

Transforming Govan: A Local Housing Systems Analysis

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October 2024



Economic
and Social
Research Council



Arts and
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Research Council



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Executive Summary

Why a Study of Govan; Why now?

The Govan housing study arose because of a shared desire from the City council and the three local community controlled housing associations to better understand housing requirements in the area and also to assess the evidence which could support a strategic business case for a package of interventions within the local housing system in order to steer housing development, including from the private sector, to the benefit of Govan and the city. This study was also supported by the University of Glasgow, which is an important stakeholder, via the (Glasgow Riverside Innovation District) (GRID) programme, in the wider Govan area.

Govan has experienced mass de-population on an unparalleled scale in the city region, but it remains a major locus of employment in the city region, because of the Queen Elizabeth University Hospital and the continuing shipbuilding and related business clusters associated with BAE. The area also has considerable light industrial and other smaller employment sites. Greater Govan is also characterised by many develop-able sites with potential for residential construction. At the same time, Govan and Partick are about to be rejoined by a new bridge which will enhance connectivity to the west end and the University, as well as complementing the subway and other accessible bus and private car transport modes.

The hypothesis is that Govan is now therefore at a tipping point that could draw on its rich, multi-faceted heritage, make it a more attractive and well located housing location and that potential opportunities (e.g. the Transforming Communities: Glasgow site in Ibrox) could be supported for first time buyers, mid-market renting, student housing and social housing (in a context of rising citywide unmet need, the housing emergency and the regenerative capacity of local housing associations to contribute to local solutions).

A Localised Local Housing Systems Analysis (our approach)

The other contributing reason for this project was an examination of the effectiveness of localising a market analysis drawing on principles from Local Housing Systems Analysis (O'Sullivan, et al, 2004). Normally, a LHSA would operate in a housing market area e.g. the Glasgow city Region or Glasgow travel to work area. In this case, we consider if the same system thinking principles and conceptual/data framework are meaningful for a well-defined sub- council area such as the electoral ward of Govan, a local housing system with well-defined physical boundaries but nonetheless a locality hugely affected and driven by the wider Glasgow economy and housing market.

Here we follow key aspects of LHSA: scoping and data audit analysis of external drivers, a profile of the local housing

system and an assessment of outcomes which help us to identify important imbalances and opportunities for future development. The localised LHSA involved triangulation of secondary data and stakeholder interviews as well as more bespoke research detective work. We did not have the budget to undertake new primary quantitative research but instead relied on triangulation of these other research instruments. In considering the utility of such a localised approach we also learn lessons about its replicability to other locations within Glasgow for future housing planning considerations.

Scoping Findings

The first phase of the project involved a scoping out of the Govan housing system including a data audit of data sources and their quality e.g. our capacity to benchmark key Govan housing indicators alongside benchmarks such as comparable electoral wards in Glasgow and the city. We also conducted cross sectoral stakeholder interviews to provide a richer sense of the housing system, alongside a review of secondary and grey literature, planning and related documents relevant to Govan.

What are the main messages emerging from the first phase? First, Govan's regeneration needs leadership, co-ordination and commitment but it faces (and can learn from) many similar challenges overcome already elsewhere in Glasgow. Second, there are systems thinking insights which speak to how we understand and anticipate future opportunities within the PRS, the asset management of the existing stock, students housing, affordable private housing for sale, transport and place connectivity. Third, LHSA insights are valuable. Despite its natural hard boundaries, Govan remains a very open economic system with considerable implications for the local housing system and development opportunities.

The team identified further specific implications to be followed up in the main research phase:

- The data audit as anticipated found that while formal local data sources could be identified and accessed, there were less than what would be available at a city council level. The most extreme example of this was the unavailability of local data from the 2022 Census which was just beginning to appear (see chapter 3 of the main report) as the report's final version was completed. In the months to come, the Census will transform what we know about Glasgow's localities, including Govan.
- The scoping interviews helped to identify gaps in knowledge we would wish to close. This was co-designed alongside secondary data analysis. For instance, while it is possible to find out quite a lot about the housing market, local expertise was accessed for the second phase from estate and letting agents as well as other built environment professionals, especially concerning land and sites.
- The team worked closely with the three community-controlled housing associations to better understand

the key demand and need parameters of the size and composition of those applying for social housing, where they come from and their demographic make-up. It was important to also develop a picture of housing need and demand among other landlords active in the ward.

- There would be considerable added-value generated by a land audit of vacant, derelict and other potential sites, taking account of their current zoned status. This was a significant piece of work.
- The scale, timing and importance of the TRA investment and its potential local system impact required close consideration. In a similar sense we engaged with investment and economic development opportunities in Govan, for instance, to understand the pace and housing implications for new investment locally through, for instance, the innovation district approach.

Drivers of the Govan Housing System

Demographic, economic, social and material deprivation, planning strategy and Govan's place in the wider city region - have all been shown to be significant as indicators of external drivers of the Govan housing system. While local data is patchy and sometimes absent, we have uncovered both similarities between Govan and other parts of the city as well as important dissimilarities e.g. income levels. Looking at the regeneration landscape, we are struck how, while the Govan area clearly has potential via several different catalysts, there is also a keen understanding of why various previous regeneration efforts in the area failed to take hold and fully deliver for local people. We need to keep this in mind for future proposals, their governance and leadership.

Striking findings from our analysis of key drivers included:

- Population growth in Govan has outstripped that of Glasgow going back to the beginning of the century and remains the case looking at the 2022 Census.
- Greater Govan is generally highly deprived (all of its 2020 data zones are in the worst 20% of deprived areas and a small number of Govan/Linthouse data zones are in the 5% most deprived communities.
- Looking at planning documents, the prevailing housing strategy for Govan seeks to invest in and balance the needs and interests of the social housing population alongside the expectation that new categories of residents will enter the area in coming years. The aim is to increase the supply of affordable entry-level and mid-market properties near public transport. To achieve these outcomes, it was deemed necessary to identify locations where flexibility in land use/use class might be possible and directly support the development of the innovation district and the overarching placemaking strategy.
- Govan's experience with the introduction of the Queen Elizabeth University Hospital sheds light on the problems and risks of narrow, silo-based approaches to policymaking. A variety of stakeholders suggest that taking a fuller view

of place - and the interconnections across local systems (labour, housing, commercial markets) - will be vital for future neighbourhood change in the area.

A Housing Profile

How does Govan's housing stock compare with Glasgow as a whole? The housing stock has also grown in Govan but at around half the rate of the city. Occupancy rates are very similar and vacancy rates are if anything lower and therefore by that metric housing is tighter in Govan. Density of dwellings is similar and has risen at both spatial scales but is now higher for the city. Govan has a higher percentage of properties in the lowest three council tax bands than the city (83% compared to 69%). Glasgow had, in 2016, 73% of properties in flatted form; Govan had 82% of its dwellings flatted.

The analysis of Govan's private housing market was generated through three methods: statistical data collection, surveys with local estate agents (letting, sales, and new development), and a tracking exercise where all sales and rental listings were monitored over a one-month period (March 2024) to determine Govan's current private market profile. In 2004, Govan accounted for 6% of Glasgow transactions and in 2022 this figure fell to 4%. The pattern of sales shows the well-known structural break of lower sales post financial crisis in 2008 – volumes have never recovered from their 2007 Glasgow high (2005 in Govan) - and had a further negative blip in 2020 due to the Covid-19 outbreak. Since 2009, annual sales have fluctuated in Govan between 283 (2011) and 537 (2021).

Median house prices in Govan rose till 2007 before falling and oscillating to a low of £70,000 in 2013 and 2014 before climbing again to reach and then exceed £100,000 from 2020 onwards. Median prices have been lower in Govan than in Glasgow for every year 2004-2022. Nonetheless, Govan annual median prices rose by 20.5% in 2021 and by 7.5% in 2022, a faster rate than in Glasgow as a whole. Based on the number of properties sold in a 12-month period (April 2023 – April 2024), Govan appears to have a less 'active' private housing market – i.e., there are fewer transactions – than Partick. In this period, 650 properties transacted in Partick whereas only 421 properties sold in Govan over the same period.

Rent data is difficult to ascertain at a local level with almost exclusive reliance required on advertised new lets only. Citylets data indicates that 200 properties were listed in 2023-24 for the PRS in Govan. Glasgow's average rent for the financial year 2023-24 was £1,107 but was lower in Govan (£984) – clearly these unstandardised comparisons of averages do not take account of size and quality differences across space. Landlord registration data indicates that private renting is dominated by landlords with small portfolios – Govan for instance has 60% of its landlords letting one property and a further 26% letting 2-4 units and just 10% let 5-9 units i.e. 96% let 10 or less properties. There are a very small number of large-scale landlords in Govan with 7 running 100-249 units, one renting out 250-499 and one with more than 500 units.

Needs and Demand

Annual Report on the Charter (ARC) data submitted to the Scottish Housing Regulator from the community-controlled housing associations indicates that turnover is steady but that waiting lists are growing, with a large component now apparent from Section 5 referrals. Acquisitions from both private landlords and owners are an important indicator of new supply (and make up a large proportion of all Glasgow acquisitions) alongside grant-funded general needs social rent. Also, as one would anticipate, the legacy of the existing stock has major implications on investment choices e.g. the net zero energy efficiency costs associated with pre-1919 tenemental stock.

Future expectations are centred around Glasgow-wide pressures having a localised impact through growing requirements to meet Section 5 referrals, plus help with growing numbers of asylum seekers, refugees and the Ukrainian legacy. While recognising the strong case for more social housing, local stakeholders also saw binding constraints in the form of barriers to land purchase, insufficient funding and a lack of proactive development leadership.

Land and Sites

The Transformational Regeneration Area (TRA) in Ibrox/East Govan in many ways encapsulates the possibilities, opportunities and challenges of pursuing a residential driven regeneration of the wider Govan area. Ibrox is the largest TRA in boundary size among the TC:G portfolio, but with comparable development opportunities. Delivery of the regeneration activity has been incremental since 2010 which was initiated by the demolition of poor housing stock and significant investment in the new build homes for social rent, mid-market rent and new supply shared equity. The largest of the development opportunities at the centre of the TRA has still to be brought forward but is a developing proposal.

The proposed project seeks to build on the important employer role played by Govan in the city economy, but also via connectivity to public transport and the bridge to recast Govan as a residential community that can service jobs across the city-region. This is about working with the grain of the market but seeking to achieve the balance between a small premium relative to Govan house prices but also a material discount to first time buyer prices in other major Glasgow residential neighbourhoods. Part of the catalytic role that such an injection can provide is to bring spending and public service users to Govan but also in time encourage further development for next stage family housing for sale. Success here will also impact on the incentives facing local landowners and businesses.

For the land audit, we looked at sites already captured in the Housing Land Audit and the Vacant and Derelict Land register datasets for 2023. In addition, we conducted key informant interviews to obtain qualitative insights into the development potential of and plans for these sites, as well as to identify other potential sites not captured in the available datasets.

The audit found that:

- There is clear evidence of active urban regeneration initiatives (e.g. Cromdale Square, the TC:G plans, etc.), but there remain several vacant and derelict sites in Govan.
- The development viability of these sites is variable – many of those that are considered developable in the short term also might not be suitable for housing.
- There are however some former residential sites that have potential including the central TRA sites, St Saviors Church site, the land adjacent to and opposite Napier House (GCC/private), Hinshelwood Drive, and the Albion Estate.
- Other formerly non-residential and privately owned sites with potential include the Scottish Enterprise site at Pacific Quay, the Hardgate Road site owned by Ogilvie Group, and the derelict BAE site plus adjacent land.
- In some cases (Hardgate/BAE/Iona/Albion) a masterplan would be needed to ensure the right mix of land uses as well as to make sure that new development fits within the existing place.
- There are also opportunities for refurbishment/renovation of Napier House and the Lyceum Theatre.
- Several respondents talked about the potential for rezoning land and/or rationalising land uses /road junctions to unlock smaller pockets of land for housing development. This would probably need to be done through the strategic plan/LDP but could also be supported by a Local Place Plans (LPP).
- The three CCHAs have an understanding about the boundaries of their own respective areas of operation as well as expanded areas of interest which do not appear to overlap. In each case, there are sites of interest that could be used to develop new homes for social rent.

Conclusions and Next Steps

A phase 1 interviewee said Govan's transformation required a seed, spark or catalyst. Arguably – we have several: the bridge, GRID, ample potential developable sites, the TC:G TRA and Govan's many place-based attributes. But this needs to be co-ordinated and led, holistically, within a built environment investment framework that makes good choices over the zoning (and re-zoning) and phasing of development for housing, for GRID and for local employment/business opportunities. Govan is at a development (and hence regenerative) tipping point driven by enhanced external connectivity, relative affordability compared to the city level, investment in the GRID and through the large-scale investment in the TRA. These catalysts for change also have further sites to work with across Govan.

The stakeholders should specifically seek to learn from Gorbals, Sighthill and elsewhere in Glasgow in terms of what works. Equally they need to work with local Govan experts to learn lessons about how and why past regeneration efforts have had mixed success and how future efforts might do better supporting local people and communities. A joined-up strategic approach could do much with this window of

opportunity.

We also think that stakeholders can learn from systems analysis both in terms of the fundamental interdependence of different tenures, mixed housing and development decisions and the consequences for adjacent areas and place development, but also around the importance of initial conditions, path dependency and the like. History matters and is essential to understanding places like Govan.

A Glasgow-wide perspective matters in looking at the case for housing investment in Govan – there is a discount to first time buyer homes and potentially student rents south of the river and that can help neighbourhood markets without sufficient developable space like Partick. It is also important because of the citywide issues with housing need and the struggle to address the rising problems of unmet need. It is ironic from Govan's perspective given that it plays such an important role in the Glasgow economy and in terms of hosting the QEUH and its complex of adjacent services. Govan is deeply embedded in Glasgow but that could and should have a reciprocal benefit for Govan if land and development could be wisely developed for housing, employment and innovation.

We were also struck by specific early steps that could support local Govan people benefiting from these investments: embed GRID further in the local area through infrastructure support e.g. district heating, work in schools and training/skills opportunities; there should be important procurement of construction benefits for local workers, apprentices and trainees. This may also manifest itself in the need to retrofit and upgrade considerable volumes of older tenements in the years ahead.

At the same time, by creating local jobs, skills and more spending power, investing more in pedestrianisation and the walkability of Govan, this can help uncouple the ward from negative perceptions and stigma. This is also important, not least to encourage commuting workers to move to new housing in Govan. Working with local employers and facilitating local economic activity remains important to these labour market goals. There are also further connectivity issues – linking via the new bridge to Partick station and the SPT railway network is important for Govan to be closer to the wider conurbation's rail network.

The PRS offers three key opportunities: to acquire vacant PRS stock for affordable housing through acquisition (often taking stock on in closes where there is already housing association presence); to support the growth and success of local mid-market rent, and, via the University presence and the new bridge, to support possible further investment in student accommodation, and making a case for that to be more affordable relative to the types of investment already at planning stage in the city centre.

Overall, we think that with expectations set at the right level, working from an LHSAs framework combining the growing sets of local data with a wider sense of the functional housing market area and economy – can yield useful insights to help us understand localised housing systems within bigger

conurbations. It is coherent, systemic, comprehensive (at least in terms of the framework deployed) and its focus on interdependence and balance/imbalance, as well as in making its assumptions transparent (including openness to the higher-level system), is to us a better trade off than any alternative way to think hard about key housing localities.

Next Steps

Communicate this report and its recommendations to the local community and key stakeholders who could drive the business case forward and support the development of a coherent development strategy to bring forward a range of new housing opportunities. Critical to his next stage is clear leadership of this process.

The city council should consider undertaking a city-region level LHSAs, both to develop the aggregate picture but to also help identify other localities that would benefit from the disaggregated LHSAs model approached here.

When the data is available, draw on this Govan research to support 2022 Census analysis of Glasgow locality housing systems, both in Govan (sense-checking our findings) and across the city.

1. Introduction

1.1 Aims and Objectives

This report is a localised Local Housing Systems Analysis (LHSA) of Govan's housing located within the larger Glasgow housing system. The origins of LHSA are in the statutory evidence base for local housing strategies in Scotland and, distinctively, to draw on a common organising framework working with the best available data, expertise and judgement to assess the extent to which the housing system is in balance and where not, which imbalances require interventions (O'Sullivan, et al, 2004). Here, we seek to take these lessons, normally operating at higher levels of spatial aggregation e.g. Greater Glasgow, to a well-defined geographic sub-area of a local authority, one with strong territorial identification, a well-developed and justified sense of heritage and history, and recognisable physical boundaries. Nonetheless, this remains a highly open economic and social area where external drivers from the wider economy and housing market will always be significant.

The funders of this research (Linthouse, Elderpark and Govan housing associations, Glasgow city council and the University of Glasgow) asked the UK Collaborative Centre for Housing Evidence to undertake this study. The initial project rationale taken from the initial research brief (December 2022), stated:

'the purpose of the project is to produce evidence in support of making a strategic business case for a package of investment and interventions within the local housing market and system in order to steer development and growth to the maximum benefit of Govan and Glasgow.

The proposed project purpose and scope were laid out as follows:

- To undertake a local housing market analysis and prepare a report that sets out the [evidence underlying a][1] strategic business case for housing investment in Govan
- The research project to look at (not exhaustive)
 - Current and future housing needs and demand, including potential new markets and housing provision (tenure and type)
 - Existing housing assets (housing stock supply) and potential sites and assets, including existing sites/projects and commitments for New Build
 - The potential for stock repurposing and conversion
 - Delivery models and products, covering traditional and MMC and the role of intermediate (including MMR and LCHO) and market tenures alongside social rent
- The research project to collate and analyse evidence including on (not exhaustive):
 - Housing stock supply (type / tenure / location / provider)

- Housing Register and expressed demand (applicants to supply / applicants to turnover)
- Housing Market – sales prices and transactions / private rent levels / intermediate rents
- Potential new demand – projection of household growth (students / working age)
- Potential residential locations, not currently identified as housing sites.

- The research project to engage economic and regeneration / placemaking expertise as required, to explore where non-standard housing delivery models are required, indicate how this could be delivered spatially and demonstrate the economic case for these strategic housing-led, placemaking / market-making interventions.

Our fundamental approach to the project has been to assemble existing literature, secondary data, and interview intelligence organised around the LHSA conceptual framework, and reported on around the key themes of local geography and relations between Govan and with the wider economy, understanding external drivers, profiling how the localised system works, and examining imbalances and opportunities in such a way as to answer the essential research questions above.

1.2 Govan's Legacy and Future

Govan has a long and significant history intertwined with the development of Glasgow and the River Clyde. The Burgh has an ancient archaeological history centred around its originally Celtic-era church, and in more recent times as the lynchpin of Clydeside shipbuilding, a legacy that remains with the continuing importance of BAE on the Clyde. Govan suffered from the region's postwar de-industrialisation, manifested in de-population and relative decline but has retained a strong community ethos, local regeneration (e.g. Govan Workspace), as represented by its community-controlled housing associations and the fact that it is where Glasgow's community-based housing association movement began in earnest in the early 1970s (Young, 2013). Govan was also the home of the first world war rent strikes, and its leader, Mary Barbour, is remembered by a prominent sculpture in Govan.

Contemporary Govan reflects its historical path dependency but also several new features and emerging possibilities for future housing-led regeneration. First, Govan is a major employer within Glasgow, including BAE shipbuilding, related larger businesses, and the city's major NHS hospital and medical research complex at the Queen Elizabeth University Hospital (QEUH) site. Linked to this, second, is the ongoing University of Glasgow campus investment in the Glasgow Riverside Innovation District (GRID), as well as the connectivity possibilities created by the imminent opening of the Govan-Partick pedestrian bridge, reconnecting Govan to the west

end of the city (and University) - also enhancing existing strong subway connectivity and excellent road links. At the same time, third, Transforming Communities: Glasgow (TC:G) are in the advanced stages of proceeding with a major mixed tenure development at the Govan East-Ibrox transformational regeneration area (TRA). This increases interest in the developability of further sites across the area for housing but including the mosaic of mixed light industrial sites, scrapyards and other spaces across the Govan-Ibrox neighbourhoods. A question for this analysis concerns how to unlock this potential to benefit Govan and Glasgow.

The Role of Community-Based Housing Associations (CBHAs) in Govan

A programme intended to renew and redevelop Govan ought to identify suitable mechanisms to align and coordinate investment strategies with community needs and interests. Historically, community-based housing associations (CBHAs) have been well-placed to fulfil such a role. In fact, Scotland's first housing association was formed in 1971, when local residents came together as the Central Govan Housing Association to rehabilitate 212 tenement flats (GHA 2023a; 2023b). Today, Govan Housing Association co-operates with two peer community-controlled housing associations in Govan: Linthouse and Elderpark. Together (see Table 1.1. for 2022), they manage around 5,000 homes in Govan (Elderpark HA: 1,338; Govan HA: 1,648; Linthouse HA: 1,226). These three CCHAs, therefore, manage approximately 60% of all the social housing and a quarter of all occupied dwellings in Govan. Wheatley Homes Glasgow, who represent the stock transfer of Glasgow's council plus subsequent re-investment and new build are the largest social landlord with 2,329 units, just over a third of the total stock.

Table 1.1: Social Housing Stock in Govan 2022

Landlord	Number of units	% of total
Wheatley Homes Glasgow	2329	33.5
Govan HA	1648	23.7
Elderpark HA	1338	19.2
Linthouse HA	1226	17.6
Home in Scotland HA	131	1.9
Southside HA	118	1.7
Other HAs	168	2.4
	6958	c. 100.00

Source: NRS GCCN

note: others include: Trust, West of Scotland, Key, Bield, Sanctuary Scotland and New Gorbals housing associations - all with less than 60 units each.

Govan's CBHAs are involved in the supply of new housing, as well as the regeneration of existing stock. In 2022, Linthouse HA led the development of a school that had been closed

since 2010 (Drumoyne Primary). The project on Cromdale Square was recently awarded a "Best Regeneration Project" prize at the Inside Housing Development Awards (SFHA 2023). Linthouse HA has also long been involved in the regeneration of Govan's pre-1919 tenements through their "Tenement Window Replacement and Sandstone Repair Programme" (LHA 2021). In 2020, Elderpark HA secured funds from GCC and SG to commence major construction and refurbishment works of the listed Elderpark Library. The project will deliver a library and learning centre to the local community and is indicative of effective public-CBHA partnership. Furthermore, Govan HA is involved in a £24 million development at Water Row, where 92 new-build midmarket rental flats will be brought to market. This project involved funding from GCC, City Deal, Clyde Mission Fund as well as Govan HA's own borrowing (GHA 2022). The apartments were completed in late 2023 and leased quickly - confirming strong demand for these kinds of mid-market properties.



Figure: Cromdale Square. Photo by Gareth James.

CBHAs are excellent mechanisms for the coordination of investment strategies intended to benefit local communities (Gibb, et al, 2020). As community anchors, Govan's CBHAs act as instrumental intermediaries between statutory bodies and local residents given their regular interchange with other organisations serving the local community, including: SE Foodbank, Home Energy Scotland, Starter Packs, Second Opportunities, Govan Pantry, Spruce Carpets, Energy Redress, Govan Jobcentre, Pollok Credit Union, One Parent Families, Glasgow Care Foundation, and Glasspool (GHA 2021; 2022)

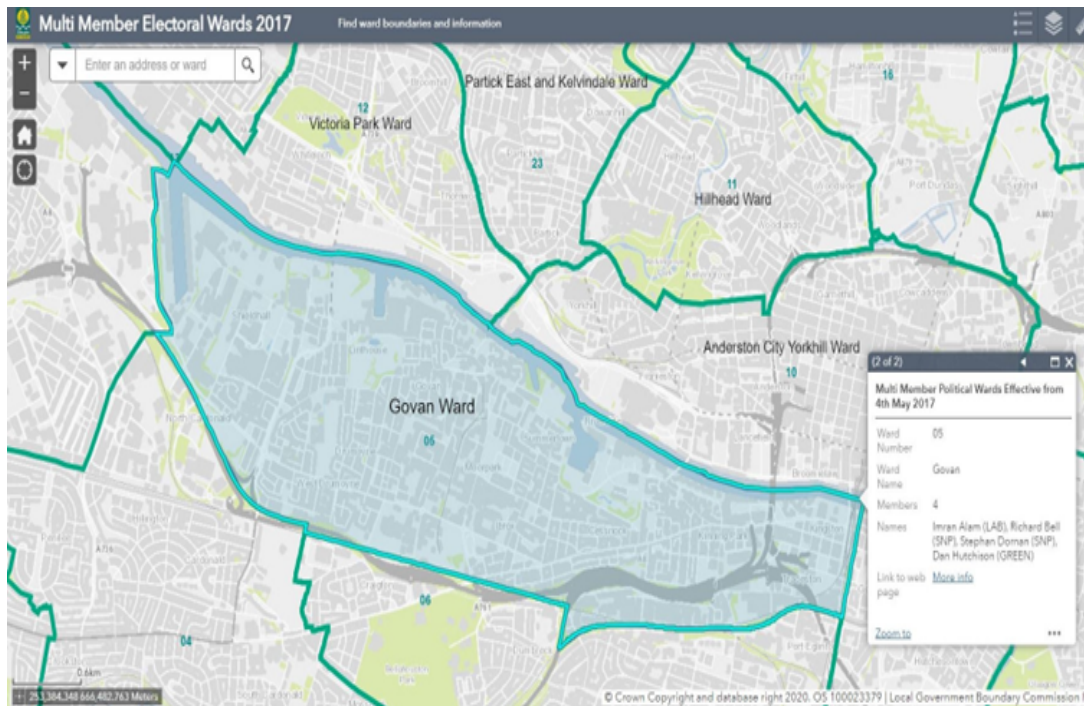
1.3 Localising LHSA

A considerable challenge for this study is the openness of the Govan housing system in the wider context of Glasgow. The more connected a neighbourhood is to the wider city, the greater this problem can be. It is important for systems analysis to be able to draw clear boundaries - in the case of city regions the key boundaries relate to the housing market area or in some cases the local labour market area or travel to work area. Here, we must work with the reality of the integration of Govan into the wider city and region. Nonetheless, it is helpful that Govan has such clear geographic boundaries - the hospital and motorway road system, the

river and the local authority boundary all produce hard boundaries that matter for perceptions of neighbourhood

boundaries. Figure 1.1 shows the current Ward 05 of Govan within its wider Glasgow setting.

Figure 1.1 Govan Ward, Glasgow



Source: Glasgow City council

Govan is striking because it is such a large employment centre and has several orders of magnitudes of jobs in the area compared to people living there. It is patently highly connected to the wider economy. A further interesting dimension of the multi modal connectivity of Govan to the city is the potential for affordable private housing, student housing and affordable/social rented investment locally. There are sites available for development (and potentially more through land assembly and creativity with potential brownfield land).

Beyond this study, an important auxiliary objective is to learn lessons from the Govan LHSA exercise to inform the city council about other parts of the city that would benefit from this localised form of analysis. At the end of this report, we will set out a checklist and template for further localised studies but also reflect on the evidence and the challenges of working in such an open urban system.

1.4 Research Methods

The study follows several of the principal elements of a LHSA approach. It is premised on value for money and thus on not creating new primary quantitative data but instead relying on elite interviews across the housing system, alongside a wide span of secondary data organised around the LHSA framework (see Figure 1.1 below). In detail we have:

- Undertaken a review of relevant planning documents and grey literature
- An audit of data sources

- A scoping study involving secondary evidence, interviews and analysis across a range of topics and themes e.g. the local economy
- An audit of potential land sites
- Quantitative analysis and qualitative interview evidence regarding external drivers including the economy
- Quantitative analysis of private market housing supported by qualitative interviews
- Analysis of needs and demand also drawing on mixed methods
- Synthesis of the evidence to highlight both system imbalances and opportunities
- Evidenced reflection on the replicability of the model to elsewhere in Glasgow.

Local Housing System Analysis (LHSA)

This report has been prepared using a well-established research framework (O’Sullivan, et al, 2004) known as Local Housing System Analysis (LHSA). As the name implies, the key characteristic of LHSA is that it takes a systems approach to the study of housing at the local level. Systems analysis is underwritten by the view that housing issues are influenced by a complex array of relationships between different parts of the housing system that must be considered and evaluated in turn to ensure better housing policy. In other words, the local

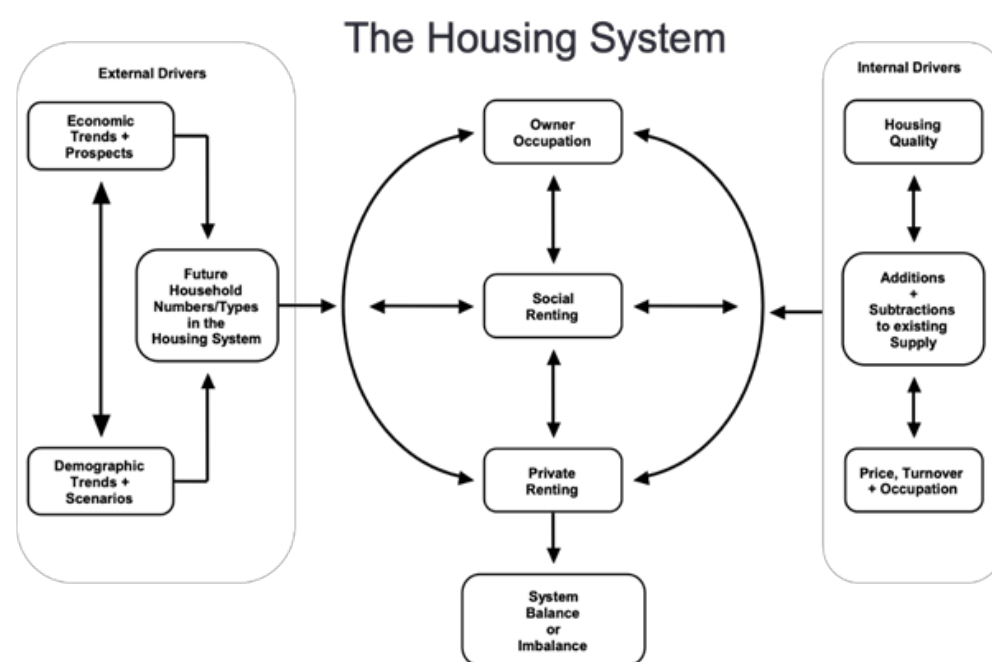
housing system is “more than just the sum of its parts” and it is the interactions between and among the parts that warrant scrutiny (SG 2019). The LHSa method originated in Scotland in the late 1980s and has been used as an evidence-based planning tool by local authorities to guide their strategic housing decisions since the 1990s (Gibb et al. 2012, 411).

Since LHSa is, fundamentally, a data collection process organised around a comprehensive framework of analysis used to inform and enhance housing policy and practice, its primary objective is diagnosis. In the first instance, LHSa is used to identify, assess, and monitor secular “imbalances in a local housing system over time” (SG 2019). Diagnosing aspects of the local housing system that demonstrate suboptimal function (or imbalance) highlights areas most suitable for focused intervention. In systems analysis, these observed imbalances are also opportunities, known as leverage

points. This emphasis on imbalances and the identification of leverage points directs policymakers to where they may focus their attention in pursuit of “long term solutions for the root causes” of the issues structuring the local housing market (Nguyen et al. 2016, 209).

As can be seen in Figure 1.2, a local housing system is conceived across all tenures and pays due attention to their interdependence and feedback between different nodes (note that the system diagram could be organised according to places/neighbourhoods or indeed property types, rather than by tenure). Furthermore, LHSa considers and evaluates all manner of external and internal drivers affecting the local housing system. Figure 1.1 lists housing quality, changes in supply, and other market effects such as price signals and stock turnover as internal factors.

Figure 1.2



Source: O'Sullivan, et al (2004)

Govan's LHSa (as with all others) began with a boundary-drawing exercise, establishing the limits of the local housing system – determining what is and what is not part of the system. This is complicated by the localised nature of Govan nested within a broader functional housing market area (Greater Glasgow), and the open flows between the two. The dominance of the larger system, and the flows across the two, are recurring themes throughout this report and caveat or nuance the analysis.

Running through the research is the interaction between Govan's specific housing stock, one dominated by tenements, exhibiting a relatively consistent level of turnover and vacancies for the CCHAs in recent years, set against a Glasgow-wide housing need pressure. This is captured in the term housing 'emergency' reflecting Ukrainian and asylum seeker need, Section 5 homelessness referrals and longer stays in

temporary accommodation. This is affecting the entire city but is expressed locally in Govan's housing system and its unique capacities and constraints.

The LHSa proceeds to an identification of all relevant parts, elements, stakeholders, actors and structures that make it up. This preliminary mental mapping directed the next stage of analysis where we examined the various parts of the system – their relations, linkages and dependencies – and assessed the degree to which they exhibit balance or imbalance, in their given context. Critically, a data audit is undertaken to identify key indicators of the system and sub-systems but, it also identifies data gaps and suggests other ways of closing those gaps in vital information to better understand the LHS.

Linked to the data collection process are a series of research questions and hypotheses that are generated by profiling

the housing system and interviewing local experts across the housing sector. These are also connected to ideas about what balance looks like in terms of demand versus supply, affordability, excessive or unstable values of key indicators e.g. rents, prices, waiting lists, homelessness, turnover rates. Interpreting these numbers requires judgement and benchmarking and should be made explicit in the analysis.

In the end, an LHSA seeks to identify and examine all the relevant aspects of the local housing system and evaluate the degree to which its relationships, linkages and dependencies are reflective of either balance or imbalance over time – i.e., the LHSA asks if the local area is characterised by a healthy (well-functioning) housing system? Where aspects of the local housing system are imbalanced, we might expect further knock-on effects and short-to-medium term system change. Often these outcomes will be unanticipated or undesirable. By diagnosing such imbalances, the LHSA directs the attention of planners and policy makers towards important leverage points where intervention may arrest or ameliorate adverse and unintended impacts or prove a catalyst for positive long-term change and a sustainable and equitable local housing environment. Within the LHSA framework, boundary-setting, data audit and profiling of the housing system, there is considerable room for judgement, differing views and inevitably gaps in data capture. However, more than 20 years of LHSA good practice has been developed to underscore the approach, one which has its inherent flexibility as a principal advantage.

We also include a summary set of contemporary indicators of Govan. The third section contains an analysis of external drivers related to the left-hand portion of Figure 1.1 above. The fourth section engages with the main components of the local Govan housing system, its profile and principal outcomes. The fifth section synthesises the work in terms of outcomes, important system imbalances and opportunities. The final section summarises and concludes, returning to the initial research questions and the issue of replicability of this approach elsewhere in Glasgow.

1.5 Outline of the Rest of the Report

After this first section, we briefly provide a summary of the earlier scoping report where it provides evidence relevant to the subsequent evidence in the later sections of the report.

2. Findings and Lessons from Phase 1 of the Research

2.1 Scoping the Research: Phase 1

In the scoping phase of the research, the team brought together evidence to inform the main data collection and analytical second phase of the project. For the first phase, this involved:

- Consulting all relevant planning, housing and community planning documentation (e.g. how Govan fits into the Glasgow housing strategy and development plans?).
- Collecting profiling information about Govan, its housing, people and the place, against relevant benchmarks like the city level of analysis.
- Conducting a deeper data audit of potential data sources.
- Compiling a high-level area profile from secondary sources, including the economic geography of the locality and its relation to Glasgow and the city-region
- Completing scoping interviews with key stakeholders to problematise the housing system and locality, understand the economic and social opportunities, thereby developing hypotheses for the research to explore.

Deprivation	2020	Of the 32 data zones, 3 (all in Govan and Linthouse) are in the 5% most deprived & all 32 are in the 20% most deprived	SIMD 2020 EZ data zone lookup
Neighbourhood house prices	2015	2 bed flat average sale price £90K	Equivalent £190K in Partick
Dwelling typology	2015	Flats: 83%	
terraced:		11.5%	
semi-det:		4.8%	
detach:		0.6%	
Tenure share	2015	Owned: 33%	
Social rent:		43%	
PRS:		24%	

Source: Phase 1 report

Table 2.1 Selected Background Indicators

Indicator	Year	score	Comment
population	2021	28,000	Population was 150,000 in 1951
Working age adults	2021	21,000	
Dwellings	2021	14,798	EW estimates data zone based
Population	2020	28,278	EW estimates data zone based
Pop density hectare	2017	18	Cf 80 in Partick
Employment in Jobs in Govan	2015	43,200	10% of city jobs; 50% of these jobs in NHS
Residents labour market position	2017	10.8% unemployed; 29% inactive	

Table 2.1 presents a selection of highlighted indicators of contemporary Govan as a housing system. Govan has undergone massive depopulation in just three or four generations reflecting de-industrialisation and active city clearance, comprehensive redevelopment and population movement policies.

Yet, at the same time, contemporary Govan is home to a tenth of all Glasgow jobs reflecting the presence of the city's principal hospital, the working shipyards, and other high-quality businesses, as well as the residue of the large number of small businesses, often light industrial. Govan also consequently has many potential brownfield sites on vacant or derelict land for redevelopment including for housing. Govan offers several key redevelopment sites, including: the Water Row site, the Graving Docks, East Govan/Ibrox TRA, land at Linthouse, the Lyceum and Fairfield Rowan buildings. Another consequence of economic change is the relatively low population density of Govan (which is a large zone of the South West of Glasgow) compared to, for instance, Partick on the north side of the river.

Table 2.1 also indicates that Govan is in many ways disconnected from the local economy's strength. Working age residents have relatively high levels of unemployment and economic inactivity. The local area also has high concentrations of multiple deprivation with three of its data zones in the worst 5% in Scotland and all 32 data zones in the

worst 20%. Nonetheless, as we discuss further later, Govan has been the site of considerable investment in recent times and has a vibrant community-focused regeneration culture.

The housing stock is dominated by flats (83% of the total) and these in turn have a high proportion of pre-1919 tenements, with just 11.5% terraced, 4.8% semi-detached and less than one percent detached. In terms of tenure patterns, Govan is distinctive: a third of people own their homes, with just under 43% in social housing and, strikingly, nearly a quarter in private renting.

2.2 Initial interviews, data audit and key findings

Scoping Interviews

A more integrated sense of the context facing the Govan housing system was generated by a series of scoping interviews,

Interviews with planning and economic development professionals

Starting with three planning and economic context interviews, several points resonated. Glasgow is a “north-bank city” by tradition, so how do you build sustained development south of the river? The Partick bridge presently under construction, which benefits from City Deal funding, is one reason why the GRID innovation district is where it is. It can be hard to move people psychologically, so if you shorten the distance it makes a difference. Others similarly spoke of connecting Govan to a west end growth dynamic.

Govan has tended to miss out - or that is a perception - on the major regeneration activities that have taken place in the city (despite obvious amenity improvements around Govan Cross for instance. So, for example, while the hospital development nearby was one of the biggest of its kind, it had little apparent impact on Govan, so the promises of new interventions that promise to transform the area are met with some scepticism. In separate interviews, it was argued that previous regeneration in other parts of the city in recent times in Dennistoun, Gorbals, Sighthill and elsewhere, shows what is possible.

Housing dynamics and their effect on the local economy are well known - as expressed through stark population change in the area. A key issue, however, is ensuring local people can benefit from the employment creation in the area. At the moment, though, the Govan area is a recipient of net commuting flows (that is more people come to work in the area, than move out it for work), the jobs in the area are seen to be at a distance (cognitively), or unavailable, to those who live in the area.

When considering GRID within its local context of Govan, the notion of “cathedrals in the desert” (that is a development in an area that has little functional connection to the local area, even though it has a footprint there) and avoiding this, was

much discussed. How can local supply chains, labour markets and knowledge spillovers benefit those who reside in the local area?

An issue of concern here is how can you ensure spin outs from an innovation district are sticky; to avoid the potential for spin outs just heading away to North America, for example, once they have reached a certain size or scale. Here, the ability to move land into use more quickly was considered important by a respondent as was having flexible business spaces. Furthermore, working with further education (FE) is seen as a vital relationship.

Key to negotiating these opportunities and being clear on the costs that may emerge, is working with local community bodies, pointing to the institutional memory provided by the Central Govan Action Plan team. Concern was also noted for developers acting as “a good neighbour”, such as through developing a civic fund to support local community groups (given the limited capacity of other bodies to support such roles).

Finally, it was noted that GRID lacks a masterplan; what does it look like in the next 5-10 years? You can't be completely specific, because things change but you can point to developable land and the nature of development that may emerge in those locales.

Development, construction and land interviews

A second perspective came from two interviews with development, construction and land interests. Starting with positive opportunities in Govan, respondents identified “huge potential” for development in Govan. In part this is due to the area's multiple active housing associations, good connectivity, strong sense of community and heritage, and proximity to the city centre and relevant construction supply chains. There are several new developments already happening (e.g. Water Row Redevelopment) and other new build opportunities on sites like Hardgate Road near the QUEH (with potential for 300-450 homes) and the former Davislea care centre (35-37 new homes). There is also potential for 30 new homes on an old school pitch immediately north of Cromdale Square.

The new bridge and GRID will attract new people and businesses to the area and increase the demand for housing. Potential was seen for district heating tying into the QUEH but also with GRID development and connecting existing pre 1919 tenement stock into this option. Both interviewees, however, also spoke of isolated pockets of development rather than strategic/holistic/wholesale approach to regeneration, despite the huge investment in the area.

Interviewees said that the challenges that they are facing as developers/contractors are much the same as the challenges that they face in other similar parts of the city and elsewhere e.g. planning constraints and viability, zero carbon heating systems and likely Passivhaus equivalent design standards, ground conditions, NPF 4 regulatory consequences, and design expectations. Important Govan-specific issues include:

- Flooding/flood marking – because of its proximity to the River Clyde, Govan is more at risk than some other

areas and the way that SEPA and other authorities are undertaking flood marking (especially now in context of NPF4 and climate emergency) present a development challenge regarding building along the Clyde.

- One respondent contended that the biggest challenge is improving the physical fabric of existing housing stock, especially securing the finance to pay for improvements to pre 1919 tenement stock
- Competition for land – including with the University and the land that will now be used for the Innovation Hub. “Having the university there, I think is a great thing. You have a potential partner in the area and source of intellect and resources potentially, but on the other hand also a competitor for land.”

It was suggested that Govan needs a “catalyst”, a “wee spark”, a “seed” from which development will grow, a “big statement”. Public sector leadership and financial commitments were seen to be important, at least in the short term in order to create a market and generate investor confidence. The respondents kept coming back to the new bridge and GRID as potential catalysts. Both saw these major infrastructure investments as having the potential to unlock development opportunities in Govan, for both affordable and private market housing, as well as other mixed uses e.g. commercial and retail spaces.

Respondents also noted the potential impact that the new bridge and wider regeneration activities might have on the housing market/house prices in the area. Higher house prices might make private market and mixed-use developments more viable for developers. The land and planning consultant also expressed some concerns that this could also lead to “displacement” of the local population.

Overall, there is huge untapped potential in Govan which could potentially be unlocked by the new bridge and other wider regeneration projects. Time will tell whether this will be enough to transform Govan and its housing market or whether additional public investment will be needed to incentivise further regeneration and new construction. The key challenges/barriers to development appear to be the same as in other similar parts of Glasgow, and there are plenty of good practice examples in the city where regeneration appears to have had more success. These places may well hold lessons for the transformation of Govan.

Interviews with CCHA directors

A focus group was held with the heads of the three community-controlled housing associations. The discussion stressed four areas: the benefits or assets that Govan possesses, the vision presented for the future of Govan, concerns about the area if this vision does not evolve, and, a sense of the barriers to Govan’s future transformation.

Govan has important location and place advantages within the Glasgow city region. It is well situated on the river and has a potentially valuable waterfront. The area is well-connected by major roads and the motorway system and has the south exit of the Clyde tunnel. Locally, the location also benefits

from the Govan and Ibrox subway stations, which have direct relevance to sites such as the Ibrox Transformational Regeneration Area (TRA) This will be further enhanced by the new (opening in 2024) pedestrian swing bridge connecting foot traffic between Govan, Partick and the west end. Linked to this development is the potential that flows from the University’s Govan investment within the GRID innovation programme.

Govan has a strong identity, culture and community, something strengthened by its rich history, multiple heritage and archaeological sites. The QUEH is the largest NHS hospital in the country and, consequently has large employment and economic effects for the Glasgow economy, including for Govan, in terms of direct and indirect jobs, also potential induced jobs locally due to local spending. Govan is also the home of BAE Systems shipbuilding which has an order book for 10 years and is a major employer and trainer of apprentices. The new pedestrian bridge also helps connect the two riverside bases of the shipbuilder.

There is a shared ambition for Govan amongst the housing associations. And there is also much to draw from several initiatives from planning and elsewhere in GCC and its partners, seeking to support the regeneration of Govan. The vision starts with the existing stable vibrant communities of Govan. It is then about sustainable community regeneration and bringing people back to Govan. This can be achieved by both improving existing housing and by offering a wider range of new housing (size, price point, tenure, mix, demand groups), to support the realisation of the area’s potential. In particular, the associations saw the importance of both improving the social housing offer but also stretching into mid-market rent, student housing and home ownership.

Land, sites and infrastructure are critical to the success of new build transformational opportunities in Govan, and the plans of stakeholders like Wheatley within the Transforming Communities: Glasgow (TC:G) within the East Govan Ibrox TRA, roads and transport investment in the motorway access roads and the tunnel, and, of course, the NHS. Govan is characterised by a mosaic of working light industrial sites, but also derelict or redundant light industrial land uses. A comprehensive approach to rezoning and liberating these sites for a range of housing projects is critical to realising the ambition.

There were shared housing concerns within Govan, identifying the following five issues:

- The turnover of social housing is relatively high and a comparatively large proportion of new tenants are homeless households which may not be consistent with engendering long-term residents and communities.
- There is a concentration of people with relatively high support needs, which is both a cost consideration and may often not work well in older tenemental stock.
- There is not enough tenure mix and good quality private sector alternatives, set against what might be argued to be a disproportionately large and dominant social housing stock. At the same time, there is a sense of ‘prosperity flight’, that when opportunities arise, socially mobile Govanites leave for other parts of Glasgow.

- The housing associations face challenges to meet net zero in social sector – because of the higher fabric first repairs and retrofits required of the pre-1919 tenement stock.
- There are opportunities for Govan-based housing associations to ramp up acquisitions from exiting private landlords, but they come with uncertainty and much red tape.

Barriers holding back the potential transformation of Govan were identified:

- Reputation (perceived anti-social behaviour, poverty, unconscious bias and negative stigma associated with social housing).
- Generational fragmentation (younger people leaving and impacts of housing allocations policy – e.g. no local connection).
- Internal connectivity is poor (limited or constrained pedestrian walking and physical barriers, such as major roads, the hospital and the river).
- Traffic congestion and dependence on the Clyde tunnel (which requires investment).
- Making the private sector investment business case is itself hampered by the perception of risk and low anticipated returns, and the challenges of industrial land uses, difficult sites, etc. Govan too much characterised by disconnected or fragmented zoning, tracts of light industrial land and land uses eg scrapyards, sewage and waste processing.
- There are also competing and conflicting stakeholder interests concerning land ownership, investment bodies, the council and overlapping multiple planning frameworks. Overall, they argued there is a lack of a cohesive, holistic built environment investment framework.

Data Audit

A data audit was undertaken to identify potentially useful secondary data sources that could provide an important part of the evidence base underpinning the analysis of recent trends, estimates of future developments and recommendations contained in the final report. The data audit focuses on issues such as the timeliness, accuracy and robustness of the data and its spatial level – in particular, whether it can be disaggregated to Electoral Ward (EW)/Data Zone level and thus facilitate analysis of trends that are specific to Govan and comparable areas surrounding it. The data audit also aims to highlight data gaps, where additional secondary or primary data (including qualitative data gathered through, for example, semi-structured interviews with key stakeholders) would significantly add to the value of the data.

Demography

National Records of Scotland produces a wide range of high-quality demographic statistics that are updated on a regular basis. The local level data that is broken down by age and sex of the “usually resident population” at EW level are useful but cross-tabulation by household composition does not appear

to be publicly available.

The most serious weakness inherent in the publicly available demographic data lies in the fact that much of it is ultimately based on the 2011 Census. These weaknesses in demographic data are exacerbated in relation to population projections, but particularly in the case of household projections based on a set of assumptions. The most recent projections are ultimately based on trends apparent in the 2001-11 decade. Estimates at small area level are less reliable – particularly because of variations in migration levels. Again, over time estimates become less reliable. Projections of both population and households are understandably, therefore, only available at local authority level and not at EW or Data Zone level. It is therefore recommended that the project team uses the official data as a starting point for any estimates of future population and households in Govan but in recognition of the uncertainty surrounding these consults with a range of stakeholders with local knowledge of Govan to address this issue.

Economic / Labour Market

A vast array of statistics and analysis are produced by ONS and Scottish Government that provide a wealth of information on the economy and, specifically, the labour market (including important variables such as levels of economic inactivity and incomes). However, although the data is useful in providing contextual insights, because none of the main surveys are disaggregated below local authority level, these publications are of little use in terms of building up an up-to-date consistent, comprehensive picture of Govan and its prospects. The Multiple Deprivation Index provides ranking at EW level, which is of some use in terms of income comparisons with other surrounding EWs. Scottish Government’s local level household income estimates (at Data Zone level) were last published in 2018 and therefore are well out of date. CACI data on income as well as other household related data is considered reasonably robust. It is available at postcode level but would have to be purchased separately at additional cost – something that may be outside the scope of this study.

Housing Market

Generally, information on key facets of the housing market and its three main tenures is significantly superior at the local level to data on the economic/labour market data, and indeed the demographic data currently available. NRS small area statistics on dwellings that are regularly updated when taken together with property data for both private sector and social dwellings, including EPC data enables the research team to build up a fairly comprehensive picture of key characteristics of the dwelling stock and how those have changed over time.

Regularly updated RoS house price statistics based on actual sale price rather than asking price are available at Electoral Ward and Data Zone level. Data on key statistics such as volume of sales and new build properties provide further useful insights into the dynamics of the owner-occupied sector at the local level.

Scottish Government data for the private rented sector also

provides useful market intelligence. However, publication at BRMA level is not particularly helpful and in addition is based mainly on advertised rents. It also only provides data on dwellings which are newly available for rent and does not give any indication of what is happening with rents of existing tenancies.

Data available on social housing provide the research team with the most comprehensive sectoral overview. A combination of data that is publicly available from the Housing Regulator together with additional information provided by housing associations participating directly in the study enables the research team to examine not only the changing characteristic and condition of the stock over time but also analyse trends in relation to other key housing management information, including rent levels, arrears, turnover, waiting lists and vacancies. This analysis in combination with ongoing discussions with senior housing association managers enabled the research team to paint a very detailed picture of the current situation and prospects for the social housing sector in Govan.

The one key component of the housing market for which publicly available data is almost absent is land availability. Information at the local level in terms of the availability of vacant/derelict sites, their quality in relation to potential development for housing or other uses and the timescales involved represents a significant data gap. Glasgow City planners made additional information available, but this data gap can only be addressed by a mapping land audit exercise to be undertaken by the research team.

In summary, there is undoubtedly a vast array of – to a greater or lesser extent – robust and relevant demographic and economic/labour market data that is easily accessible. However, problems of timeliness, particularly in the case of the demographic data, and more generally the problems of disaggregation to EW/Data Zone level of economic/labour market data mean that triangulating this with the expert knowledge of local stakeholders is imperative in the interests of providing a sound evidence basis for forward planning and recommendations. In the case of the housing market the overall picture is much better, but notable data gaps include information on land availability and additional information on the private rented sector.

2.3 Lessons for phase 2

What are the main messages emerging from the scoping exercise? First, Govan's regeneration needs leadership, co-ordination and commitment but it faces (and can learn from) many similar challenges overcome already elsewhere in Glasgow. Second, there are many systems thinking insights which speak to how we understand and anticipate future opportunities within the PRS, the asset management of the existing stock, students housing, affordable private housing for sale, transport and place connectivity.

Third, LHSA insights are valuable. Despite its natural hard boundaries, Govan remains a very open economic system with considerable implications for the local housing system

and development opportunities. New investment seeking incomers must take sufficient account of the wider sub-markets and locations that the likely would-be buyers would come from and consider how benefits in the form of affordability and housing quality are traded off with accessibility and connectivity to the wider city. Similarly, mid-market rent and student housing investment, and social housing acquisitions from the PRS must take sufficient account of these interdependencies within and beyond the local housing system. This is most obviously the case when we consider the wider spatial implications of the large planned TRA mixed tenure investment led by Transforming Communities: Glasgow.

Fourth, from a research perspective, there will be further insights to be gleaned from different stakeholder perspectives that were not yet engaged within this first phase. The data audit has identified several important shortcomings in relation to vintage, timeliness and aggregation with several of the key areas we wish to examine – this means that we will need to be more flexible in our approach with data and inevitably triangulate with qualitative and expert sources from our stakeholders and other built environment professionals, locally. The team identified further specific implications for the main research phase:

- The scoping interviews helped to identify second round interviews and the gaps in knowledge we would wish to close. This was co-designed alongside secondary data analysis. For instance, while it is possible to find out quite a lot about the housing market, local expertise was accessed for the second phase from estate and letting agents as well as other built environment professionals, especially concerning land and sites.
- The team worked closely with the three community-controlled housing associations to better understand the key demand and need parameters of the size and composition of those applying for social housing, where they come from and their demographic make-up. The team also used this opportunity to glean a deeper understanding of the social housing stock, turnover rates and the micro level variations in demand and supply. It was important to also develop a picture of housing need and demand among other landlords active in the ward.
- There was considerable added-value generated by a serious land audit of vacant, derelict and other potential sites, taking account of their current zoned status. This was a significant piece of work for the project.
- The scale, timing and importance of the TRA investment and its potential local system impact required close consideration. In a similar sense we engaged with investment and economic development opportunities in Govan, for instance, to understand the pace and housing implications of new investment locally through, for instance, the innovation district approach.
- The scoping study and feedback from the steering group helped refine the project focus to bring focus on LHSA outputs and not overdo analysis of Govan as a place nor possible scenarios for its future.

3. External Drivers

3.1 Introduction

Referring to figure 1.2, we next consider the external drivers of the local housing system, focusing on economic drivers, demographic drivers and considering likely future trends and scenarios for these important underpinning drivers of Govan's housing system. As we noted earlier, we recognise that Govan's future is intimately bound up in what happens to the Glasgow and Greater Glasgow housing, economic and social systems. We return to these points at the end of this section.

3.2 Demographic trends

Table 3.1: Glasgow City: Population Estimates by Age, 2001-2021

	2001 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)
0-15	106,342 (18.4)	98,204 (17.3)	95,824 (16.2)	98,487 (16.0)	99,881 (15.7)
16-39	218,627 (37.8)	214,140 (37.7)	23,0473 (38.9)	245,721 (40.0)	259,324 (40.8)
40-65	163,096 (28.2)	171,261 (30.1)	184,512 (31.1)	187,072 (30.4)	189,321 (29.8)
>65	90,645 (15.7)	84,855 (14.9)	82,251 (13.9)	83,790 (13.6)	86,604 (13.6)
Total	578,710 (100)	568,460 (100)	593,060 (100)	615,070 (100)	635,130 (100)

Source: Mid-year Population Estimates by Council Area, sex and single year of age, 1981-2021

Table 3.2 Govan: Population Estimates by Age: 2001-2021

	2001 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)
0-15	4,668 (18.6)	4,071 (16.8)	3,621 (14.5)	4,339 (15.8)	4,306 (15.2)
16-39	10,043 (40.0)	9,945 (41.0)	10,934 (43.8)	12,171 (44.4)	12,789 (45.2)
40-65	6,812 (27.2)	6,959 (28.7)	7,391 (29.6)	7,822 (28.5)	8,109 (28.7)
>65	3,560 (14.2)	3,249 (13.4)	3,021 (12.1)	3,066 (11.2)	3,074 (10.9)
Total	25,083 (100)	24,224 (100)	24,967 (100)	27,398 (100)	28,278 (100)

Source: Electoral Ward Population Estimates (2011 Data Zone Based)

Table 3.3: Partick East/ Kelvindale: Population Estimates by Age: 2001-2021

	2001 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)
0-15	3,078 (11.7)	3,109 (12.0)	2,818 (10.1)	2,906 (9.9)	2,899 (9.2)
16-39	12,407 (47.1)	11,650 (44.9)	13,323 (47.6)	14,032 (47.7)	15,793 (50.0)
40-65	7,252 (27.5)	7,792 (30.0)	8,229 (29.4)	8,348 (28.4)	8,339 (26.4)
>65	3,589 (13.6)	3,398 (13.1)	3,600 (12.9)	4,158 (14.1)	4,584 (14.5)
Total	26,326 (100)	25,949 (100)	27,970 (100)	29,444 (100)	31,615 (100)

Source: Electoral Ward Population Estimates (2011 Data Zone Based)

The population of Glasgow City as well as both Govan and Partick East/Kelvindale dipped between 2001 and 2006, but thereafter all three areas recorded steady population growth, though at differing rates overall (2006-2021): 11.7% for Glasgow City; 16.7% for Govan and 21.8% for Partick East/Kelvindale).

These differential growth rates encompassed some similarities but also some significant differences and changes over time in the proportions of their respective populations falling into each age group:

(1) Children <16: in 2021, the proportion of Govan's population in this age group was similar to Glasgow City's (a little over 15%) and in both cases the proportion had declined by around 3ppts between 2001 and 2021. In contrast, in Partick East/Kelvindale, in 2021, the proportion of the population under 16 was only 9.2%, but it too had declined by almost 3ppts since 2001.

(2) 16 – 39-year-olds: In Govan, as in Glasgow City as a whole and in Partick East/Kelvindale, the proportion of the population of (younger) working age rose significantly between 2001 and 2021. However, Glasgow City experienced a growth of only 3ppts over this 20-year period, like the figure for Partick East/Kelvindale (2.9ppts), whereas the comparable figure for Govan was 5.2ppts. However, in 2021, Partick East/Kelvindale still had the highest proportion in this age group (50.0%) compared to only 45.2% in Govan and only 40.8 for Glasgow City.

(3) 40 – 64-year-olds: in contrast, in 2021, Partick East/Kelvindale had the lowest proportion of its population in this (older) working age group (26.4) compared to Govan (28.7%) and Glasgow City (29.8). However, the proportions within each of the three areas remained more constant over the period 2001-2021, rising by only approximately 1.5ppts in the case of Glasgow City and Govan, while in the case of Partick East/Kelvindale it fell by around 1%.

(4) Older people 65+: in the case of this age group there was a considerable difference between Govan (10.9%) and the other

two areas (Glasgow City and Partick East/Kelvindale: 13.6% and 14.5% respectively) in the proportion of the population who were 65 and over. This age group also recorded different rates of change in the three areas. In the case of both Glasgow and Govan the proportion of the population 65 and over declined 2001-2021 (Glasgow -2.1%; Govan -3.3%), whereas the proportion increased by 0.9ppts in Partick East/Kelvindale.

Just after the draft report was submitted, we were able to access an early release of the new 2022 Census relating to population by age at local level in Glasgow. This is described in Table 3.4 below. The data here is not comparable to the trend analysis above in Tables 3.1 to 3.3. Here we use GCPH neighbourhood geographies of Greater Govan and Ibrox/Kingston for 2022 and 2011. Both localities have both grown above the Glasgow average (see - all people column). They have also experienced bigger growth for those aged 0-15 (especially in Ibrox). They also grew more for the 25-44 and 45-64 age bands than the Glasgow average. Govan grew more than the average for 65-74 (Ibrox below the Glasgow average). On the other hand, Govan saw its 16-24 age band fall by 2.8% where it grew albeit at low rates in Ibrox and in Glasgow as a whole. The other striking age band is the over 75 band where Glasgow overall fell by 7.9% and both Govan and Ibrox fell by even more, 14.9% and 12%, respectively. We have also included Broomhill/Partick West across the river for comparative purposes. These are the trends but explaining and interpreting them is quite challenging given the likely multiple factors involved e.g. with the trends in the over 75s.

Table 3.4 2022 Census Glasgow Local Area Demographic Numbers and Comparisons with 2011 (GCPH neighbourhood geographies)

Number of people by age band	All people	0-15	16-24	25-44	45-64	65-74	75+
Greater Govan	13904	2307	1545	4409	3710	1217	728
Ibrox/Kingston	13515	1717	2309	5728	2571	660	512
Broomhill/Partick West	23467	18631	6122	7608	4702	1890	1273
Glasgow	621170	95698	90100	197771	150548	50408	36629
% change since 2011							
Greater Govan	7.3	4.9	-2.8	11.7	9.0	26.9	-14.9
Ibrox/Kingston	13.1	28.3	1.9	17.8	14.2	11.3	-12.0
Broomhill/Partick West	3.1	14.5	-8.9	3.4	1.7	40.1	-15.8
Glasgow	4.7	0.1	0.4	7.3	6.5	18.9	-7.9

Source: 2022 Census

Note: Glasgow Centre for Population Health Glasgow Neighbourhoods definitions from Understanding Glasgow – consistent definition of neighbourhood areas unlike the changing ward definitions between 2011 and 2022 Censuses. See: <https://www.understandingglasgow.com>

3.3 Employment and economic trends

The data audit highlighted the paucity of economic data available at the sub-local authority level, and particularly the Electoral Ward level. The two tables below are one of the few sources of relevant small areas statistics that provide at least an insight into the economic circumstances in which households in Govan live. They draw on Scottish Government CHMA income data which was last produced in 2018 for the HNDA process. The data is therefore somewhat out of date but provides an insight into the position of Govan relative to its neighbouring Electoral Ward (EW) – Partick East/Kelvindale.

Table 3.5 Local Incomes data compared: Govan and South West Glasgow

IZ Reference	IZ Name	No of DZs Incl.	Income <£300pw (£15,600pa) %HHs	Income <£600pw (£31,200pa) %HHs	Income <60% of Median %HHs
9833-9840	Drumoyne & Shieldhall	8	32.5	72.2	24.9
9841-9847	Govan & Linthouse	7	46.6	85.0	39.4
9848	Craigtown (pt of)	1	21.0	58.0	22.0
9859-9861	Ibrox	3	37.7	72.7	28.3
9862-9865	Ibrox E & Cessnock	4	30.8	70.0	27.2
9866-9870	Kinning Pk & Festival Pk	5	17.0	51.0	14.5
9872	Kingston West & Drumbeck	1	14.0	48.0	13.0
10031/32 & 36	Laurieston & Tradeston	3	23.3	61.0	21.7
%HHs	Govan EW – wted average	32	32.1	69.8	26.4
	Drumoyne & Shieldhall	8	32.5	72.2	24.9

Source: CHMA: Banded Income Statistics, 2018, DZ level

The two tables (3.5 and 3.6) clearly show a very significant gap in typical household incomes between Govan and Partick East/Kelvindale. In 2018, the proportion of households in Govan with a weekly income of less than £300 was estimated to approximately 32% compared to only 16% in Partick East/ Kelvindale. Likewise, the comparable figures for the proportions of households with weekly incomes of less than £600 were 70% and 46%. This income gap is also illustrated clearly by the proportion of households defined as being “low income (<60% of the median household income): 26% for Govan compared to approximately 13% for Partick East/ Kelvindale.

Table 3.6 Local Incomes data: West End Glasgow

IZ Reference	IZ Name	No of DZs	Income <£300pw	Income <£600pw	Income <60% of Median
S010...		Incl.	(£15,600pa) %Hhs	(£31,200pa) %Hhs	%Hhs
10363 - 10368	Kelvindale	6	13.5	40.2	12.0
10374 & 10380	Kelvingrove	2	15.5	44.0	14.0
10381 - 10387	Hillhead	7	20.9	56.0	17.4
10396	Partick	1	19.0	52.0	14.0
10397 & 10402	Partickhill	2	12.0	38.5	9.0
10403 - 10407	Dowanhill	5	14.8	42.8	11.2
10412 - 10413	Kelvinside	2	14.5	46.0	9.5

Source: CHMA: Banded Income Statistics, 2018, DZ level

3.4 Deprivation and other social stress indicators

Analysis of the Scottish Index of Multiple Deprivation (SIMD) 2020 data for Govan and Partick East/Kelvindale Electoral Wards (Tables 3.7 and 3.8 below) reinforces the picture that emerged from the analysis of the 2018 CHMA income data: there are much higher levels of deprivation in Govan. More than a quarter (25.9%) of people in Govan are classified in terms of the proportion of people who are 'income deprived' compared to only 6.6% for Partick East/Kelvindale and 19.8% for Glasgow City. Similarly, almost one fifth (17.5%) of people in Govan are 'employment deprived', more than three times the proportion for Partick East/Kelvindale (5.2%) and 14.3% for Glasgow City. It is also important to point out that these averages conceal significant differences in the levels of deprivation within Govan itself, with significantly higher levels of income and employment deprivation in Drumoyne & Shieldhall, Govan & Linthouse, Craigtown, Ibrox and Ibrox & Cessnock areas of Govan than in the remaining areas (Kinning Park & Festival Park, Kingston West & Drumbeck and Laurieston & Tradeston).

The SIMD data also includes the number of people living in overcrowded accommodation by Data Zone. Once again, the average number per data zone living in overcrowded conditions in Govan (194) is much higher than in Partick East/Kelvindale (144) as well as for Glasgow City as a whole (165).

Table 3.7 Govan Domain Deprivation

IZ Reference	IZ Name	No of DZs Incl.	People who are 'income deprived' %	People who are 'empmt deprived' %	Number of people in o/ crowded hhs (DZav)
9833-9840	Drumoyne & Shieldhall	8	25.6	17.8	149
9841-9847	Govan & Linthouse	7	28.9	22.9	193
9848	Craigtown (pt of)	1	27.0	19.0	198
9859-9861	Ibrox	3	34.0	26.0	267
9862-9865	Ibrox E & Cessnock	4	26.0	15.8	207
9866-9870	Kinning Pk & Festival Pk	5	13.6	8.6	178
9872	Kingston West & Drumbeck	1	16.0	9.0	218
10031/32 & 36	Laurieston & Tradeston	3	8.3	9.0	141
	Govan EW – wted average	32	25.9	17.5	194
	Glasgow City – wted average		19.8	14.3	165

Source: Scottish Index of Multiple Deprivation, 2020

Table 3.8 West End Deprivation Domains

IZ Reference	IZ Name	No of DZs	People who are 'income deprived' %	People who are 'empmt deprived' %	Number of people in o/ crowded Hhs (DZav)
10363-10368	Kelvindale	6	4.2	3.3	68
10374&10380	Kelvingrove	2	3.5	2.5	171
10381-10387	Hillhead	7	12.3	10.0	225
10396	Partick	1	13.0	8.0	235
10397&10402	Partickhill	2	5.0	3.0	94
10403-10407	Dowanhill	5	3.6	2.6	148
10412-10413	Kelvinside	2	2.5	4.0	66
	PartickEast/ Kelvindale EW – wted average	25	6.6	5.2	144

Source: Scottish Index of Multiple Deprivation, 2020

3.5 Planning for Govan and South West of Glasgow – impacts on the housing system

The prevailing landscape of planning recommendations for Govan and their impact on the housing system can be assessed from a review of the most recent planning reports: The Central Govan Action Plan (CGAP) (2017), The Glasgow City Development Plan (CDP) (2017), The Govan-Partick: Strategic Development Framework (SDF) (2020), and The Central Glasgow Urban Transformation Strategy (2022).

The assortment of specific housing recommendations for Govan include:

- (1) Assess and meet social housing targets;
- (2) Consider appropriate densities to meet housing needs and aspirations;
- (3) Address new and changing housing areas;
- (4) Increase the volume of affordable housing and community-controlled commercial spaces;
- (5) Increase the focus on middle-market homes;
- (6) Increase the quantity of urban family homes, across tenures and in a variety of urban forms;
- (7) All potential housing sites to be within walking distance of the Subway and/or bus stations;
- (8) Support the activation of ground floors, and invite mixed-use development, new community facilities and infrastructure which supports the delivery of vibrant, liveable places;
- (9) Transform the area into a connected low-carbon place with an exemplary energy strategy where the urban structure promotes well-being;
- (10) Invest in net zero housing solutions;
- (11) Capitalise on the existing cultural and physical assets;
- (12) Reuse land and buildings;
- (13) Reposition Govan as a popular, sought-after riverside town within the city (GCC 2006; GHA 2018; GCC 2020)

We see, therefore, that the prevailing housing strategy for Govan seeks to balance the needs and interests of the sizeable social housing population with the expectation that new categories of resident will enter the area in the coming years. Based on the recommendation to increase the supply of affordable entry-level and mid-market properties near public transport, it can be surmised that the incoming population is expected to be composed of professional renters and first-homebuyers.

To achieve these housing outcomes, it was deemed necessary to identify locations where flexibility in land use/ use class might be possible. Existing strategic documents suggested the priority ought to be areas where it could be demonstrated that proposed activities would directly support the development of the innovation district as well as the overarching placemaking strategy (GCC 2020).

In summary, the prevailing housing strategy for Govan is based upon the identification of existing residential opportunities, vacant land, and sites where land-use-zoning might be modified to permit redevelopment. The intention is to exploit these opportunities to increase the supply of affordable, entry-level homes for young professionals and first-homebuyers, and well as the supply of mid-market

rental properties for those working near Govan. Planning documents emphasise that this 'transformation strategy' must be balanced and incorporate the needs of the social housing sector which cannot be left behind were Govan to become gentrified to an extent, and more economically connected to Glasgow City Centre.

3.6 Economic and wider drivers: employment, connectivity, land, GRID

Govan's housing market sits within a wider set of economic processes and dynamics. In this section we sketch out some of the broader economic development dynamics impacting the Govan economy, with a view to informing how the housing market might change.

Our phase one report set out a few stylised points about the Govan economy: that connections between residents and local firms are not as strong as they might be (or there is a perception of this); that Govan may be pulled into a west end growth dynamic through connective infrastructure; and that, despite numerous interventions, Govan has appeared to miss out on a notable regeneration dividend to date. Additional interviews and documentary analysis were undertaken in early 2024 to further explore, refine and flesh out these observations.

The development of the Queen Elizabeth University Hospital (QEUH) to the south-west of Govan, offers some salutary lessons for policymakers. First, several schemes were set in place to shape the local labour market to support the anchor development. In terms of links through the capital spend and construction activities, it was remarked that apprenticeship activities through the construction process were arranged with the contracting firms. Additionally, looking to the operational phase of the hospital, multiple engagements with local schools to build awareness of job opportunities within the NHS were set out. Some frictions were reported. For example, there was a view from one interviewee that a proposal for developing a widening access training centre for the medical profession, at the QEUH, was not advanced by a higher education institution.

Seeking to bring into the local area employees who would then work at the hospital, efforts were made by NHS Greater Glasgow and Clyde to provide special mortgage schemes (in partnership with other organisations) to encourage workers to locate close by. In terms of QEUH and links to the housing sector more broadly, it was remarked by one participant that a fragmented set of housing bodies, made taking a strategic view on housing and area change difficult.

It was further argued by a respondent that at the time of the development of the QEUH, the economic development concerns of GCC were focused on the Commonwealth Games rather than the QEUH and its legacy; focus was elsewhere in the city, in essence. A consultancy firm did undertake an ex-ante assessment of QEUH's economic impact. However, we are

not aware of any ex-post assessments of the impact of QUEH on the Govan labour or housing markets. This is an important gap in the evidence base, and this needs to be addressed to help clarify or correct the perception (which we elaborate on further below) that there is a disconnect between local employers and residents at present.

A further economic development consideration relates to the connective infrastructure provided and planned for Govan. Fastlink – a bus transport scheme completed in 2015, which connects the city centre to QUEH - is one initiative, and there have been suggestions of this being extended (see the 2021 evaluation). How this connects to Clyde Metro proposals will also be important to consider.

Additionally, one respondent spoke of the alignment between the Govan-Patrick bridge and the proposals for GRID, pointing to a sense of necessary dependency here:

[The] Govan-Partick Bridge is critical to the delivery of the cross-river Innovation District and cross-river cultural quarter that the Council seeks to deliver. The 'theory of change' within the City Deal business case was about re-connecting Govan to the north-bank of the river and improving place quality in Central Govan to make it an attractive place that is capable of attracting residential and commercial development that can no longer be accommodated in the west end due to the lack of development land.

One respondent also spoke about the roles social enterprises play in Govan, with several such entities identified at present. It was remarked, however, that while a diverse social enterprise landscape exists, short term funding appears to militate against network and capacity building within the sector. Looking forward, GRID - in potentially creating some form of quid pro quo between the university and the local community (perhaps through a social innovation research project/programme) - may require the supporting roles played by social enterprises for effective operationalisation. Here, one respondent noted that social enterprises may act as critical "intermediaries" between the university and the community, helping to fashion and shape lines of communication between the two, and directing where resource commitments are made.

Our initial report documents the perceived gap between the economic base in Govan (that is firms and other employers operating in the area) and residents' abilities to connect to this. One interviewee argued, with respect to this, that without some kind of agreement between local authorities and the commercial operations that establish themselves in Govan, there is little to ensure the benefits of economic investment will accrue to residents. It was suggested that, historically, market-based solutions had failed in Govan, as employers simply advertised their jobs widely, seeking the most qualified candidates that often lived beyond the boundaries of Govan. The interviewee claimed:

"Unless you have some kind of agreement that is part of the investment and infrastructure to bring in these industries that states they must give a proportion of jobs to local people... That's the only way that you can probably address it. Because if you just leave it to the market, these companies will just advertise widely and take the best people for the jobs. And that wouldn't necessarily be local people because local people may not have the skills to take on these new opportunities"

A further respondent similarly intimated that some citizens in Govan may simply feel "they are not in place to go and get a job" at present.

It was suggested there may be a systemic reason underwriting the persistent gap between investment in Govan and the material situation of the local resident population. The housing executive observed that a disconnect or institutional boundary between housing and economic policy at the local authority level may contribute to siloed interventions that fail to address wider social issues. So long as housing professionals limit their focus to the physical dimension of the built environment, while economic policy is confined to a consideration of market operations and investment, the linkages between commercial operations and the local environment within which they are embedded remain under examined. The executive remarked:

"There is too great a disconnect in housing policy and those economic outcomes. In other words, housing and, you know, investment professionals tend to be more focused on the visual built environment and physical outcomes. And then, at the water's edge, it sort of stops and they're like okay, well, the economic stuff is someone else's problem"

Govan therefore sheds light on the problems and risks of narrow, silo-based approaches to policymaking. We have collated evidence from several interlocutors that taking a fuller view of place- and the interconnections across a number of systems (labour, housing, commercial markets) - will be vital for future neighbourhood change in the area.

3.7 Wider Glasgow economic and demographic trends

Govan is, as we have seen, a major city level source of jobs and economic activity. Govan's openness with respect to the wider city and city region means that demographic and economic trends, and structural challenges at that higher level, matter for what is possible in Govan. It also is suggestive of possible ways in which transforming Govan might complement strengths or untapped opportunities in the wider city and city region. Data below is unless otherwise

stated from the Glasgow City Region Economic Baseline (2021)

Demography

The city region has 1.84m residents (2019) and has seen significant population growth in recent years (+2.7% in recent years), with much of this driven by net migration of around 10,000 per annum. The city region also has significant in-migration from asylum seekers (often with NRPF) and Ukrainian war refugees. Population change is variable across the city-region – Glasgow City Council sees growth, for example, whilst we can observe decline in Inverclyde.

Labour Market

There are 855,000 jobs in the city region but they are growing relatively slowly against comparator core city regions. The working age employment rate (72.7%) is behind the Scottish and UK averages. Unemployment (4%) is above the Scottish average but well below most UK comparator core cities. Nearly 25% of the working age are inactive, the 2nd worst of the core city regions. Nearly a third of the GCR's work force are in low paid jobs, again the 2nd worst of the core city regions. GCR has a bifurcation of skills with both relatively strong levels of highly skilled workers but also relatively large proportions of unskilled workers. More than 90% of jobs are filled by people living within the GCR.

Productivity, Innovation and Growth

GCR has a poor record on new patents but also has a high and increasing level of R&D spend by businesses in the city region. The city region contributed £42.9 billion to the UK economy in 2018, the fourth largest of the city regions. GVA increased by 25% in the last decade (as did GVA per hour worked – the fourth largest increase in the core city regions – though the level remains below the UK average).

Based on the median house price to income ratio, GCR is the most affordable UK core city region, although recently rising rents in the PRS will dampen that positive housing to productivity connection (as will the recognition of the Glasgow housing emergency).

Structural Challenges and Opportunities

According to the GCR economic baseline, current and persistent economic weaknesses include: poor performance on business births, especially in growth sectors, low levels of patents, procurement spend on the SME sector, as well as skills gaps, low male healthy life expectancy and a cluster of economic inactivity and unemployment measures especially with respect to young people. Some 57% of the 15% most deprived communities in Scotland are in the GCR. Although it is declining, the GCR has most vacant and derelict land in Scotland, often in our most deprived communities, and a significant amount in Govan.

Demographic, economic, social and material deprivation, planning strategy and Govan's place in the wider city region - have all been shown to be significant as indicators of external drivers of the Govan housing system. While local data is patchy and sometimes absent, we have uncovered both similarities between Govan and other parts of the city as well as important dissimilarities e.g. income levels. Looking at the regeneration landscape, we are struck how while the Govan area clearly has potential via several different catalysts, there is also a keen understanding of why various previous regeneration efforts in the area failed to take hold and fully deliver for local people. We need to keep this in mind for future proposals, their governance and leadership.

We now move on to consider in more detail the internal composition of the Govan housing system, including both private and non-market housing and the question of developable land.

3.8 Conclusions and synthesis of evidence

4. Internal Profile of the Govan Housing System

4.1 Introduction

After considering the external drivers impacting on the local housing system, we now move on to consider a more detailed examination of the Govan housing system. Here we draw on both secondary evidence and qualitative interviews with key informants. We begin by looking at the distribution of dwellings and their characteristics. We then look at the private housing market, before considering the social housing sector, the Ibrox/East Govan TRA, housing need, scope for development and the audit of land and sites in Govan.

4.2 Housing Stock – Type, Quality, Cost & Price

The tables below (4.1 to 4.11) provide a view of the housing stock and its change over time contrasting Glasgow with Govan but also the comparator benchmark of Partick East/ Kelvindale. These tables distinguish the total dwellings from occupied, vacant, long term vacant and second homes (4.1, 4.4 and 4.8 for 2006 to 2022), density and quality estimates for 2011 to 2022 (Tables 4.2, 4.5 and 4.9), dwelling types (2011 and 2016) in tables 4.3, 4.6 and 4.10) and bedroom numbers for the two local areas only (Tables 4.7 and 4.11) for 2006-2016.

Table 4.1: Glasgow: Occupancy, 2006-2022

	Total Dwgs (%)	Occupied (%)	Vacant (%)	Long-term Vacant (%)	2nd Homes (%)
2006	295,295 (100)	284,900 (97.5)	10,395 (3.5)	N/A	Incl in Vacant
2011	299,881 (100)	288,789 (96.3)	9,684 (2.2)	N/A	1,408 (0.5)
2016	306,000 (100)	297,064 (97.1)	8,457 (2.8)	2,669	479 (0.2)
2021	319,810 (100)	312,592 (97.7)	6,702 (2.1)	2,958	516
2022	322,238 (100)	314,536 (97.6)	7,172 (2.2)	3,023	530 (0.2)

Source: Estimates of Households and Dwellings in Scotland, 1991-2022

Table 4.2: Glasgow: Dwelling Density and Quality estimates, 2011- 2022

	Total Dwgs	Dwgs per ha	CT A-C (%)	CT D-E (%)	CT F-H (%)
2011	299,881	16.91	71	23	6
2016	306,000	17.60	70	24	7
2021	319,810	18.37	69.5	23.7	6.9
2022	322,238	18.54	69.2	23.9	6.9

Source: Estimates of Households and Dwellings in Scotland, 1991-2022

Table 4.3: Glasgow: Dwelling Types, 2011-2016

	Total Dwgs	Detached (%)	Semi-Det (%)	Terraced (%)	Flats (%)	Unknown (%)
2011	299,881	3	11	12	73	0
2016	306,000	4	11	12	73	0

Source: Estimates of Households and Dwellings in Scotland, 1991-2022

Tables 4.1 to 4.3 tell us about the wider Glasgow trend housing stock and characteristics. The total stock of dwellings has grown from 295,000 in 2006 to 322,000 in 2022 (a growth of 9.1%). In this period the rate of dwelling occupation has been relatively constant between 97.1% and 97.6%, while the vacancy rate has fluctuated between 2.1 and 3.5%. Comparing between 2011 and 2022 (see Table 4.2) density measured by dwellings per hectare has increased from 16.91 to 18.54 (or 9.6%). The table also indicates a small decline in properties in council tax bands A-C in that period (falling from 71 to 69%) with an increase of just under one per cent for both bands D-E (23 to 23.9%) and F-H (6 to 6.9%). Finally, comparing dwelling types between 2011 and 2016 there is little change with flats dominating with 73% of the stock, terraced at 12%, semi-detached at 11% and detached rising from 3 to 4%.

Tables 4.4 to 4.7 summarise similar information for Govan on dwellings and their characteristics. Total dwellings rose from 2016 to 2022 from 14,254 to 14,894 units (just under 4.49% growth). In that period occupied dwellings hardly fluctuated between 97.3 and 97.6%. Vacancy rates mirrored this ratio fluctuating between 2.2 and 2.6%. (and tightening more recently). Density (dwellings per hectare) has also increased – from 16.33 to 17.22 units between 2006 and 2022, a 6.4% increase. The distribution of council tax bands is persistent with a slight increase in all three bandings (A-C, D-E and F-H). In 2022, 83% were in A-C, 13% were in D-E and 4% were in F-H.

Table 4.4 Govan: Occupancy, 2016-22

	Total Dwgs (%)	Occupied (%)	Vacant (%)	LT Empty (%)	2nd Homes (%)
2016	14,254 (100)	13864 (97.3)	368 (2.6)	131 (0.9)	22 (0.2)
2021	14,798 (100)	14444 (97.6)	332 (2.2)	131 (0.9)	22 (0.1)
2022	14894 (100)	14542 (97.6)	329 (2.2)	142 (1.0)	23 (0.2)

Source: Electoral Ward Household and Dwelling Estimates 2014-22

The most recent figures for dwelling type shares are from 2016. Comparing with 2006, they indicate negligible falls in detached homes (only 0.6% in 2016) and bigger falls in flatted stock (but still 82% in 2016), 4.7% semi-detached in 2016 and up 5% since 2006, terraced units had increased by 18% in the same period and in 2016 represented just under 12% of the Govan stock. Finally, Table 4.7 looking at bedroom size shares between 2006 and 2016 indicates that one bed properties have all been eliminated with just 10 units in 2016, 2 bed properties had fallen slightly but were still more than 2500 units (18%); 3 bed units were the most common with 6294, a rise of just 110 units since 2006 (44% in 2016); whereas 4 bed properties have fallen by more than 280 units in the same period but still accounted for 25% in 2016. The largest properties, 5 bedrooms or more accounted for 1850 units in 2016, up around 120 units in the decade since 2006 and totalled 13% of the total stock.

How does Govan compare with Glasgow as a whole? The housing stock has also grown in Govan but at around half the rate of the city. Occupancy rates are very similar and vacancy rates are if anything lower and therefore by that metric housing is tighter in Govan. Density of dwellings is similar and has risen at both spatial scales but is now higher for the city (18.54) than for Govan (17.22). Govan has a higher percentage of properties in the lowest three council tax bands than the city (83% compared to 69%). Glasgow had, in 2016, 73% of properties in flatted form; Govan had 82% of its dwellings flatted. 18% in Govan of dwellings were terraced compared to 11% for Glasgow as a whole.

Table: 4.5: Govan: Dwelling Density and Quality estimates, 2011- 2022

	Total Dwgs	Dwgs per ha	CTA-C	CTD-E	CTF-H
2006	14,408	16.33	12,404	1,347	657
2011	14,377	16.29	12,264	1,448	665
2016	14,291	16.19	12,111	1,518	662
2021	14,776	16.74	12,547	1,569	660
2022	15,201	17.22	12,586	1,944	671

Source: Electoral Ward Dwelling Estimates and Characteristics of Dwellings (2005 – 2022)

Table 4.6: Govan: Dwelling Types 2006 - 2016

	Total Dwgs	Det-ached	Semi-Det	Te-rraced	Flats	Unknown
2006	14,408	87	666	1424	12,108	123
2011	14,377	85	676	1583	11,938	95
2016	14,291	85	699	1685	11,732	90
2021 N/A						

Source: Electoral Ward Dwelling Estimates and Characteristics of Dwellings (2005 – 2022)

Table 4.7: Govan: Number of Apartments, 2006-2016

	Total Dwgs	Bedsit	2 apts	3 apts	4 apts	5+ apts
2006	14,408	11	2606	6179	3884	1,733
2011	14,377	12	2647	6346	3586	1,786
2016	14,291	10	2522	6294	3606	1,850
2021 N/A						

Source: Electoral Ward Dwelling Estimates and Characteristics of Dwellings (2005 – 2022)

Tables 4.8 to 4.11 provide trend data on Partick East/ Kelvindale's housing stock and their characteristics. Partick's stock increased from 16,673 in 2006 to 18,305 in 2022, a growth of just under 10% in 6 years. Student housing is assumed to have contributed to this increase. Between 97 and 98% was occupied with vacancy rates of 2% or less. Going back to a comparison of 2006 to 2022 (table 4.9) total dwellings grew by nearly 22%. The share of low council Tax bands is much lower in Partick – in 2022 it was 60%. Density is much higher rising from 32.67 in 2006 to 41.82 in 2022 more than double densities in Glasgow or Govan. Nearly 90% of the Partick housing stock was flatted in 2016 (less than 2% was detached). Partick has seen its one bed properties grow significantly (107 in 2006 to 1,803 in 2016) but like Govan has most properties of 3 apt (just under a third in 2016) but a distinctively large number of 5 apt plus properties (more than 25% in 2016).

Table 4.8: Partick East/Kelvindale: Occupancy, 2016-22

	Total Dwgs (%)	Occ-upied (%)	Vacant (%)	LT Empty (%)	2nd Homes (%)
2016	16,673 (100)	16,230 (97.3)	354 (2.1)	200 (1.2)	89 (0.5)
2021	18,216 (100)	17,803 (97.7)	326 (1.8)	167 (0.9)	87 (0.5)
2022	18,305 (100)	17,880 (97.7)	339 (1.9)	148 (0.8)	86 (0.5)

Source: Electoral Ward Dwelling Estimates and Characteristics of Dwellings (2005 – 2022)

Table 4.9: Partick East/Kelvindale: Dwelling Density and Quality Estimates, 2011-2022

	Total Dwgs	Dwgs per ha	CT A-C	CT D-E	CT F-H
2006	14,368	32.67	4,195	6,287	3111
2011	15,235	34.65	4656	7353	3226
2016	16,821	38.25	6026	7430	3365
2021	18,243	41.49	7231	7520	3492
2022	18,388	41.82	7259	7611	3515

Source: Electoral Ward Dwelling Estimates and Characteristics of Dwellings (2005 – 2022)

Table 4.10: Partick East/Kelvindale: Dwelling Types, 2006-2016

	Total Dwgs	De-tached	Semi-Det	Te-raced	Flats	Un-known
2006	14,368	306	915	683	12,439	25
2011	15,235	305	917	716	13,273	24
2016	16,821	309	921	722	14,848	21
2021 N/A						

Source: Electoral Ward Dwelling Estimates and Characteristics of Dwellings (2005 – 2022)

Table 4.11: Partick East/Kelvindale: Number of apartments, 2006-2016

	Total Dwgs	Bedsit	2 Apt	3 Apt	4 Apt	5+ Apts
2006	14,368	107	1543	4832	3735	4,151
2011	15,235	521	1581	5062	3846	4,225
2016	16,821	1893	1591	5139	3926	4,272
2021 N/A						

Source: Electoral Ward Dwelling Estimates and Characteristics of Dwellings (2005 – 2022)

Private Housing Market

The analysis of Govan's private housing market was generated through three distinct methods: statistical data collection, surveys with local estate agents (letting, sales, and new development), and a tracking exercise where all sales and rentals listings were monitored over a one-month period (March 2024) to determine Govan's current private stock on the market profile. For context, key aspects of Govan's private housing market are compared to those of Partick. The rationale being that they share geographic proximity, have long been associated, will soon be physically connected via the new footbridge, as well as the argument that investment in Govan may, in time, lead it to more closely approximate the built environment and economic characteristics of Partick.

Trend Govan and Glasgow Housing Market for Sale

Registers of Scotland data from 2004 to 2022 shows the patterns of annual median house prices and volumes of sales (Table 4.12). In 2004, Govan accounted for 6% of Glasgow

transactions and in 2022 this figure fell to 4%. The pattern of sales shows the well-known structural break in the form of lower sales post financial crisis in 2008 – volumes have never recovered from their 2007 Glasgow high (2005 in Govan) - and had a further negative blip in 2020 due to the Covid-19 outbreak. Since 2009, annual sales have fluctuated in Govan between 283 (2011) and 537 (2021).

Table 4.12 Govan and Glasgow Median house prices and sales (RoS)

Year	Govan median prices	Glasgow median prices	Govan sales	Glasgow sales
2004	70,277	97,000	928	16267
2005	94,000	106,000	977	16835
2006	95,000	116,000	912	18294
2007	99,000	127,500	875	19288
2008	90,000	125,000	612	12585
2009	80,000	120,000	338	8026
2010	77,550	121,000	332	8129
2011	86,000	120,000	283	7475
2012	80,000	110,000	348	7666
2013	70,000	110,100	366	8995
2014	70,000	117,500	388	10342
2015	70,277	126,000	480	11593
2016	79,500	130,000	505	11800
2017	90,000	142,500	449	12157
2018	90,150	136,995	431	11698
2019	95,000	138,000	422	11840
2020	100,000	149,500	336	9421
2021	120,500	160,000	537	13664
2022	129,000	171,100	470	11617

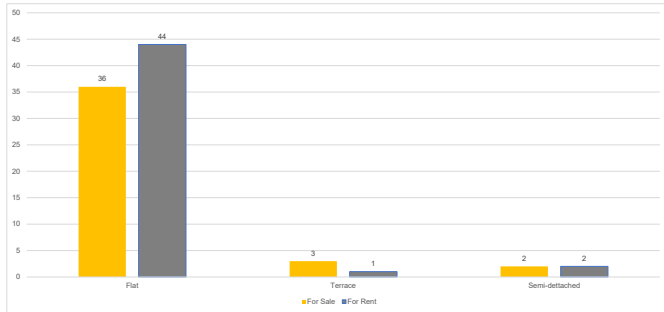
Median house prices in Govan rose till 2007 before falling and oscillating to a low of £70,000 in 2013 and 2014 before climbing again to reach and then exceed £100,000 from 2020 onwards. Median prices have been less in Govan than Glasgow for every year 2004-2022. In recent years the ratio between the two has signified a large discount to Govan though this does not take any account of the product or quality mix on sale (e.g. 149,500:100,000 in 2020 and 171,100:129,000 in 2022). Nonetheless, Govan annual median prices rose by 20.5% in 2021 and by 7.5% in 2022, a faster rate than in Glasgow as a whole.

Snapshot Stock Profile (March 2024)

Based on the close monitoring exercise of the Govan private housing market for the month of March 2024, a snapshot of its privately available housing landscape can be drawn. Across March, a total of 41 properties were marketed for sale (through Zoopla and Rightmove with duplicates removed). Fourteen of these were on the market at the beginning of the month and a further 27 properties became available to the end of March. In the same period, 47 rental properties were marketed, with 8

pre-existing listings and 39 coming on the market through the course of March. As indicated by Figure 4.1, the vast majority of both the sales (88%) and rental (94%) stock available were flats, with only a small proportion being terraces or semi-detached properties.

Figure 4.1. Distribution of Available Housing Stock in Govan by Archetype (March 2024).



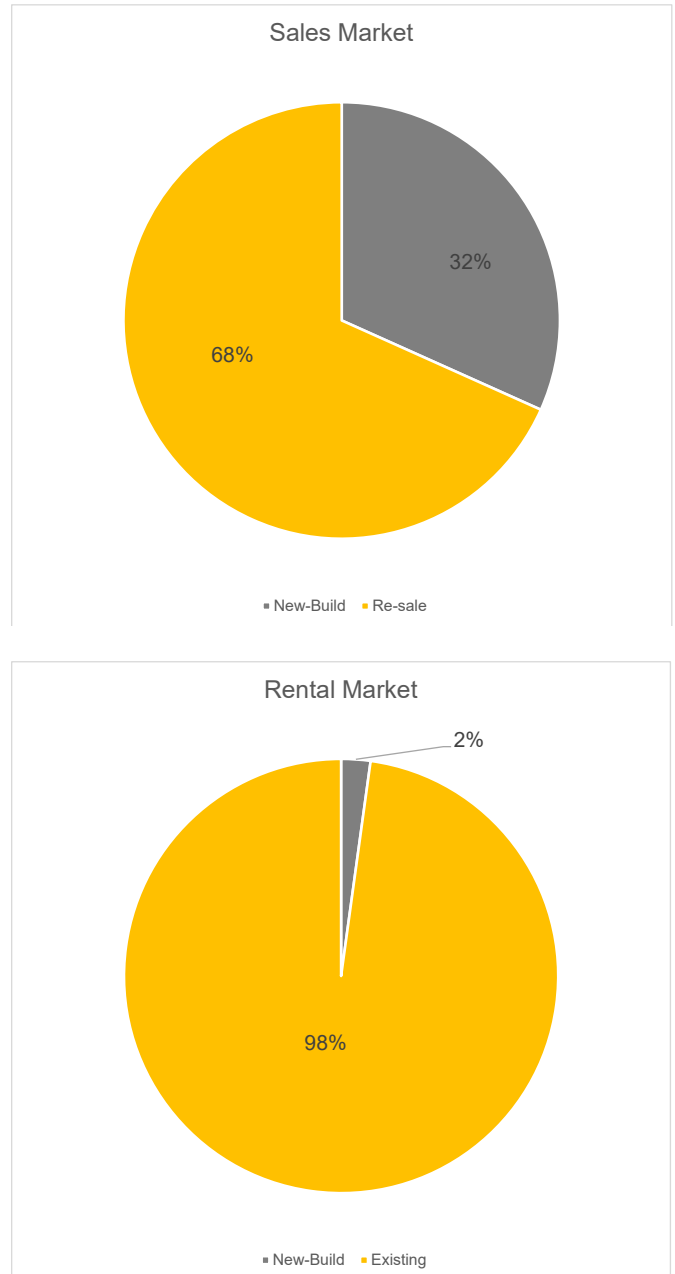
The lowest priced sales listing in Govan in March 2024 was a 1-bedroom flat for £45,000, while the most expensive property was a new build 2-bedroom for £299,999. As indicated by Table 4.13, the typical price range for a 1-bedroom in the resale market in Govan was £50,000 - £80,000; and £100,000 - £150,000 for a 2-bedroom. The prices for new build apartments were around £180,000 - £200,000 for a 1-bedroom and £260,000 - £300,000 for a 2 bedroom.

Table 4.13. Typical List Price Range by Property Size and Tenure in Govan (March 2024).

	Typical 1-Bedroom Range	Typical 2-Bedroom Range
Re-sale	£50,000 - £80,000	£100,000 - £150,000
New Build	£180,000 - £200,000	£260,000 - £300,000
For Lease	£700 - £795pcm	£795 - £895pcm

Recognising that LHA rates were rebased to the 30th percentile in April 2024 after several periods of being frozen, the most affordable rental property in Govan in March 2024 was a 1-bedroom flat £550pcm and the most expensive was a 2-bedroom for £2,500pcm. Table 4.1 indicates that the typical cost to lease a 1-bedroom in Govan was £700 - £795pcm, while renting a 2-bedroom would typically require £795 - £895pcm.

Figure 4.2. Sales and Rental Market Shares of New builds in Govan (March 2024).



As illustrated by Figure 4.2, a large proportion of the properties available for purchase (32%) are new builds (almost all being concentrated at the Prince’s Quay, Festival Court development). For the rental market, on the other hand, only a fraction of properties for let were new build. In March, Govan Housing Association had a single listing available in Water Row (their mid-market development).

Industrial Sites

In March 2024, there was a single industrial site available for purchase in Govan, at G51 3AR (603 Helen Street). The 2.70-acre (10,926 m2) site was listed at £500,000 and is still available. The marketing material for the site stated:

“Helen Street is zoned with no particular development allocation in the Glasgow City Development Plan... As a brownfield site, preference will be given to the regeneration of this site for productive use. Due to the location and surrounding uses it is presumed that uses in Classes 4 (Business), 5 (General Industrial), and 6 (Storage and Distributions) will potentially be acceptable” (GS 2024).

The finding that there is very little industrial property available for purchase in Govan was confirmed by the industrial agent we surveyed. He indicated there was a distinct imbalance in Govan between low supply and high demand levels for industrial property. The agent suggested holders of industrial property lacked motivation to sell since many owners of individual lots held them as part of a retirement strategy, while the holders of the largest parcels of industrial land in Govan were either pension funds or overseas consortiums that had long-term revenue strategies.

Broadly speaking, pension funds and overseas entities are often stubborn holders of industrial properties because these assets are seen to generate stable rental income, appreciate over time, and diversify their investment portfolios, reducing risk. Additionally, industrial properties are often viewed as a hedge against inflation while, simultaneously, representing future higher yield potential through redevelopment. For pension funds, industrial holdings (given the longer-term and more stable nature of the lease agreements) help ensure they meet long-term financial obligations.

Private Sector Pricing

Average Home Price

Figure 4.3. Average Property Price, Govan/Partick & G51/G11 Compared (April 2023 – April 2024).



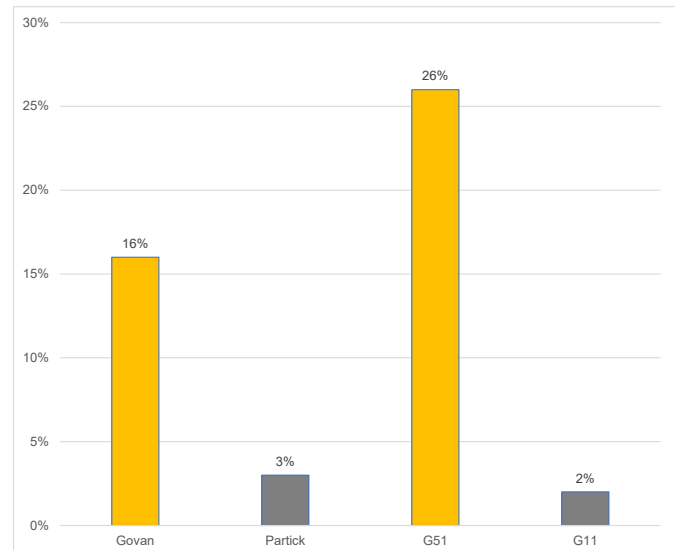
Data source: Rightmove 2024.

As indicated by Figure 4.3, the average price of a property in Govan (£193,381) is considerably lower than across the Clyde in Partick (£294,666). Taking data for Govan and Partick, we find that homes in Partick are around 52% more expensive on average than in Govan. Comparing the associated postcodes of G51 and G11, we find that homes in G11 are around 34% more expensive on average than homes in G51 (Rightmove 2024a; 2024b; 2024c; 2024d).

This finding conforms with the suggestion from estate agents selling in Govan that price is the primary driver of interest for certain buyers. Three agents reported that first-homebuyers (which comprise a large proportion of prospective purchasers looking in Govan) are motivated by the view that they get far more space for the same money in Govan than if they were to buy in the West End.

Change in Price

Figure 4.4. Average Percentage Price Change, Govan/Partick & G51/G11 Compared (03/2022 – 03/2023 vs. 03/2023 – 03/2024).



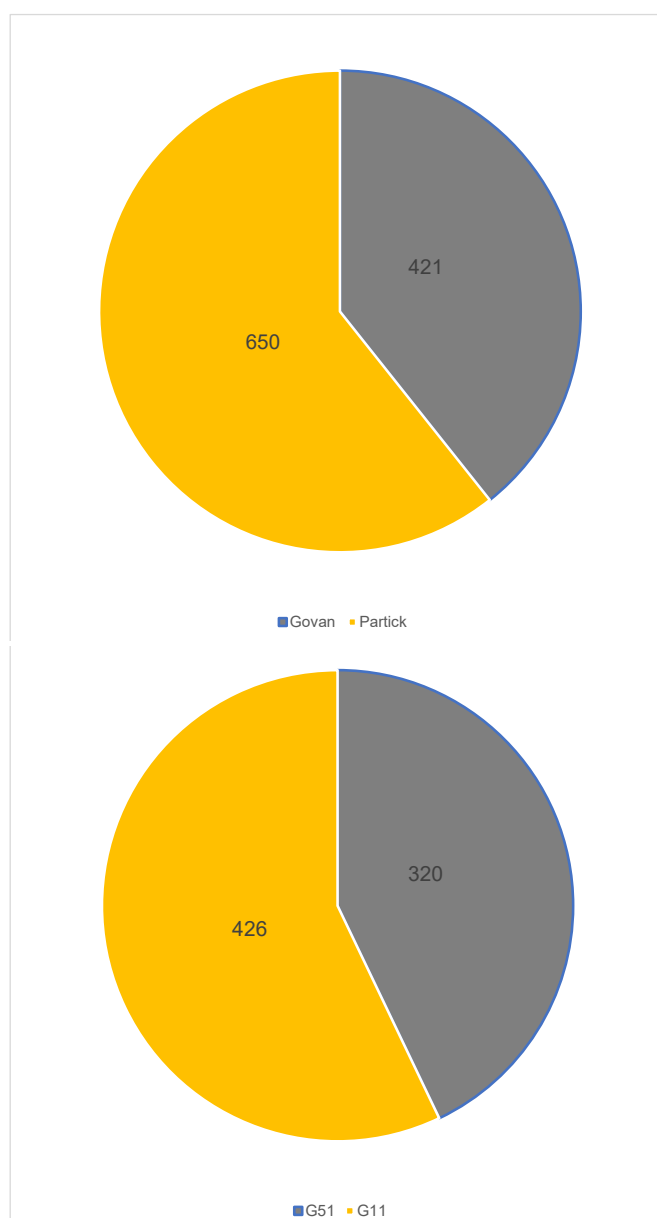
Data source: Rightmove 2024.

Interestingly, although average prices in Govan are considerably lower than in Partick, prices are increasing far more rapidly in Govan than they are in Partick. Comparing the average sale price of homes in Govan in the 12 months between April 2022 and April 2023 with the average sale price between April 2023 and April 2024 suggests average prices have risen 16%. As indicated by Figure 4.4, over the same period, average prices in Partick have only risen by 3% (this figure is closer to the Glasgow average over the period of 2%) (Rightmove 2024a; 2024b; 2024c; 2024d).

The estate agents surveyed explained that for properties with strong first-home-buyer appeal (i.e., traditional pre-1919 tenements with modern interiors), competition is strong. One agent indicated as many as 12 buyers may bid on the same property, leading to sale prices 20% above the advertised price range.

Based on the number of properties sold in a 12-month period (April 2023 – April 2024), Govan appears to have a less ‘active’ private housing market – i.e., there are fewer transactions – than Partick. According to Glasgow City Council, Ward 23 – Partick East/Kelvindale had a population of 28,914 and 14,891 dwellings in 2015, while Ward 5 – Govan had a population of 26,769 and 14,132 dwellings, making these two areas comparable in terms of theoretical property market size (GCC 2017a; 2017b). Despite this, as indicated by Figure 4.5, 650 properties transacted in Partick whereas only 421 properties sold in Govan over the same period. It is important to note, however, that 43% of all dwellings in Govan are social housing whereas the figure for Partick is only 11% (GCC 2017a; 2017b). The difference in private housing market activity between Govan and Partick can in large part be explained by the dominance of social housing in the area.

Figure 4.5. Number of Sold Properties for Govan/ Partick & G51/G11 Compared (April 2023 – April 2024).



Data source: Rightmove 2024.

The four estate agents that were surveyed maintained that prospective purchasers for the re-sale market in Govan were predominantly first-homebuyers and buy-to-let investors. Agents that dealt with new build and developer stock, added ‘downsizers’ to these categories (i.e., older property owners, perhaps of retirement age, often selling houses and moving into much more modern but smaller apartments) – although interest from ‘downsizers’ was restricted to very specific riverside developments. The investors typically had a prior connection to Govan or already owned property in the area. The first-home buyers, on the other hand, either came from other parts of Glasgow or outside the city. The agents indicated it was less common that first-homebuyers were private renters in Govan or had grown up in the area.

First-Home-Buyers

The agents estimated the first-home buyers were in their mid-20s to early 30s, young professionals, typically working in and around the City Centre of Glasgow. One agent mentioned dealing with several prospective purchasers employed at Queen Elizabeth University Hospital. Most were single or couples, with few families among this cohort. The agents suggested the price and proximity to the City Centre (i.e., work opportunities) were the main drivers of first-homebuyer interest in Govan.

The majority of first-home buyer interest was directed towards pre-1919 traditional tenement flats or new build flats. In general, they seem disinclined to undertake renovation work prior to occupation, so flats that had modern interiors sold much more quickly.

Buy-to-let Investors

Investors on the other hand, tend to buy properties that are less-well renovated internally, or situated in buildings constructed between 1950 to 1980, with less street-appeal. The agents suggested this was because the rental yields on these kinds of properties were often higher as the sale prices did not command a competitive premium. One agent indicated that while the properties that most appealed to first-home buyers might go for 20% above the list price, properties that investors bought commonly sold at or slightly below the asking prices.

Private Renters

The two letting agents indicated that the typical profile of prospective private tenants in Govan were professional people between the age of 30 to 50. These professionals were generally employed in Glasgow City Centre and appreciated Govan’s proximity and excellent public transport connections. Unlike other parts of Glasgow (such as Partick), it is still possible to get a 2-bedroom flat for under £1,000 per month. The letting agents argued that being able to secure a 2-bedroom flat for around £900 or a 1 bedroom for around £700 per month were the biggest drivers of private renter interests in Govan.

Table 4.14 Private Landlords in Govan and Glasgow, March 2024

Portfolio	Landlords			Properties		Ratio properties to Landlord	
	Glasgow	Govan	% Govan	Glasgow	Govan	Glasgow	Govan
1	24465	1,336	5.5%	24,465	1,336	1.0	1.0
2-4	5786	588	10.2%	14,268	854	2.5	1.5
5-9	983	219	22.3%	6,169	470	6.3	2.1
10-49	317	82	25.9%	5,420	362	17.1	4.4
50-99	25	4	16.0%	1,746	111	69.8	27.8
100-249	25	7	28.0%	3,989	176	159.6	25.1
250-499	8	1	12.5%	2,561	324	320.1	324.0
>500	3	1	33.3%	2,303	177	767.7	177.0
All	31612	2,238	7.1%	60,921	3,810	1.9	1.7

Source: GCC Landlord Registration

Data held by GCC from the landlord registration system provides information comparing Govan landlords and the city for March 2024. This data has some redundancies in it, some of it may be up to three years out of date, but nonetheless it tells us much about the structure of landlordism, locally. Table 4.14 indicates that private renting is dominated by landlords with small portfolios – Govan for instance has 60% of its landlords letting one property and a further 26% letting 2-4 units and just 10% let 5-9 units i.e. 96% let 10 or less properties. There are a very small number of large-scale landlords in Govan with 7 running 100-249 units, one renting out 250-499 and one with more than 500 units. The Glasgow-wide comparable figures suggest that 77% of landlords have just one unit, 18% let 2-4 units and 3% let out 5-9 units (i.e. 98% of the total let out less than 10 units). Govan is less reliant on landlords with one unit and has a larger proportion of its PRS stock owned by large scale landlords (for landlords with more than 100 units in their portfolio, this accounted for 14.5% of Glasgow PRS properties registered, compared to 17.8% in Govan).

Private Rents

Rent data is difficult to ascertain at a local level with almost exclusive reliance required on advertised new lets. That said, Citylets data indicates that for 2023-24, Glasgow’s average (mean) rent was £1,107 (per calendar month) but lower at £989 in Govan – clearly these unstandardised comparisons of averages do not fully take account of quality differences across space. Contrasting mean rents for 2 bed properties, Glasgow rents averaged £1139, while Govan rents were at £997.

Energy Efficiency / Retrofit Challenge

The need to improve the energy efficiency of a large proportion of Govan’s social housing stock – especially its pre-1919 tenements – was cited by two of the Housing Association executives as one of the most significant future challenges. Because the area has a disproportionately high concentration of some of the least energy efficient and hardest-to-treat homes in Glasgow, anticipated retrofit projects place additional funding and investment pressure on

the area.

Govan’s housing stock is dominated by flats and these in turn have a high proportion of pre-1919 tenements. This is significantly higher than the Glasgow averages where 73% are flats and only 25% of the total are pre-1919 tenements. Pre-1919 tenements typically have higher heating demand profiles and lower EPC ratings (D+) than other building archetypes. The vast majority (82%) presently rely on gas boilers. Most pre-1919 tenements in Glasgow have heating demands in the range 100–200 kWh/m²/year, suggesting additional retrofit is required in addition to careful heating system design to enable clean heat solutions (GCC 2024). Recent evidence from local retrofit projects suggests that the estimated cost per unit to facilitate decarbonised heating for a 2-bedroom, 2-occupant pre-1919 tenement is somewhere in the range £15,500 - £40,000 depending on existing levels of insulation and repair (inclusive of clean heat technology, system design, insulation measures and installation) (Gibb et al. 2023; Harrington 2024).

This situation affects the rejuvenation of Govan in two distinct ways. On the one hand, private investment may be dissuaded in anticipation of additional financial burden required to bring homes in Govan up to Minimum Energy Efficiency Standards (MEES) – i.e., the business case for private investment in Govan is qualified by the energy efficiency of the existing stock. On the other hand, all community-based initiatives and projects the community-controlled housing associations might seek to undertake have to be balanced against energy efficient requirements in the context of limited resources and funding. The housing executive explained:

“These properties are going to need significant investment and they’ve got the additional challenge that it’s more difficult to make them energy efficient complying. Because, understandably, you can’t just clad a sandstone tenement and planners wouldn’t allow that. Nobody would want to do that. But that just makes it much more challenging in terms of making them energy efficient - And the transition away from gas is also much more challenging” (HA1 2024)

4.5 The East Govan/Ibrox TC:G Transformational Regeneration Area – a Catalyst for Change

The Transformational Regeneration Area (TRA) in Ibrox/ East Govan in many ways encapsulates the possibilities, opportunities and challenges of pursuing a residential driven regeneration of the wider Govan area. Ibrox is the largest TRA in boundary size among the TC: G portfolio, but with comparable development opportunities. Delivery of the regeneration activity has been incremental since 2010 which was initiated by the demolition of poor housing stock and significant investment in the new build homes for social rent, mid-market rent and new supply shared equity. The largest of

the development opportunities at the centre of the TRA has still to be brought forward, though concrete proposals are now emerging.

A delivery Strategy was undertaken by TC:G in 2019 for the vacant and derelict land sites around Broomloan Road/Brighton/Britton Street. Plans envisaged a preference of mixed tenure development of around 300 to 360 new build units in total with 3 to 4 storey flats facing onto Broomloan Road, but stepped back to facilitate the new walking / cycling route. Density / block heights would reduce as development steps back from the main road reducing to two storey family housing in the centre of the site at Brighton / Briton Street, with three storey townhouses on Clynder Street. Altogether, there is potential for a more higher density of around 478 units across the central site. There also remains a development site towards the south of the TRA at Hinshelwood Drive. An initial capacity review indicated a potential for around 150 units of 4 storey flatted development however further feasibility work is required. This will add to the 116 units of new social housing and 36 mid-market rent in adjacent Hinshelwood Drive Development by Wheatley Group which completed in 2017. Wheatley Group are also interested the development opportunity at the former Merchant Homes site at Albion car park, which has planning permission for a further 160 social rent flats and a S75 agreement. This site is outwith TRA Boundary in the south area.

The vision

The aim of the TRA programme is to deliver new-build housing for social and private rent, private sale, other alternative tenures (including shared equity and low-cost home ownership) and with the involvement of communities to create the conditions where a mix of sustainable land uses are supported, including where appropriate attracting new commercial development. For the remaining sites within TRA, the aim is to develop a desirable mixed tenure housing and mixed density of flatted and low-rise properties, which is integrated with the local subway stations linking the development to the rest of Glasgow, also close to major motorway connections and, via Govan, the new bridge to Partick and the west end. This site's potential is as a catalyst of change attracting further future private sector housing development, both to the east and to the west, provided blockages to development can be overcome (see below). The mental map is of a residential area running from Bellahouston park along the subway line, the TRA site and on to Govan and the new bridge. This builds on the notion of Govan as a key player in employment in the city but that reverse commuting opportunity can provide reasons for people to live there and work elsewhere in the city supported by such strong and growing connectivity.

Plans and Choices

Soft Market Testing carried out in 2019 and 2021 indicated market interest in the central site, assuming that all pre-development issues are addressed satisfactorily. A review of tenure mix opportunities through discussion with Glasgow City Council and their Strategic Housing Investment Plan has indicated a need for around 20 % of site for affordable

opportunities to support the development of larger family homes. Due to some of the infrastructure requirements for the site along with areas of the site designated as open space within City Development Plan the best approach is for a private sector development partner to be procured to bring forward delivery. This approach was also taken at Sighthill and Laurieston TRAs.

Our discussion with the Wheatley Group regarding the TC:G East Govan Ibrox site suggests that a lesson from the recent regeneration of Sighthill, etc. is that the single developer competition for the whole thing may be the best way forward. This is because a single developer can maximise efficient supply chains and control costs better, but they recognise that for these reasons, the project may require a more specialist developer rather than more mainstream traditional players. It is also quite possible with the new bridge, subway proximity and the University's role in the GRID, that the private element might attract Purpose Built Student Accommodation, given the six storey building proposals (and now that Build To Rent investment seems less likely in the current policy context).

Barriers and Risks

Progress with the TC:G project requires overcoming specific obstacles. As one local planner explained:

There have been other priorities around the city but apart from that this site has always been kind of landlocked, so, you know, there's industrial to the south and the stadium, there's industrial to the west, there's a kind of mixed industrial to the east, and you don't really have any visibility through to the waterfront or a sense of connection to Pacific Quay, there's been no connection through Govan to the west end, so it kind of feels like a tipping point for the site... if the Graving Docks comes forward in some way, it really leaves this as the last big vacant and derelict site in the area.



Figure: Central TRA site where Broomloan Primary School once stood on corner of Vicarfield Street and Broomloan Road. Photo by Gareth James.

Egress around Ibrox stadium to the immediate south of the site is important and TC:G are confident that will be negotiated successfully. A key longstanding challenge has been Scottish Water's drainage requirements. This would normally have been directed to the River Clyde, but this is not possible because of the location of the subway line and would also have a significant cost that would negatively impact the viability of development of the site. Through a Pre-Development Enquiry application to Scottish Water the parties have now provisionally agreed to link site drainage to the local sewer system. The other critical parties in the project are Strathclyde Passenger Transport (who run the subway and the line that runs directly beneath the TRA site). These issues are reportedly greater on the former school site Broomloan Road/ Vicarfield Rd site. Plans for and performance of local schools, which are so relevant to potential incoming first-time buyers, are also important factors.



Figure: Central TRA site off Broomloan Rd where three 20-storey highrise blocks once stood (left) and the site formerly known as Iona Court (right). Photos by Gareth James.

A third physical constraint is the proximity of different blighting land uses particularly scrap yards. TC:G have considered with support from Council Planning Department opportunities to redesignate particular sites for housing land so that the externality can be removed but also create more space and scope for the redevelopment of the area. However, this is also connected to their seeking to understand and enhance employment and economic opportunity on consolidated industrial and commercial land uses nearby, creating in the process more future sites for housing as well. While there are negative perceptions about the area because of the mosaic of mixed land uses, they are clear that there are important opportunities to support and enhance employment and business development locally.

A critical issue is affordability both in terms of build costs and subsidy for non-market housing, but also securing the most advantageous price point for first time buyer private new build. While the subsidy environment is currently challenged by the cumulative effects of capital programme budget cuts from the Scottish Government, as mentioned above, a single developer with well-established efficient supply chains can be a key way to manage project cost.

The sweet spot price point

The key to private sector development, Wheatley believe, is to first develop the optimal first-time buyer (FTB) market offer. This would be about finding a developer who can use

their supply chain to support product that seeks to price a premium in Govan but also at a discount to the wider city housing market for first time buyers. This is why the developer competition is so critical. The success of the FTB market would also in time encourage second stepper and further market purchasers and thereby act as a catalyst for change in the local housing market.

Next steps

The TC:G partners are near to resolving all outstanding drainage and wider infrastructure issues which have been identified above. They will decide imminently on the direction of the site disposition choice, and then move forward with their developer competition. That may all take about 12 months to be followed by seeking planning permission which they would hope to do within no more than a further 12 months. Thereafter, the development can commence. Clearly, some of the other complementary local area initiatives on changing land use designation and negotiating over Stadium egress etc can be worked on in the background.

A Microcosm?

In several respects, the TRA captures many of the issues at the heart of the Govan LHSA and the opportunities for housing transformation. The TRA project seeks to build on the important employer role played by Govan's in the city economy, but also via connectivity to public transport and the bridge to recast Govan as a residential community that can service jobs across the city-region. This is about working with the grain of the market but seeking to achieve the balance between a small premium relative to Govan house prices but also a material discount to first time buyer prices in other major Glasgow residential neighbourhoods. Part of the catalytic role that such an injection can provide is to bring spending and public service users to Govan but also in time encourage further development for next stage family housing for sale. Success here will also impact on the incentives facing local landowners and businesses. Also, as we have seen elsewhere in our interviews, just as Wheatley have been learning from redevelopment elsewhere in the city (e.g. Sighthill), it is clearly important to learn from success elsewhere.

4.6 Need and demand evidence

Based on recent private market sales and rental data, as well as the survey of real estate professionals operating in Govan, there is compelling evidence to suggest both (a) existing, persistent and increasing demand for affordable, entry-level housing to purchase; and (b) existing, persistent and increasing demand for mid-market rental housing in Govan.

Purchase Demand

In terms of new development or refurbished homes, discussions with property professionals indicate that 1-bedroom flats offered in the range of £100,000 - £200,000 would attract high levels of purchaser interest from first homebuyers, while 2-bedrooms in the range of £150,000

- £300,000 would satisfy demand from young families or retirees downsizing from other parts of Glasgow or beyond. Importantly, the data suggest that downsizing retirees are more discriminating in terms of location (rather than simply price-driven), and their demand is focused predominately on the waterfront and Govan town centre. In general, the demand for 1-bedroom and 2-bedroom flats at the top end of the ranges (i.e., £200,000 and £300,000, respectively) include a location sensitivity. On the other hand, the demand for 1-bedroom and 2-bedroom flats at the bottom end of the ranges (i.e., £100,000 and £150,000, respectively) are far less location sensitive and, therefore, expand the prospective zone for acquisition opportunity across Govan.

Provided the offering price of new development and refurbished homes are pegged at a material discount to equivalent homes across the Clyde in Partick, the increased supply of these new homes will be met by prevailing and expected demand. It is important to recognise that demand from most new home buyers for Govan is highly price sensitive. The private market data indicate that properties priced too closely to their equivalents in Partick do not sell and may not attract offers.

Rental Demand

The data indicate there is strong demand for mid-market rental properties. These mid-market homes would alleviate the increasing private rental market pressure experienced in Govan and provide an opportunity for qualifying renters in Govan to potentially save capital, with a view to purchasing in the future. To meet the demand for mid-market rental properties, the price targeting for newly built or refurbished homes ought to be rentals approximately 15% less than their equivalents in the private rental sector in Govan. At current rents, these would be new build or refurbished 1-bedroom flats offered for around £700pcm and 2-bedroom flats offered for around £850pcm. The demand for mid-market rental homes is not particularly location-sensitive since the private rental market is extremely tight across Govan, extending the potential locations for these kinds of developments.

Social Housing Demand and Need

The boxed example below provides recent information about waiting lists, terminations and lets in Elderpark housing association.

Table 4.15 provides a similar summary of waiting list, voids, lettings (and their breakdown), new supply and acquisitions – for Linthouse HA for the three most recent completed financial years to 2023-24. This indicates a number of points: the substantial but consistent level of section 5 referrals, volatility in transfer list lets (which may be linked to new supply and acquisitions), a strong level of growth in the overall waiting list (by more than 27%), a similar peak in waiting list lets in 2022-23, and a strong growth in acquisitions rising from 8 in 2021-22 to 40 in the most recent year..

Elderpark Housing Association data from Q1 2022-23 to Q4 2023-24)

Lets

Lets fluctuated from 15 to around 30 a quarter. It is striking that the composition has been dominated by Section 5 referrals for the last 6 quarters. Compared to their target share this has grown by 140%.

Waiting List

Waiting list applicants are overwhelmingly from 4 post code sectors in G51 (accounting for about 87% of the entire list).

New Applicants

With the exception of one quarter where demand grew by 50%, the other 7 quarters had new applicants of between 100 and 130 people with a stable composition with general applicants who were the most likely category of new applicant.

Terminations

Until the most recent quarters, terminations were static at 24-27 per quarter but these fell to 11-15 in the most recent period.

Table 4.15 Linthouse HA Need and Demand Data 2021-22 to 2023-4

Category	2021-22	2022-23	2023-24
Waiting list (year end)	898	1079	1147
Voids	112	143	119
Total lets, of which:	114	189	114
- Transfers	18	61	16
- Waiting List	42	68	44
- Section 5	52	54	53
- Mutual exchange	2		
- other		6	1
New Build supply		49	
Acquisitions	8	17	40

Source: Linthouse HA data

When asked about housing demand levels in Govan, one CCHA chief executive suggested demand always outstripped supply in the social sector, that waiting lists were long, and that vacancy periods for homes were extremely low. This situation, however, was nothing new, nor unusual for Govan. Rather it was the status quo and reflects Glasgow-wide need pressures.

“There’s always been quite a demand for Govan. Govan houses anyway. The waiting list has always been quite chunky, but it’s high now, you know.

It's as high as it's ever been... When you contact people and ask, are you still interested? It's a resounding yes. People are very, very interested. A lot of them with family connections, etc. But, yeah... I think we could put up a thousand new homes, and we'd fill them within a week"

The same person referred to a considerable need for mid-market homes rather than simply more housing at the most affordable end of the social housing spectrum. Mid-market homes would cater to that segment of the population that are in work but unable to enter the private rented sector due to financial pressures. The HA director referred to their recent experience with the construction and letting of around 100 new mid-market homes in Govan and the strong interest these properties has received. The interviewee explained:

"What we think is a bigger gap is this mid-market rather than your social housing. I mean, definitely, there's a need for social. But there's a greater need, I think, for mid-market, and that was evident when we completed the first block of the Water Row properties... we could have filled the building 3 or 4 times over, and that's with 92 properties"

They continued:

"Quite a lot of people are on private rents. And it's just completely unaffordable. It's those type of people that the mid-market properties would help, you know. Because some of them are never going to get a social house because they just don't have enough points.... They're always going to be paying a private level of rent and never able to really get out of that"

When asked where these mid-market developments should be located, or where demand for them in Govan was greatest, the same HA director indicated the most important factor was that they were within easy access to public transport connections. The ideal situation was that mid-market homes were built within walking distance of train or underground stations.

"All of the residents will be working so it needs to be near transport... I think anywhere that is easily accessible to public transport"

The Chief Executive of one of the other CCHAs confirmed that need/demand in Govan is very high. "15 years ago I am told that there were houses lying empty on the estates... We have 120 houses that become empty every year, so about 10% of our properties, but they're let within the space of 10-15 days. And we've got hundreds upon hundreds of applicants waiting, trying to get a house so the demand vastly outstrips

the supply... and that's grown exponentially every single year over the last past 10 years".

Also: "there are too many homeless people so that's a tricky one because Glasgow has no social stock of its own... RSLs are supposed to take that load means the vast majority are all pretty much going to homelessness". There are also significant numbers of refugees and asylum seekers - "people coming from outwith with the right to remain". But "predominantly, I think it's just people from the area or located within the area. I don't think you're getting masses of people who want to move to the area from outwith... Now that might be a slightly different in some senses with the hospital... but it's quite a territorial community". The Director also noted the heterogeneity of Govan itself: "Govan and Elder Park are quite distinct in terms of areas to people". Often, applicants wanting to live in a specific part of Govan.

The origins/destinations of applicants for social housing are strongly influenced by legislation. The absence of local connection points in the allocations scheme is an issue for people who have grown up in the area and want to stay close to family. In addition, a lot of applicants are from the PRS and have often been evicted because of rental control related matters. There are also some unusual sources of need/demand, e.g. like HMS Ambition (used for housing Ukrainians) docking nearby. However, applicants from the east coast of Scotland were choosing to live in Govan because of proximity to work: Braehead, Airport and BAE Systems, indeed with the new Hospital attracting people from all over Scotland.

The legislation in relation to the proportion of allocations that has to be made to Section 5 cases is seen as a major issue, something exacerbated by the announcement of a housing emergency and Glasgow's consequent desire to operate with higher nomination agreement levels: "80 of the 120 [relets] that come in are all let to people under Section 5". As a consequence, "there is very little movement of people within the community, very few transfers... You build a new set of houses, there's very little of that aspirational type move which you used to get back in the day... there is very little choice for applicants.... Take out the Section 5s, we might have 40-50 houses a year that are going to become empty, there are 1000 people on our waiting list... unless you've got any of the kind of homelessness, domestic violence, significant medical needs... you probably have no chance, you could sit on the waiting list forever".

The Chief Executive of another CCHA confirmed the very high levels of need/demand in Govan and identified their perspective on the specific causes of the current "social housing crisis in Scotland": (1) the "very progressive homeless legislation" and the removal of local connection by Government; (2) heightened demand for accommodation in Glasgow from younger people in particular who migrate there because of the employment opportunities and the social life; (3) pressures on the housing system are compounded by the Ukrainian crisis and Government pressure to give asylum seekers their decisions within 6 weeks; (4) the consequences of Glasgow Council having no stock of its own; (5) rents for new build social housing developments are significantly higher because of private finance considerations and are not

really affordable.

This HA Director confirmed that the gap between need and supply has grown over the last 15 years. Again, legislation is seen as a significant part of this: “What the Government needs to realise is that you can’t have progressive legislation without having the wherewithal to deliver the commitments within the legislation”.

This is reflected in significant increases in the waiting lists for social housing. One CCHA CEO commented that “if you are a single person in Glasgow working as a car mechanic and you wanted your own flat to get away from your parents, you’ll never get one”... Given the high proportion of 2-3 bedroom apartments “it would have to be a younger single person who is willing to put themselves through the homeless system”. For households like this, the lack of low-cost home ownership, shared ownership in particular, is a real gap in the market “you’re really struggling on the mid-market rent, but you might actually afford a shared ownership” – rental side is actually affordable.

There are some differences apparent in terms of the types of households on the waiting list: “there are smaller numbers looking for single person dwellings, so studio flats tend to be more difficult to let. “But we don’t have much in the way of 3, 4 and 5 bedroom houses”.

“Allocations policies are designed around creating... ghettos is the wrong word, but actually what you do is herd everybody together in the same social classes, with the same social issues, and then put them all in the same place, which does not lend itself particularly well to any sort of ongoing development of the individual and of the community”.

In practice there appears to be little information-sharing between housing associations and GCC and Scottish Government. One CCHA Director commented: “You essentially work on your own and under guidance... housing managers [who are] responsible for the allocation of tenancies - I don’t think they ever engage”... “You could argue the benefits, the merits and demerits of common housing registers, but... I think Glasgow’s an area for common registration that’s too big and wouldn’t work, but you could see the logic for a shared allocation system in Govan because they’re the same type of housing, the same fundamental issues, the same locality and social links... I can see some merit in them sharing policy work... similar issues around anti-social behaviour and ... potentially sharing some services”.

In a similar vein, another CCHA Director identified a need for Housing to be more closely integrated with Planning, Health and Social Care – particularly Planning to “speedily address the kind of structural issues where we don’t have enough 3, 4 and 5 bedroom [dwellings]”. CBHAs are “really agile and move really fast to help both Scottish Government, local others and each other”. A more collaborative approach would be helpful – as was reported during Covid-19 when red tape was removed and stakeholders formed an emergency board involving 4 councillors, the 3 housing association Directors, an NHS representative and Glasgow City Council staff.

4.7 Development and Appetite for Building in the Govan/Ibrox Areas

The chief executive of one of the three community-controlled housing associations in Govan suggested that housing supply in the area was being constrained, in part, because authorities were slow to release suitable land and respond to their development interests. They argued that, although potential development sites were plentiful across Govan, due to institutional and political roadblocks, positive engagement with housing associations about acquisition, development and new construction were rare. The interviewee explained:

“I don’t feel like anything is being done. There’s no proactivity. Nobody from the Council has come and said: ‘Oh, you said several times you’re interested in that land. This is what you need to do.’ Or, ‘This is what we can do to help you.’ There’s no activity. It just feels like a box ticking exercise”

The CEO contended that rezoning little-used industrial lots in Govan would unlock considerable land for new housing supply but noted there appeared to be little interest from authorities to pursue such a strategy. The reasons behind this reluctance to exploit existing industrial land for new housing construction were unclear, although the HA Director speculated concerns about relocating employment opportunities in Govan may be politically fraught:

“I think that the reluctance to pursue rezoning might have a political agenda behind it... I think this may perhaps be for political reasons. It might be viewed that they’re pushing out any work that is available locally. If those jobs go, you know, people will have to travel, which some people are reluctant to do”

Funding emerged as a further barrier to land release, as partnership with housing associations on land acquisition and new construction projects necessarily requires considerable financial support. When asked what role private sector investment might have in unlocking these development opportunities and adding housing supply, the executive was convinced the Council wasn’t interested in partnering with ‘for profit’ entities in pursuit of new construction. The lack of engagement with local housing associations on the issue of rezoning, land acquisition and new construction, on the one hand, and an in-principle disinclination to facilitate private investment, on the other, characterised the Council’s role in constraining Govan’s new housing supply. They summed the situation up this way:

“I think it’s possible the Council has a reluctance or inability to release those plots of land. And then there’s the funding that goes with strategies like that. The grant funding... I think the Council have a strong desire and interest to work with housing

associations rather than private developers. I think from a political point of view as well. The majority of people in Govan would see private developers as a negative. Because, you know, they would just see them as making money for themselves”

The Director of one of the CCHAs had a clear view of the opportunities for social and affordable housing in Govan: “Because of significant land constraints in Govan the stock is mainly flats. Real development opportunities are linked to the Helen Street corridor – large swathes of the industrial land there could be made available for housing. Not necessarily social housing – the transport links and geography lends itself to owner occupation”. The HA Director indicated that there is some potential new development on the go for flats, some greenfield sites – but also now looking at demolishing a community centre and building mixed tenure flats. “The land study (being undertaken by CaCHE) will show there are other small pieces of land but not masses of it”.

“80% of the housing stock in Govan is flats... I'm not particularly interested in building houses, just for the sake of building new houses... creating Govan as a more affluent place... is more important to me than just using the land to build more houses. So, it's about understanding the right tenure type going forward”.

One CCHA Director indicated a reluctance to invest in student accommodation in the future: There is currently a “high demand for our properties... what would be the business driver to change to student accommodation, to double the rent...? That would then take away social rented stock... So

in the existing stock I'm saying no to student accommodation, I don't think it's bearable. I think I could see the benefits of it being located in the area... but it would probably need to be in a new space”.

In terms of their forward development programme one CCHA CEO highlighted the constraints on developing a greater variety of property types: “It's as simple as... what can you build on the land? What stacks up financially if you build on that land? It turns out nine times out of ten that it's always going to be flats: 4, 5, 6-storey flats”.

The quality of new developments is seen an important supply issue: “As soon as you do good quality new build – we did one two years ago at Cromdale Square, 49 units - we could have filled that 10 times over”.

Acquisitions play an important role in the supply of social dwellings in Govan. However, CCHAs have somewhat different attitudes towards participating in what can be seen as a generous Government subsidy: “100% grant to buy the flat (for a year and then subject to review) and 50% of cost to bring it up to Scottish Housing Quality Standard. Last year (2023/24) there were 80 acquisitions in the City of Glasgow - 34 of those were located in Govan in the greater Linthouse area”.

One CCHA is clearly focussed on increasing the quality of new supply (as at Cromdale Square) and that where possible they should be mixed tenure schemes (as at Hardgate road where there is a proposal for 300+ units – a mixture of mid-market rent and low-cost home ownership in some form and social rented dwellings. The Director also noted however, that “there's going to be a much bigger role for social housing... in terms of mental health issues, alcohol dependency, people with a particular need”.

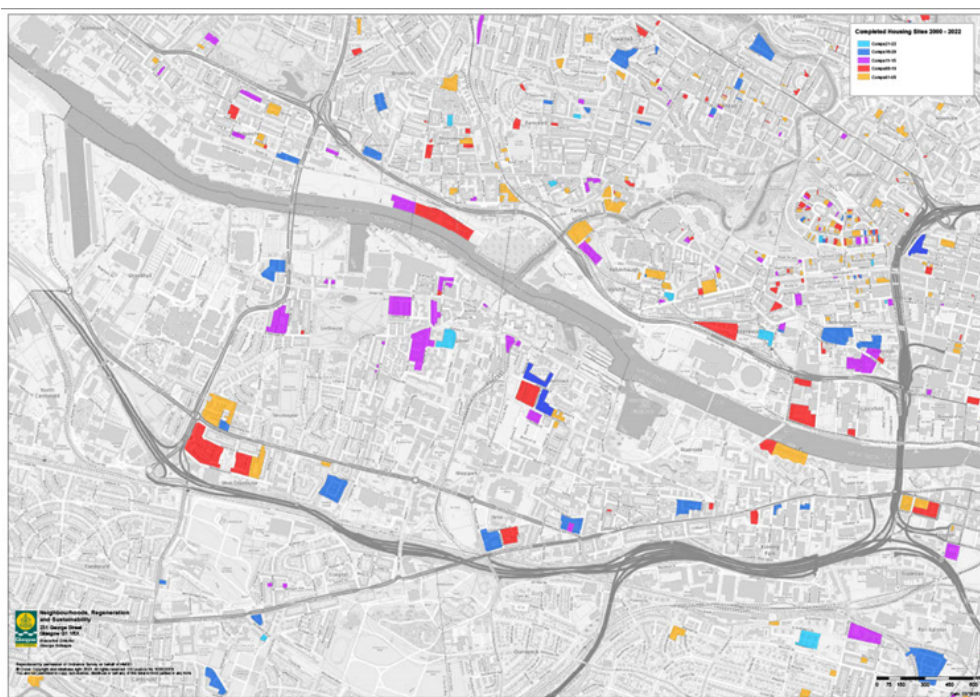


Image: Govan Completed Housing Sites, 2000-2022.

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4.8 Land audit description and key findings

For the land audit, we looked at sites already captured in the Housing Land Audit and the Vacant and Derelict Land register datasets for 2023. In addition, we conducted key informant interviews to obtain qualitative insights into the development potential of and plans for these sites, as well as to identify other potential sites not captured in the available datasets. As one of the CCHA Directors argued:

'There's a need for understanding the potential for strategic land development across an area as opposed to just pepper-potted locations... We can talk a lot about things to do with the hospital... one in 10 people are employed there in Govan. But ... just because you work in Govan does that mean you want to live there?... There's a lot of emphasis placed on the fact that the hospital's there and people should live there next to the hospital because they work in the hospital. I don't necessarily think that's a reality...'

Housing Land Audit (HLA) sites

HLA data includes information on housing land sites, including their previous use classes, status and potential avenues for development. The 2023 data for Glasgow includes 19 sites within the Govan area, each at different stages of development progress. Notably, eight of these sites have already advanced to stages of completion, construction, or have secured planning consent, which is evidence of active urban regeneration initiatives. These sites include, for example, the award-winning development at Cromdale Square just off Shieldhall Road (see page 4). Six more sites exhibit signs of advancement with detailed proposals under consideration, including, the regeneration of the Graving Docks, which, if it goes ahead, will contribute significantly to the renewal of the Govan waterfront. The HLA also identifies a small site (0.08ha) on the corner of Govan Road and Napier Street but this is currently being used as a community allotment space and would likely face local opposition if proposals for housing development were to come forward now.

The remaining four sites are also included in the VDL register. Three of these comprise the central TRA sites discussed in section 4.5 (i.e. the former Broomloan Road Primary School site comprising of about 0.6ha, and the two sites immediately south of that, both of which consist of about 2.5ha each. Together, these sites were once occupied by a mix of high-rise blocks and interwar tenemental homes, which have long since been demolished. Transforming Communities: Glasgow is currently progressing plans for the redevelopment of these sites.

The fourth site is that of the former St Saviour's Church located on Merryland Street where it meets Summertown Road. The site is privately owned (presumably by the Catholic Church) and comprises about 0.3ha which, according to the HLA,

could accommodate up to 24 new homes for social rent. The old church hall is still standing, and the site is surrounded by other residential uses. However, we are not aware of any plans to develop this site for housing or any other uses.

Vacant and Derelict Land

The VDL register includes information on the size of a site, ownership, previous uses, and development potential. The 2023 data show 30 vacant and derelict sites in Govan. Once we remove the sites that also appear in the HLA, 21 sites remain. Of these, five were previously for residential use and are developable in the short to medium term, while 16 were previously under non-residential uses (i.e. transport, general industry, manufacturing, community and health, and recreational uses). For some of these previously non-residential sites the former use class is recorded as unknown. We look at former residential and non-residential sites separately.

Former residential sites

The five former residential sites include, first, land directly opposite Napier House on Govan Road, comprising about 0.3ha. This site, which appears to be partly owned by GCC, has been vacant since the early 1980s. There are some light industrial uses immediately north of the site along the riverbank, and a larger unit to the east along Govan Road, which is currently being used as a film studio. This led one local planner to suggest: "it's maybe not an ideal site for housing... You just don't want to stick houses on to Govan Road, and then that has a detrimental impact on the industrial uses... because there will be an element of noise and disturbance associated with those industrial uses. So, you don't want to have housing that's in too close proximity." However, this was previously a residential site.

Second, there is a privately-owned site of about 1.3ha in the Teucharhill area of Govan located behind Rowan Business Park just off Aboyne Street. The site was once occupied by interwar tenemental properties, but these were demolished in the early 1990s. The land has been vacant ever since. There is a mix of land uses in the immediate area including residential on the opposite side of the road. It is considered developable in the short term and, according to one informant, was at one time considered as a potential site for relocating travelling show people from Water Row to enable Phase 2 of that housing development to proceed. The land was heavily contaminated, and the Clyde Mission Fund was used to enable remediation works. An Urban Planner observed, "As a place, it probably has got a lot of residential there, there's churches and schools and shops nearby, which is all positive, it's just this particular area is quite internal... for the purposes of the study, though, it would be worthwhile keeping it on the list for review".



Figure: Vacant land opposite Napier House formerly used for housing. Photo by Gareth James.

Next, there are the two sites located immediately south of Ibrox Stadium. These are the TRA sites at Hinshelwood Drive and what was once Broomloan Court on the Albion Estate (see section 4.5). Fifth, on the westernmost fringe of Greater Govan, there is a small site comprising about 0.14ha of vacant land on Paisley Road at the entrance to Springfield Quay. It is considered developable in the medium term, but it is not immediately obvious that this site would be suitable for housing.

Non-residential sites

The other 16 sites in the VDL register (for which the previous use was something other than residential) include six sites owned by GCC and 10 privately-owned sites.

Of the six sites owned by GCC, three are considered developable in the short term, including:

- a 0.43ha site just off the roundabout at the intersection of Edmiston Drive and Helen Street. This appears to have been occupied previously by St Anthony's F.C. There are some relatively new commercial developments on adjacent land. An urban planner stated, "I guess that what's been created here is a very non-residential environment and, in a way, there's a lot of heavy traffic at the roundabout... but some level of residential could potentially contribute to urbanising the setting, if you like. But, from a purely Development Management point of view, looking at it in terms of delivering residential amenity, it might be challenging."
- 0.9ha of vacant land in the Kinning Park area, just off Houston Street. Its previous use is unknown, and it is surrounded by industrial uses.

The other three vary in terms of development potential.

- 1.62ha of derelict land north of Pearce Lane. While its previous use is given as 'unknown', it is currently occupied by travelling show people (noting that the last two Glasgow local housing strategies include action commitment in respect of travelling show people).. It is considered developable in the medium term and is earmarked for Phase 2 of the Water Row development.

- 1.8ha of derelict land on the corner of Stanley Street and Milnpark Street in Kinning Park. It has been derelict since 2016. It was previously under industrial use and is surrounded by general industrial and commercial uses. It is developable in the medium term.
- a 3.24ha site located next to the Albion Estate. It is a SPT site but, according to the VDL, has been derelict since the early 1980s. Its development potential is undetermined.

Of the 10 privately-owned sites, all but two are considered developable in the short to medium term. Six of these are comprised of less than 1ha each, including

- a former car park (now naturalised) on the corner of MacGregor Street and Ardlaw Street;
- a 0.58ha site at Kinning Park pitches on Maclean Street which has been vacant since the late 1990s;
- a 0.27ha site on Bogmoor Road which was previously used for storage and has been vacant since 2006; and,
- three sites for which the former use is recorded as 'unknown' and all of which have remained vacant or derelict since the early 1980s.

This leaves a subset of four privately-owned VDL sites. The first is located on Bogmoor Road. Comprising 1.43ha, it has previously been used for manufacturing and is still surrounded by heavy industrial uses. It also appears to be in use by travelling show people at present. The other three sites appear to hold more potential for residential development. These include Hardgate Road, Princess Dock and the BAE Shipyard.

The Hardgate Road site comprises 1.65ha of derelict land (at least according to the VDL register - it could be larger if it included the adjacent car park). This land is currently owned by the Ogilvie Group who are working in partnership with Linthouse HA to develop proposals for 300-450 new homes plus community facilities on site. We spoke to a development consultant who said:

generally, we're looking at maybe five or six blocks of flats... six storeys high...car parking and loads of amenities space in between, so quite a green site in relation to the space... the intention is to have a mixed use and also a mixed tenure... I think there is recognition that having a mixed tenure in there would be good for such a large site... I can see potentially mid-market rent going well in there because proximity to the hospital and maybe even shared equity.

A recent joint application for planning permission 'in principle' was considered invalid due to the need for more community consultation, which is now underway. The site may also be constrained by a nearby sewerage works and the potential expansion of the Clyde Fastlink which could potentially cut across one corner of the site.

Second, there is a 3.25ha site at Princess Dock / Pacific

Quay owned by Scottish Enterprise. It is considered to be developable in the short term, but given its proximity to the river, it may be that flooding risk is an issue. This was the case, too, with proposal at the Graving Docks. However, if planning and development constraints could be overcome, it could be seen as an extension to the existing residential developments in Pacific Quay / Festival Park area.

Third, and by far the largest of all the Govan sites identified in the HLA / VDL, is the derelict shipyard site located east of Holmfauld Road in the Linthouse area of Govan. This land is leased from Peel by BAE Systems, but it appears to have been derelict since 2007. It is however considered to be developable in the medium term. A development consultant interviewed for this research said of the BAE site and the land immediately adjacent: "it would make sense to have housing, or potentially mixed-use development, coming here and occupying the land up to the river..." While this respondent expressed some concerns about competition for land in the area, with the University of Glasgow in particular, they did add that "there's plenty of room for everyone if you have a decent masterplan." An urban planner agreed, adding:

There's an opportunity to do something that there aren't that many places within Scotland or the city region where you can have that attractiveness in terms of the location of the hospital, an identity as a real high-end science and innovation location... so we'd be keen not to compromise that. Equally, in terms of urban practice, an element of residential that could support that, would be worth keeping on the table in terms of scoping the masterplan process.



Figure: Site at Princess Dock owned by Scottish Enterprise. Photo by Gareth James.

A representative of BAE told us that the derelict site in question is "partially within the BAE Systems leased area" and that "Part of that area could be made surplus, but we would need Peel, the landowner, to be supportive..." The representative went on to say:

We do have two main access points coming through [that] area... one for the shipyard car parking and one for logistics, both of which would need to be retained. If a proposal was to be taken forward for residential, careful planning would need to be undertaken to ensure segregation from the Shipyard activities and that each use did not have a negative impact on the other.

Following NPF4, there might also be concerns from SEPA about the potential for flooding along the River Clyde. Similar concerns were expressed in relation to the Graving Docks, which has been addressed in the designs that will allow water to pass below the development.

Other potential housing sites identified by interviewees

The first of these is Napier House which is a 19th Century category B listed building partially owned by Glasgow City Council. Next door is the former Bells Lounge public house, which appears to have been vacant since at least 2016 and has since fallen into disrepair. There is also a strip of land on the opposite side of the road, which we discussed earlier in the report.



Figure: Napier House (left) and Bells Lounge (right). Photos by Gareth James.

According to the CGAP (2006: 18), Napier House was the subject of a feasibility study by Govan Housing Association which "established a viable option for refurbishing the property for housing use." Multiple ownership was, and presumably remains, the main obstacle to refurbishment of the building. CGAP called on GCC to initiate a CPO "to consolidate ownership of the entire building" which would "allow the Council to establish its current condition and decide on its future." (CGAP, 2006: 20). The data underpinning the feasibility study are now redundant. One of the local planners we spoke to said "I don't get the impression that redevelopment of the site of the former Napier House is a local or political priority. The meanwhile uses of the site seem to have local support." However, two other planners thought there was some potential here: one stated that "the pub site... looks like an ideal windfall development", while another said "the former Bells bar could be a potential small housing project... within the Govan Heritage longlist it is not

something that we would take forward but there's a potential project there linked to Napier House, which is a listed building, but there's an opportunity to do something there [on the pub site], too."

Second is a site on Nimmo Road where there are some existing (presumably underutilised) structures. Elderpark Housing Association is working with JR Construction Scotland Ltd to redevelop this site. The project has recently been granted planning permission for demolition of the existing buildings and erection of flatted residential development (43 units) with access, amenity space and associated works, subject to condition and s69.



Figure: Site on Nimmo Drive. Photo by Gareth James.

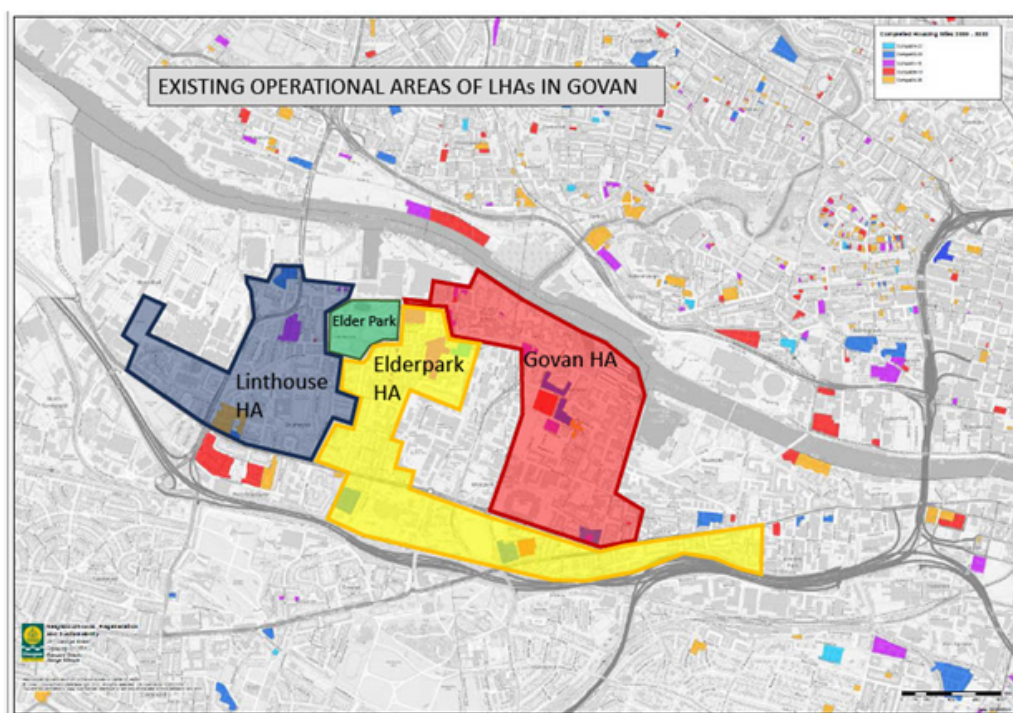
There are at least two other sites for which we don't have a great deal of information: one is the red ash pitch next to Govan High School / behind Cromdale Square. Linthouse is in early conversations with GCC about this one. The other is the Lyceum Theatre. The building is listed and for sale but not clear if there are any prospective buyers or how suitable it would be for housing - a photo of the latter is included below.

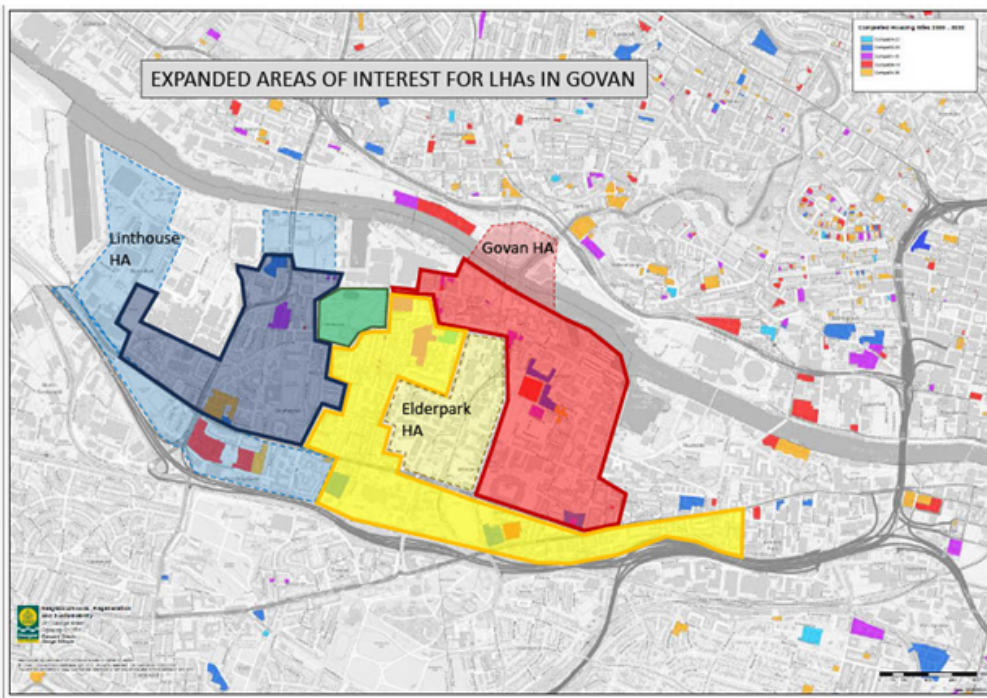


Figure: Lyceum Theatre, now on the Buildings at Risk list. Picture by Gareth James.

Existing areas of operation and areas of interest for CCHAs

As part of our land audit, we also held a mapping workshop with the CEOs of the three CCHAs to explore and map their respective existing areas of operation and expanded areas of interest. The results of this exercise are captured in the images below. These maps show, for example, Linthouse HA's interest in expanding to the west (Hardgate Road) and north (the BAE Systems site), as well as to the south where they perceive there to be opportunities that might arise from a rezoning of industrial land or rationalising of road junctions in that area. Elderpark HA currently operates in central Govan and expressed an interest in any opportunities for expansion in that area. They are currently working on plans to develop the site at Nimmo Road (see above). While Govan HA saw an opportunity to expand into the area north of the river – a possibility opened up by the construction of the new bridge.





Images: Existing Operational Areas of Local Housing Associations in Govan (top) and Expanded Areas of Interest (bottom).

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Summary of land audit key points

- There is clear evidence of active urban regeneration initiatives (e.g. Cromdale Square, the Wheatley TC:G plans, etc), but there remain several vacant and derelict sites in Govan.
- The development viability of these sites is variable – many of those that are considered developable in the short term also might not be suitable for housing.
- There are however some former residential sites that have potential including the central TRA sites, St Saviors Church site, the land adjacent to and opposite Napier House (GCC/ private), Hinshelwood Drive, and the Albion Estate.
- Other formerly non-residential and privately owned sites with potential include the Scottish Enterprise site at Pacific Quay, the Hardgate Road site owned by Ogilvie Group, and the derelict BAE site plus adjacent land.
- In some cases (Hardgate/BAE/Iona/Albion), a good masterplan would be needed to ensure the right mix of land uses as well as to make sure that new development fits within the existing place.
- There are also opportunities for refurbishment/renovation of Napier House and the Lyceum Theatre.
- Several respondents talked about the potential for rezoning land and/or rationalising land uses /road junctions to unlock smaller pockets of land for housing development. This would probably need to be done through the strategic plan/LDP but could also be supported by LPPs.
- The three CCHAs appear to have an understanding about

the boundaries of their own respective areas of operation as well as expanded areas of interest which do not appear to overlap. In each case, there are sites of interest that could be used to develop new homes for social rent.

4.9 Conclusions

This has been a long and wide-ranging chapter that has provided details about the housing stock, and challenges that can be inferred. It has looked at private housing and provided insights about the PRS, and about the potential for a larger first-time buyer market. It has also considered the housing need and demand more broadly, the appetite for new supply and looked at the status of the TRA and the findings of our site/land audit. As always we have not all of the data we would have looked to progress this analysis but we can point to several important insights that can be discerned and that we will return to in the concluding chapter.

5. Outcomes and Imbalance

5.1 Introduction

In this chapter we briefly summarise the striking imbalances and outcomes for the analysis thus far, mindful of our priority interests in the business case for more mixed tenure development in Govan and the replicability of this localised form of LHSA.

5.2 Affordability and shortage/surplus

We note the private sector price and rent discounts operating in Govan compared with Partick. This prima facie evidence that a suitably well-placed price discount for first time buyers could grow a new build market in that sector. We also note the case made for more mid marker rent development, a tenure niche already well established in the area, would help meet that growing need for those working households who will not realistically be housed by social housing but who are at the margins (or worse) in affording private renting.

Several stakeholders have observed a case for new build student accommodation, though not at the expense of more non-market housing. The presence of the GRID, the nascent student housing already provided and the footbridge to Partick – all create an opportunity for student housing in Govan. Moreover, it is widely understood that existing provision and plans for city centre PBSA tend to be aimed at wealthier international post graduate students and underserve the local and undergraduate markets. This may be an opportunity to change that and to begin to distribute such investment south of the river yet still adjacent to the campus.

Citywide, Glasgow's population is expected to continue to grow. The 2023 LHS (p.8) quotes (using NRS 2018 based projections) a central figure of 7,373 additional people and 6,311 households adding to the city's numbers between 2023-28 (given 2023 estimates of a population of 637,000 (392,000 households). This follows steady growth over the past 15-20 years). At the local Govan level, absence of key census information on household type at Ward level makes need/demand analysis more difficult. The apparent change in age structure is of some help – there are fewer children but rising share of (younger) working age people who are important for economic development and housing demand. It is also worth noting that there is also a lower proportion of pensioners in Govan (10.9%) versus 14.5% in Partick.

However, we also found that, with admittedly pre-Covid data, that as regards relative income levels – there is a clear gap between Govan and Partick East/Kelvindale. There is twice the proportion of households with <£300 pw in Govan (32% v 16%); and similarly, double the incidence in Govan for those classified as low income (60% of median) (26% v 13%). This was reinforced by SIMD data: Govan has significantly higher levels of deprivation on all three indicators – income, employment

and overcrowding.

5.3 Homelessness and other pressures

Glasgow is enduring a significant and long-term problem of rising and high homelessness applications, exacerbated by budget cuts, by increasing numbers of asylum seekers, Ukrainian refugees and blockages in temporary accommodation. All housing associations in Glasgow are feeling the Section 5 homelessness referral/nominations pressures and this is one of the direct ways in which the need for new social housing supply is being manifested. Govan is no different and this is why housing associations tell us that the demand created by new supply is essentially infinite. With relatively low turnover, there is not enough social housing available. This is the sharp end of housing need but it is not the only challenge.

5.4 Needs & demand implications for potential new supply and mix

There is considerable active engagement by social landlords seeking sites in Govan and engaging with individual prospects. The associations are proactive but also careful mindful of their obligations to their tenants and the multiple requirements they face e.g. improving older tenemental stock, funding and delivering retrofit. Both they and Wheatley have identified the importance of re-zoning land and taking a larger scale holistic approach to built environment investment across Govan and Ibrox.

We have already identified that there appears to be evidence of demand and appetite by private sector owners and tenants to live in Govan, that demand is price –sensitive and that the right sort of discount to typical Glasgow average prices could support an expanded FTB market locally, including new build within mixed tenure communities such as that proposed in the TRA.

5.5 Land audit implications

The land audit has surveyed different kinds of sites across the locality. It has indicated smaller and medium sized sites as well as some with potential for larger and mixed tenure development. We have also found evidence of constraints to sell among industrial land owners (including institutional investors). Several of the stakeholders we spoke to suggest the need for a coherent land assembly approach for the area which would not just be about housing but would also support the GRID and indeed other forms of local

employment generation. This requires co-ordination, planning input to rezone where required and overall leadership to promote new and appropriate development.

"This whole area at the north end of Helen Street / Harmony Row area is one that I think... within the strategic development framework... it's an area where some restructuring would be beneficial for the town centre because basically what's happened is we've put in this monocultural industrial business space... quasi-retail... my gut feeling is the market will move there if we don't, in terms of the bridge is going to open... you've got the subway, you've got the bridge, you know, Govan is generally looking better. Although there is still intense levels of social need, the physical fabric of the place is looking a lot better, so you can start to see that people will come in and look at the student accommodation and residential and what is our view on that? Is our view on it that it's an absolute no because we want to protect industrial business land, or is our view that we will take planning applications and consider each of them on merit, or are we going to take some kind of strategic land approach? The challenge is... we don't have ownership. So we're in a situation where, in an ideal world, you would be looking there and saying we can bring people to the town centre, create more of an urban feel around the town centre, but we don't have much control... because of land ownership."

Urban Planner

As we indicated earlier, this also needs to learn lessons both from what worked elsewhere in Glasgow but also why previous regeneration did not deliver sufficient local benefits to people from Govan.

"If you look at the work that Clyde Gateway have done. They were like big strategic decisions like that. They were able to mobilise the skills, resources, as well as cash, to make some of these big moves. If they said what would be beneficial would be this would make a good residential areas and what you want to do is consolidate your industrial business and some new good quality activity up here and make this an area that really supports the town centre but we don't really have the kind of ... there's probably things we can do to coordinate better, both within planning and with wider stakeholders, we don't have money for acquisitions to be proactive in terms of going out and at risk consolidating to deliver a more cohesive masterplanned approach"

Urban planner

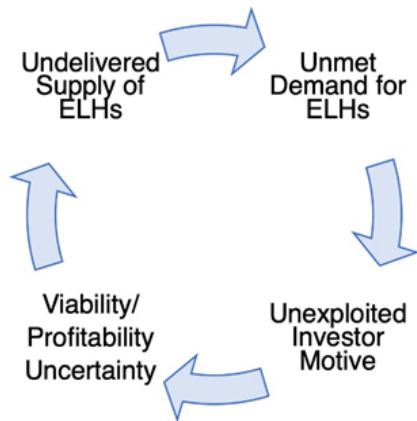
5.6 Imbalance and intervention leverage points

The case for intervention and maximising leverage stems from the simultaneous cluster of catalysts: the footbridge, the GRID investment, the TC:G TRA plans, a range of other developable sites, and demand –side opportunities created by the price variations offering discounts to private purchasers and landlords (including student housing providers) choosing to invest in real estate in Govan. This must not be at the expense of social and other affordable housing provision for which need is strong city-wide. This is all a potential cocktail of mixed tenure opportunity but it has to be co-ordinated, holistic and planned; most important it needs clear strong leadership and demonstrable benefits to stakeholders, with a focus prioritising the local community.

Examining private sector investment, the evidence is clear: there is a high level of unmet demand for entry-level homes (ELHs) for purchase in Govan. Private investment is expected to enter Govan and either build new ELHs or refurbish existing buildings thus increasing supply and marginally addressing demand and over time clearing the imbalance. At present, however, the private housing market does not function in this way. Instead, demand remains high and with it the potential for investor returns, while supply remains low reinforcing the status quo supply-demand imbalance. There is also a sense that areas like Partick and adjacent neighbourhoods have little developable space and there is scope therefore to encourage new development in Govan with its greater connectivity to the north of the river and essentially provide new build entry level private housing as well as mid-market rent to encourage more in-migration to the area, and in due course create demand for subsequent local moves.

Our systems approach to local housing analysis reveals the cause of this market failure in Govan. Figure 5.1 illustrates a prevailing and persistent negative feedback loop wherein uncertainty concerning the viability and profitability of development schemes inhibits private investment. This raises the question, what is the source of investor uncertainty? We can rule out external drivers as the source of this uncertainty given this form of market failure is not equally present across Glasgow (i.e., the broader housing system), while it has been a feature of Govan's local housing market (and similar local areas) for decades. Indeed, external conditions ought to favour investment given the high levels of unmet demand and generally favourable property investment economics. The source of investor uncertainty, therefore, is internal drivers specific to Govan. In particular, the evidence suggests that private investment in refurbishment is held back by the condition of the dominant existing housing stock in Govan (i.e., pre-1919 tenements and 1970s/1980s constructions) – in the context of energy efficiency requirements – on the one hand, and the inability to find suitable brownfield sites for new building due to the dominance of industrial land use in areas with high residential demand.

Figure 5.1. Investment Uncertainty Negative Feedback Loop.



Systems analysis suggests that policy intervention is required to disrupt negative feedback loops such as those illustrated in Figure 5.1. In the context of our present dilemma, intervention is required to overcome investor uncertainty concerning (a) energy efficiency requirements for refurbishments; and (b) investor uncertainty relating to the land use of potential brownfield development sites.

This suggests that if policymakers would like to motivate private investment to increase the supply of first-time homes in Govan and begin to address unmet demand, some way of addressing the burden of energy efficiency requirements and their impact on the development business case ought to be considered. How this is achieved is a separate question, although various financial deferral or abatement schemes might be considered that permit developers to achieve their energy efficiency requirements while preserving the profitability assessment required to initiate capital deployment. Build costs and the associated energy efficiency requirements are stable across Glasgow, whereas eventual sale prices vary considerably.

6. Conclusions

6.1 Introduction

The original research questions were essentially derived from the desire to test whether there was an evidenced business case for housing investment in Govan and do this via a local housing systems analysis approach (and to address how transferable such a localised approach might be for other parts of the city). In this final chapter we do two things: we summarise first, the key lessons or takeaways from the analysis for the diverse clients supporting the project; second, we reflect on the scope for generalising this approach to other parts of Glasgow.

6.2 Key lessons or takeaways for Govan and for Glasgow City Council and the University

We note that we have made many points in earlier chapters and do not attempt to repeat them here other than pull together higher-level conclusions. A phase 1 interviewee said Govan's transformation required a seed, spark or catalyst. Arguably – we have several: the bridge, GRID, ample potential developable sites, the TC:G TRA and Govan's many place-based attributes. But this needs to be co-ordinated and led, holistically, within a built environment investment framework that makes good choices over the zoning (and re-zoning) and phasing of development for housing, for GRID and for local employment/business opportunities. Govan is at a development (and hence regenerative) tipping point driven by enhanced external connectivity, relative affordability compared to the city, investment in the GRID and through the large-scale investment in the TRA. These catalysts for change also have further sites to work with across Govan.

The stakeholders should specifically seek to learn from Gorbals, Sighthill and elsewhere in Glasgow in terms of what works. Equally they need to work with local Govan experts to learn lessons about how and why past regeneration efforts have had mixed success and how future efforts might do better supporting local people and communities. A joined-up strategic approach could do much with this window of opportunity.

We also think that stakeholders can learn from systems analysis both in terms of the fundamental interdependence of different tenures, mixed housing and development decisions and the consequences for adjacent areas and place development, but also around the importance of initial conditions, path dependency and the like. History matters and is essential to understanding places like Govan.

A Glasgow-wide perspective matters in looking at the case for housing investment in Govan – there is a discount to first time buyer homes and potentially student rents south of the river and that can help neighbourhood markets without

sufficient developable space like Partick. It is also important because of the citywide issues with housing need and the struggle to address the rising problems of unmet need. It is ironic from Govan's perspective given that it plays such an important role in the Glasgow economy and in terms of hosting the QEUH and its complex of adjacent services. Govan is deeply embedded in Glasgow but that could and should have a reciprocal benefit for Govan if land and development could be wisely developed for housing, employment and innovation.

We were also struck by specific early steps that could support local Govan people benefiting from these investments: embed GRID further in the local area through infrastructure support e.g. district heating, work in schools and training/skills opportunities; there should be important procurement of construction benefits for local workers, apprentices and trainees. This may also manifest itself in the need to retrofit and upgrade considerable volumes of older tenements in the years ahead.

At the same time by creating local jobs skills and more spending power, investing more in pedestrianisation and the walkability of Govan, - this can help uncouple the ward from wider perceptions and stigma. This is also important, not least to encourage commuting workers to move to new housing in Govan. Working with local employers and facilitating local economic activity remains important to these labour market goals. There are also further connectivity issues – linking via the new bridge to Partick station and the SPE railway network is important for Govan to be closer to the wider conurbation's rail network.

The PRS offers three key opportunities: to acquire vacant PRS stock for affordable housing through acquisition (often taking stock on in closes where there is already housing association presence); to support the growth and success of local mid-market rent, and, via the University presence and the new bridge, to support possible further investment in student accommodation, and making a case for that to be more affordable relative to the types of investment already at planning stage in the city centre.

6.3 Lessons for implementing local LHSA elsewhere in Glasgow

The first thing to say is that at one level this localised LHSA has been an important and rare opportunity to look in the round at a specific well-defined part of Glasgow. As one of the CCHA Directors said:

“Strategic approach important... “up to now, there hasn't been a strategic look at it [Govan market needs/demand analysis]. I think it's literally been opportunistic building across all of Govan when

bits of land became available. For me the very purpose of this study is to actually create a longer term strategic understanding... and that might not be social housing, it could be private housing, it could be mid-market, it could be based on a mortgage”.

Strategic analysis and evidence gathering can create momentum and support the move towards a business case for a more strategic approach to Govan. That has much to commend it. Systems thinking at the heart of such a spatially focused housing system analysis remains to us a valuable cornerstone to any such strategic exercise. It is also important to say that we have found in Govan that the specifics and the initial conditions of the area are vital to understanding the housing system - this will be equally true but also idiosyncratic for anywhere else that is studied.

A second point, and an unavoidable difficulty, is that even in the Govan case with its well-defined physical boundaries at Ward level, the fact is that the city and city region dominate and influence what goes on in the locality of interest. This is particularly so because of the unusually prominent role of Govan as a strategic employment and health service site. Govan does have hard boundaries, but it remains a very open system as a functional geography. Ideally, one would undertake a city region level LHSA and piggyback on areas like Govan from that research, recognising the importance of these top-down drivers but understanding at the same time that locations like Govan have strong history, place, heritage, community and related attributes (as well as specific challenges). The LHSA framework is a great starting point and basis for organising the research, but it must be grounded in the wider social economic housing systems for Glasgow and indeed greater Glasgow.

Third, as we expected, the localised analysis has been bedevilled by data gaps and shortages. In relation to the data audit and transferable lessons - we discussed the need to moderate expectations in relation to availability of small area data when undertaking at LHSA at the local level. It is also worth mentioning the issues around primary research in the form of household surveys (in case this is seen as a solution) i.e. they are not without cost or indeed necessarily the best way forward. Setting aside the expense, there are significant problems with non-response, response bias, inaccurate information, uninformed comment, the halo effect – and unwillingness to be forthcoming when it comes to responses on income and savings, in particular.

The big data gap which is temporary, but frustrating, is of course the 2022 Census. This has been a major gap which would not apply to future studies. However, we recognise the importance of the data that organisations made available to us and that there are specific local data sets and indicators that can play an important role in this kind of work. Naturally, we would encourage further investment in local data which is essential to effective market analysis.

Relying on the judicious combination of extensive stakeholder interviews across the housing system with the local data we

could assemble is valuable but also time intensive - and a little uncertain in terms of availability and willingness of experts to talk to us.

Overall, we think that with expectations set at the right level, working from an LHSA framework combining the growing sets of local data with a wider sense of the functional housing market area and economy – can yield useful insights to help us understand localised housing systems within bigger conurbations. It is coherent, systemic, comprehensive (at least in terms of the framework deployed) and its focus on interdependence and balance/imbalance, as well as in making its assumptions transparent (including openness to the higher-level system), is to us a better trade off than any alternative way to think hard about key housing localities.

Below, we summarise a stylised checklist of actions that might constitute a research process for other well-defined local areas in Glasgow.

6.4 A Localised LHSA Research Process

This checklist draws strongly on the 2004 LHSA framework described in figure 1.1 in the first chapter. A key prior question is the extent to which the localised study is embedded and situated within a Glasgow-wide LHSA which might be based around the Glasgow housing market partnership, the TTWA or the city-region boundaries, reflecting a functional housing market area-based system. Certainly, the wider study and indicators would be a critical benchmark to compare with the localised LHSA. We assume that as with the Govan study, there is no resource for a quantitative household survey or similar research instrument.

What would be the key stages of the research?

- Initial Scoping analysis that would involve interviews with a wide cross section of housing interests with distinctive knowledge of the locality – planning, economic development, housing strategy (GCC), private housing, social providers and the local community.
- A specific work stream sets out a credible understanding of the flows and connections between the city economic and housing system and the locality (and vice versa) to create a set of expectations and stylised facts about the degree, nature and consequences of the openness of economic and social geography between the two spatial scales (this includes close reflection on the specific agreed boundaries of the locality e.g. are they well defined physical boundaries like the river, or are they more administrative in form e.g. electoral ward or local authority boundary). Thought experiments, subsequently to be tested, could consider how interventions locally (or elsewhere in the Glasgow system) might impact or displace or have less obvious consequences. This work stream would be infused by and incorporate systems thinking insights (Gibb and Marsh, 2019).
- This first stage would also include a full data audit of data sources from the locality and its benchmark Glasgow

system level. This might also include a comparable data audit on a more typical city locality, as we did in this report with Partick.

- The initial stage of the project would round off with a scoping report which sets out initial research questions and identifies likely challenges for the analysis (e.g. the timing leading to the lack of census analysis). The scoping report would lay out the planned approach to the main primary data collection phase.
- We would organise the data collection framework starts with (a) the external drivers of the locality set in the wider city context (demography, economy but also the wider relevant development, regeneration and housing planning context) – this will in all probability involve a combination of reinforcing quantitative and qualitative insights.
- The second part (b) is the close examination of the locality's housing system, considering need and demand, cross tenure, land and development issues and opportunities. The imbalance and balance section draws on key housing indicators (see below) and clusters their magnitudes to provide an interlocking system narrative about the location and severity or pressures that might require interventions to support a more balanced housing system.

What would be the critical indicators of balance and imbalance?

- House prices and rents over time less volatile and growing only by the general rate of inflation (i.e. more neutral with respect to the economy and balancing asset ownership with consumer affordability)
- Affordability outcomes (cost to income ratios, residual incomes etc) should be stable within accepted norms or thresholds with respect to Scotland and the Glasgow average). This should be underpinned by the balance in the local housing system on terms dwellings and households and sufficient new supply, vacancy and turnover to meet newly arising demand and need.
- Homelessness and other housing precarity/disadvantage outcomes should be consistent with the city's capacity to meet its duties and work toward its rapid rehousing and temporary accommodation objectives.
- Housing supply in the locality should be consistent with over time the wider demographic forecasts for household growth across the city and wider region – the locality should make its contribution to the wider goal.
- The wider city region LHSA and the locality are inextricably linked and complement each other. For instance, it is important that the future trajectory of the locality should complement and support the wider Glasgow housing system and not distort, weaken or displace it.

These and other key indicators are conceptualised in terms of contributing to what is called a well-functioning housing system. What does a well-functioning housing system look like in terms of positive characteristics? The recent housing strategy report by the Church of England the Nationwide Foundation (Homes for All: A Vision for England's Housing), drafted by CaCHE researchers led by Alex Marsh identified a

series of key characteristics which we contend stand for the goals of the desired outcomes of a housing system at these more local scales and not just nationally. The report says (2024, p.25) that we can split these characteristics into three groups: home, the housing market and the housing system. We complete this checklist by summarising and paraphrasing these elements.

Homes:

- People live in homes of high minimum standards and provide stable adaptable, secure environments
- Homes provide thermal warmth and energy efficiency
- Homes are affordable in terms of cost to income and residual income
- Genuinely affordable choices for housing exist throughout the life course
- Home ownership should be possible more widely but is not the only measure of housing success or quality
- Housing is regardless of tenure well designed, secure and affordable and residents feel they can exercise meaningful degrees of control.

The housing market:

- We build enough homes to meet existing need and newly arising needs and demands, including sufficient accessible homes
- Sufficient homes are in places where people want to live, and communities have an influence on design and development
- There is sufficient good quality social housing which is a platform for lower income households to build their lives
- There is a thriving high-quality PRS which balances security and affordability with decent rates of return for landlords
- Mortgage regulation is such that the home ownership sector is more accessible but still stable and financially sustainable
- Temporary accommodation is available to those who need it for short periods, and it does not disempower them.

The housing system:

- The different parts of the housing system work together rather than against each other.
- Homelessness is rare, brief and non-recurring.
- House prices and rent rise over time in a more stable or orderly fashion, close to or at the rate of general inflation.
- Housing contributes to and does not inhibit economic growth or performance and housing policy is more integrated into levelling-up and spatial balance strategies, facilitating labour mobility.
- Housing complements other vital social systems such as social care, health care and social security.
- Housing system structures and processes do not amplify social division e.g. discrimination, exclusion and wealth

inequalities.

6.5 Next Steps

First, we will work with our partners to disseminate this research to the local community and stakeholders across the city and beyond who could be parties to building the business case for context-sensitive local residential development.

The city council should, second, consider undertaking a Glasgow wide LHSA which will both provide an aggregate picture of the barriers, opportunities, priorities and processes affecting the housing system and filtered through a valuable lens of systemic interdependencies, feedback, the well-functioning housing system concept, and adaptive learning and appreciation of system dynamics over time. This will also help prioritise other localities where a study like the work done in Govan would be fruitful.

The housing planning team, third, should also draw on this study to undertake a Govan (and Glasgow baseline) analysis of emerging 2022 Census data, as a template to do similar work at well-defined localities across Glasgow

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