving care and support services have highlighted growing frustration with the current system, and pointed to significant gaps in service provision, emphasising the need for a more streamlined and accessible support structures – especially in the context of national policies aimed at promoting independent living.

Clients often find the system difficult to navigate, with limited guidance available to help them access the right services. They stressed the importance of clearer and more personalised communication to ensure people understand both their entitlements and the realistic availability of support.
Third-sector organisations, such as the Citizens Advice Bureau, were recognised as playing a vital role in offering advice, information, and hands-on support with completing the necessary forms to access services. However, it was also noted that the responsibility for care and support provision should not fall solely on the third sector. Greater investment and action are needed within public sector social services to ensure adequate and equitable support for all.

Future requirements

In light of Clackmannanshire's ageing population and an increase in long-term health conditions and disabilities, there is a need for a greater provision of care and support services to meet the needs of different client groups to enable independent living within the community.

Partner stakeholder engagement reiterated the need to future-proof the provision of care and support services to ensure that the system can cope with the increasing demands. Similarly, separate conversations with HSCP partners revealed that there is a need to further explore the service provision to unpaid carers in order to enable them to keep providing the necessary support.

External stakeholder consultation and engagement

Full consultation findings can be found in appendix 1. Following stakeholder groups were consulted with:

- Alzheimer's Scotland
- Clackmannanshire & Stirling HSCP
- Local RSLs
- NHS Forth Valley
- Older Adults' Forum Clackmannanshire

Discussions also took place with CTSI in relation to the available third sector support organisations across Clackmannanshire.

6. Site Provision

National Policies

- Scottish Social Housing Charter
- Scottish Government. Evidence Review: Accommodation Needs of Gypsy/Travellers
- Scottish Government. Guidance for Local Authorities on Managing Unauthorised Camping by Gypsy/Travellers in Scotland
- Scottish Government. Improving Gypsy/Traveller Sites. Guidance in minimum site standards and site tenants' core rights and responsibilities
- Scottish Government. Improving the Lives of Scotland's Gypsy/Travellers 2. Action Plan 2024-202

Local Policies and Strategies

- Clackmannanshire Local Development Plan 2015 SC3 – Gypsies and Travellers and Travelling Showpeople

Land, Care and Support Needs

Land needs for the provision of sites include high quality, suitably located sites and pitches with sufficient space and which contain all necessary amenities to enable independent and dignified living.

Care and Support Needs

Care and support needs to meet the requirements of people relying on as well as benefitting from the site provision includes a site manager who manages the site on a regular and continuous basis and is there to offer information, advice and support, as well as practical assistance to residents on the site.

Client Groups (Suitable For)

The target groups which benefit from site provision Gypsy/Travellers as well as Travelling Showpeople. The evidence will consider the provision and the needs of each of these groups.

Evidence

Gypsy/Travellers

Gypsy/Travellers are a distinct ethnic group and a recognised ethnic minority by the Scottish Government. The latest 2022 Scottish Census places the number of Gypsy/Travellers at 3,343 individuals which represents less than 1% of the overall Scottish population. However, the number is likely to be higher, and is estimated to be anywhere between 15,000 to 20,000 individuals, as not every person may wish to publicly identify themselves as a Gypsy/Traveller, be it due to discrimination, marginalisation or the associated stigma attached to the 'Gypsy/Traveller' ethnicity.[21]

Table 5.114 Number of people who identify as White: Gypsy/Travellers

	2011	2022	% Change
Clackmannanshire	68	56	-21%
Scotland	4,212	3,343	-26%

Source: Scottish Census 2011 & 2022

Census data reveals that across Clackmannanshire there were 56 individuals who identified themselves as White: Gypsy/Traveller in 2022. This represents a 21% decrease (12 individuals) from 2011. Comparatively, the Scottish average saw a 26% decrease in the Gypsy/Traveller population. As mentioned previously, however, the undisclosed Gypsy/Traveller population in Clackmannanshire is likely to be much higher.

It is necessary to note that Gypsy/Travellers are not a monolithic, homogenous group and may include different groups who self-identify as Roma, Romany Gypsies, Scottish Travellers or Irish Travellers.[22] While nomadic living and 'travelling' are important aspects of Gypsy/Travellers, not every Gypsy/Traveller travels all year round. Some Gypsy/Traveller communities may travel seasonally or permanently live on a site. Increasingly, members of the Gypsy/Traveller community are moving into mainstream 'bricks and mortar' accommodation.[23]

For those members of the Gypsy/Traveller community who have either decided or required to move into mainstream housing, Clackmannanshire Council operates a general needs allocation policy with points and bands-based allocation system that is open to all, regardless of their current tenure, housing situation or ethnic origin. Following application and assessment process, any successful Gypsy/Traveller applicant would then sign a secure tenancy agreement with the Council to move into their permanent home.

For Gypsy/Travellers who choose to maintain their nomadic or semi-nomadic culture and living, accommodation may include:

- Permanent sites which provide residents with permanent accommodation. Individuals typically stay on the site for the majority of the year, and only travel for a few week overs the year.
- Transit sites which are permanent developments with basic amenities which are used on a temporary basis by residents who may be moving between longer-term locations.
- Stopping places which are pieces of land that are used as short stays for short periods of time.[24]

Since 2017, the Scottish Social Housing Charter contains an outcome on Gypsy/Travellers which includes minimum standards that Gypsy/Traveller sites provided by social housing landlords must meet. Standards cover facilities and amenities, fabric standards which includes energy efficiency, maintenance and repairs, including quality of fixtures and fittings, lighting, heating, hot and cold water supply as well as services provided by the landlord.

[21] Gypsy Travellers In Scotland. A resource for the media. Equality and Human Rights Commission 2013
[22] Evidence Review: Accommodation Needs of Gypsy/Travellers. Scottish Government. 2020
[23] Gypsy/Travellers and the Scottish Planning System. A Guide for Local Authorities. PAS 2015
[24] Gypsy/Travellers and the Scottish Planning System. A Guide for Local Authorities. PAS 2015

However, research indicates that minimum site standards across various local authorities in Scotland have been rarely adequately maintained.[25] As a result, there is a pressing need for local authorities to reassess their approach and demonstrate a serious commitment to ensuring that the sites meet the minimum requirements set out by the Scottish Government. To facilitate compliance, local authorities should take meaningful steps, such as continuing capital funding to improve site standards, improving communication with the Gypsy/Traveller communities as well as tackling repairs and maintenance-based discrimination within Gypsy/Traveller sites.[26]

Westhaugh Gypsy/Traveller Site

Within Clackmannanshire, there is one public, Council-owned permanent Gypsy/Traveller site at Westhaugh, near Alva. There are no privately-owned sites. The Westhaugh site has 16 pitches, 2 of which are adapted for disabled households. The site also has a community hub and a play park. Each pitch has its own hardstanding for parking a caravan and another vehicle, with space for a second caravan, an amenity block with toilet, shower/bath, kitchen area, hot and cold water and storage, as well as a hook-up facility for electricity to the caravan.

In the financial period 2021/22, only 44.4% of the Gypsy/Travellers were satisfied with the management of the site[27], whereas the latest Tenant Satisfaction and Aspiration Survey 2023 placed the figure at 75%. The large variation in the percentage of satisfied residents may be partially explained by the overall small population of the community which can skew results as well as the methodological differences in data collection. Nonetheless, the relatively low figures may suggest substandard quality of housing and landlord relations with the community.

In 2022, Clackmannanshire Council received funding from the Scottish Government to help redevelop the site after it reached the end of its useful life. The project is being developed with direct input from and is led by the views of the Gypsy/Traveller community.

The project aims to replace current standing amenity blocks with larger, modern blocks that address the needs and the current living trends of the Gypsy/Traveller community. The amenity blocks will meet high standards, corresponding to the quality of mainstream accommodation. In addition, communal shared space will be developed with a new community hub and new landscaping features to facilitate safety and community cohesion.

Project works started in October 2022, once the Westhaugh residents were decanted into mainstream tenancies within the Council's stock portfolio. As of October 2024, following a number of delays resulting from issues with contractors, works have been paused and the Westhaugh site is still closed for redevelopment. Clackmannanshire Council is in regular conversation with all relevant stakeholders, including the Scottish Government, to enable the works to resume and rehouse residents onto the site as soon as practicable possible.

The Westhaugh Gypsy/Traveller residents currently comprise of 11 families decanted to mainstream accommodation and 2 families travelling. Once the project is finished, the Gypsy/Traveller households are expected to move back to the newly redeveloped Westhaugh site, leaving an estimate of 3 pitches empty. To enable efficient and effective allocation of the remaining pitches that is fair for all, the Council aims to develop a fit-for-purpose Gypsy/Traveller site-specific allocations policy with direct input from the Gypsy/Traveller community.

[25] MECOPP. Gypsy/Traveller Accommodation Paper 1: Maintenance on Local Authority Sites 2024
[26] Ibid
[27] Scottish Housing Regulator. Annual Return on the Charter

The Council remains transparent on the project process and the associated issues. It maintains regular contact with the Westhaugh Gypsy/Traveller residents by setting up regular meetings and providing updates on the development of the site. The residents have voiced their concerns and distress, including worsening mental health that was caused as a result of the delays to the project, separation from other members of the community as well as members being housed into mainstream accommodation that is not necessarily culturally appropriate to their individual needs.

To support the Gypsy/Traveller community, the Council has a dedicated Gypsy/Traveller liaison officer who engages with and provides relevant advice, information, emotional as well as practical assistance to the Gypsy/Traveller families. The Officer is working together with MECOPP, a charity dedicated to supporting the Gypsy/Traveller communities across Scotland, to provide regular updates on the project and to offer direct practical and emotional support to the residents.

Gypsy/Traveller Homelessness

Table 5.115 Homeless applications by Gypsy/Travellers

	2019/2020	2020/2021	2021/2022	2022/2023	2023/2024
Gypsy/Travellers	0	0	5	0	5
All	523	501	551	593	616

Source: Clackmannanshire Council Information System 2024. Numbers are rounded for disclosure control purposes.

Table 5.115 reveals that homeless applications from Gypsy/Travellers represent a very small proportion of overall homeless presentations across Clackmannanshire. However, given the small population size of the community, and taking into account 2022 census figures, both 2021/22 and 2023/24 saw a large proportion of Gypsy/Traveller households applying as homeless.

It is difficult to determine whether Gypsy/Travellers applying as homeless originally came from mainstream accommodation, Gypsy/Traveller sites or other local authorities. Conversations with the Gypsy/Traveller liaison officer and senior housing officers have suggested that the 2023/24 spike may have been caused by a lack of site availability due to the ongoing works, forcing Gypsy/Traveller households, who would otherwise choose to move onto a permanent site, to present as homeless. In comparison, the 2021/22 spike may be partially attributed to the Covid-19 pandemic and its impacts on Gypsy/Traveller households to travel freely.

Additionally, research indicates that there has been decreasing capacity of culturally appropriate accommodation for members of the Gypsy/Traveller communities across Scotland throughout the recent years, with a seen reduction in the number of sites and pitches and a simultaneous increase in occupancy rates.[28] It is important to acknowledge that this could have further exacerbated homeless presentations from the Gypsy/Travellers across Clackmannanshire.

However, it is hoped that homeless presentations from the Gypsy/Traveller community will reduce once the Westhaugh redevelopment project is complete and the site is opened back up for use.

[28] MECOPP. Gypsy/Traveller Accommodation Paper 3: A Capacity Crisis in Gypsy/Traveller Accommodation

Unauthorised Encampments

According to Planning Aid Scotland, a lack of public and private permanent sites and the blocking of traditional stopping places has historically contributed to a rise in unauthorised encampments on accessible but not necessarily suitable land.[29] The Scottish Government has developed and published a guide on how to manage unauthorised encampments, which includes adopting a person-centred and human rights-focused approach to dealing with Gypsy/Travelling groups encamping without prior consent.

Clackmannanshire is the smallest mainland local authority in Scotland and is a known passing place for numerous Gypsy/Traveller groups and communities. It borders larger local authorities of Fife, Stirling and Falkirk, all with established and larger Gypsy/Traveller communities. As such, unauthorised encampments are bound to occur on occasion. However, discussions with Officers responsible for responding to and managing unauthorised encampments have revealed that these are relatively rare, with 1 to 3 encampments occurring on a yearly basis with communities staying on land for several days before travelling to other areas outwith Clackmannanshire.

Travelling Showpeople

Occupational Travellers and Showpeople are people who define themselves in terms of their occupations and businesses which move from place to place. Travelling Showpeople may often follow regular, planned and advertised routes and may include Fairground and Circus People.[30] Unlike Gypsy/Travellers, Occupational Travellers and Showpeople are not considered to be a distinct ethnic group. However, both site as well as care and support needs for Travelling Showpeople are not dissimilar to the needs of the nomadic Gypsy/Traveller communities.

Within Clackmannanshire, Travelling Showpeople are known to travel to the area in April/May, July and October on an annual basis for fairs and events. Discussions with the Council's Licensing Team, responsible for managing site applications and permissions, have revealed that every year, anywhere between 10 to 50 Travelling Showpeople travel to Clackmannanshire, tending to stay between 7 to 10 days for the duration of festivals and fairs, after which they move to other local authorities.

Capacity to accommodate the needs of Showpeople has not been a noted issue across Clackmannnashire. Spaces are provided in recreational parks such as the West End Park in Alloa and Johnstone Park in Alva. Arriving groups may book spaces individually or via the Scottish Showmen's Guild. These are not official caravan parks, and so the Travelling Showpeople groups bring their own caravans and campervans in order to reside on one of the parks. The Council provides metered electricity supply as well as fresh water supply via standpipe for the duration of the stay as requested by the travelling groups. There are also toilet and shower facilities on site, however, it has been noted that Travelling Showpeople tend not to access these as there are no additional requirements.

The current evidence establishes clear and regular patterns of Occupational Travellers' and Showpeople's presence across Clackmannanshire area. Stable site applications and the provision of required onsite amenities suggests that the needs of Showpeople are being appropriately met. However, there may be a future need for further provision of parks and the associated amenities, if more fairs and events are established within Clackmannanshire.

[29] Gypsy/Travellers and the Scottish Planning System. A Guide for Local Authorities. PAS 2015
[30] Gypsy Travellers In Scotland. A resource for the media. Equality and Human Rights Commission 2013

Gaps and shortfalls in need and provision

Delays in the development process have resulted in worsening mental health of the Gypsy/Travellers in Clackmannanshire. Consultations with the Gypsy/Traveller community have suggested a need for regular updates and 'get together' meetings aimed at strengthening community bonds.

Conversations with MECOPP have highlighted that a lack of understanding and awareness of Gypsy/Traveller culture among some service providers can lead to disregard for the community's specific housing needs. To address these challenges, MECOPP has recommended organising meetings with the Housing Service to create a safe and welcoming space for the members of Gypsy/Traveller community members. Organising drop-in sessions at accessible locations would provide an opportunity for individuals to comfortably express their housing needs, ensuring that services are better tailored to support them effectively.
There is also an indicated need to tackle discrimination targeted towards the community from the settled community. Suggestions have included utilising cultural competency training sessions to reduce negative perceptions and prejudice about the Gypsy/Travellers, as well as increasing social media presence to better the relations between the settle community and the Gypsy/Traveller community.

Furthermore, engagement with and research carried out by MECOPP has illustrated that the Gypsy/Traveller communities across Scotland have experienced significant challenges in developing and accessing private culturally appropriate accommodation options due to overcomplicated planning application processes. Subsequently, to support the development of private accommodation options, there is a need to strengthen engagement with community members in order to create more accessible and streamlined planning system.

Future requirements

Current evidence suggests that the needs of the Travelling Showpeople are being appropriately met and no future provision is required at this point in time. However, regular discussions with the Council's licensing Team should be held to monitor the provision against the levels of demand.

It is hoped that the completion of the Westhaugh site will mark a considerable decrease in the unmet needs. However, there is a need to account for any Gypsy/Travellers who wish to move to and reside in the area in future. Furthermore, there is a need to further consider private accommodation options as well as reviewing planning application processes which would enable easier access to private sites. Regular conversation with MECOPP should be held to enable this.

External stakeholder consultation and engagement

External stakeholder consultations and engagement included continuous collaborative efforts between the Westhaugh Gypsy/Traveller community residents and Clackmannanshire Council via continuous conversations and engagement sessions aimed at the development of the Westhaugh site and further provision and development of required care and support services.

The Council also engages with Minority Ethnic Carers of People Project (MECOPP) to ensure that the dignity and the rights are protected, and ultimately the best life outcomes are achieved for the Gypsy/Traveller community in Clackmannanshire and any future Gypsy/Traveller persons, families and communities who wish to come and reside in Clackmannanshire.

LHS	Specialist Provision – Key Issues Identified in the HNDA
Accessible and adapted housing	1. There is a lack of information on households requiring accessible and adapted housing by tenure type. There is a lack of information on the needs for adapted housing and in-situ solutions for owner occupiers as well as the private rented sector. 2. There is a need to establish a register to track the number and types of adaptations made to mainstream housing properties. This would enable more effective matching of adapted homes to households with specific needs, and support the fair allocation of accessible and adapted housing. 3. NRS and the Scottish Census indicate a growing number of older individuals, with a number of individuals aged 85 and over projected to increase by 95% by 2043. 4. The Scottish Census indicates that physical and mental health across Clackmannanshire has worsened from 2011 to 2022. 5. As of 2023/24, there were 304 amenity housing, 241 ambulant disabled and 2 other specially adapted properties provided by a total of 6 social landlords. 6. According to Scottish House Condition Survey, 2,000 or 8% of all households have their daily activities restricted due to their current accommodation, indicating a need for adaptations to their properties or a move to a more suitable accommodation type. 7. There is a significant shortfall in the provision of accessible and adapted housing across Clackmannanshire's social rented sector, with the number of households indicating a need for accessible housing far outweighing the yearly turnover rates of accessible and adapted properties across Clackmannanshire. 8. Partner RSL and HSCP stakeholders have indicated a pronounced need for accessible housing, and smaller 1-bedroom housing units which could accommodate the needs of households with disabilities. 9. Clackmannanshire Council operates a Common Housing Register with Ochil View HA. Together, both organisations own 85% of all self-contained stock across the area. 10. As of November 2024, there were 457 applicants on Clackmannanshire Council's housing waiting list with assessed medical need. This represents 17% of all housing applicants, indicating a substantial number of households whose current accommodation does not meet their needs due to

medical conditions. Extrapolating the figure to the entirety of social rented sector, there are approximately 526 applicants waiting for accessible or adapted homes where their housing needs cannot be met through in-situ solutions.

11. 2023/24 financial period saw 72 lets made to applicants assessed with medical need by Clackmannanshire Council (excluding ambulant disabled/amenity housing), as well as an annual turnover of 39 ambulant disabled and amenity properties, and 26 sheltered or very sheltered accommodation units across the social rented sector. Comparing these figures with 526 applicants waiting for suitable properties, this leaves an estimated 383 applicants with ongoing, unmet housing needs linked to medical conditions—a number that is likely to grow due to rapidly ageing population and an increase in medical conditions.
12. However, it is important to note that this does not directly translate into a need for 383 additional units. Moves by households may release properties that are suitable for others with differing medical needs, thus partially alleviating demand.
13. A review of the housing waiting list is needed to better understand how void properties can be more effectively matched to applicants with medical needs, and to determine how many additional housing units are required for cases where in-situ solutions are not viable.
14. Nonetheless, consultations with partner stakeholders have shown that the provision of accessible and adapted housing should not be solely the responsibility of the social rented sector.
15. RSL and HSCP stakeholders have raised concerns about private developers prioritising larger, two-storey homes, limiting the availability of smaller units – particularly accessible bungalows – due to the higher costs associated with their construction.
16. It is vital to engage with private sector developers to facilitate the delivery of affordable and accessible housing and understand the challenges that they face in delivering accessible and wheelchair-accessible housing to meet current need and demand.
17. In light of Scotland’s rapidly ageing population, partner stakeholders have stressed the important of planning for future needs. Greater collaboration between social landlords and private developers has been seen as vital to ensuring ‘future-proof’ housing developments which would reduce the

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<td>need for future adaptations, including the construction of more bungalow-type properties.
18. Partners within the Housing Market Partnership have endorsed the view that accessible and adapted housing should not be seen solely as a solution for older, ageing, or disabled households. Instead, the benefits of such housing should be promoted to all households regardless of their tenure, individual characteristics and/or needs, in alignment with the principles of the Housing for Varying Needs agenda.
19. There is a significant gap in the service provision for private sector disabled adaptation under the Scheme of Assistance, with 50 private sector housing grant applications yet to be assessed as of October 2024. Work is underway between the Council and HSCP partners to enable the provision of services.
20. SHCS data reveals that 1,000 households require medical adaptations to their properties.
21. Taking into account 271 adaptations carried out to Council stock, 240 adaptations carried out to RSL housing with stock across Clackmannanshire as well as 43 adaptations carried out to private sector households as part of the Scheme of Assistance in 2023/24, the data reveals that there are approximately 446 households still requiring adaptations to their homes – a number that is likely to keep increasing with changes in demographics.</td>
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<td>Wheelchair housing</td>
<td>1. There were 58 fully wheelchair-adapted properties within the social rented sector in 2023/24.
2. Turnover for wheelchair-adapted properties across the social rented sector is low. In 2023/24, the sector saw a turnover of 1 wheelchair-adapted properties.
3. According to CHR, there were a total of 37 applicant households with identified need for wheelchair-adapted housing. Extrapolating the figure to the entirety of social rented sector, this figure stands at an approximate 43 households.
4. At present, there are no nationally or locally held statistics on the number of wheelchair housing units within the private sector, both for owner occupiers and the private rented sector. There is also no information on the number of wheelchair user households across Clackmannanshire.
5. Using the methodology established by CIH and Horizon Housing, using baseline estimates there was an estimate of 168 wheelchair user households with unmet housing need in 2018, estimated to rise to 170 in 2043. Correspondingly,</td>
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	using the higher estimate of 1.3% for unmet housing need, the figures stood at 170 in 2018, estimated to rise to 175 in 2043. 6. Following conversations with Housing Market Partnership stakeholders, it was agreed that higher estimates of unmet need should be used to reflect the number of households waiting for wheelchair-adapted housing, long waiting times for accessible housing as well as low levels of property turnover. 7. Assuming the CHR figures for the number of households with identified need for wheelchair-adapted housing across the entirety social rented sector (43 households), this shows that the majority of need for wheelchair-adapted housing is across the private sector. 8. In support of this, partner RSL and HSCP stakeholders have noted a strong demand for greater engagement from private sector developers in delivering specialist housing solutions, including wheelchair-adapted housing. 9. The estimates will be considered when setting supply targets for accessible housing units in the SHIP in order to take into account wheelchair user households across Clackmannanshire. Furthermore, the information will be used to inform the development of the Local Housing Strategy.
Non-permanent housing	1. Clackmannanshire saw an 18% increase in homeless presentations from 2019/20 to 2023/24 2. In 2023/24, Clackmannanshire had the 3rd highest rate of households presenting as homeless with 253 households per 10,000 compared to the Scottish average of 160 households per 10,000. 3. Majority of applicants are predominantly young (within the 25-34 age range, followed by 35-44 age range) single person male households. 4. There has been a growth in the use of unsuitable accommodation units and breaches of Homeless Persons (Unsuitable Accommodation) Order with 110 breaches recorded in 2023/24. 5. The average total time spent in temporary accommodation has risen by 14% over the five-year period but remains below the Scottish average of 20%. In 2023/24, homeless households in Clackmannanshire spent an average of 159 days in temporary accommodation, compared to 226 days across Scotland. 6. In 2023/24, there were more households entering than exiting temporary accommodation placements with 291 entering and 265 exiting temporary placements in 2023/24. At the end of

2023/24 there were 345 live homelessness cases and 141 households in temporary accommodation, compared to 193 live homelessness cases and 108 households in 2019/20.

7. It may be assumed that the number of homeless presentations and subsequent temporary accommodation placements will continue to increase in the upcoming years. Given the increase in the number of breaches of Unsuitable Accommodation Order and taking into account the number of households in temporary accommodation in 2023/24, over 141 temporary accommodation units will be required going forward.
8. From 2019/20 to 2023/24 there has been a steady number of homeless applications from people leaving prison. In 2023/24 there were 27 homeless applications, representing 4% of all households presenting as homeless.
9. Conversations with Criminal Justice Social Work Service, indicate a need for purpose-built, easy-to-maintain temporary accommodation units for prison leaver households assessed as homeless
10. Evidence and discussions carried out with partner stakeholders suggest a fundamental mismatch between the demand and supply of temporary accommodation. There is also a lack of effective outreach support to assist individuals with multiple and/or complex needs
11. There is a need to consider the needs of households with multiple and complex needs who may struggle to sustain their accommodation and who cycle in-and-out of temporary placements.
12. Work is currently being undertaken by Clackmannanshire & Stirling HSCP to address the gap in the provision of services and explore effective outreach programmes which would enable more effective sustainment of tenancies.
13. In 2023/24, there were 37 homeless applications made from households fleeing domestic abuse, which presents a 21% decrease from 2019/20.
14. Evidence from Women's Aid shows that whilst shelters for women fleeing domestic abuse are rarely used to full capacity, other services to support victims of domestic abuse have seen high level of repeat cases and repeat support provided.
15. In October 2024, Clackmannanshire Council's Housing and Justice Services have initiated a pilot programme intended at shifting emphasis from outcomes based on managing perpetrator's behaviour to housing-focused outcomes for the victims.

	16. There has been a reduction in the overall number of homeless presentations with a looked after status from 2019/20 to 2023/24. From 2019/20 to 2023/24, there were 3 care leavers who presented as homeless directly from children's residential accommodation. 17. To align with Clackmannanshire Council's The Promise Plan, services across the Council aim to ensure that young people at the point of leaving care are not placed in temporary accommodation, and are instead offered appropriate permanent housing with the relevant support to promote independent living and tenancy sustainment. 18. Going forward, it is necessary that the temporary accommodation route is effectively avoided for all care leaver households by effective collaboration between all responsible Council services.
Support Provision	1. As of March 2023, there were 10 care homes across Clackmannanshire. 2. From 2019 to 2023, there has been a steady year-on-year reduction of registered care places, from 389 in 2019 to 376 in 2023 (3% reduction overall) 3. Over the 5 years, there has been a 22.4% decrease in the total number of care home residents and a 15% decrease in occupancy rates across all care homes. 4. There has been a policy shift at both national and local levels which aims to promote care within the community rather than the provision care home-based support. Clackmannanshire & Stirling HSCP stakeholders have noted that there is no particular need for future care home places, rather the focus should be on offering more community-based support and consider the provision of alternative housing models to meet the needs of individuals with multiple and complex needs. 5. The view was shared with the client groups consulted, who revealed the desire to remain the community for as long as possible. 6. Sheltered housing was widely acknowledged and valued for supporting independent living, but clients felt that Clackmannanshire lacked sufficient sheltered housing as well as other alternative models of housing to meet the needs of older people. 7. In 2023/24, there were 145 self-contained retirement/sheltered housing units, 38 housing with care/very sheltered housing units and 2 very sheltered non-self-contained units across Clackmannanshire's social housing stock, provided by a total of 3 RSLs across Clackmannanshire.

	8. Waiting list and turnover data for sheltered and very sheltered housing suggests that the demand for sheltered accommodation exceeds the current availability of stock, with 146 housing applicants waiting for retirement/sheltered housing as of September 2024 compared to a turnover 20 retirement/sheltered units in 2023/24. 9. Consultations with partner stakeholder from the HSCP have also highlighted a significant gap in the provision of specialist housing, particularly for clients with learning disabilities. This has been evidenced by significant delayed hospital discharges and out-of-area hospital placements due to multiple and complex needs of individuals.
Care/support services for independent living at home	1. Data shows that there has been a 4% increase in the number of people supported with care at home services and 44% rise in the total number of care at home hours provided from 2018/19 to 2022/23, suggesting an increase in the multiple and complex needs of clients. 2. There has been a 4.5% increase in the number of individuals with high care needs being cared at home, with 52.1% of high care need clients being cared at home in 2022/23. 3. There has been a slight 1% decrease in the number of care at home clients receiving personal care services, although the number of personal care hours provided has grown by 35%. 4. Census data shows that from 2011 to 2022, there has been a 3% increase in the number of individuals providing unpaid care in Clackmannanshire. 6,397 individuals (12.7% of the total population) provide unpaid care, majority of whom are aged 50-64. 5. Discussions with HSCP partners have highlighted the need to better promote existing support available to unpaid carers and ensure they are able to access the services to which they may be entitled to. There is a need for more timely, targeted interventions that are tailored to the individual needs of carers. 6. Conversations with client groups receiving care and support services have highlighted growing frustration with the current system, and pointed to significant gaps in service provision, emphasising the need for a more streamlined and accessible support structures. 7. Clients often find the system difficult to navigate, with limited guidance available to help them access the right services. 8. Clackmannanshire offers a number of public and third sector support services which offer tenancy

	sustainment, addiction, emotional and practical support, which can help people lead and maintain independent and fulfilling lives. 9. Third-sector organisations, such as the Citizens Advice Bureau, were recognised as playing a vital role in offering advice, information, and hands-on support with completing the necessary forms to access services. However, clients also noted that the responsibility for care and support provision should not fall solely on the third sector. 10. Greater investment and action are needed within public sector social services to ensure adequate and equitable support for all. 11. Partner stakeholder engagement reiterated the need to future-proof the provision of care and support services to ensure that the system can cope with the increasing demands. 12. The Clackmannanshire & Stirling HSCP Strategic Commissioning Plan 2023–2033 sets out key themes and priorities to deliver a transformational programme aimed at improving the provision of, and access to, health and social care services. 13. The plan aligns with identified key housing challenges, and promotes prevention, early intervention, and independent living through quality housing, personalised support, and care delivered closer to home, while also aiming to empower individuals and communities through timely, person-centred approaches. 14. Going forward, it is pivotal that the LHS aligns with the priorities identified within the Strategic Commission Plan in order to provide seamless integration of housing and housing-related care and support with the overarching delivery of health and social care services.
Site provision	1. As of 2022, there were 56 Gypsy/Travellers living in Clackmannanshire, which equates to a 21% reduction from 2011. However, the actual or ‘hidden’ number of Gypsy/Travellers is likely to be higher. 2. There are a number of Gypsy/Traveller households who have given up their nomadic lifestyle and living in mainstream accommodation in Clackmannanshire. However, the real number of such households is unknown and further research is required to determine whether they have moved into mainstream accommodation voluntarily or due to other factors such as a lack of suitable sites, marginalisation or stigma. 3. Clackmannanshire has one permanent, Council-operated Gypsy/Traveller site. The site has 16 pitches, 2 of which are adapted for disabled

households.

4. The Westhaugh Gypsy/Traveller site has been closed for redevelopment since October 2022. There have been a number of significant delays to the project and works are still underway as of October 2024.
5. Once the project is finished, the Gypsy/Traveller households are expected to move back to the newly redeveloped Westhaugh site, with 3 pitches vacant. To enable efficient and effective allocation of the remaining pitches that is fair for all, the Council aims to develop a fit-for-purpose Gypsy/Traveller site-specific allocations policy with direct input from the Gypsy/Traveller community.
6. Clackmannanshire Council has a dedicated Gypsy/Traveller liaison officer who maintains regular contact with the Gypsy/Traveller community and who offers updates on the development of the site, and can provide relevant information, advice as well as practical and emotional support on a range of different issues.
7. The Council works with MECOPP (Minority Ethnic Carers of People Project), a charity dedicated to supporting the Gypsy/Traveller communities across Scotland, to provide regular updates on the project and to offer direct practical and emotional support to the residents.
8. There has been a spike of homeless applications from Gypsy/Traveller households in 2023/24 (4 applications), which may be associated with the closure of the Westhaugh site.
9. Delays in the development process have resulted in worsening mental health of the Gypsy/Travellers in Clackmannanshire.
10. There are continuous conversations and engagement sessions between the Council and the Gypsy/Traveller community aimed at the development of the Westhaugh site and further provision and development of required care and support services.
11. Anywhere between 10 to 50 Travelling Showpeople travel to Clackmannanshire in April/May, July and October for various fair and festival and stay in the area for anywhere between 7 to 10 days.
12. Travelling Showpeople bring their own caravans and campervans in order to reside. The Council provides metered electricity supply as well as fresh water supply via standpipe. There are also toilet and shower facilities on site, but the Travelling Showpeople have not indicated a requirement for these.

	13. Discussions with the Licensing team have suggested the housing needs of Travelling Showpeople are being appropriately met at this point in time.
LDP	Specialist Provision – Key Issues Identified in the HNDA
Planning for housing for Specialist Provision Housing	1. Evidence as well as consultations with partner stakeholders and client groups shows that there is a need for more accessible and adapted housing, including wheelchair-adapted properties. 2. Using CIH and Horizon Housing calculations, there was an estimate of 168 wheelchair user households with unmet housing need in 2018, estimated to rise to 170 in 2043. Correspondingly, using the higher estimate of 1.3% for unmet housing need, the figures stood at 170 in 2018, estimated to rise to 175 in 2043. 3. Following discussions with partner stakeholders within Housing Partnership meetings, higher estimates will be used to determine unmet need. It may be assumed then that 175 wheelchair user households in 2043 will require adequate housing solutions, including wheelchair-accessible housing to meet their housing needs. 4. Given Clackmannanshire's ageing population and population projections, it is very likely that the demand for specialist housing will continue increasing in the future. 5. Clackmannanshire & Stirling HSCP stakeholders have noted that there is a need to explore alternative types of accommodation to meet the needs of different client groups, and in particular, individuals with complex learning difficulties. 6. This includes considerations for 'core and cluster' model of care or bespoke housing villages. 7. Work needs to be undertaken to quantify the number of individuals who would be benefiting from the provision of bespoke housing solutions as well as establish a clear pathway for funding to do so.
Site provision	1. MECOPP have indicated a need to consider private accommodation options to enable further housing solutions for Gypsy/Travellers who may want to explore alternate housing options. 2. MECOPP have illustrated that the Gypsy/Traveller communities across Scotland have experienced significant challenges in developing and accessing private culturally appropriate accommodation options due to overcomplicated planning application processes. 3. To support the development of private accommodation options, there is a need to strengthen engagement with community members

	in order to create more accessible and streamlined planning system. Regular conversation with MECOPP should be held to enable this.