Topic 2: Delivery of Homes

Engagement version March 2025

Requirements addressed in this section

Information required by the Town and Country Planning (Scotland) Act 1997, as amended, regarding the issue addressed in this section

Town and Country Planning (Scotland) Act 1997, as amended

Section	Requirement
Section 15(1A)	The Local Development Plan (LDP) must include targets for meeting the housing needs of people living in the part of the district to which it relates.
Section 15(5)(a)	the principal physical, cultural, economic, social, built heritage and environmental characteristics of the district,
Section 15(5)(b)	the principal purposes for which the land is used,
Section 15(5)(ca)	the housing needs of the population of the area, including in particular, the needs of persons undertaking further and higher education, older people and disabled people
Section 15(5)(cb)	the availability of land in the district for housing, including for older people and disabled people
Section 15(5)(f)	any change which the planning authority thinks may occur in relation to these matters mentioned in paragraphs (a) to (eb)
Section 16(2) (ab)	In preparing the LDP, the planning authority are to have regard to the list published under section 16E of persons seeking to acquire land in the authority's area for self-build housing.

Section 16B(3) (a) - (c)	The Evidence Report is to:
	• set out the planning authority's view on the matters listed in section 15(5) (see above)
	• set out –
	  ○ a summary of the action taken by the planning authority to support and promote the construction and adaptation of housing to meet the housing needs of older people and disabled people in the authority's area
	  ○ an analysis of the extent to which the action has helped to meet those needs
	• set out –
	  ○ a summary of the action taken by the planning authority to meet the needs of gypsy/travellers in the authority's area
	  ○ an analysis of the extent to which that action has helped to meet those needs

Town and Country Planning (Development Planning) (Scotland) Regulations 2023:

Section	Requirement
Regulation 9(2)(e)	In preparing the LDP, the planning authority must have regard to: • any local housing strategy
Regulation 24(c)	A Delivery Programme is to set out the following matters: • the expected sequencing of, and timescales for, delivery of housing on sites allocated by the LDP

DRAFT

National Planning Framework 4

Local Development Plans (LDPs) are expected to identify a Local Housing Land Requirement (LHLR) for the area they cover. This is to meet the duty for a housing target and to represent how much land is required. To promote an ambitious and plan-led approach, the Local Housing Land Requirement is expected to exceed the 10 year Minimum All Tenure Housing Land Requirement (MATHLR) set out in Annex E.

Deliverable land should be allocated to meet the 10 year Local Housing Land Requirement in locations that create quality places for people to live. Areas that may be suitable for new homes beyond 10 years are also to be identified. The location of where new homes are allocated should be consistent with local living including, where relevant, 20 minute neighbourhoods and an infrastructure first approach. Diverse needs and delivery models should be taken into account across all areas, as well as allocating land to ensure provision of accommodation for Gypsy/Travellers and Travelling Showpeople where need is identified.

The LDP Delivery Programme is expected to establish a deliverable housing land pipeline for the Local Housing Land Requirement. The purpose of the pipeline is to provide a transparent view of the phasing of housing allocations so that interventions, including infrastructure, that enable delivery can be planned: it is not to stage permissions. Representing when land will be brought forward, phasing is expected across the short (1-3 years), medium (4-6 years) and long-term (7-10 years). Where sites earlier in the deliverable housing land pipeline are not delivering as programmed, and alternative delivery mechanisms identified in the delivery programme are not practical, measures should be considered to enable earlier delivery of long-term deliverable sites (7-10 years) or areas identified for new homes beyond 10 years. De-allocations should be considered where sites are no longer deliverable. The annual Housing Land Audit will monitor the delivery of housing land to inform the pipeline and the actions to be taken in the delivery programme.

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Links to Evidence

- Scottish Vacant and Derelict Land Survey (2023)
- NPF4 - Aberdeen City and Aberdeenshire MATHLR Assessment Report
- Airbnb Scotland Survey 2023 on numbers and distribution of Airbnb homes across Scotland
- Scottish Government Housing to 2040 Report
- Chief Planner's Letter: Planning for Housing (June 2024)
- Aberdeen City and Aberdeenshire Housing Need and Demand Assessment 3: 2023-2028 [1]
- Aberdeen City and Aberdeenshire Housing Land Audit 2023
- Aberdeen City and Aberdeenshire Housing Land Audit 2024
- Aberdeen City Local Housing Strategy 2018-2023
- Aberdeen City Council Strategic Housing Investment Plan 2024/25 – 2028/29
- Aberdeen Brownfield Urban Capacity Study (2019)
- Online Register of HMO Licence Applications and HMO Licences
- Houses in Multiple Occupation Concentrations – Interactive Online Map (updated on a monthly basis)
- Online Register of STL Licence Applications and STL Licences
- Aberdeen City Council Self-Build Housing Register (May 2024 Update)
- Planning Permission in Principle for erection of 19no. self-build dwelling houses with associated landscaping, access and infrastructure - Woodend, Culter House Road, Aberdeen Peterculter (planning ref. 210889/PPP) (insert planning ref. into search field to view decision notice and approved plans)
- Aberdeen City Community Planning Aberdeen Engagement Report
- Aberdeen City Demolition safest option for RAAC-affected homes
- National Records for Scotland Mid-2023 population estimates
- National Records for Scotland Households and Dwellings in Scotland, 2023

[1] The HNDA was submitted to the Centre for Housing Market Analysis (CHMA) in October 2023 and was formally signed off as 'robust and credible' in mid-January 2024.

Summary of Evidence

Policy context

Purpose and Scope of Evidence Report Chapter

The Council have a responsibility to encourage, promote and facilitate the delivery of more high quality affordable and sustainable homes, in the right locations, providing choice across tenures meeting the diverse housing needs of people and communities in Aberdeen. The evidence base to support these aims must set out trends relating to the housing market and housing completions, demographics and needs, and information on brownfield sites in the city.

This section is structured in the following order:

- Spatial Location of 2023 Local Development Plan sites and 2023 Housing Land Audit sites
- Housing Market Drivers and Trends
- Demographic Context
- Estimating Housing Need and Demand
- Local Housing Strategy and Housing Supply Target
- Past Housing Completion Rates and Existing Housing Land Supply
- Brownfield and Greenfield Development Trends
- Vacant and Derelict Land and Urban Capacity Sites
- Windfall Development Trends
- Housing Affordability
- Specialist Housing Provision
- Wheelchair Accessible Housing
- Houses in Multiple Occupation
- Short-term Lets
- Self Build Housing and Self Build Register
- Reinforced Autoclaved Aerated Concrete
- Place Standard Assessment

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Spatial Location of 2023 LDP sites and 2023 Housing Land Audit sites

Maps for the 2023 Local Development Plan sites and 2023 Housing Land Audit sites can be found below. These give a good baseline understanding of the remaining capacities of current sites around Aberdeen.

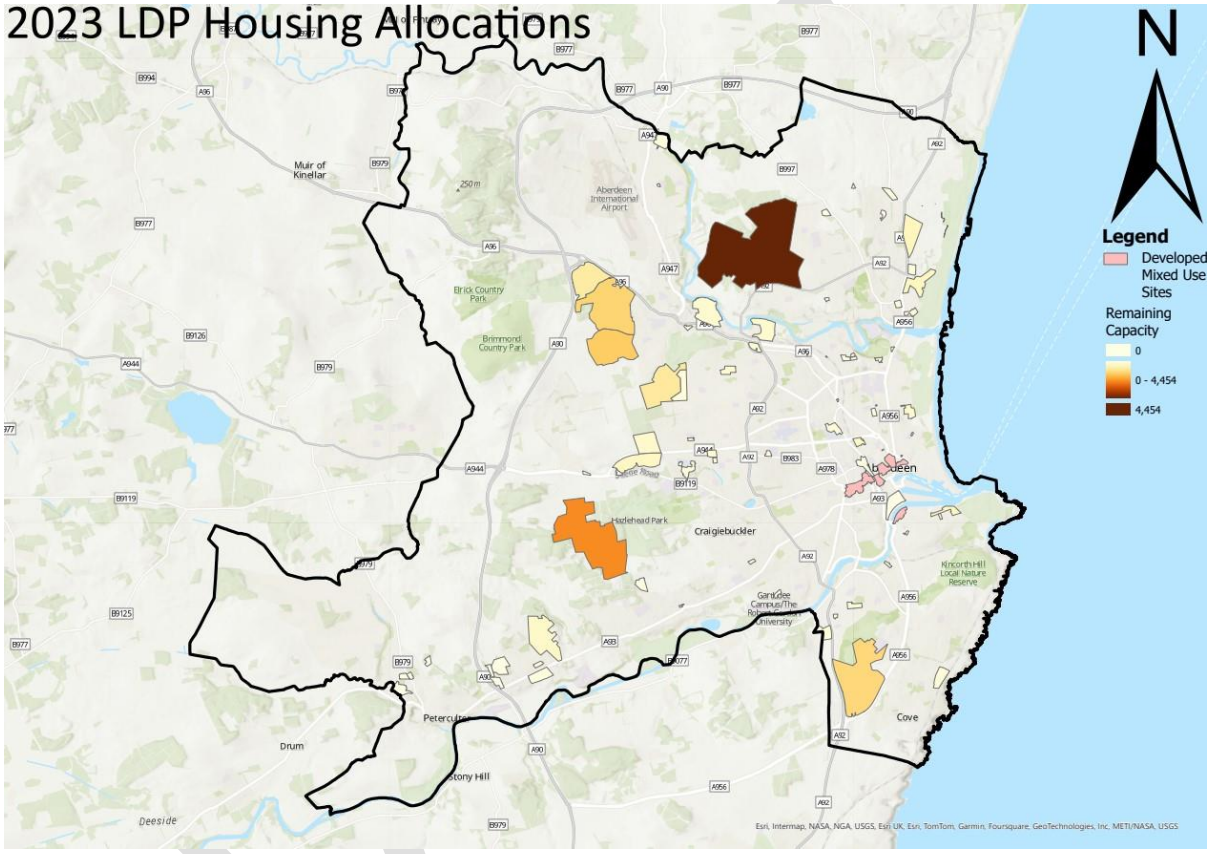


Figure 1: Map of Aberdeen Local Development Plan 2023 sites.

The above map shows that there is still significant scope for housebuilding on the larger greenfield housing allocations, particularly at Grandhome and Countesswells.

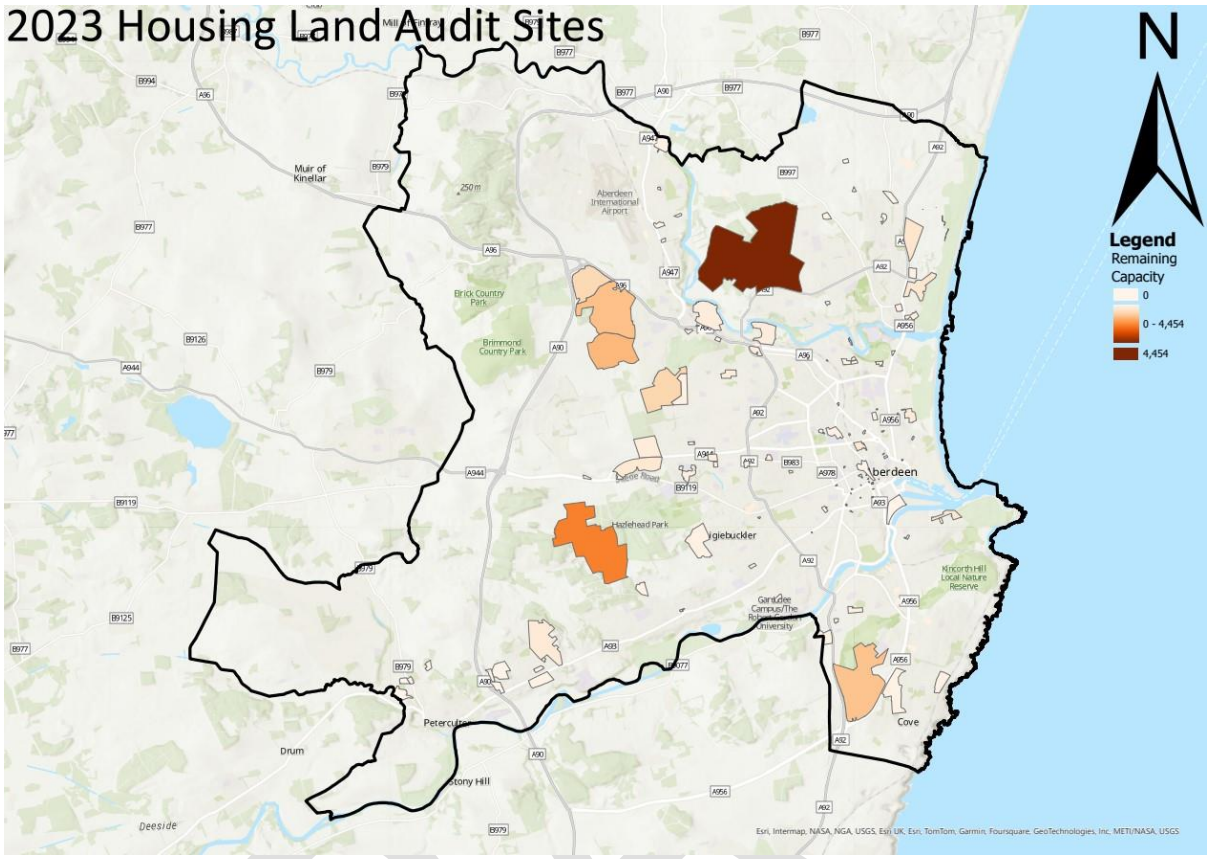


Figure 2: Map of the Housing Land Audit sites 2023 – 2024 is not yet available.

The above map is similar to the Local Development Plan map however it also demonstrates that there are a large quantity of smaller sites which are counted within the Housing Land Audit (HLA) which are scattered throughout the existing built areas of the city.

Housing Market Drivers & Trends

Chapter 2 of the Housing Need and Demand Assessment 2023-2042 (HNDA) presents an extensive range of data on key drivers of the local housing market in Aberdeen and Aberdeenshire. It is not appropriate to reproduce all of the data here. In summary, the chapter identifies a number of issues for the local housing market that will need to be considered during preparation of the new Local Development Plan. The key issues are outlined in Table 1 below.

Topic	Key Issues Identified in HNDA
Demographic issues for local housing market	• Following a prolonged period of strong population growth, both Aberdeen City and Aberdeenshire saw decreases in population from 2015 in response to local economic circumstances. • Compared to Scotland, both areas have seen an above average increase in older age groups and a decrease in young adults. • Population projections indicate a higher rate of increase in population in Aberdeenshire than Aberdeen in future years. The main increases are in older age groups. • After a long period of positive net in-migration up to 2014, there was a reversal of this trend from 2015, and both Aberdeen City and Aberdeenshire saw negative net migration for a few years. There remains uncertainty over the future direction and pattern of migration trends post Covid-19 and Brexit. • Aberdeen City has an average household size of 2.02 persons. Household size has been declining and this trend is projected to continue. • The number of households is projected to increase by 3% in Aberdeen City by 2028. This may be a conservative estimate of household growth as recent migration trends indicate a higher level of growth is more likely. • In Aberdeen City the largest projected increase is in single adult households (+4.4%). The largest percentage increases are in older households, particularly those aged 75+, with projected increases of 18.8% in Aberdeen City.
Economic issues for the local housing market	• Following a prolonged period of economic growth in North East Scotland, there was a significant decline between 2014 and 2017 due to the downturn in oil and gas prices. However, economic performance remains above the average in Scotland and the rest of the UK.

	• Employment in the region remains focused on activities related to oil and gas, although this has begun to decline. • Unemployment rates in the area have historically been much lower than in Scotland but in Aberdeen City this has changed in recent years with unemployment now at similar rates to Scotland (3.3% in Aberdeen City, 3.2% in Scotland). • There was a recent rise in claimants for Universal Credit housing costs in Aberdeen City, from 14.1% in 2018 to 19% in 2022, an increase of more than one third. • In Aberdeen City, there are 29 datazones out of 283 that fall within the 20% most deprived in Scotland and 1 datazone within the 5% most deprived. 35% of datazones fall within the 20% most deprived for the housing domain. • The downturn in the price of oil in 2014 has had a significant negative impact on the region's economy. While recent oil price increases may provide a boost in the short term, the focus is now on energy transition and developing a sustainable and resilient diversified economy which capitalises on new technologies. There remains some uncertainty about the type and scale of employment opportunities likely to result from this. • The delivery of new housing continues to be negatively impacted by a significant increase in construction costs since late 2020 and shortages of key materials.

Table 1: Summary of Key Local Housing Market Drivers

Chapter 3 of the HNDA profiles the physical characteristics of the existing housing stock, identifying any stock pressures, stock management issues etc. The information in this chapter of the HNDA does not feed into the estimates of future additional housing need (see section below) but it will help to inform decisions on housing stock and housing related policies. Although the information in this chapter is perhaps more relevant to the forthcoming Local Housing Strategy (LHS), it may also influence the LDP and other local planning guidance. Again, the detailed evidence is not reproduced here, but a summary of some of the key issues which may need to be taken into account during production of the LDP and other local planning guidance are outlined in Table 2.

Topic 2: Delivery of Homes

Topic	Key Issues Identified in HNDA
Housing quality	• There are high levels of disrepair in Aberdeen City's housing stock. This has improved significantly for the social housing stock but remains an issue for other sectors.
Housing stock pressures	• There is significant pressure on social housing stock. On 31 March 2022, there were 4,750 applicants on the waiting list in Aberdeen City (3,321 with a housing need). • 70% of Aberdeen City applications with a housing need require a one-bedroom property and 12% require a two-bedroom property. 38% of Aberdeen City properties are bedsit or one-bedroom, and 45% are two-bedroom. • This suggests that in the future there will be a shortage of one-bedroom properties, as there is a significant disparity between the demand levels and the stock available. • It seems likely there will be a surplus of two-bedroom properties available, due to the number of applications being far below the actual stock level. • Aberdeen City is currently experiencing levels of low demand for two-bedroom tenement flats and multi-storey blocks.
Size, type , tenure and location of future social housing supply	• New housing supply needs to be smaller and more specialist to meet changing demographics. • The local housing market is experiencing challenges around pace of construction on site. In the past 12 months, there has been a 23% average cost increase in construction materials.

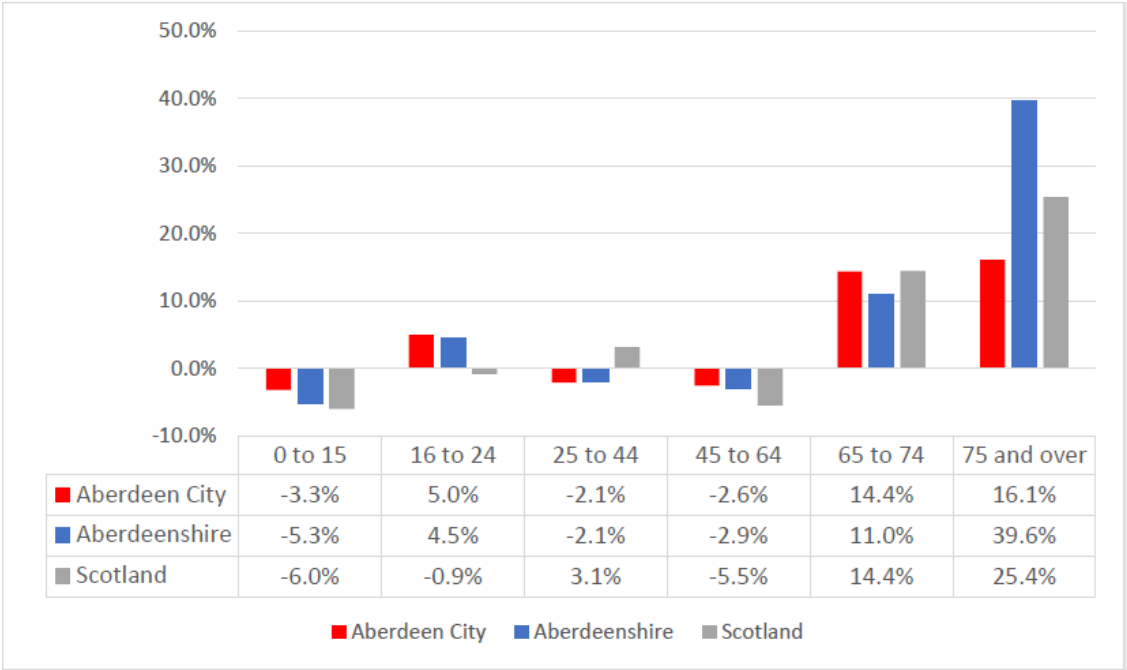
Table 2: Summary of Key Housing Stock Issues

Demographic Context

As outlined in paragraph 2.3 of the Housing Needs and Demand Assessment, the National Records of Scotland's (NRS) population estimates for mid-2021 show that the population of Aberdeen City grew from 222,460 in 2011 to 227,430 in 2021. This represents a growth of 4,970 (2.2%) over the 10 year period. This was lower than the percentage population growth for Scotland as a whole over the same period (3.4%). It is significant to note that the overall increase in population was not consistent over this 10 year period. Whilst Aberdeen saw consistent population increases over the first four years from 2011/12 to 2014/15, it then saw a period of population decline

between 2015/16 and 2017/18. This was followed by two years of population growth in 2018/19 and 2019/20 (albeit at lower levels than in the early part of the decade), but then a further period of sharp population decline in 2020/21. This was consistent with the broader pattern seen across Scotland during the Covid-19 pandemic, which generally saw populations in cities falling.

The NRS 2018-based population projections provide a range of scenarios and under the 'principal' scenario (a scenario based upon the most likely factors) the total population of Aberdeen City is projected to increase by 1.1% over the 10 year period between 2018 and 2028. However, not all age groups are expected to change in the same way. The largest increases are projected in the 65-74 years and the 75 years and older age groups (which are projected to increase by 14.4% and 16.1% respectively over the 10 year period), whereas the 0-15 years, 25-44 years, and 45-64 years age groups are all projected to fall (see Figure 3 below – extracted from paragraph 2.12 of the HNDA). This shows a clear trend towards an ageing population in Aberdeen.



	0 to 15	16 to 24	25 to 44	45 to 64	65 to 74	75 and over
Aberdeen City	-3.3%	5.0%	-2.1%	-2.6%	14.4%	16.1%
Aberdeenshire	-5.3%	4.5%	-2.1%	-2.9%	11.0%	39.6%
Scotland	-6.0%	-0.9%	3.1%	-5.5%	14.4%	25.4%

Figure 3: Projected Percentage Change in Population by Age Groups, 2018-2028, National Records of Scotland, Population Projections for Scottish Areas (2018-based)

Paragraph 2.29 of the HNDA shows that the number of households in Aberdeen City grew from 103,423 in 2011 to 108,844 in 2021 (based on NRS 2021 data). This represents a growth of 5,421 (5.2%) over the 10 year period. At 5.2%, the growth in

households over this 10 year period therefore exceeds the growth in population over the same period (2.2% as noted above). This is because the average household size in Aberdeen has been decreasing over recent years (as it has in Scotland as a whole). According to NRS 2021 data, average household size in Aberdeen stood at 2.07 in 2011 but had declined to 2.02 in 2021 (a fall of 2.4%).

Paragraph 2.34 of the HNDA shows that, under the principle projection scenario of the NRS 2018-based household projections, the number of households in Aberdeen is forecast to increase by 3.1% over the 10 year period from 2018 to 2028. As with population, not all household types are projected to grow in the same way. Table 3 below (extracted from paragraph 2.44 of the HNDA), shows that largest projected increases are within the '1 adult' and '2+adult 1+ children' households. By 2028, single adult households are projected to remain the most common household type in Aberdeen.

		2018	2028	Change	% Change
Aberdeen City	1 adult	41,343	43,169	1,826	4.4%
	1 adult 1+ child(ren)	4,021	3,984	-37	-0.9%
	2 person all adult	35,543	36,570	1,027	2.9%
	2+adult 1+ children	18,904	19,762	858	4.5%
	3+ person all adult	7,776	7,400	-376	-4.8%

Table 3: Projected Change in Household Size by Household Type 2018-2028, National Records of Scotland, Household Projections for Scotland (2018-based)

As outlined in paragraph 2.39 of the HNDA, it is significant to note that the 2018-based NRS projections may need to be treated with a degree of caution. They may present a rather pessimistic view of likely future trends in the population and number of households in Aberdeen. Projections are trend-based, which means that trends in the years leading up to the base date of the projections determine the forecast level of future growth. Following the oil price crash in 2014, the years from 2015 to 2018 represented a particularly difficult and atypical period for the local economy in Aberdeen. After many years of positive net migration into the area, there was a major reversal in this trend from 2015 to 2018, and this will have impacted the 2018-based projections. It is possible that future net migration, and consequent growth in the population and number of households, could be higher than the levels indicated by the 2018-based principal projections.

Topic 2: Delivery of Homes

Estimating Housing Need and Demand

As outlined above, National Planning Framework 4 (Annex E) sets out Minimum All-Tenure Housing Land Requirements (MATHLRs) for each planning authority in Scotland. The MATHLR is the minimum amount of land, by reference to the number of housing units, that is to be provided by each planning authority for a 10 year period. The MATHLR is expected to be exceeded in each Local Development Plan's LHLR (Local Housing Land Requirement). The MATHLRs are evidence based, combining past development rates with future projections and policy ambitions. The MATHLR figure for Aberdeen City is 7,000 units over a 10 year period, which equates to 700 units per year on average.

The Local Development Plan Guidance (p63) states that the same evidence that was used to inform the MATHLRs can be used by planning authorities to inform their LHLR. However, it also indicates that where more recent evidence is available this should be used as it enables the Evidence Report to be more up to date in looking to the future. The Housing Needs and Demand Assessment is based on more up to date evidence and was signed off by the Scottish Government Centre for Housing Market Analysis as "robust and credible" in mid-January 2024.

Chapter 4 of the HNDA provides an estimate of future housing need and demand in Aberdeen City and Aberdeenshire. The HNDA uses NRS household projections to determine the overall scale of growth, while the tenure split between need and demand is driven by the relationship between house prices, rent levels (and expected changes over time), and incomes (and how these change over time). In order to facilitate this, the HNDA uses a number of scenarios which are based on a range of assumptions for variables such as household growth, incomes and changes in house price and rental costs. Not all of the scenarios will be equally likely but they are internally consistent.

The HNDA models four different scenarios, including the default scenario of the HNDA model:

- Scenario 1 – Tool Default
- Scenario 2 – Principal Growth
- Scenario 3 – High Migration
- Scenario 4 – High Migration Plus

The scenarios and their various inputs / assumptions are outlined in more detail in paragraphs 4.7 to 4.29 of the HNDA.

Table 4 below provides a summary of the number of additional housing units that the HNDA model indicates would be required in Aberdeen City during the 20 year period from 2023 to 2042 under the four different scenarios (based on Table 4.44 in the HNDA).

	Scenario 1 (Default)	**Scenario 2 (Principal Growth)**	**Scenario 3 (High Migration)**	**Scenario 4 (High Migration Plus)**
Aberdeen City (20 year total)	6,745	7,080	10,650	12,905
Aberdeen City (20 year annual average)	338	354	533	646

Table 4: Summary of HNDA Scenario Outputs 2023-2042 – Overall Housing Requirements

Each scenario also provides a more detailed breakdown of projected annual requirements into 5-yearly bands. These breakdowns are summarised in Table 5 below.

	2023-2027 (Per Year)	**2028-2032 (Per Year)**	**2033-2037 (Per Year)**	**2038-2042 (Per Year)**	**2023-2042 (20 Year Annual Ave)**
Scenario 1 (Default)	359	368	383	239	338
Scenario 2 (Principal Growth)	344	450	384	238	355
Scenario 3 (High Migration)	519	633	564	414	534
Scenario 4 (High Migration Plus)	970	633	565	413	646

Table 5: Summary of HNDA Scenario Outputs 2023-2042 – 5 Yearly Breakdown

Topic 2: Delivery of Homes

Local Housing Strategy and Housing Supply Target

Like all Scottish local authorities, Aberdeen City Council is required to prepare a Local Housing Strategy (LHS) every five years. The Council's current LHS covers the period 2018-2023 and sets out how the Council and its partners will address local housing need and demand and contribute to national housing priorities over that period. It covers all types and tenures of housing, including social rented, private rented and owner-occupied accommodation.

A key requirement of the LHS is to identify a Housing Supply Target (HST) for the local authority area. In accordance with relevant Scottish Government guidance, the HST should outline the level and type of housing to be delivered over the period of the LHS. The current LHS for Aberdeen City identifies a total HST for the five year period from 2018/19 to 2022/23 of 5,240 homes. This is sub-divided into 3,404 open market homes and 1,836 affordable homes. These HST figures were based on the outcomes of a previous Housing Needs and Demand Assessment (HNDA).

Following approval of the latest HNDA, a new LHS for Aberdeen will need to be prepared. It is expected that a new LHS, with updated HST figures for the City, will be published for consultation in spring 2025. Once published, the new LHS will be a key input for the next LDP and its content will be incorporated into the Evidence Report as and when it emerges. The draft LHS will be out for consultation in March 2025.

Past Housing Completion Rates and Existing Housing Land Supply

The 2024 Housing Land Audit (HLA) provides information about all housing development sites within the City that are for 5 or more housing units. It includes sites that are allocated for housing in the 2023 Local Development Plan and/or have planning permission for housing development. It provides information on the planning status of each site as well as other key information such as housing allocation reference (for sites that are allocated in the 2023 LDP), whether the site is greenfield or brownfield, and who the developer is.

The HLA monitors past housing completion rates on all relevant housing sites. This enables past development trends to be examined. The HLA also provides projected future housing completion rates for each site that is considered 'effective' (ie free from significant development constraints). The 'effective' housing supply is divided into two categories – '5 year effective' and 'post 5 year effective'. The 5 year effective

supply identifies the number of housing units that are expected to come forward within five years of the base date of the HLA (the HLA includes projected annual completion rates for all housing sites within the 5 year effective supply). The post 5 year effective supply identifies housing units on effective sites which are expected to come forward beyond five years from the base date of the HLA (the HLA includes projected annual programming rates for years 6 and 7 for sites in the post 5 year effective supply but it does not provide programming beyond year 7 as it is difficult to forecast completion rates so far into the future). Other sites are identified as 'constrained', which means that they are subject to some form of barrier that would need to be overcome in order for development to commence – this could be a physical barrier (eg flood risk) or a non-physical barrier (eg uncertainties around development viability). The HLA does not provide projected future housing completion rates for constrained sites – instead it simply identifies the total number of housing units on each of these sites. The 'established' housing land supply represents the total of both the effective and constrained supply.

The 2024 HLA provides past completion figures for a 10 year period from 2014-2024. These are shown in Table 6 below shows actual completions over the last ten years for Aberdeen City and Aberdeenshire. Note that due to the change from calendar to financial years the first quarter of 2023 is shown separately. As can be seen from the table, housing completion rates dipped significantly in 2020 as a result of the Covid-19 pandemic. However, there was a 'bounceback' in construction activity in 2021, as a result of a number of affordable housing and flatted developments seeing higher completions rates. Average housing completion rates in Aberdeen over the 10 year period amount to approximately 983 homes per year.

Year	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2023/24
Total no. of completed housing units	686	796	835	1,176	1,211	931	659	1,448	812	215	1,061

Table 6: Housing Completions in Aberdeen City 2018-2022

Based on data from the 2024 HLA, Table 7 below identifies the total established, deliverable (10 year and post 10 year), and constrained housing land supply in Aberdeen on 1 January 2023. It shows that on 1 April 2024, the total established land supply amounted to just over 20,000 homes. Of these, the total deliverable housing land supply amounted to over 16,500 homes.

	No. of Housing Units
Established	20,745
10 Year Deliverable	8,871
Post 10 Year Deliverable	7,847
Constrained	5,475

Table 7: Housing Land Supply in Aberdeen HLA 2024

Figure 4 below shows shows programmed completions for the next ten years for sites in the HLA from 2024/25 to 2033/34 . The MATHLR is contained within NPF4 and is defined as 'the minimum amount of land, by reference to the number of housing units, that is to be provided by each planning authority in Scotland for a 10-year period' the annualised NPF4 MATHLR figure for Aberdeen City is 700 units per year. With respect to projected future completions, Figure 4 indicates that sites within the existing 'effective' housing land supply (ie the supply at 2024/25) are expected to deliver annual completion levels that would significantly exceed NPF4's annualised MATHLR figure throughout the period to 2033/34.

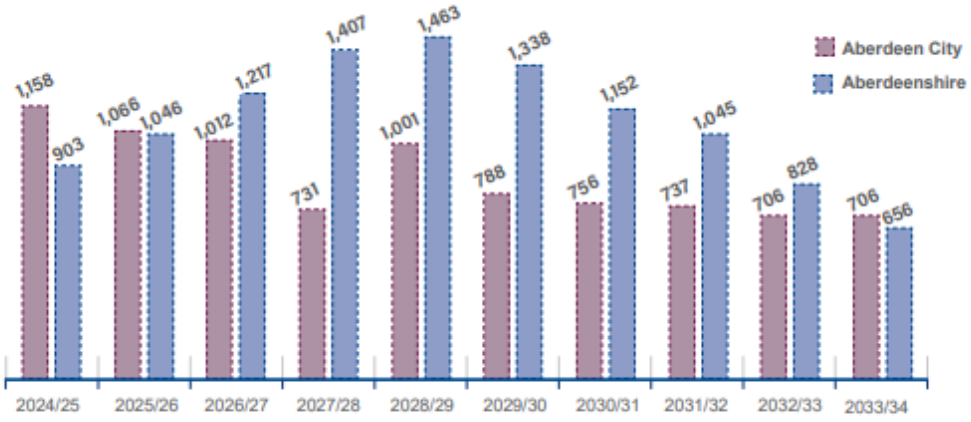


Figure 3.2 Programmed Completions 2024/25 – 2033/34 Aberdeen City and Aberdeenshire

Figure 4: Programmed Housing Completions 2024/35-2033/34 (2024 Housing Land Audit)

Brownfield and Greenfield Development Trends

As well as providing information on overall housing completion levels, the more detailed site-based information from previous Housing Land Assessments (HLA) can also be used to provide evidence of other development trends. In particular, it can be used to examine past trends in the split between brownfield and greenfield development levels.

Table 8 below shows that 53% of all housing development in Aberdeen during the period from 2012 to 2022 has taken place on greenfield sites and 47% has taken place on brownfield sites. This demonstrates the significant role that brownfield development has played in helping to meet housing needs within Aberdeen over the last decade or so.

Looking to the future, the HLA identifies that some 76% of the overall housing land supply in Aberdeen is on greenfield sites, with 24% on brownfield sites. This is reflective of the large greenfield housing land allocations that are identified in the 2023 Local Development Plan (LDP) (albeit that the LDP also seeks to promote brownfield development). National Planning Framework 4 (policy 9) seeks to encourage the development of brownfield, vacant and derelict land and empty buildings. It states that LDPs should set out opportunities for the sustainable reuse of brownfield land. It will therefore be important that the next LDP continues to promote brownfield development where possible.

Type of Development	Total No. of Units Completed 2012 – 2022	Percentage of Total Development 2012 – 2022
Brownfield	4,663	47%
Greenfield	5,333	53%

Table 8: Greenfield & Brownfield Development Split 2012-2022 (Source: Housing Land Audits 2013-2023

Vacant & Derelict Land and Urban Capacity Sites

The Vacant and Derelict Land Register provides an annual update of the extent and state of vacant and derelict land within Aberdeen as part of the Scottish Vacant and Derelict Land Survey (SVDLS). The latest survey return for Aberdeen (in 2024) identifies approximately 74 vacant and derelict sites within the City, amounting to approximately 144 hectares in total area. This may provide a useful source of evidence for potential re-development sites which could be considered for allocation in the next Local Development Plan (LDP). Any such development sites that are ultimately proposed for allocation in the new LDP will be subject to a full site assessment process, which will consider viability and deliverability, in line with relevant guidance.

Maps of the Vacant and Derelict Land 2024 sites and the Brownfield Urban Capacity Study 2019 sites can be found in the Spatial Strategy topic paper.

A Brownfield Urban Capacity Study (BUCS) was undertaken in 2019 to support the preparation of the 2023 Local Development Plan. It provided an assessment of the potential of brownfield sites in Aberdeen to absorb future housing development. It identified brownfield sites that were considered potentially suitable for housing development but did not have any form of extant planning permission at the time of writing. In addition, it identified separately brownfield sites that did have an extant planning permission for housing but that were not considered effective in the 2019 Housing Land Audit.

The study applied a range of indicative density range assumptions (based on site location) to estimate potential housing capacities for each of the identified sites. The indicative density ranges (IDRs) were as follows:

- City Centre: 70-95 units per hectare
- Urban: 40-75 units per hectare
- Suburban: 35-55 units per hectare
- Rural: 30-40 units per hectare

By applying the various density range assumptions to the identified sites in Aberdeen, the study identified the potential for brownfield sites to accommodate a total of between 3,809 (IDR upper range scenario) and 2,227 (IDR lower range scenario) new homes. A number of these sites were subsequently allocated for development within the 2023 LDP.

An updated BUCS will be undertaken to inform production of the new LDP, and this will be used to underpin any brownfield development assumptions in the new plan. In line with the new requirements of National Planning Framework 4 with respect to site

deliverability, the updated BUCS will include more information on the likely deliverability of identified brownfield sites. Any brownfield development sites that are ultimately proposed for allocation in the new LDP will also be subject to a full site assessment process in line with relevant guidance.

Windfall Development Trends

The detailed site-based information from previous Housing Land Audits can also be used to examine long-term trends in 'windfall' development (ie development that has taken place on unallocated sites that became available unexpectedly during the lifetime of previous Local Development Plans (LDP). Table 9 below shows the number of housing units that have been completed on windfall sites each year from 2012 to 2022. It shows that a total of 2,381 housing units have been completed on windfall sites in Aberdeen during this period, which equates to an average rate of 216 housing units per year.

This helps to demonstrate the significant role that windfall development has played in helping to meet housing need in Aberdeen over the long-term. This evidence will help to inform any decisions about whether to include a 'windfall assumption' in the next LDP (ie an assumption that windfall sites will continue to come forward in the future and could therefore make a contribution towards the Local Housing Land Requirement of the next LDP).

Year	No. of Units
2012	299
2013	250
2014	163
2015	124
2016	246
2017	199
2018	210
2019	111
2020	12
2021	554
2022	213
Total	**2,381**
Annual Ave	**216**

Table 9: Windfall Development Levels in Aberdeen 2012-2022 (Source: Housing Land Audits 2013-2023)

Housing Affordability

The Aberdeen City Council Strategic Housing Investment Plan 2024/25 – 2028/29 (SHIP) (and previous annual iterations of the SHIP) include data on past affordable housing completions. Annual affordable housing completions figures for the five year period from 2018/19 to 2022/23 is presented in Table 10 below. This shows that a total of 2,391 affordable housing units were completed in Aberdeen during the five year period, equating to an average of 478 affordable homes per year. These completion rates exceed the Housing Supply Target of 1,836 for total affordable housing completions over this period, as outlined in the current Local Housing Strategy – see earlier section on 'Local Housing Strategy and Housing Supply Target' for more information).

Year	2018/19	2019/20	2020/21	2021/22	2022/23
Total no. of completed affordable housing units	356	401	461	692	481

Table 10: Affordable Housing Completions in Aberdeen 2018/19 – 2022/23

Notwithstanding the significant recent progress in delivering affordable housing, chapter 2 of the Housing Needs and Demand Assessment (paragraphs 2.50 – 2.118) sets out an extensive range of data on the affordability challenges that persist within the local housing market in Aberdeen and Aberdeenshire. It is not appropriate to reproduce all of the data here. However, in summary, the chapter identifies a number of affordability issues and pressures that will need to be taken into account and addressed in the forthcoming Local Development Plan. The key issues are summarised in Table 11 below.

Affordability issues for the local housing market	• House prices in Aberdeen City and Aberdeenshire had been well above the Scottish average for many years. This changed from 2015 onwards when the area saw significant decreases while prices in Scotland rose steadily, and in 2020 the average price in Aberdeen City dropped below the Scottish average. • Lower quartile prices across the area remain above those in Scotland. • Average private rental prices peaked in Aberdeen and Aberdeenshire in 2014 before decreasing rapidly and falling below the Scottish average. • Aberdeen City and Aberdeenshire was the only area of Scotland to see rents for 1 bed flats fall over the last 10 years (-11%

	compared to +31% for Scotland). 2 bed flats saw just a 3% increase compared to +33% in Scotland. • However, in the last year there has been a reversal of this trend and rental prices are now increasing rapidly, particularly in Aberdeen City. • The gap between private and social rents has narrowed in recent years. However, social rents, and particularly Council rents, continue to be significantly more affordable than private rents. • Median household income growth since 2015 was below the Scottish average of 11%. In Aberdeen City, there was a fall of 2% with incomes dropping below the Scottish average. • Lower quartile incomes in Aberdeen City are the same as in Scotland. • Lower quartile house prices are around 6-8 times higher than lower quartile incomes across the area. • Private sector rents are not affordable for those on lower quartile incomes across most of the area. • The recent fall in house prices and rent levels has only had a marginal impact on affordability because incomes have also fallen. In addition, substantial increases in mortgage interest rates and reduced supply of rental properties are both exacerbating affordability pressures.

Table 11: Summary of Affordability Issues and Trends in Aberdeen

In addition to presenting evidence on affordability issues, chapter 4 of the HNDA considers affordable housing need in the context of the estimates of future housing need and demand in Aberdeen. For each of the growth scenarios, and for each of the 5-yearly time periods within the projection period, the HNDA shows the projected split between the need for open market and affordable housing. The results are summarised in Table 12 below. As can be seen from the table, the projected need for affordable housing as a proportion of all housing is significant in all scenarios. It exceeds 50% in all periods for scenarios 2-4, and for scenario 1 it averages just below 50%.

		2023-2027 (Per Year)	**2028-2032 (Per Year)**	**2033-2037 (Per Year)**	**2038-2042 (Per Year)**	**2023-2042 (20 Year Annual Ave)**
Scenario 1 (Default)	Market	139	198	215	140	174
	Affordable	220	170	168	99	165
	Total	**359**	**368**	**383**	**239**	**338**
Scenario 2 (Principal Growth)	Market	131	177	178	105	148
	Affordable	213	273	206	133	207
	Total	**344**	**450**	**384**	**238**	**355**
Scenario 3 (High Migration)	Market	218	265	261	182	233
	Affordable	301	368	303	232	301
	Total	**519**	**633**	**564**	**414**	**534**
Scenario 4 (High Migration Plus)	Market	442	265	262	182	289
	Affordable	528	368	303	232	358
	Total	**970**	**633**	**565**	**413**	**646**

Table 12: Summary of HNDA Scenario Outputs 2023-2042 – Market and Affordable Split

Scottish Index of Multiple Deprivation 2020 data for housing can be found below. This can give some indication of where the most affordable areas of the city are situated.

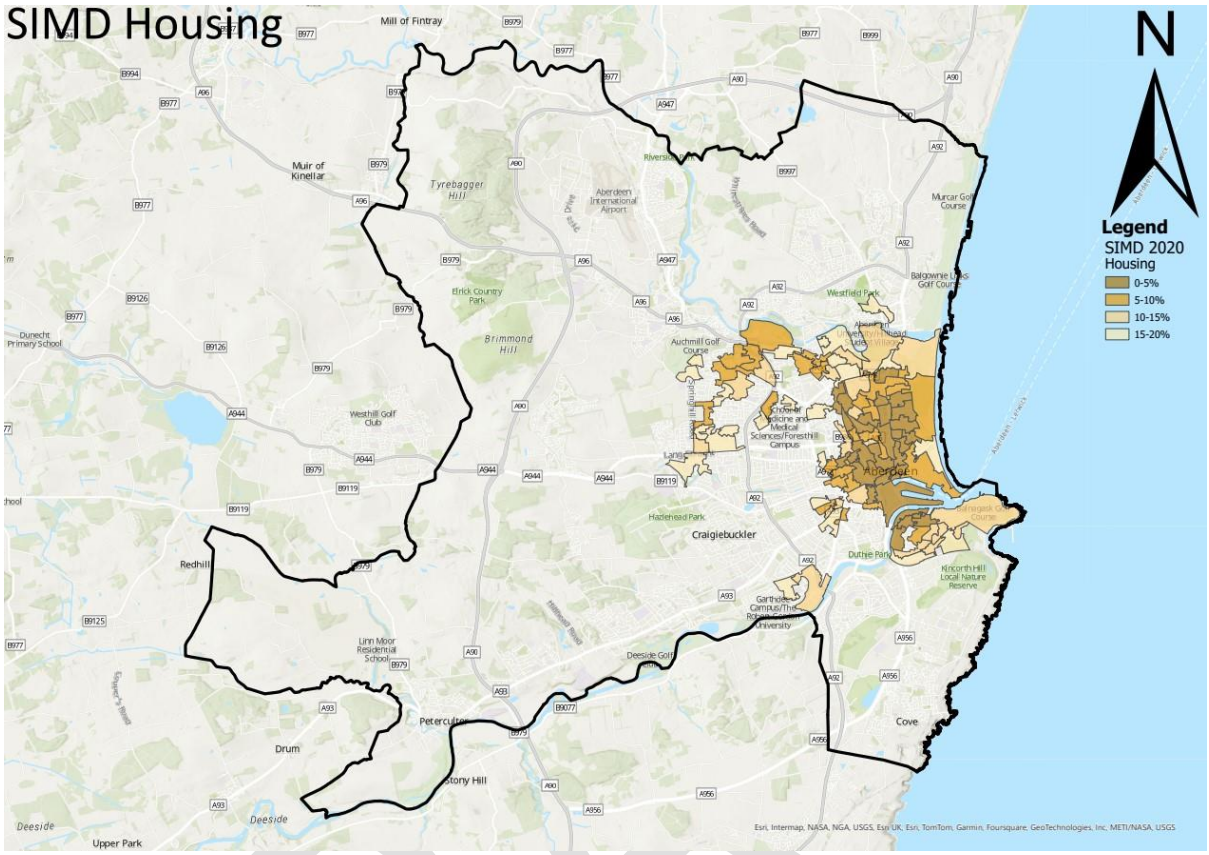


Figure 5: Scottish Index of Multiple Deprivation 2020 data for housing

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Strategic Housing Investment Plan sites can be found below.

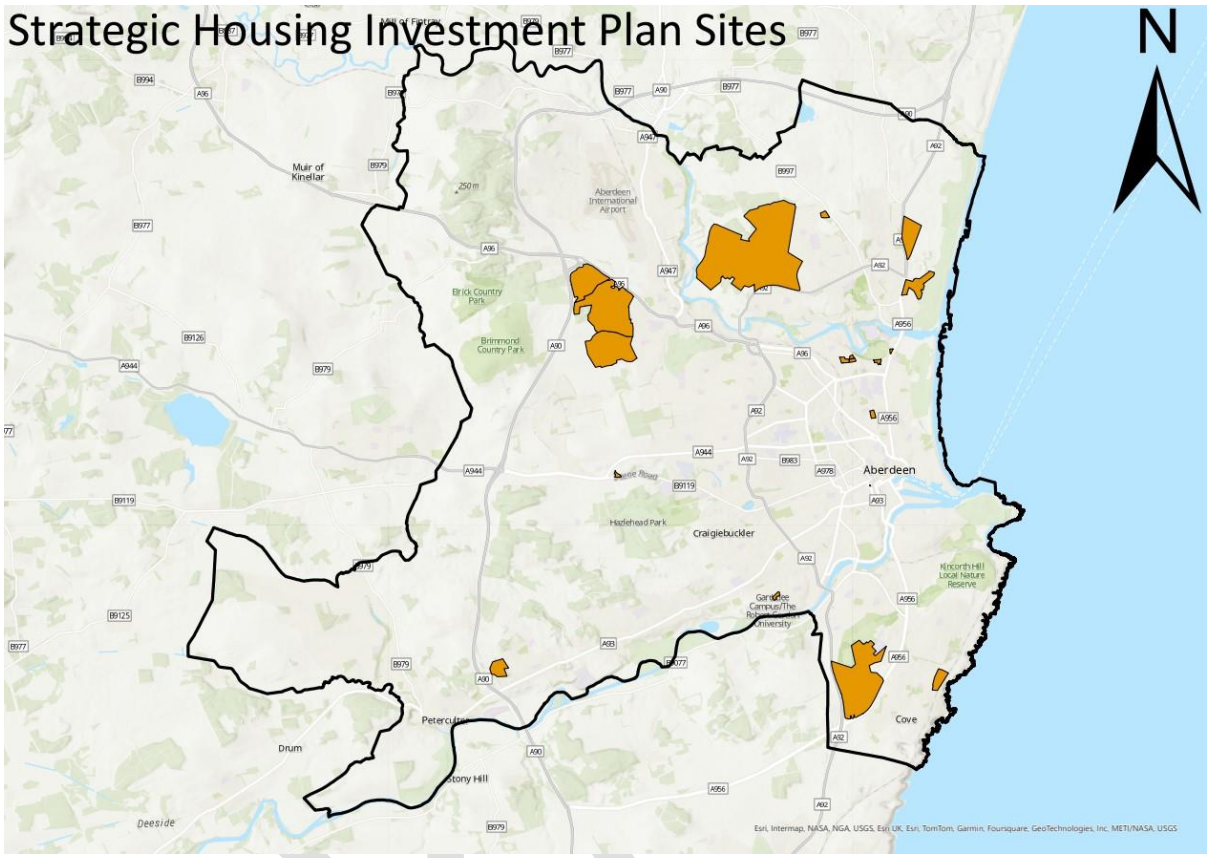


Figure 6: Strategic Housing Investment Plan sites

Specialist Housing Provision

Chapter 5 of the Housing Needs and Demand Assessment addresses specialist housing provision. It focuses on understanding, and as far as possible quantifying, the implications for providing accommodation for people with specialist needs. It considers the needs of the following key groups:

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

As above, the detailed evidence from the HNDA is not reproduced here, but a summary of the key issues that the Local Development Plan will likely need to address with respect to specialist housing provision is outlined in Table 13 below.

Topic	Key Issues Identified in HNDA
Accessible / adapted housing	• Generally, there is a lack of accessible accommodation. In Aberdeen City there has been a 47% rise in the number of applications with additional space requirements due to illness or disability. • Factors affecting the delivery of disabled adaptations include increased costs due to economic factors, equity in provision and delays in assessment. • Based on previous trends, the average annual requirement for adaptations for social rented housing in Aberdeen City is 630 and in the private sector the predicted numbers are around 140 per year. • There is an identified lack of accommodation for people with complex care needs or those with bariatric conditions. The excess build costs to cover specialist features require capital investment out with the current levels of subsidy available for affordable housing.

Non-permanent housing (e.g. for students)	• It is difficult to predict future needs with any sort of accuracy, as the number of refugees and migrants could be affected by broader economic circumstances. • There remain challenges around supply and demand of suitable housing across all sectors, particularly larger family accommodation to meet the needs of refugee families. • There is a growing trend for international students to travel with their families which results in the need for larger accommodation within the City. However, based on figures provided by further education institutions, the data from the past five years suggests a maintained level of vacant bedspaces which implies there is not currently any overall shortage of student accommodation in Aberdeen City.
Supported provision (eg care homes, sheltered housing)	• There is no current evidence to suggest an increased requirement for care home provision in Aberdeen City. • In Aberdeen, the Market Position Statement for learning disability and mental health identified the need for an additional 8 unit development, every 2 years plus one site per year to meet the needs of those with complex are. Work is ongoing to determine the needs for people with mental health issues. • Aberdeen City Council is currently undertaking a review of its sheltered housing and very sheltered housing service to determine future needs for this model of accommodation.
Site provision (eg sites/pitches for Gypsy/Traveller and Travelling Showpeople)	• There are an estimated 2,160 Gypsy/Travellers across Aberdeen City and Aberdeenshire. Despite the need for additional sites and potential locations being identified in the LDPs of both Councils, there has been a lack of progress in terms of delivering further site provision. • Previous LDPs have indicated an intention to reduce the size of the Clinterty site and develop an additional smaller site, with Grandhome, Newhills and Loirston being considered as viable locations. Despite this, no progress has yet been made in developing new sites.

Table 13: Summary of Key Issues for Specialist Housing Provision

A map showing the location of Aberdeen's traveller site can be found below.

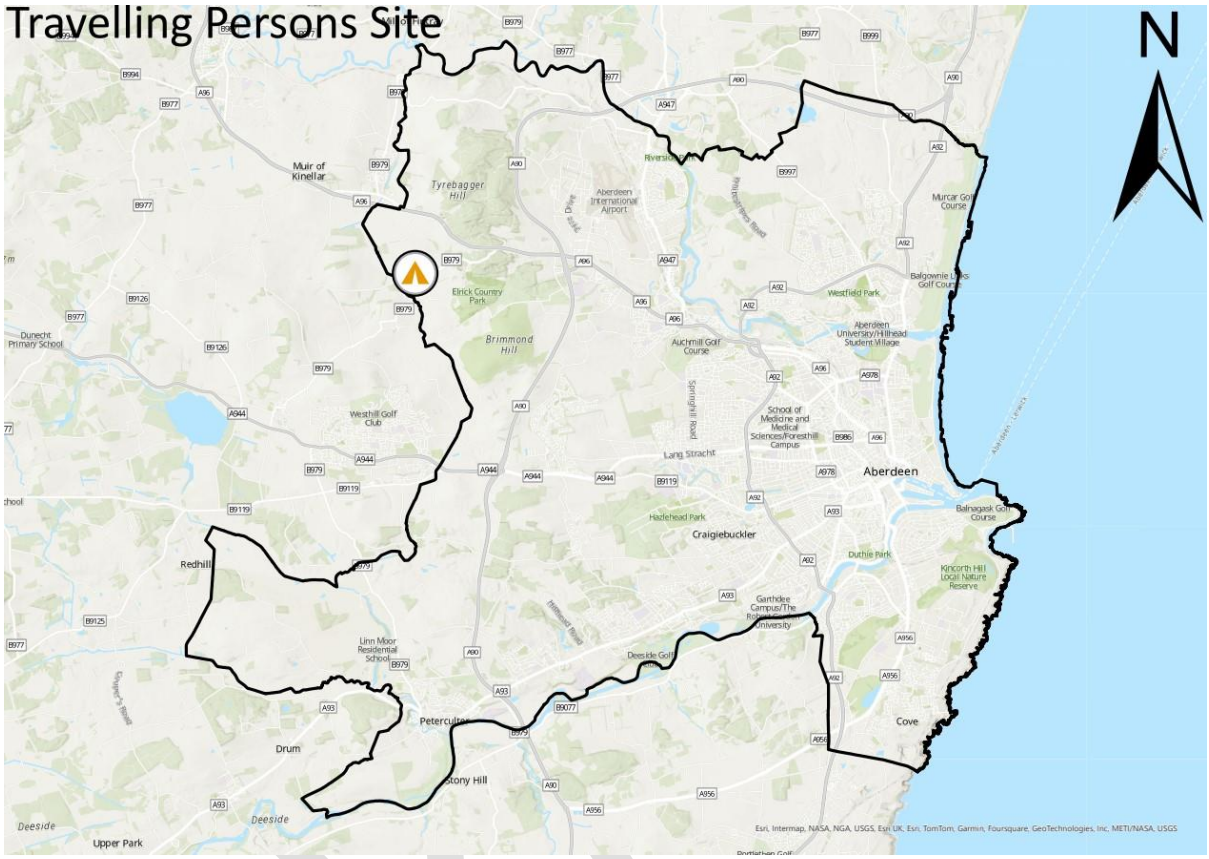


Figure 7: Map showing the location of Aberdeen's traveller site

Wheelchair Accessible Housing

The Council's current Local Housing Strategy identifies an affordable housing target with a minimum 15% being fully wheelchair accessible. This target will be reviewed during preparation of the new Local Housing Strategy, which is currently expected to be adopted in late 2024.

Section 7 of the Aberdeen City Council Strategic Housing Investment Plan 2024/25 – 2028/29 (SHIP) provides detailed evidence on the need for wheelchair accessible housing. It draws on information from the HNDA, as summarised in Table 12 above. Section 7.2 of the SHIP shows that, at the time of its writing, Aberdeen City Council had 223 wheelchair accessible properties in specialist accommodation (including sheltered and very sheltered accommodation) and 428 in 'mainstream' housing.

In 2022/23 there was a 15% increase in the overall numbers of people applying for wheelchair accessible housing, rising to 3,741 from 3,282 in the previous year.

The Council is committed to reducing waiting lists for accessible housing by working with its internal design team and RSL partners to ensure that the needs of those who are currently on the housing waiting lists for wheelchair accessible housing are met through the Affordable Housing Supply Programme.

There is robust information on the supply and demand for the Council's wheelchair accessible housing. Work is ongoing to establish the supply and demand for other sectors. The Council is working with registered social landlords, developers, and Disabled Person's Housing Service (DPHS) to establish a baseline. This work is being overseen by the Independent Living & Specialist Provision Strategic Group that delivers and monitors the Aberdeen City Local Housing Strategy's Joint Delivery Action Plan in relation to specialist provision housing.

Aberdeen City's Health and Social Care Partnership's Strategic Plan identifies the challenges of an ageing population and the desire to support people in a community setting. To meet these challenges an adequate supply of good quality accessible housing needs to be in place.

Houses in Multiple Occupation

Houses in Multiple Occupation (HMOs) account for a significant proportion of the available rental accommodation in Aberdeen and are particularly important in supporting the city's student population. The Council's online Register of HMO Licence Applications and HMO Licences provides an up-to-date list of all current HMO licenses and pending license applications, and this gives a clear picture of the number of properties in occupation as HMOs within Aberdeen.

Whilst HMOs play an important role in Aberdeen's housing market, the cumulative impact of large numbers of HMOs in an area can give rise to a number of issues and concerns. These can include: potential physical deterioration caused by lack of investment by absentee landlords; an increased population density in a localised area resulting in an increased demand on services, infrastructure and parking provision; and a deficiency in community cohesion as a result of transient tenants. For these reasons, policy H8 of the 2023 Local Development Plan outlines an approach to avoiding an excessive concentration of HMOs in parts of the City. It states that proposals for new HMOs will be assessed to determine whether the cumulative concentration of HMOs would be excessive in the context of the proportion of HMOs relative to other residential properties and any resultant detriment to the established residential character and amenity of the area. It goes on to state that, within areas of concern due to excessive concentration, further HMO provision is unlikely to prove acceptable.

In order to prevent an excessive concentration of HMOs within parts of the City, the Council currently considers that the number of licensed HMOs should generally not exceed 12% of the total residential properties in any single Small Data Zone. This broadly equates to a 1:8 ratio of HMOs to other residential properties within any single Small Data Zone. This ratio is considered to represent a suitable balance between protecting the established residential character and amenity from adverse impacts resulting from high numbers of HMOs whilst also acknowledging the significant role of HMOs in meeting the housing needs of students and other sectors of the population. Small Data Zones have been identified as the most appropriate geographical area for this purpose as they are large enough for statistics to be presented accurately whilst also being small enough that they can be used to represent communities spatially. They also have shapes that respect physical boundaries on the ground wherever possible. Map data showing current HMO concentrations within Small Data Zones is published on the City Council's website, and this data is updated on a monthly basis.

Short-term Lets

Short-term Lets (STLs) essentially involve the short-term provision of accommodation by a host in the course of business to a guest. Under Section 26B of the Town and Country Planning (Scotland) Act 1997 (as amended), Councils can choose to designate STL control areas. STL control areas allow authorities to consider STL proposals within specific geographically defined areas, to avoid concentrations of STLs and resulting detrimental impacts on amenity. An STL control area requires planning permission to be sought for any STLs within that area. No STL control areas have been designated to date in Aberdeen. It is for the Council to determine whether planning permission is required for any proposals to use an existing property as an STL based on the individual circumstances.

Although the Housing Needs and Demand Assessment has demonstrated a need for new open market housing in Aberdeen, and that there is also a significant need for more affordable housing (see earlier sections for more information), it has not identified that any significant additional pressure is currently being placed on local housing need or affordability by the conversion of existing residential accommodation to STLs in the City. In this respect the situation in Aberdeen is different from other areas of Scotland where the number of STLs has placed significant pressure on the availability and affordability of housing. At present, the loss of residential accommodation resulting from changes of use to STLs is therefore considered unlikely to have any significant detrimental impact on local housing need within Aberdeen. Nevertheless, this situation will be kept under review during production of the new Local Development Plan. The Council maintains an up-to-date online Register of STL Licence Applications and STL Licences and this will be used to maintain a clear understanding of the number of properties in occupation as STLs within Aberdeen.

Self-Build Housing and Self-Build Register

Self-build housing is where a person commissions or is personally involved in the design and construction of a dwelling intended to be their main residence. It provides choice and the ability to tailor housing to suit an individual's needs. This form of housing is supported by National Planning Framework 4.

The self-build register will provide an indication of demand for self-build housing in the plan area. Aberdeen City Council's Self-Build Register was launched in late 2023 and, at the time of writing, seven people had registered their interest in acquiring land for self-build homes.

At the Planning Development Management Committee on 20 June 2024, planning permission in principle was approved for 19 self-build housing plots at Woodend, Culter House Road, Peterculter (planning reference 210889/PPP). Given the scale of existing demand for self-build plots, it appears reasonable to expect that this planning permission is likely to meet the majority of demand for self-build housing in Aberdeen. Nevertheless, monthly update reports from the self-build housing register will be published on the Council's website, and the level of registered interest will be kept under review during preparation of the next Local Development Plan.

Reinforced Autoclaved Aerated Concrete (RAAC)

An estimated 366 council and 138 private addresses in the Balnagask area of Torry have reinforced autoclaved aerated concrete (RAAC) in roof panels. These are to be demolished on safety grounds and a rebuild programme will follow. Demolition and landscaping is estimated at £20-25 million and will take 3-4 years. Building new homes will cost an additional £130 million or more and take 5-15 years. Detailed delivery plans, including financing, will be drawn up for consideration.

Place Standard Assessment

Between 5 October and 6 November 2023, 470 participants took part in online and six in person Place Standard assessments for Community Planning. The full results and more information on this are found in the Place Topic Paper. The Place Standard assess places and is split into 14 themes. Places are assessed, awarded a score out of 7, and people asks for comment on what is good now and what can be improved about their local area. The results for Aberdeen are split into north, south and central, with "all" noting where these comments were present on all three areas. The results from the Place Standard are paramount for assessing quality of place and understanding the positive and negative perception of local areas. The Place Standard assessments were completed with adults and children.

The Housing and Community theme of the Place Standard is relevant here. The results are as follows: A score of 4.02 out of 7 was achieved, and the comments submitted are noted below.

Place Standard Theme	"Good" now	"Improve" for the future
Housing and Community	• Good range and mix of housing available. (All) • Good community with good neighbours, and has a good community spirit and range of reasonable facilities. (All)	• Availability and affordable housing options (South) • General maintenance of housing, and insulated and energy efficient housing (ALL) • Disadvantaged areas should be the focus of more green and community spaces (Central) • Improvements to appearance/maintenance of neighbourhoods (All) • Anti social behaviour (adults) focus of tenants/in community (Central) • Improving community spirit/social integration/reduce isolation through increasing events and activities for all (All) •Too much house building, lack of quality and space and amenities in new developments (North) • Too many empty homes (South) • The type of housing available was not necessarily suitable for what people need i.e. not enough social housing. (South) • Increases to, and improvements for, making neighbourhoods 'look' better (South) • Some areas have too many "private lets" or "short term lets which can have a negative impact on community (Central)

Table 14: Comments relating to good aspects and what can make Aberdeen better. Summary of Community Planning Aberdeen's Local Outcome Improvement Plan and Locality Plans for North, South and Central Refresh Engagement Report 2023, Play and Recreation Extract.

Topic 2: Delivery of Homes

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The children and young people results noted: 54.2% felt they were okay, 34.7% felt they were not good, and 11.1% felt they were great.

Place Standard Theme	What is good now?	Percentage	What would make it better?	Percentage
Housing and Community	Green gardens	23.6%	Green gardens	19.8%
	Houses that feel like a home	22.6%	Homes that look good	18.9%
	Homes that look good	21.7%	Houses that feel like a home	14.2%

Table 15: Top 3 responses for 'What is good now' and 'What would make it better?' Extract from Community Planning Aberdeen's Local Outcome Improvement Plan and Locality Plans for North, South and Central Refresh Engagement Report 2023, Play and Recreation Extract.

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Summary of Implications for Proposed Plan

Both the population and the number of households in the City is projected to continue to rise, as is reflected in the housing need and demand figures in the HNDA and the MATHLR. In addition, it is predicted that the population will continue to age, and average household size will continue to reduce. The Proposed Plan will need to address these demographic changes and trends.

Approaches to accommodating any additional growth will be influenced by NPF4 principles such as compact growth, local living and infrastructure first.

An updated Brownfield Urban Capacity Study (BUCS) will be required to assess the contribution which brownfield and infill sites within the city can make.

An Existing Site Audit will be required to assess the suitability/deliverability of existing allocations.

A housing crisis has been acknowledged nationally and in Aberdeen City. How the housing crisis presents in Aberdeen is specific to the city, the following implications take cognisance of this.

Although the city has benefited from significant recent delivery of affordable housing there remains high levels of affordable housing need. It is proposed to continue with the current requirement for 25% of homes to be affordable for all developments of 5 or more. This is in accordance with NPF4 policy 16 - a tailored local policy position will be required to ensure that affordable housing contributions are targeted toward meeting local housing need in the city and to set out the exceptional circumstances where a lower contribution will be acceptable.

<u>Specialist Housing Provision:</u>

Accessible - Given the evidence from the HNDA on the ageing nature of Aberdeen's population, with the largest population growth being expected in older age groups, there is a need to develop a local policy position within the Proposed Plan to reflect this. Older people are more likely to either live alone, or in a household where all occupants are aged 65 or over and the Proposed Plan will therefore need to support suitable housing options to address these needs.

Student - Aberdeen has three main further education institutions, and students represent a valuable and sizable section of the City's population. Based on figures provided by further education institutions, and summarised in the HNDA, data from the past five years suggests a maintained level of vacant student bedspaces which implies there is not currently any overall shortage of student accommodation in Aberdeen City. Nevertheless, it remains

important that students have a high quality of choice of accommodation whilst studying in Aberdeen, and the Proposed Plan will therefore require a local policy position to support this.

Wheel Chair Accessible - Given the scale of local need for wheelchair accessible homes, there is a need to develop a local policy position in the Proposed Plan aimed at increasing the level of wheelchair accessible housing. This is likely to need to apply to both affordable housing and open market housing.

Houses in Multiple Occupation - Given the particular local issues with respect to HMO concentrations in parts of Aberdeen, there is a need to develop a local policy position in the Proposed Plan aimed at continuing to avoid excessive HMO concentrations from developing within specific localised areas.

Short-Term Lets - At present, the loss of residential accommodation resulting from changes of use to STLs is considered unlikely to have any significant detrimental impact on local housing need within Aberdeen. Nevertheless, this situation will be kept under review during production of the new LDP. The Council's online Register of STL License Applications and STL Licenses will be used to maintain a clear and up-to-date understanding of the number of properties in occupation as STLs within Aberdeen.

Self Build Housing - The recent grant of planning permission in principle for 19 plots at Woodend, Culter House Road, Peterculter (planning reference 210889/PPP) is likely to meet demand for self-build housing in the longer term, based on the limited number of people who have registered their details on the Self-Build Housing Register. This would suggest that there is no particular need for detailed LDP policies aimed at self-build housing. Monthly update reports from the Self-Build Housing Register will be published on the Council's website, and the level of registered interest will be kept under review during preparation of the next LDP. Should there be a significant increase of interest this may require the introduction of specific local policies. The availability for land for self-build can also form part of the call for both the calls for ideas and sites exercises.

Marmot Principles

Aberdeen, along with North Ayrshire and South Lanarkshire, has been confirmed as one of three Marmot Places in Scotland. Aberdeen will seek to embed the eight Marmot Principles within the Proposed Plan. The table below identifies where the topic paper align with the Marmot Principles.

Principle	**Potential implication for the Plan**
Give every child the best start in life.	X
Enable all children, young people and adults to maximise their capabilities and control over their lives.	X
Create fair employment and good work for all.	
Ensure a healthy standard of living for all.	X
Create and develop healthy and sustainable places and communities.	X
Strengthen the role and impact of ill health prevention.	X
Tackle racism, discrimination and their outcomes.	X
Pursue environmental sustainability and health equity together.	

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