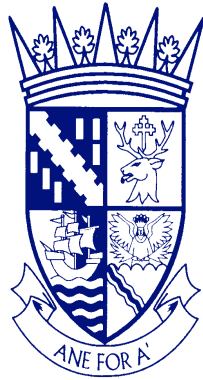


Local Housing Strategy 2004-2009



Falkirk Council
Housing & Social Work Services

Appendix A (1)

Housing Market Analysis

Falkirk Council

Corporate & Commercial Services, Research & Information Unit

Local Housing Strategy

Definition of Falkirk Housing Market Area and its Characteristics

1.0 Introduction

1.1 The purpose of this paper is to describe the housing market within the Falkirk Council area as an input to the Local Housing Strategy. It is divided into two parts. The first defines the housing market across the Council area as a whole, including sub markets. The second section looks at some basic information on the housing market covering the Council area as a whole.

1.2 The new Local Housing Strategy requires the Council to consider all aspects of housing in the Falkirk area. This covers the private sector as well as the housing which the Council owns itself. This is a very broad remit and means that considerable new work has to be done to understand the local housing system. This paper is a contribution towards that.

1.3 The local housing system is dynamic - it changes over time as dwellings age, new ones are built, household numbers and composition change and tastes and preferences change. It is influenced by outside factors such as the state of the economy, national housing policies and the surrounding housing systems. This report reflects the situation as it currently is.

2.0 Defining the Falkirk housing market area

2.1.1 Background: It is generally believed that the Falkirk Council area is a self contained housing market in its own right. This was the view of Communities Scotland in their "Housing Market Context Statement" for Forth Valley, where they stated: "Stirling/ Clackmannanshire and Falkirk form two distinct major housing market areas in Forth Valley"¹.

2.1.2 This was also the conclusion of the study carried out by Central Regional Council in 1995 for the Second Revision of Central 2000 (the previous Structure Plan). This identified four housing market areas one of which was the then Falkirk District which covers the same area as Falkirk Council.²

2.1.3 More recent research by DTZ Pidea Consulting on behalf of Communities Scotland looked at the four cities as the first stage in identifying a national housing market structure. "A further round of analysis identified market areas in Falkirk, Stirling and Ayrshire"³. Their approach was to look for areas furthest from the core area where at least 10 percent of house sales were to people moving from the core area.

2.1.4 This section of this report discusses the validity of considering Falkirk as a self contained housing market and identifies sub market areas within the whole.

¹ Communities Scotland, "Housing Market Context Statement – Forth Valley", April 2002, Page 4, para 1.1.

² Central Regional Council, "Definition of Housing Market Areas in Central Region", Central 2000 Technical Report 4, May 1995.

³ Communities Scotland, "Housing Market Areas in Scotland: definition and review, Volume 1: Main Report" December 2003, Page 14, para. 3.17.

- 2.1.5** There is no agreed measure of when an area becomes a self contained housing market. The Communities Scotland Housing Market Context Statement stated that Falkirk was a housing market area but provided no figures to indicate how this was arrived at. Communities Scotland's predecessor published a guide in 1993⁴ which suggested defining a self contained housing market in terms of both housing and labour markets. It recommended using a figure of 70% or 75% self containment as a suitable measure.
- 2.1.6** The recent DTZ Pinda research uses a different methodology. As outlined in para. 2.1.3 above, their process began by identifying communities furthest from the core of their market area in which the proportion of all house sales that were to households from the core, exceeded 10 percent.
- 2.1.7** Their report⁵ recommended that an operational housing market should demonstrate:
- Evidence of substantial levels of movement between points within the market area;
 - Limited movement across the market area boundaries.
- 2.1.8** The remainder of this section looks at the data that is available to determine whether or not Falkirk Council area can be considered as a self contained housing market area. This looks at Sasines data, the 2001 Census data which is available so far, and information from the Council's Housing Services on lettings and waiting lists.
- 2.2.1** Sasines: The Sasines data provides an unrivalled source of information on house sales, including the origins of house purchasers. This can be used to look at housing market areas. For the purpose of this exercise, data from 1997 to mid 2003 have been used. Right to Buy sales and other transactions where no move took place e.g. property transfers as the result of inheritance or divorce, were excluded from the analysis. In total 18,187 sales were included.
- 2.2.2** The methodology used was adapted slightly from that outlined in the Communities Scotland Research document on the definition of housing market areas Vol. 3 "Guidance on market area definition". It is as follows:
- Define the settlement backbone – identify the major settlements on which the market area structure is to be based – this should generally be the settlements in rank order of size (Vol. 3 Table 2.1, Page 6).
 - For each main settlement in turn, establish the proportion of sales in each other settlement accounted for by purchasers originating in the main settlement.
 - If the proportion of purchasers originating in the main settlement exceeds 10 percent, then that settlement is deemed to be part of the main settlement's housing market.
 - If the proportion of purchasers originating in the main settlement lies between 5% and 10%, then the proportion of households selling in these settlements who moved to the main settlement is established.
 - If the proportion of householders selling in a settlement who moved to the main settlement is over 8%, that settlement is included in the main settlement's housing market area.
- 2.2.3** Using this method, settlements were identified from the Sasines as the town names given for addresses of property being sold and also of purchaser origins. These largely coincided with settlements identified by the Council for its own purposes when producing population estimates. The Council's own estimates of the population of the settlements with a population of over 5,000 from the 2001 Census are shown in the table below (Table 1).

⁴ "Local Market Analysis and Planning in Scottish Homes – A Best Practice Guide" Scottish Homes 1993

⁵ Communities Scotland "Housing Market Areas in Scotland: definition and review, Volume 3: Guidance on market area definition", December 2003, Page 2, para 1.9.

Table 1: Population of major settlements 2001

Settlement	Population
Falkirk	32,422
Grangemouth	17,906
Bo'ness	13,961
Stenhousemuir	10,351
Denny*	9,286
Larbert	6,136
Polmont	5,430

* Including Head of Muir

Source: 2001 Census (Crown copyright) and Falkirk Council Research & Information Unit

- 2.2.4** It was decided not to use the locality population figures published by the General Register Office for Scotland (GROS) from the 2001 Census⁶, because the list of localities given there does not correspond to the settlements in the Sasines nor to those usually identified separately by the Council. This is particularly the case in the Braes area, where GROS have a single locality – called Polmont - while the Sasines and the Council identify separately – Brightons, Laurieston, Maddiston, Polmont, Redding, Reddingmuirhead, Rumford, Wallacestone and Westquarter.
- 2.2.5** In total, 45 separate settlements were identified in the Sasines as places where there had been house sales in the period 1997 to mid 2003. However, in 19 of these there were fewer than 30 sales. These were excluded from the main analysis. This left 26 settlements with a minimum of 47 sales.
- 2.2.6** Beginning with Falkirk, which is largest town in the area, settlements were identified as being within the Falkirk housing market area, using the criterion of 10%+ of sales being to people originating in Falkirk. The results are shown in the top part of Table 2. Including, Falkirk itself, 15 settlements can be considered part of the Falkirk housing market area using this criterion. These covers most of the Braes and the Larbert/Stenhousemuir areas.
- 2.2.7** The next stage suggested by the DTZ Pieda methodology was to look at settlements where between 5% and 10% of purchasers originated in the main centre and then consider the proportion of those moving *from* those settlements who moved to the main centre. If that proportion exceeded the suggested 8% figure, then that centre should be included in the main centre housing market.
- 2.2.8** For this exercise, only moves within the Council area are included. It is however, recognised that people will have moved to places outwith the Council area for which no records were available for this piece of work. These moves would reduce the percentage of people moving to Falkirk.
- 2.2.9** Once this second stage of defining the Falkirk housing market was completed, almost the whole of the Council area was included. The exceptions were Bo'ness and the most remote settlements in the Denny area – Dunipace and Banknock. Bo'ness is dealt with below and comes within the Edinburgh housing market since 12.9% of purchasers come from there. 16.5% of purchasers in Banknock came from Cumbernauld and 24% of those in Dunipace from Stirling. This indicates that these settlements are more naturally part of housing market areas in North Lanarkshire and Stirling.

⁶ General Register Office for Scotland "Scotland's Census 2001: Key Statistics for Settlements and Localities in Scotland", March 2003

Table 2: Falkirk housing market area – initial definition

Settlement	% of sales to people <i>from</i> Falkirk	% of people moving <i>to</i> Falkirk
<i>Centres where over 10% of purchasers originated in Falkirk</i>		
Falkirk	47.3%	n/a
Laurieston	36.5%	n/a
Carron	31.7%	n/a
Shieldhill	31.4%	n/a
Carronshore	28.3%	n/a
California	26.4%	n/a
Maddiston	25.8%	n/a
Brightons	24.1%	n/a
Redding	23.4%	n/a
Avonbridge	21.1%	n/a
Larbert	20.4%	n/a
Stenhousemuir	20.2%	n/a
Polmont	18.1%	n/a
Rumford	15.5%	n/a
Reddingmuirhead	13.6%	n/a
<i>Centres where between 5% and 10% of purchasers originated in Falkirk</i>		
Bonnybridge	9.0%	14.0%
Grangemouth	8.9%	11.3%
Airth	8.6%	17.6%
Whitecross	6.4%	12.5%
High Bonnybridge	5.9%	20.8%
Dennyloanhead	5.8%	12.5%
Denny	5.7%	8.0%
Slamannan	5.1%	29.4%

Source: Register of Sasines

- 2.2.10** Looking at this on a map, clearly shows that there is a core market area consisting of Falkirk town itself extending north into the Larbert/Stenhousemuir area and south into the Braes. It includes those settlements that meet the more stringent criterion for being part of the Falkirk housing market area. This in turn is surrounded by an outer ring of settlements which meet the second criteria including Grangemouth, the remainder of the Braes, the Bonnybridge and Denny areas.
- 2.2.11** Some of the 19 smaller villages on the fringes of the Council area, not included in the main analysis, were included in the rings of the Falkirk market area if they met the appropriate criteria.
- 2.2.12** Having defined the Falkirk (town) market area, but recognising that the whole of the Council area was not included in it, it was decided to continue working down the settlement hierarchy set out in Table 1 to identify any further housing market areas and also sub markets covering the whole of the Falkirk Council area.
- 2.2.13** Looking next at **Grangemouth**, 57.3% of buyers there already lived in the town. No other origin reached 10%. People from Grangemouth made up between 5% and 10% of the purchasers in the Braes settlements of Brightons, Laurieston, Maddiston, Polmont, Redding, Rumford and Shieldhill. However, in no case did over 8% of people *from* these places move to Grangemouth.

- 2.2.14** On that basis, it was considered that Grangemouth was part of the Falkirk housing market, as already determined (see Table 2). Although there is some evidence of a connection with settlements in the Braes area it is not strong enough to meet the criteria set out above. Given the very high level of self-containment and lack of connection with any other areas, Grangemouth should be treated as a housing sub market area.
- 2.2.15** Looking at the figures for the small settlements of Skinflats and Letham which were too small to be included in the main analysis, they nevertheless fulfil the criteria to be included in the Grangemouth sub market area. They would also be part of the Falkirk market area.
- 2.2.16** **Bo'ness** presented a different picture. 50.2% of purchasers originated locally and there were no other settlements in the Council area where even 5% of purchasers came from Bo'ness. Looking at Bo'ness as a destination for purchasers, 12.9% came from Edinburgh and 14.1% from West Lothian. West Lothian was considered by the DTZ Pbeda report to be part of the Edinburgh housing market area.⁷ Of those from West Lothian 65% came from Linlithgow, or 9.9% of the total. Looking at the data provided by Communities Scotland⁸, 15.9% of purchasers in Linlithgow came from Edinburgh, placing it within the Edinburgh housing market on this methodology. It was therefore concluded that Bo'ness was on the edge of the Edinburgh housing market but should be treated as a sub-market within Falkirk Council area.
- 2.2.17** The village of Blackness, which was too small to be included in the main analysis, has been added to the Bo'ness sub-market area. 7% of purchasers there came from Bo'ness and 25% of those selling in Blackness went to Bo'ness. Also, 43% of purchasers there came from Edinburgh and a further 21% from West Lothian, placing it too in the Edinburgh housing market area.
- 2.2.18** The next town in the hierarchy in **Stenhousemuir**. With 20.2% of sales to people from Falkirk, it is clearly part of the Falkirk housing market area. 26% of sales were to households already living in Stenhousemuir. 10.8% of sales in Larbert were to people from Stenhousemuir as were 11.9% of sales in Carron and 8.6% of sales in Carronshore and 14.5% of people moving from Carronshore went to Stenhousemuir. All of Carron, Carronshore and Larbert are part of the Falkirk housing market area defined above. This suggests a sub-market centred on Stenhousemuir.
- 2.2.19** **Larbert** is also in the hierarchy of settlements with a population of over 5,000. 18.9% of moves were internal to Larbert and 13.7% of those moving to Stenhousemuir came from Larbert. While the connections between Larbert and Carron and Carronshore are less strong, 6.3% of purchasers in Carron came from Larbert and 12.5% of those moving from Carron went to Larbert. Only 4.8% of purchasers in Carronshore came from Larbert but 15.1% of those from Carronshore went there.
- 2.2.20** Taking all these figures together indicates that there is a sub market area covering both Larbert and Stenhousemuir taking in Carron and Carronshore. To this can be added the village of Torwood, which is not included in the main analysis but meets the criteria for being part of a Larbert market area as well as the Falkirk market.

⁷ Communities Scotland "Housing Market Areas in Scotland: definition and review, Volume 1: Main report", December 2003, Page vii, para. 13

⁸ Communities Scotland Data Pack, LVIU Sasines data for Scotland 2000.

- 2.2.21** While **Polmont** is the largest settlement in the Braes, the connections between settlements in the Braes are less with Polmont than with Falkirk itself. Using the usual methodology, only Rumford, Brightons and Redding can be considered part of a Polmont sub market. While all the other settlements are part of the Falkirk housing market area, their connectedness to other places in the Braes is less strong, although frequently at a round the 5% level. Whitecross and Slamannan on the edges of the Council area have links to West Lothian, while several places attract numbers of purchasers from Grangemouth. Some of the settlements are relatively remote and so are difficult to consider other than as isolated “markets” in their own right.
- 2.2.22** The identification of a sub market area in the Braes is less clear than in the other cases described. Nevertheless, there is an identifiable area to the south of Falkirk which forms part of the Falkirk housing market area and which has greater or lesser connections between its settlements.
- 2.2.23** It is possible to identify another sub-market area centred on **Denny**. This takes in Dennyloanhead and Dunipace where 27% and 29.2% of purchasers come from Denny. Also included are Bonnybridge and High Bonnybridge where between 5% and 10% of purchasers come from Denny and 14% and 12.5% of people moving from these places buy in Denny.
- 2.2.24** Dunipace was identified above as forming part of the Stirling housing market area, but it also has close connections with Denny and so is part of that sub-market. This shows how housing market areas can overlap. To the Denny sub market can be added Fankerton and Stoneywood which are not in the main analysis but both meet the criteria for inclusion in a Denny sub market.
- 2.2.25** Banknock is part of the Cumbernauld housing market area. Nevertheless it, as well as the small villages of Longcroft and Allandale, have sufficient connections with Bonnybridge to be part of a Bonnybridge sub market. For the purposes of the Housing Strategy, it is therefore proposed to include Banknock in a Denny/Bonnybridge sub market.
- 2.2.26** Most of the Council area has now been included in one of the sub market areas apart from Airth which has quite strong connections with Stirling rather than with the neighbouring sub markets of Grangemouth or Larbert/Stenhousemuir to which it is connected but not part of. Together with the villages of South Alloa and Dunmore which are probably part of the Stirling market area, this could be considered as a distinctive sub area. However, the numbers of sales are too small to justify a separate sub market area. On balance of numbers of sales, it will be considered as part of the Larbert/Stenhousemuir sub market.
- 2.2.27** This leaves the core of Falkirk town, together with the small village of Glen Village which was not part of the original analysis, as a sub-market area in its own right. It is around 50% self contained.
- 2.2.28** This whole structure gives a series of six fairly well defined housing sub markets within the Council area. Five of these are sub markets of the Falkirk (town) housing market area (which has been recognised by Communities Scotland. These are centred on Falkirk itself, Grangemouth, Larbert/Stenhousemuir, Denny/Bonnybridge and the Braes. The remaining sub market is the Bo’ness area which is more correctly part of the Edinburgh housing market area, although on the edge of it.
- 2.2.29** These six areas closely match the Housing Management Areas used by the Council’s Housing Services and also to many of the other service delivery areas used by the Council.

- 2.3.1** 2001 Census migration data: Recently, information has become available from the 2001 Census on migration patterns in the year before the Census. The Census has the advantage that it includes all migrants and not just those who purchase houses or rent from local authorities. It also includes individuals who do not move as part of a whole household. Unfortunately the small area origin/destination data has not yet been published. Once it is available, further analysis can be done
- 2.3.2** The 2001 Census showed that, of all those people moving to a new address in the Council area in the year before the Census, 71.7% moved within the Council area. This is the seventh highest percentage of the 32 Councils within Scotland. The average was 65%. There is no exactly comparable figure from the 1991 Census since the figures then related to the 59 district and islands Councils which existed at that time. The average for these was 63.2% which reflects the smaller size of many of these councils – self containment being partly related to size. Falkirk Council, however, covers the same area as the former District Council.
- 2.3.3** The figure for Falkirk represents a slight reduction from the 1991 percentage when 75% moved within the district. This is not particularly surprising since it is generally accepted that there is greater population movement in terms of distance now than in the past. In terms of numbers of migrants, there were 12,960 people moving in the year before the 2001 Census – 8.9%. This compares with 11,500 in the year before 1991, or 8.2%.
- 2.3.4** Further information is available from the 2001 Census on those moving from Falkirk to other parts of the UK. This shows that of those moving from addresses in Falkirk, 76.4% moved to another address in the Council area. This is the third highest percentage of any Council in Scotland. Table A in the Appendix shows the levels of self containment in each of the 32 councils in Scotland.
- 2.3.5** The percentage of all migrants who move within an area is one measure of self-containment. On that measure, Falkirk is over 70% self contained for in-migration and over 75% self contained for out-migration. This strongly suggests that we would be justified in considering Falkirk Council area to be a self contained housing market area.
- 2.3.6** However, self containment is not simply a matter of looking at the proportions of people who move within an area. It also includes the level of connection which an area has with other areas. Strong connections suggest that the areas may be part of the same housing market area. This is the thinking behind the DTZ Pieda research.
- 2.3.7** Looking at patterns of inward and outward movement in terms of connections with other council areas, no area provides a significant number of in-migrants compared to any other. The highest proportion of in-migrants (7.2%) comes from outside Scotland. This is actually a rather low percentage compared to some councils. These long distance moves can generally be ignored in the definition of the local housing market, although they may be a feature of its characteristics.
- 2.3.8** Only six council areas provide over 1% of Falkirk's in-migrants. Two of these are Glasgow and Edinburgh, which as the largest cities in Scotland, provide a large source of potential migrants for the rest of the country. The 2% of migrants which each provides to Falkirk are again low proportions compared to many other councils. The similarity in the figures for Glasgow and Edinburgh reinforces the view expressed in the "City Regions Boundaries Study"⁹ that Falkirk is part of the wider catchments of both cities.

⁹ Scottish Executive, Central Research Unit "City Region Boundaries Study" 2002, Table 11, page 25.

- 2.3.9** The other remaining council areas providing over 1% of Falkirk’s in-migrants are all neighbouring areas: West Lothian 2.6%, Stirling 2.5%, North Lanarkshire 2.4% and Fife 1.9%. Clackmannanshire, the final neighbouring council provides just under 1% of all Falkirk’s in-migrants.
- 2.3.10** In terms of out-migrants – where people from Falkirk move to – the pattern is almost identical to in-migration and the percentages are very similar. Table 3 shows the main patterns of both in and out migration from the 2001 Census.

Table 3: Migration connections between Falkirk and other areas

Area	Where people in Falkirk move from	Where people from Falkirk move to
Falkirk – internal moves as % of total	71.7%	76.4%
Clackmannanshire	1.0%	0.9%
Fife	1.9%	1.6%
North Lanarkshire	2.3%	1.4%
Stirling	2.4%	2.8%
West Lothian	2.5%	1.9%
Glasgow	2.1%	2.1%
Edinburgh	2.1%	2.1%
Rest of Scotland	6.8%	5.3%
Rest of UK	5.4%	5.5%
Outwith UK	1.8%	n/a

Note: only in-migrants from abroad are included, there is no information on those leaving the country
Source: 2001 Census (Crown copyright)

- 2.3.11** Since none of these migration figures comes near the 10% figure used by the DTZ Pidea research to include a community within the housing market area of a neighbouring one, it can be concluded that the Falkirk Council area as a whole is not part of any neighbouring housing market.
- 2.3.12** The above research however only looks at the Council area as a whole. Once the origin/destination data is available from the 2001 Census at a smaller area level, further work will be carried out to see if there are any differences below the level of the whole Council area. For example, are there any parts of the Council area which might be considered as part of a different housing market area, or are there any parts of neighbouring councils which might be considered to be linked to market area(s) within Falkirk.
- 2.4.1** Lettings and Waiting List data: It is generally accepted that the local authority rented “market” is limited and that few people move between local authority areas. This is sometimes seen as a restriction on people’s freedom of movement, although this is much less true now that the proportion of social rented housing has fallen significantly since the 1970’s.
- 2.4.2** Information is available from both the council’s waiting lists and from lettings information on the numbers of people who request a house in the Council area and also those to whom a letting is made. Table 4 shows, for each of the Council’s Housing Management Areas, the number of people on the waiting list requesting that area.

Table 4: Waiting list requests – area of choice by origin

Housing Management Area	Currently living in:					
	Same area		Elsewhere in Council area		Outwith area	
	No	%	No	%	No	%
Falkirk	1,222	29.0%	2,490	59.1%	499	11.8%
Dawson	432	31.4%	791	57.5%	152	11.1%
Camelon	903	27.7%	2,011	61.8%	342	10.5%
Grangemouth	1,351	53.9%	901	36.0%	254	10.1%
Bo'ness	905	67.4%	281	20.9%	156	11.6%
Stenhousemuir	1,047	37.4%	1,451	51.8%	304	10.8%
Braes	1,121	38.7%	1,437	49.7%	335	11.6%
Denny	1,354	62.7%	539	24.9%	268	12.4%

Source: Housing Waiting List

2.4.3 This shows that relatively few requests for Council housing come from outside the Council area (about 11% on average) and that most areas are fairly self contained in terms of the numbers of requests for housing. The figures for the three Management Areas in Falkirk – Falkirk, Dawson and Camelon - show relatively low levels of self containment. In terms of housing markets it would be better to combine the figures for the three areas since there is a considerable amount of cross selection among the three areas. However, the format information available does not allow this to be done.

2.4.4 It must be remembered that applicants can request several areas and many do so. In that context, the figures for actual lettings are probably more useful since they reflect actual movement of population. The letting figures for the period 1998-2003 are shown in Table 5.

Table 5: Lettings by area of origin 1998-2003

Housing Management Area	Currently living in:					
	Same area		Elsewhere in Council area		Outwith area	
	No	%	No	%	No	%
Falkirk	526	47.4%	539	48.6%	45	4.1%
Dawson	467	48.1%	447	46.1%	56	5.8%
Camelon	521	56.4%	375	40.6%	27	2.9%
Grangemouth	1,017	63.1%	518	32.2%	76	4.7%
Bo'ness	673	83.0%	77	9.5%	61	7.5%
Stenhousemuir	460	59.2%	276	35.5%	41	5.3%
Braes	688	60.3%	358	31.4%	95	8.3%
Denny	1,078	80.5%	174	13.0%	87	6.5%

Source: Housing Waiting List

2.4.5 Table 5 shows much higher figures for self containment than Table 4 and also fewer lets to people from outside the Council area. The self containment figures are also generally higher than the equivalent figures for the owner occupied sector discussed above, and there are a smaller percentage of people coming from outwith the Council area. As with the Sasines data, this information shows the relative isolation of the Bo'ness area and the self containment of Grangemouth and Denny compared to the other areas.

2.5.1 Housing market: All three sets of information used to define the Falkirk housing market tell a similar story. There is a strongly self contained housing market area within the Council area centred on Falkirk itself. Where detailed origin/destination information is available, it can be seen that the Bo'ness area is more strongly attached to the Edinburgh area and less connected to the rest of the Council area, but it is also fairly self contained in its own right.

2.5.2 Other places on the periphery of the Council area, such as Banknock and Dunipace have closer attachment to markets in neighbouring council areas but nonetheless also operate within the sub markets of the Council area. It is possible to define six sub markets within the Council area which closely reflect the service delivery areas, in particular the Housing Management areas which the Council uses.

2.5.3 Further work will be done on the local housing market once the origin/destination data from the 2001 Census is released and the position will continue to be monitored.

3.0 Characteristics of the Falkirk Council Area Housing Market

3.1.1 The Local Housing Strategy has to cover the Council area as a whole so this section of the report looks at various aspects of the housing system across the Council area. This ignores the fact that the Bo'ness area is more properly on the edge of the Edinburgh market area and some other small settlements on the edge of the Council area are not actually part of the Falkirk (town) housing market area.

3.1.2 The following aspects of the housing system are considered:

- ◆ Housing tenure
- ◆ New house building
- ◆ Sales of houses
- ◆ House prices
- ◆ House types
- ◆ Age of housing stock
- ◆ House size
- ◆ Characteristics of those living in different tenures

More specific information on social rented housing – Council housing and Housing Associations are dealt with in other papers. This information provides the background to the Local Housing Strategy

3.2.1 Housing tenure: Using the 2001 Census as a base, tenure estimates have been made for 2003 for the Council area as a whole. There are reasonably good figures available for the social rented sector (Falkirk Council's own housing and Housing Associations), figures for the private sector are more difficult to obtain. There is also a reasonably good estimate of the total housing stock which can be obtained from the number of properties on the Council Tax Register. Estimates of private rented properties are particularly difficult to make, so the figures used are largely taken from the 2001 Census. Table 6 shows the estimated tenure of the current housing stock in Falkirk Council area.

Table 6: Estimated housing stock by tenure 2003

Tenure	No of houses	% of total
Social rented:		
Falkirk Council	19,323	29.2%
Housing Associations	3,182	4.8%
Owner Occupied	41,624	62.8%
Private rented and other	2,152	3.2%
Total	66,281	

Source: Falkirk Council Research & Information Unit

3.2.2 Housing tenure has been changing within the Council area. The proportion of owner occupied houses has increased substantially while the number of Falkirk Council houses has fallen. No new Council houses have been built since the mid 1980's and almost all new build has been for owner occupation. At the same time, Council houses have been sold to their tenants so that the number of Council houses has decreased from 33,500 in 1980 to just 19,300 now – a decrease of 42% - due almost entirely to Right to Buy sales.

- 3.2.3** There has been an increase in Housing Association properties. A small number, averaging about 40 per year, are being built and Communities Scotland (formerly Scottish Homes) have transferred all their properties in the Bo'ness area to Weslo Housing Association and properties in the Denny and Falkirk area to Paragon Housing Association.
- 3.2.4** Table 7 shows housing tenure from the 1981, 1991 and 2001 Censuses together with most recent estimates for 2003 which have been made by the Council. This illustrates, both the growth in the total number of houses in the area and the changing tenure pattern. These patterns are similar to national trends.

Table 7: Change in housing tenure 1981-2003

Tenure	1981		1991		2001		2003	
	No	%	No	%	No	%	No	%
Social rented								
Falkirk Council	37,237	69.3%	25,906	44.2%	20,981	32.6%	19,323	29.2%
Housing Association	747	1.4%	3,520	6.0%	3,129	4.9%	3,182	4.8%
Owner Occupied	14,126	26.3%	27,897	47.6%	38,162	59.2%	41,624	62.8%
Private rented and other	1,617	3.0%	1,230	2.1%	2,152	3.3%	2,152	3.2%
Total	53,727		58,553		64,424		66,281	

Note that Scottish Homes (now Communities Scotland) housing is included with Housing Association in 1991 and 2001 but with Falkirk Council in 1981

Sources: 1981, 1991 and 2001 Censuses (Crown Copyright), Falkirk Council R & I Unit

- 3.2.5** The total housing stock has increased from under 54,000 to over 66,000 in the last 22 years, an increase of 12,500 or 23%. This is almost wholly due to new build and there have been very few houses demolished over that period. This raises an issue for the longer term. Houses in all tenures will eventually need to be replaced and there are considerable numbers of properties built in the 19th and early 20th centuries where this may need to be considered within the next 20 years or so. Improvements can extend the life of properties, but this cannot be done indefinitely.
- 3.2.6** This is less of a problem for public sector properties where the landlords can make a decision to demolish and rebuild. It is potentially more of a problem where these properties are owner occupied where the owner would lose 100% of the current value of the property and have to bear the rebuilding costs. There is also the issue of disrepair as properties reach the end of their useful life. This should be considered as part of the Housing Strategy in future.
- 3.2.7** One factor in the owner occupied sector which is often ignored is the fact that, according to the 2001 Census, some 34% of owner occupiers actually own their houses out-right. This has an impact on their ability to buy another property, should they wish to do so.
- 3.2.8** This tenure change over the last twenty years has had a significant impact on the area (and on the country as a whole), which will need to be monitored in future. It means that provision of housing has shifted from the social rented sector (in particular, local authorities) to the private sector. Some of the effects are described below. Future reports for the Local Housing Strategy should consider this in more detail.
- 3.3.1** New House Building: One of the features of any housing market and a measure of its vitality, is the amount of new house building which is taking place. The new build sector in Falkirk has been buoyant in the last few years and there are considerable pressures from the house builders to release more land for building.
- 3.3.2** The average number of houses completed each year has increased over the past few years. In the 1980's the average was 480 per year but that rose to 600 per year in

the 1990's. However, the last two years have seen the highest ever annual levels of house building, with almost 1,000 houses completed in 2002/03. The latest Housing Land Audit¹⁰ shows an effective land supply for the years 2002-2007 of 4,153 which would give an average of 830 houses completed each year if it is achieved.

- 3.3.3** Table 8 shows the number of house completions each year since 1981. This has been split into the categories of social rented and private sector and also shows the number of houses being built on plots of three or fewer houses.

Table 8: New house building 1981-2003

Year	SSHA*	Falkirk District Council**	Housing Associations	Plots	Private developments	Total	% private
1981/82	37	30	25	24	277	393	70.5%
1982/83	102	38	114	18	400	672	59.5%
1983/84	-	64	150	21	482	717	67.2%
1984/85	-	114	30	17	478	639	74.8%
1985/86	-	85	-	25	357	467	76.4%
1986/87	-	8	-	28	336	372	90.3%
1987/88	-	-	64	31	365	460	79.3%
1988/98	-	-	-	37	260	297	87.5%
1989/90	-	-	-	41	366	407	89.9%
1990/91	-	-	-	41	359	400	89.8%
1991/92	-	-	115	25	565	705	80.1%
1992/93	-	-	-	36	401	437	91.8%
1993/94	-	-	46	27	545	618	88.2%
1994/95	-	-	4	27	437	468	93.4%
1995/96	-	-	52	34	515	601	85.7%
1996/97	-	-	22	16	589	627	93.9%
1997/98	-	-	66	36	754	856	88.1%
1998/99	-	-	36	35	483	554	87.2%
1999/2000	-	-	81	22	523	626	83.5%
2000/01	-	-	18	14	494	526	93.9%
2001/02	-	-	55	17	826	898	92.0%
2002/03	-	-	62	20	913	995	91.8%
Total	139	339	940	592	10,725	12,735	84.2%

* SSHA= Scottish Special Housing Association, subsequently Scottish Homes, now Communities Scotland
 ** Now Falkirk Council

- 3.3.4** Table 8 shows the very high proportion of new housing which is now coming from larger private developments – over 90% in the most recent years. Since Falkirk District Council and the SSHA ceased to build houses, new social rented housing has been limited to Housing Associations which have not made up the deficit (if it is considered that there is one).

- 3.3.5** The number of houses completed on small plots has averaged 27 per year over the period but has varied quite a bit. In the last few years the numbers have been lower than at other times in the last 20 years.

- 3.4.1** House Sales: Another indicator of the vitality of the local housing market is the volume of house sales. These can be divided into three main categories – sales of newly built houses, sales of former public sector houses (Right to Buy (RTB) mainly Council houses but also Housing Association and Communities Scotland), and sales of existing owner occupied properties. Within these categories a considerable number of subcategories could be identified. The housing market is much more complex than it might first appear.

¹⁰ Falkirk Council Development Services, "Housing Land Audit 2002/2003", June 2003

- 3.4.2** Information is available from the Register of Sasines on all these sales and these have been analysed for the years 1997 to mid 2003. Table 9 shows the number of sales in the three categories identified for each year.

Table 9: Sales of houses 1997-2003

Year	Total	New build		Right to Buy		Other	
		No	%	No	%	No	%
1997	3,212	536	16.7%	716	22.3%	1,960	61.0%
1998	3,310	590	17.8%	500	15.1%	2,220	67.1%
1999	3,367	535	15.9%	400	11.9%	2,432	72.2%
2000	3,806	565	14.8%	568	14.9%	2,673	70.2%
2001	3,982	670	16.8%	594	14.9%	2,718	68.3%
2002	4,668	807	17.3%	840	18.0%	3,021	64.7%
2003*	2,192	359	16.4%	434	19.8%	1,399	63.8%

* First six months only

Source: Sasines

- 3.4.3** The figures for total sales show that sales have increased overall over the period with a higher level of sales particularly in the last three years. This indicates a buoyant and improving housing market. Total sales increased by 45% between 1997 and 2002. In the period 1997 to 2000, for which equivalent figures are available, sales volumes increased in Falkirk by 18.5% compared with an increase of 11.7% in Scotland as a whole.
- 3.4.4** Sales of new houses obviously closely follow the trends in new house building (discussed above). However this is not exact. The source of the house completions information above is the Building Control returns which record the issue of Completion Certificates. These may be issued before houses are sold by the developers. On the other hand, developers may sell houses while they are still under construction.
- 3.4.5** New build sales have increased over the six year period, in line with increasing numbers of new houses built. They average about 80 houses per year below the level of completions. The difference is made up of houses completed for Housing Associations and smaller plotted developments. New build sales, on average, make up just over 16.5% of all sales.
- 3.4.6** Other sales have also increased over the six year period which indicates a strong resale market. They average at about 67% of total sales. Within this group are a small number of categories which are worth noting.
- 3.4.7** There are a number of sales each year where the purchaser is a developer. This occurs when someone wishes to buy a new house and the developer buys their existing property in order to facilitate the sale of the new house. The developer then resells the older property which relieves the new house purchaser of the necessity of selling their original home. These two are one of the biggest groups of sales other than those included in the Table 9.
- 3.4.8** Other sales involve banks and building societies and may be repossessions. Numbers are small – averaging about 10 per year. Weslo Housing Association operates a flexible tenure scheme where the Housing Association will purchase the house of an owner who is in financial difficulties at up to 85% of the market value and the owner then becomes a Welso tenant. There are nine purchases by Weslo over the six years in Bo'ness which may be part of this scheme.
- 3.4.9** In other transactions, property companies or individuals buy or sell numbers of properties. This includes those where developers sell for rent or to holding companies. There are also inheritances of property and transfers on divorce which are harder to identify.

3.4.10 An increasingly important segment of the market is the resale of former Right to Buy (RTB) properties. An exercise was undertaken to identify these resales. Altogether some 4,480 RTB resales were identified between 1997 and mid 2003. Table 10 shows the increase in the numbers of these sales and the proportion of all sales in that category.

Table 10: RTB resales 1997-2003

Year	RTB resales	Total transactions	RTB resales as % of total
1997	550	3,212	17.1%
1998	596	3,310	18.0%
1999	618	3,367	18.4%
2000	716	3,806	18.8%
2001	753	3,982	18.9%
2002	828	4,668	17.7%
2003*	419	2,192	19.1%
Total	4,480	24,537	18.3%

* First six months only

Source: Sasines

3.4.11 It is not surprising that the number of sales in this category have been increasing since the accumulated total of RTB sales is now over 13,500 and so there is an increasing pool of RTB houses which can be resold. The work which was carried out on this sector also showed that RTB resales provide an important source of low cost housing with the current average price being only £43,250.

3.4.12 Right to Buy sales include those by the Falkirk Council, Communities Scotland and its predecessors and Housing Associations. Sales by other public sector bodies such as the Health Board or the Water Authority are included in "Other" sales. Numbers of these are very small. Sales of public sector house have varied over the six year period. Sales fell between 1997 and 1999 but have increased again since then, particularly in 2002 and 2003. They have averaged 16.7% of all sales (see Table 9).

3.4.13 In addition, information on the sale of Falkirk Council houses is available back to 1980 when the Right to Buy legislation was passed. These are set out in Table 11.

3.4.14 Table 11 shows that sales peaked at over 1,000 per year in the late 1980's, then fell to under 400 by 1996. Sales have fluctuated since then but at a generally lower level than in the early 1990's, although the most recent years have shown an increase.

Table 11: Sales of Council houses

Year	Total
1980/81	49
1981/82*	225
1982/83	513
1983/84	796
1984/85	659
1985/86	462
1986/87	441
1987/88	768
1988/89	1,226
1989/90	963
1990/91	705
1991/92	636
1992/93	725
1993/94	584
1994/95	592
1995/96	385
1996/97	420
1997/98	567
1998/99	464
1999/2000	346
2000/01	542
2001/02	675
2002/03	875
Total	13,618

Source: Falkirk Council Housing Stock Register – April 2003

- 3.5.1** House Prices: Prices are an important indicator in the housing market. Information is available from the Sasines for the last few years – 1997 to mid 2003. Table 12 shows the average house price in each year together with comparisons for Scotland and the UK. The Falkirk analysis excludes RTB sales and other transactions where no move took place e.g. property transfers as the result of inheritance or divorce.

Table 12: Average house prices 1997-2003

Year	Falkirk	Scotland	UK
1997	£53,415	£59,210	£68,505
1998	£53,525	£60,680	£72,195
1999	£57,285	£61,545	£77,405
2000	£60,805	£61,965	£85,005
2001	£64,485	£63,630	£92,255
2002	£72,135	£68,990	£108,340
2003	£73,145	£79,400	£132,590

Sources: Falkirk – Sasines; Scotland and UK – HBOS Housing Research

- 3.5.2** Table 12 shows a considerable increase in average house prices in the Council area over the last few years. Prices have increased on average by £19,730 or 37%, well above the rate of inflation, since 1997. In contrast, prices in Scotland as a whole have risen by 34%, a lot of this in the last year, but at the UK level they have almost doubled, increasing by 94%. Falkirk thus shows a similar increase to Scotland as a whole, although average prices have generally been slightly lower.
- 3.5.3** Particular areas of Scotland have however shown prices similar or higher than the UK average. The average price in Lothian (including Edinburgh and West Lothian) was £144,000 by mid 2003. The HBOS average figure for the former Central Region, which includes Falkirk, in mid 2003 was £90,000. These figures indicate that prices in the Falkirk area are lower than in surrounding areas.

- 3.5.4** However average house prices hide other information. Separate analyses have been done on new build properties and RTB resales. Table 13 shows the average prices for these two sales sectors compared to the overall average.

Table 13: Average house prices by sector

Year	New build	RTB resales	Other sales	All
1997	£63,895	£37,115	£56,115	£53,415
1998	£65,905	£36,675	£55,600	£53,525
1999	£79,585	£36,290	£58,000	£57,285
2000	£89,370	£36,245	£61,755	£60,805
2001	£95,265	£39,125	£63,520	£64,485
2002	£107,175	£40,200	£71,060	£72,135
2003	£110,445	£43,254	£72,075	£73,145

Source: Sasines

- 3.5.5** Table 13 shows that there has been a very large increase in the average price of new houses, from just under £64,000 to over £110,000, a 73% increase. A new house now costs £37,000 more than the average, about 50% more. This reflects the type of new houses currently being built by developers.
- 3.5.6** On the other hand, resales of RTB properties showed a slight decrease in price from 1997 to 2000, before beginning to increase to an average of £43,250. This is less than 60% of the overall average. RTB resales therefore provide a substantial volume of properties for sale at very reasonable prices.
- 3.5.7** Prices of RTB sales themselves are determined by the levels of discount available to purchasers, as well as the values of the properties. The selling prices are about 55% of the value of the houses because of discounts. The average price paid for a RTB house in the first half of 2003 was only £16,950. This is only some £1,200 higher than the price paid in 1997.
- 3.5.8** All other sales of second hand properties have increased in price from £56,115 to £72,075 on average. This is an increase of £15,960, or 28%.
- 3.5.9** Another measure of house prices is the median price. This is the price at which 50% of properties were sold for less and 50% for more. Because average prices can be influenced by a small number of very expensive houses being sold (the highest price paid since 1997 was £725,000), the median is often considered a better measure.
- 3.5.10** Overall (excluding RTB sales and transfers), the median price increased from £42,500 in 1997 to £51,000 in 2003, an increase of £8,500 or 20% in Falkirk. The median price of new houses increased from £59,995 in 1997 to £103,000 in 2003 – a 72% increase.
- 3.5.11** Yet another way of looking at house prices is to consider the number of houses sold in different price bands. This is set out in Table 14 where the number and percentage of sales in price bands from under £20,000 to over £200,000 are compared for 1997 and 2002 (the last full year for which figures are available).
- 3.5.12** The change in the distribution of prices by band shows in particular the very large increase in the number of more expensive houses being sold – those over £100,000 – and the general fall in the number of properties sold at the lowest prices. Over 20% of all houses sold in 2002 cost over £100,000 compared to only 4% in 1997.

Table 14: House prices by price band 1997 and 2002

Price band	1997		2002	
	No	%	No	%
£0-£20,000	31	1.3%	50	1.5%
£20,001-£30,000	278	11.9%	250	7.5%
£30,001-£40,000	560	24.1%	537	16.1%
£40,001-£50,000	432	18.6%	533	16.0%
£50,001-£60,000	391	16.8%	446	13.4%
£60,001-£70,000	171	7.3%	214	6.4%
£70,001-£80,000	177	7.6%	217	6.5%
£80,001-£90,000	122	5.2%	219	6.6%
£90,001-£100,000	68	2.9%	172	5.2%
£100,001-£125,000	51	2.2%	341	10.2%
£125,001-£150,000	29	1.2%	174	5.2%
£150,001-£250,000	11	0.5%	107	3.2%
Over £250,000	7	0.3%	69	2.1%
Total	2,328		3,339	

Source: Sasines

3.5.13 The above discussion suggests that while prices are increasing within the Council area, in comparison to many other areas – including the surrounding areas – prices are still very reasonable. Purchase of public sector housing by sitting tenants continues to provide a very cheap way into owner occupation as does the resale of RTB houses. The more general issue of affordability is dealt with in a separate paper.

3.5.14 There may be concerns however, at the price increases in new build developments. These are now substantially above prices in the existing housing stock. However, the developers claim to be filling a gap in the market in the Council area for larger more expensive properties which do not appear in the existing housing stock and for which there is a demand.

3.6.1 House types: The type of housing which is available is one aspect of the housing market which can be reflected in the popularity of the housing in particular areas and across the Council area as a whole. By type of housing is meant characteristics such as flatted, detached, semi-detached properties. It also includes the age of the property.

3.6.2 Table 15 shows the house types within the Council area at the time of the 1991 and 2001 Censuses. This shows that just under one third of all houses were flats at both dates compared to a Scotland figure of 34% in 2001. By 2001 68% of dwellings were houses – either detached, semi-detached or terraced. The apparent decrease in the number of terraced houses is probably due to the way in which form fillers interpreted the Census form in 2001 compared to 1991. The Council is one of relatively few in Scotland with multi-storey properties.

Table 15: House types 1991 and 2001

House type	1991		2001	
	No	%	No	%
Detached	7,371	12.6%	10,805	16.8%
Semi-detached	14,632	25.0%	17,749	27.6%
Terrace	16,599	28.3%	15,400	23.9%
Flat – low rise	18,534	31.6%	18,788	29.2%
Flat – multi-storey	1,095	1.9%	1,095	1.7%
Other	369	0.6%	584	0.9%
Total	58,600		64,421	

Source: 1991 and 2001 Censuses (Crown copyright),

- 3.7.1** Age of housing stock: About 12,700 houses have been built in the Council since 1981. This represents 19% of the total stock. Information on the age of properties in the private sector is difficult to come by. However, the Council has data on the age of its own properties. This is shown in Table 16. It can probably be assumed that the 13,500 council houses that have been sold in the last 20 years have a similar age profile to the remaining stock.

Table 16: Age of Council housing stock

Date of construction	No of properties
Pre 1919	228
1919-1944	5,626
1945-1964	8,471
1965-1982	4,975
Since 1982	152
Total	19,452

Source: Falkirk Council Housing Stock Register 2003

- 3.7.2** The age of properties is an important indication of their likely condition. New houses should be in good condition. The date of construction is also a guide to the building standards that were in force when they were built. It is also a pointer to when future redevelopment may be necessary. At current rates of demolition, houses being built now will have to last several hundred years! This cannot continue in the long term and the position will need to be monitored. In particular, concentrations of older properties should be identified.

- 3.8.1** House size: House size is important, particularly when related to household size. Table 17 shows the distribution of occupied houses by size and number of people living in them in the 2001 Census. It should be noted that the Census counts of number of rooms includes kitchens. Comparisons with the 1991 Census indicates that there has been a particular growth in the number of large houses of 6 or more rooms, together with an increase in the number of single person households.

Table 17: House size and number of residents

No of rooms	No of residents					Total
	1	2	3	4	5 or more	
1 or 2	1,548	571	125	68	18	2,330
3	4,753	1,722	381	171	58	7,085
4 or 5	11,791	14,203	6,817	4,929	1,575	39,315
6 or more	1,523	4,384	2,913	3,546	1,452	13,818
Total	19,615	20,880	10,236	8,714	3,103	62,548

Source: 2001 Census (Crown copyright)

- 3.8.2** 63% of houses have four or five rooms and 22% are even bigger. In contrast 65% of households are of one or two people. The table indicates that there are relatively few households who are overcrowded, although, using an approximation to the bedroom standard, 8.4% of households have at least one room less than they need.

- 3.9.1** Characteristics of those living in different tenures: The characteristics of those living in different tenures varies, and this has an impact on the housing market. Most of the following information is taken from the 2001 Census and shows the strong contrast which exists between the owner occupied and social rented sectors.

- 3.9.2** Social rented housing is increasingly becoming the tenure of the elderly and less well off. In 2003 12,760 people in the Falkirk area were in receipt of Housing Benefit out of a total rented sector of 24,670, or 52%. Assuming that the proportions are similar in each of the three rented tenures (Council, Housing Association and private rented), this means that half of all tenants have incomes that are so low that they are entitled to Housing Benefit.

- 3.9.3** In terms of age, half of those aged 85+ who still live in their own homes are Council tenants and 37% of those aged over 60. On the other hand, only 25% of those aged 25-49 rent from the Council. 25% of all Council house tenants are single pensioners while only 10% of owner occupiers are pensioners living alone.
- 3.9.4** Partly because of this, 70% of Council houses are occupied by only one or two people, compared to 60% of owner occupied houses. However, both these figures are high and illustrate very well the increase in the number of very small households that will need to be provided for. Projections suggest that numbers of small households, and in particular single person households are likely to continue to increase for the foreseeable future.
- 3.9.5** Other groups who are liable to poverty are over represented in Council housing. 70% single parents live in social rented housing and only 25% are owner occupiers. 74% of the unemployed live in Council or Housing Association houses and only 18% live in houses which are privately owned. This contrasts with the 34% of houses that are social rented and 63% owner occupied.
- 3.9.6** Only 15% of those living in owner occupied houses suffer from a limiting long term illness compared to 31% of those living in a Council house and 35% of those in Housing Association properties. Also, only 7% of people in owner occupation had poor health in contrast to 17% of those in social rented accommodation.
- 3.9.7** Social rented tenants are more likely to be overcrowded. 13% of Council properties and 17% of Housing Association properties are overcrowded in that they have at least one room less than the size of the household requires. In contrast, only 5% of owner occupied houses are overcrowded on this measure.
- 3.9.8** Largely because of the characteristics of the occupants, only 13% of owner occupiers do not have a car compared to 59% of Council tenants and 62% of Housing Association tenants.

4.0 Conclusion

- 4.1** This paper sets out to show the extent to which the Falkirk Council area represents a self contained housing market area. The conclusion is that, apart from the Bo'ness area, which could be considered part of the Edinburgh housing market, and some small settlements on the edge of the Council area, it is a self contained market area centred on Falkirk town. Additionally, the area can be sub divided into six sub-market areas.
- 4.2** The characteristics of the Falkirk Council market area are then described as background information to inform the first Local Housing Strategy for Falkirk Council.
- 4.3** The area is growing with a buoyant housing market of rising prices (particularly for new houses). The number of new houses being built is increasing. In line with national trends, there has been a significant change in the tenure pattern over the last twenty years. This has largely been due to the impact of 13,500 RTB sales and limited new build of social rented housing.
- 4.4** There is an increasing contrast between those living in owner occupied properties and social rented housing. This has implications for the Local Housing Strategy and will need further monitoring and evaluation.

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Appendix

Table A: Self containment of local authorities in Scotland from the 2001 Census migration data

	% of migrants to area with origin in area	% of migrants from area with destination in area
Aberdeen	61.1%	65.9%
Aberdeenshire	61.7%	64.1%
Angus	68.1%	67.5%
Argyll and Bute	55.5%	59.9%
Clackmannanshire	61.4%	63.9%
Dumfries and Galloway	72.5%	73.9%
Dundee	69.2%	74.2%
East Ayrshire	69.6%	70.0%
East Dunbartonshire	51.2%	48.9%
East Lothian	60.2%	63.7%
East Renfrewshire	45.7%	46.6%
Edinburgh	60.4%	68.7%
Eilean Siar	62.1%	56.0%
Falkirk	71.7%	76.4%
Fife	72.3%	76.4%
Glasgow	65.9%	70.1%
Highland	67.8%	71.1%
Inverclyde	76.6%	78.3%
Midlothian	58.6%	58.1%
Moray	56.7%	60.6%
North Ayrshire	70.6%	71.0%
North Lanarkshire	75.5%	75.7%
Orkney	75.8%	70.2%
Perth and Kinross	60.2%	63.9%
Renfrewshire	70.7%	70.8%
Scottish Borders	63.2%	68.9%
Shetland	68.4%	61.3%
South Ayrshire	65.0%	65.9%
South Lanarkshire	69.0%	70.4%
Stirling	54.4%	61.8%
West Dunbartonshire	72.6%	70.9%
West Lothian	65.0%	72.7%
Average of all councils	65.0%	66.8%

Source: 2001 Census GROS Crown copyright