



# Renfrewshire Local Housing Strategy 2023-2028

Local Context and Evidence Base

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This document provides an overview of the geography, demographic trends, housing supply and key market issues across Renfrewshire.

It also outlines Renfrewshire’s geography in terms of its settlements, population centres and sub-market areas as well as Renfrewshire’s strong links with neighbouring local authorities across the wider Glasgow City Region.

Consideration is given to the current population as well as future population and household projections and trends with information drawn from the 2023 Housing Need and Demand Assessment and National Records of Scotland population data.

This document also provides an overview of existing housing supply across different tenures as well as levels of recent development activity with an overview provided of Renfrewshire’s housing market in terms of affordability and availability in the private sector.

## Renfrewshire’s Geography

Renfrewshire covers a large area and is approximately 261 square kilometres in area with significant population concentrations in the 3 primary urban centres of Paisley, Renfrew and Johnstone.

For the Local Housing Strategy, the wider geography of Renfrewshire is divided into 5 housing sub-market areas: (i) Paisley and Linwood, (ii) Renfrew, (iii) Johnstone and Elderslie, (iv) North Renfrewshire and (v) West Renfrewshire.

## Renfrewshire’s Demography (*Population, Households and Future Projections*)

In 2021, 179,940 people lived in Renfrewshire according to official population and household statistics from National Records of Scotland.

### Renfrewshire’s Population (2021)

Year	2021
Population	179,940 People
Households	87,910 Households
Average Household Size	2.02 People

National Records of Scotland (NRS), Mid-Year Population estimates

## Renfrewshire's Future Household Projections to 2028

Household type	2018	2028
1 Adult	35,756	38,935
2 Adults	22,273	23,861
3 or more adults	7,258	6,945
1 Adult with 1 or more children	6,204	6,625
2 or more adults with 1 or more children	14,254	14,234
<b>Total Household Projection</b>	<b>85,745</b>	<b>90,601</b>

National Records of Scotland (NRS), Population estimates

By 2028, the number of households in Renfrewshire is expected to increase to around 90,601 through a combination of small projected increases in the population combined with an increasing number of people living alone.

Between 2018 and 2028, National Records of Scotland estimate that Renfrewshire's population will increase by approximately 2.5% which will be driven by net migration into Renfrewshire.

Renfrewshire's population like Scotland's is ageing with people living longer. In 2021, almost one fifth (19.6%) of Renfrewshire's population was 65 years of age or older.

Population projections for the period 2018 to 2028 suggest that the number of people in the 65 to 74 year old age group will increase by 20% and that the proportion of those aged 75 years and over is expected to increase by 21% over this ten year period (NRS Sub National Population Projections (2018 based)).

## Renfrewshire's Population by Age Group (2021)

Age Group	2021	
0-15	29,784	16.55%
16-24	17,798	9.89%
25-44	46,950	26.09%
45-64	50,823	28.24%
65-74	19,047	10.59%
75+	15,538	8.64%
<b>Total</b>	<b>179,940 People</b>	

National Records of Scotland (NRS), Mid-Year Population estimates

These trends mean that it is vital that our housing supply reflects the local population and demographics with sufficient availability of housing types across tenures to meet the housing needs of a range of different age groups (*Strategic Priorities 1 and 5*).

This increasingly aged population, who will have associated greater health related support needs, will place added pressures on social housing providers and support provider services.

### Estimated Life Expectancy and Healthy Life Expectancy Rates in Renfrewshire

In 2019-2021, life expectancy at birth in Renfrewshire was higher for females (80.0 years) than for males (75.5 years).

In Renfrewshire, female life expectancy at birth is lower than the equivalent national average of 80.8 years and male life expectancy at birth is also lower than the national average of 76.6 years (Healthy Life Expectancy Estimates by Council Area in Scotland 2019-2021).

Healthy Life Expectancy rates are an estimate of how many years a person might be expected to live in a healthy state.

As people age, estimated healthy life expectancy rates decrease while complex health needs can increase which presents challenges for housing providers and housing related support services.

The following table compares estimated healthy life expectancy rates for males and females both in Renfrewshire and nationally.

### Healthy Life Expectancy Estimates of Men and Women in Renfrewshire and Scotland (Years) 2019-2021

Age Group	Healthy Life Expectancy Female RC Area	Healthy Life Expectancy Male RC Area	Healthy Life Expectancy Female Scotland	Healthy Life Expectancy Male Scotland
60-64	12.41	13.31	13.89	12.31
65-69	9.42	10.54	10.97	9.59
70-74	6.79	8.08	8.32	7.20
75-79	4.62	6.04	6.01	5.13
80-84	2.95	4.37	4.15	3.51
85-89	2.13	3.10	2.75	2.30
90+	1.38	2.19	1.78	1.48

Healthy Life Expectancy Estimates by Council Area in Scotland 2019-2021; (NRS Data 2023)

## Housing Stock

The total housing stock in Renfrewshire was 89,571 properties according to National Records of Scotland in 2021.

Across all tenures, recent Council Tax information (2023) notes that around 67% of all dwellings are owner occupied, 22% are social rented and the remaining 11% are privately rented.

The Scottish House Condition Survey (2017-2019) also suggests that Renfrewshire's housing stock comprises 56% houses and 44% flats.

## Affordable Housing (Council and Housing Association)

Around 77% of the Councils approximately 12,200 properties are flats with the number of houses as a property type having been adversely affected by the use of 'Right to Buy' prior to it ending in 2016.

Housing associations tend to have a more balanced mix of property types with new homes delivered as part of the Strategic Housing Investment Plan over the last 10 years helping redress the balance of property type within the affordable housing sector.


The five local housing associations (*those who only operate within Renfrewshire*) collectively own around 6,200 properties. The remaining social rented properties are owned and managed by 10 national housing associations with Link Group and Sanctuary Scotland having a significant local presence with around 1,700 properties.

Turnover is generally around 9-10% of available stock with around 2,000 properties becoming available for social rent across the Council and our housing association partners each year.

## New Build Development

Renfrewshire's Strategic Housing Investment Plan (SHIP) continues to deliver a range of affordable homes across Renfrewshire.

Renfrewshire Council are currently on site or are preparing plans to build more than 500 new Council homes for social rent over the next five to ten years across Renfrewshire.

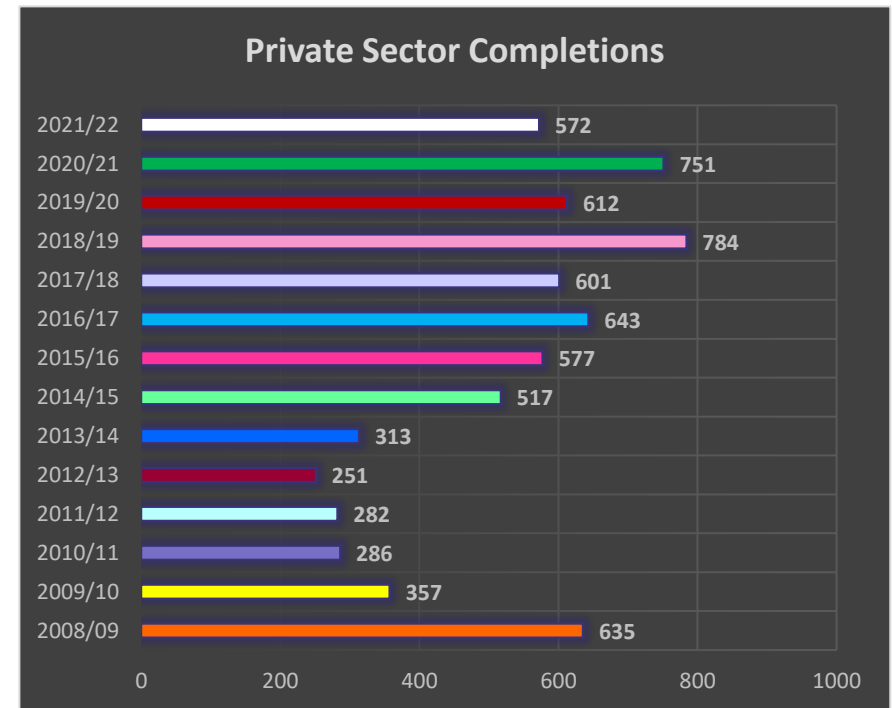


Affordable Housing Completions	
2017/18	77
2018/19	127
2019/20	195
2020/21	124
2021/22	170
2022/23	369

Annual Affordable Housing Completions, Renfrewshire Strategic Housing Investment Plan

Demand across private sector sites has been high with both single developer sites and multi-developer sites such as Dargavel Village, Bishopton continuing to sell to a range of different household groups.

A number of other large private sites are progressing which will also provide new housing across Renfrewshire with a number of previously vacant and derelict sites brought back into productive use for residential use.



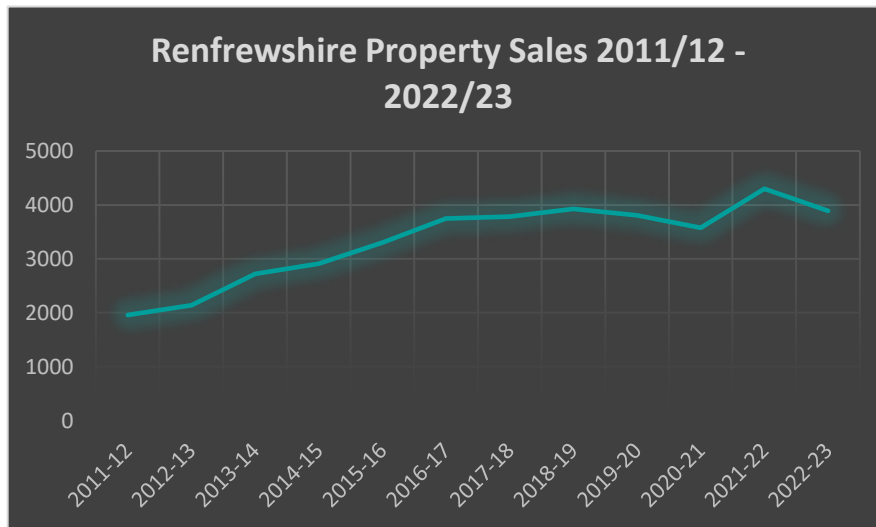
Renfrewshire Housing Land Audit 2008/09 to 2021/22

## Housing Market

The housing market in Renfrewshire continued to strengthen in recent years with strong year on year sales growth between 2011 and 2019 according to data from Registers of Scotland.

However, there was a slowdown in transactions during the COVID-19 pandemic, but as restriction eased, sales volumes recovered with more than 4,300 property sales completed in 2021/22.

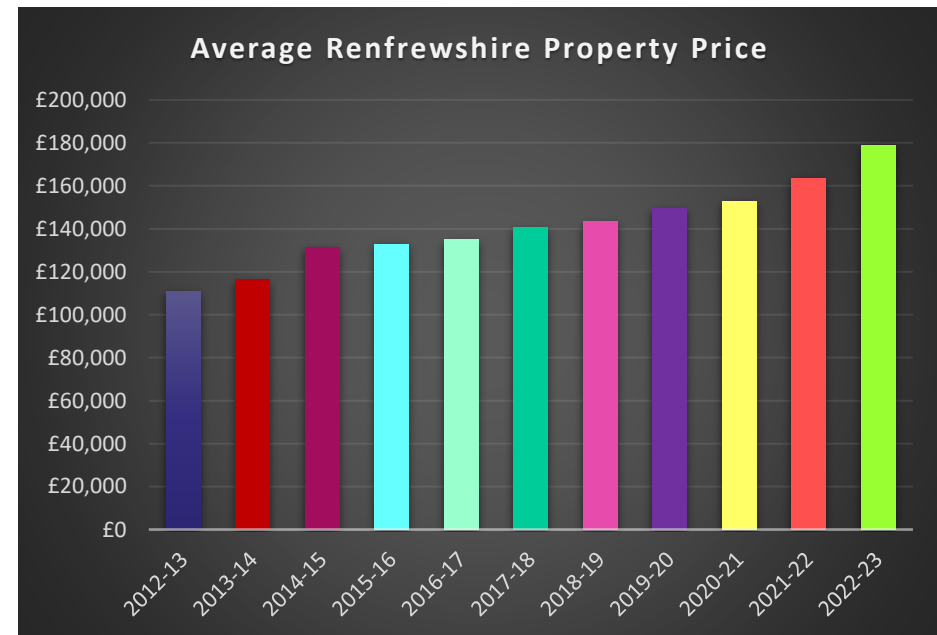
Sales volumes declined to 3,890 in 2022/23 which suggests that much of the pent up excess demand built up during Covid-19 restrictions had worked its way through the market during 2021/22.



Registers of Scotland Annual Sales Data 2011/2012 – 2022/2023

## House Prices

Across Renfrewshire, the average residential property price in 2022/23 was £179,033 according to Registers of Scotland. This compares with an average national price of £215,634.



Registers of Scotland Average Sales Values

There are significant differences in property prices across Renfrewshire with the more urban areas of Paisley, Linwood,

Renfrew and Johnstone more affordable than the more rural settlements across North and West Renfrewshire.

This can in part be attributed to the property types available in each location with more urban areas having a higher proportion of flatted stock which tend to be less expensive.

Renfrewshire's average property price (£179,033) is amongst the lowest in the Glasgow City Region with only Inverclyde (£132,266), West Dunbartonshire (£142,823) and North Lanarkshire (£165,011) having a lower average purchase price in 2022/23.



Private Sector development, Bellway Homes, Renfrew



If you require a printed copy of the Renfrewshire Local Housing Strategy 2023-2028 please email:  
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