



Chartered  
Institute of  
Housing  
Scotland

# Manifesto companion

Data and evidence informing our asks for the next  
Scottish government



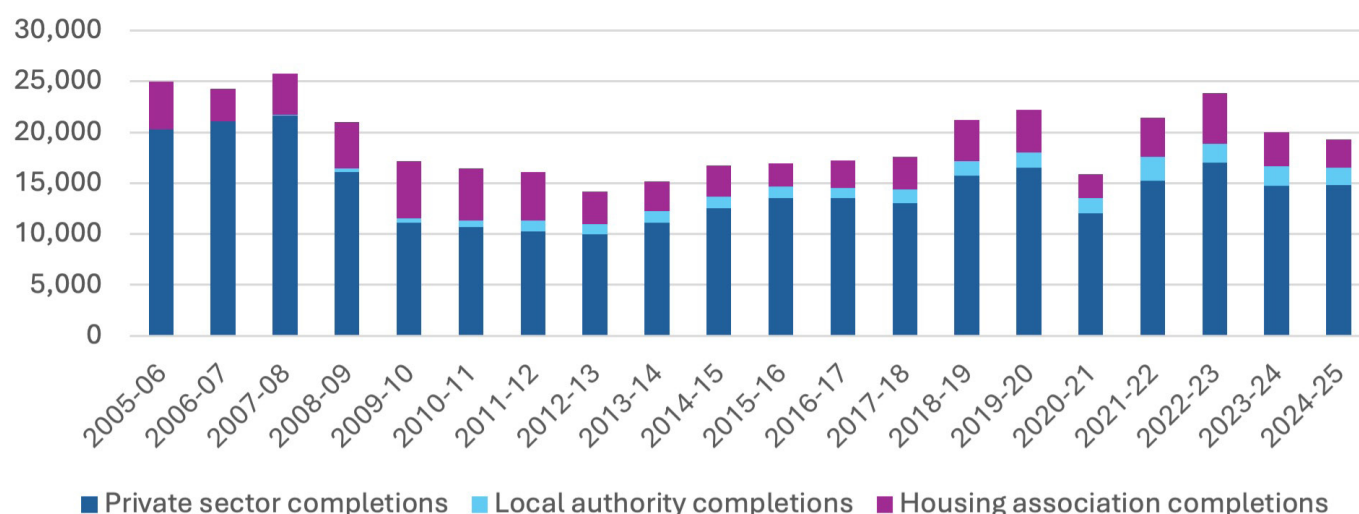
We have purposefully kept our manifesto document as concise as possible, to ensure it is accessible and to the point. However, we value evidence-based decision making, and policy informed by experts so we have compiled this accompanying document full of useful facts, figures and further reading for those of you who would like more information on any of the topics we presented in our Manifesto for Housing 2026.

## Housing supply

We're not building enough homes to meet the growing demand and to tackle the backlog of homelessness cases. Despite some recovery in new build completions following the pandemic, housebuilding has now stagnated, particularly in the local authority sector. Inflation has significantly increased the cost of materials and labour making it more difficult for social landlords to deliver homes within benchmark subsidy levels. The [latest statistics](#) show:

- 19,288 homes were completed across all tenures in 2024/25, down 3.7 per cent from 20,034 the previous year
- Housing associations completed 1,698 homes, down 12 per cent
- Local authorities completed 2,792 homes, down 17.2 per cent.

**Figure one: All tenure housing completions**



**Source:** [Scottish government housing statistics](#)



## Affordable Housing Supply Programme

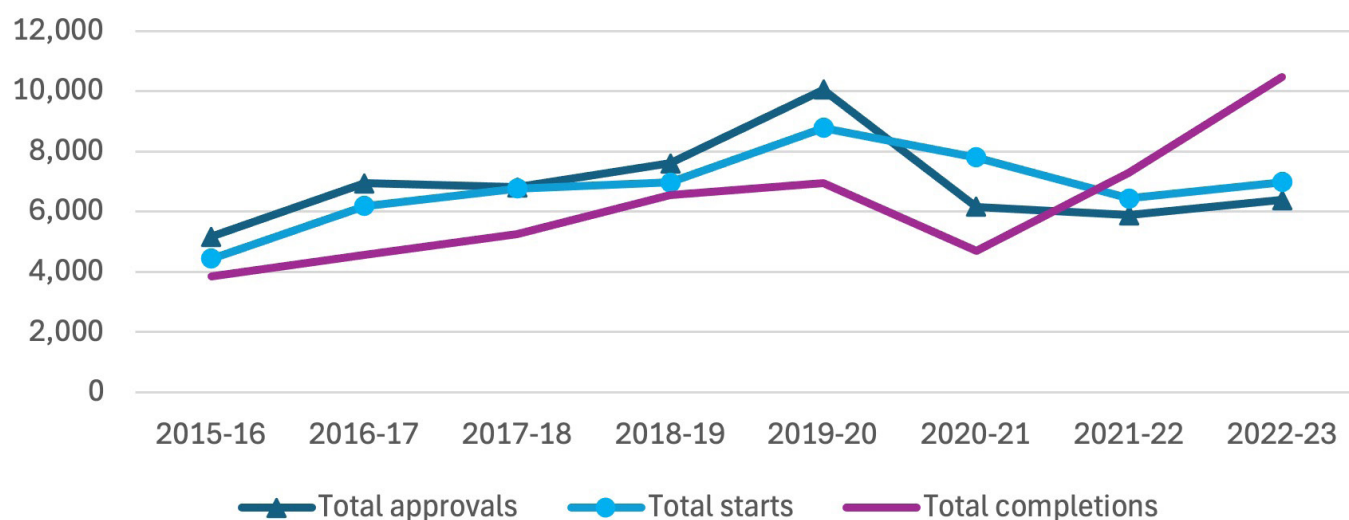
The Scottish government committed to delivering 110,000 affordable homes by 2032. As we approach the elections next year, only 28,537 homes have been delivered through the Affordable Housing Supply programme (AHSP).

A falling number of affordable housing approvals suggests that the downward trend in completions shown in figure one will continue for some time. The latest [AHSP out-turn report](#) for 2022/23 shows:

**Table one: AHSP approvals, starts and completions 2022/23**

	Approvals	Starts	Completions
Registered social landlords	2,665	2,370	5,100
Local authorities	2,408	2,925	2,971
<b>Total</b>	<b>6,396</b>	<b>6,990</b>	<b>10,466</b>

**Figure two: Total AHSP approvals, starts and completions: 2015-2023**



Source: [Affordable Housing Supply Programme out-turn reports - 2015-2023](#)

**Figure three: Total AHSP approvals, starts and completions by landlord**



**Source:** [Affordable Housing Supply Programme out-turn reports - 2015-2023](#)

## AHSP grant funding

The [current Scottish government benchmark rates](#) for social rent and mid-market rent (MMR) came into effect in October 2024. The rates reflect the grant subsidy levels that social landlords should be aiming to work within, but Scottish government guidance does indicate that developments requiring subsidy levels above these rates will be considered.

The percentage of development cost covered by Scottish government grant is crucial to affordability as additional borrowing must be paid for through rents.

The AHSP outturn gives details of the average costs per unit, average grants and borrowing levels. While this shows the grant percentage increasing slightly in recent years, local authorities still receive significantly less grant per home than housing associations.

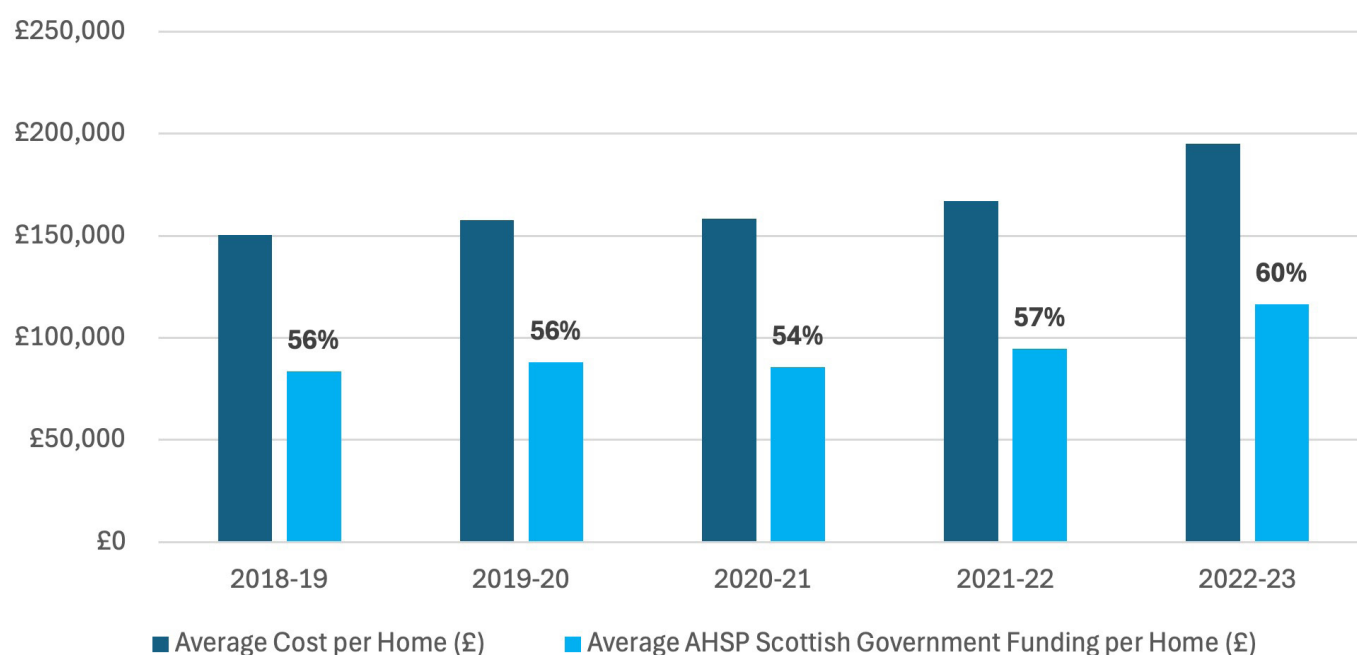
The latest [AHSP out-turn report](#) for 2022/23 shows:

**Table two: AHSP average cost of delivery and source of funding 2022/23**

	Average cost per home	Grant funding	Private finance	Public finance	Percentage covered by grant
Registered social landlords	£195,076.98	£116,600.88	£76,251.20	£2,224.80	60%
Local authorities	£181,622.77	£74,585.45	£86,669.35	£20,367.97	41%



Figure four: AHSP grant funding per home – social rent (2018-2023)



Source: [Affordable Housing Supply Programme out-turn report – 2022-23](#)

### Useful resources on affordable housing supply:

- [Solace/ALACHO report on local authority housing](#)
- [New homes, empty homes and lettings - An early analysis of 2023/24 data returns from social landlords - July 2024](#)



## Affordable housing need

New research published by CIH Scotland and partners has identified a need to deliver 15,693 social and affordable homes each year over the next parliamentary term to tackle the backlog of homelessness and meet emerging needs. The research shows that:

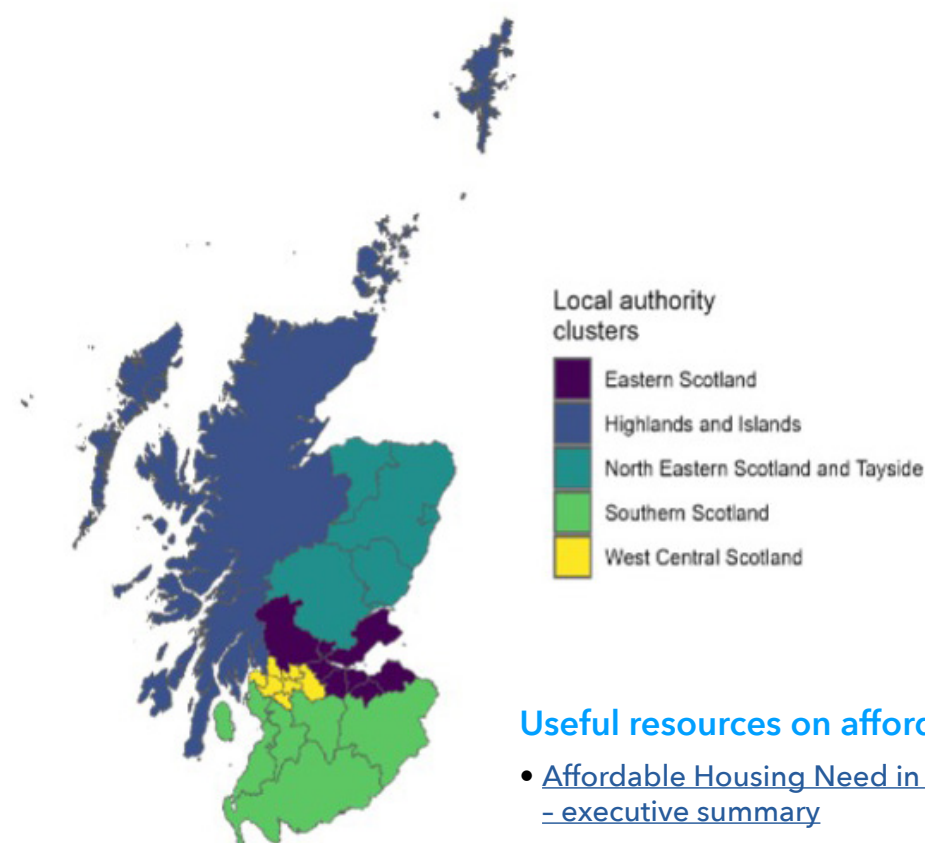
- 55 per cent of newly forming households will not be able to afford market housing.
- The Scottish government must deliver 15,693 affordable homes each year to meet needs.
- Delivery will cost between £8-9.2 billion depending on construction costs and the percentage of social housing delivered.

The report also highlights differing need across Scotland with Eastern Scotland requiring just over half of the identified housing need.

**Table three: Affordable housing need by area**

Local authority cluster	Annual gross affordable requirement	Percentage of total requirement
Northeastern Scotland and Tayside	2,158	13.75%
Highlands and Islands	1,310	8.35%
Eastern Scotland	7,860	50.09%
Southern Scotland	2,011	12.81%
West Central Scotland	2,345	15.00%
Scotland	<b>15,693</b>	

Source: [Affordable Housing Need in Scotland Post 2026](#)



### Useful resources on affordable housing need:

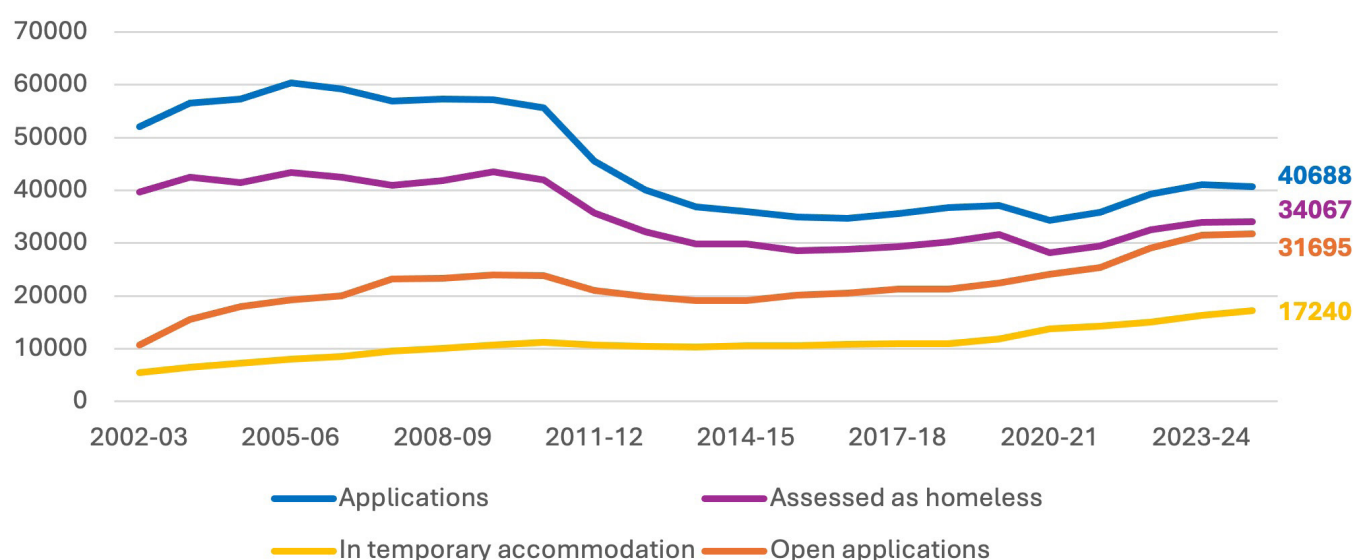
- [Affordable Housing Need in Scotland Post-2026 - executive summary](#)
- [Affordable Housing Need in Scotland Post-2026 - full report](#)

## Homelessness

The number of people experiencing homelessness has been increasing steadily and some local authorities are now regularly breaching statutory homelessness duties. The [latest statistics](#) show a slight reduction in the number of homeless applications but increases in open cases and the number of households in temporary accommodation:

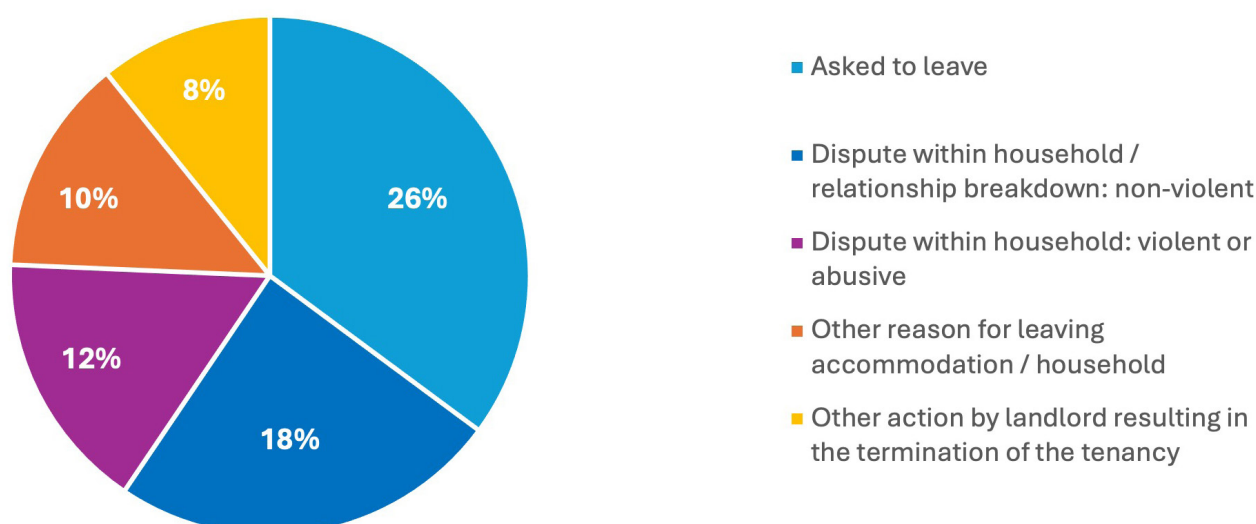
- 40,688 homeless applications made in 2024/25 compared to 41,054 the previous year (-1%)
- 31,695 open cases compared to 31,513 (+1%)
- 17,240 households in temporary accommodation compared to 16,330 (+6%)
- 10,180 children in temporary accommodation compared to 10,360 (-1%)

**Figure five: The number of homeless applications, open cases and households in temporary accommodation**



Source: [Homelessness in Scotland: 2024-25](#)

**Figure six: Five most common reasons for homelessness 2024/25**



Source: [Homelessness in Scotland: 2024-25](#)



The Scottish Housing Regulator has raised concerns about the ability of some local authorities to meet their statutory homelessness duties reporting that several are now in systemic failure. Scottish government statistics show during 2024/25:

- There were 16,485 instances where temporary accommodation was not offered, more than double the previous year (7,995).
- There were 7,850 reported breaches of the unsuitable accommodation order (UAO) across 21 local authorities compared to 7,440 in 2023/24.

## Housing First

The Scottish government committed to scaling up Housing First (HF) with an aim for this to be the default option for everyone who needs it. The latest [quarterly monitoring report](#) from 1 October 2023 to 31 March 2024 shows that:

- 26 local authorities are operating a HF programme, with one additional authority implementing a similar programme.
- 1,820 HF tenancies are estimated to have started across Scotland as of 31 March 2024.
- 986 HF tenancies have started since 1 April 2021. 854 of these remain active. A total of 132 tenancies have ended, none were due to eviction.
- Within active tenancies there are 867 adults and 144 children, with an additional 106 households having access to 167 children but without full-time custody.
- The average time from referral to permanent tenancy is 311 days, with only 18 per cent moving into their tenancy within 50 days.
- 93 per cent of HF households are single people. 39 per cent are aged 35-49.
- Tenancy sustainment rates are at 89 per cent over 12 months after entry.

## Useful resources on homelessness:

- [Ending Homelessness Together action plan](#)
- Rapid Rehousing Transition Plan reporting
  - [Rapid Rehousing Transition Plans: Developing a monitoring framework for local authorities](#)
  - [Rapid Rehousing Transition Plans: Making the case for the next five years](#)
  - [Rapid Rehousing Transition Plans: Improving access to the private rented sector](#)
- Scottish Housing regulation thematic reports on homelessness
  - [Homelessness services in Scotland: A thematic review - February 2023](#)
  - [Update to our February 2023 thematic review of homelessness services in Scotland - December 2023](#)

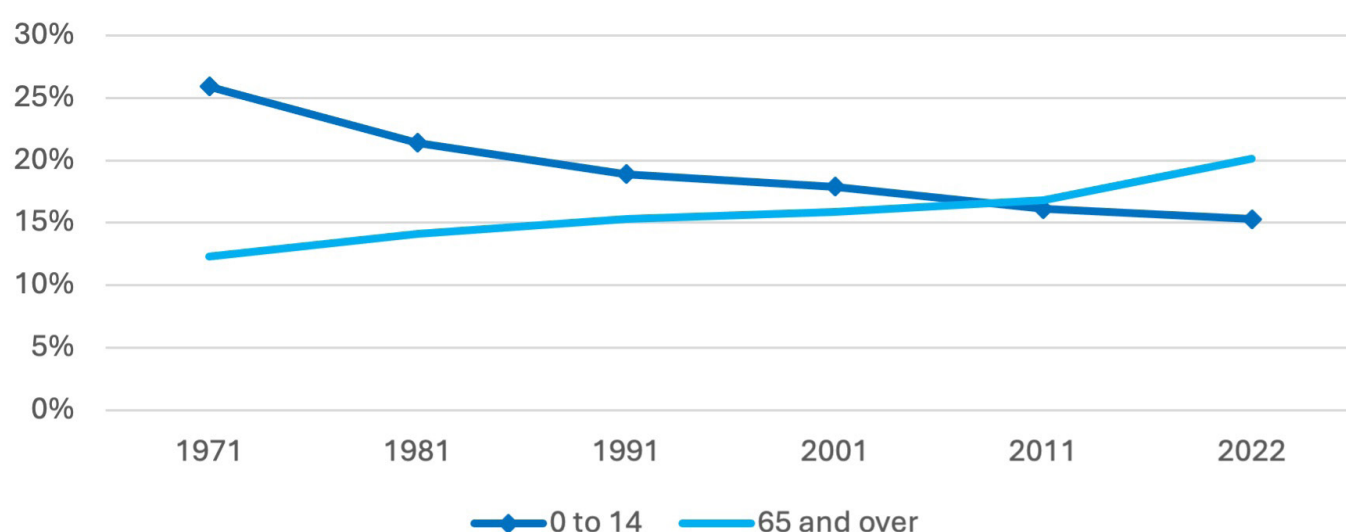
## Meeting people's changing needs

Our population is ageing faster than the rest of the UK, but healthy life expectancy is actually decreasing. The right housing and support services are essential to help people to live well at all stages of life and that investing in preventative measures can save money for our health and social care system and other partners.

### Our ageing population

National Records of Scotland (NRS) publish regular information on population estimates and future projections showing that our population is growing and ageing.

**Figure seven: Age groups as a proportion of Scotland's population**



**Source:** [National Records of Scotland population analysis 2023](#)

NRS estimates that there are now one million people aged 65 and over living in Scotland. The number of people aged 75 and over is projected to increase by around 340,000 by 2047. As people age, their housing needs change and they may be more likely to need extra help to live well and maintain their independence.

Our new research, [What's next for adaptations?](#) Published in partnership with the University of Stirling's ISPA project, SFHA and ALACHO shows an increasing need for adaptations across tenures. The research found:

- The average cost of installing adaptations has increased but this has not been reflected in budgets.
- The need for adaptations is projected to increase from 342,448 in 2022 to 372,627 by 2040.
- Delivery costs are estimated to rise from £68 million per year in 2025 to over £76 million per year by 2040.

### Useful resources on housing and ageing:

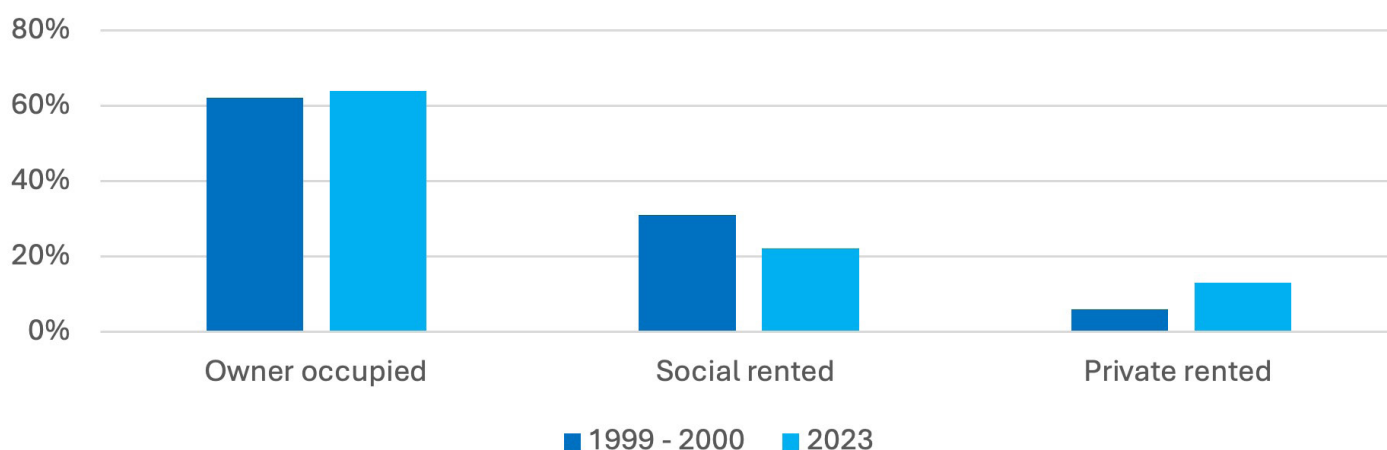
- [Housing for older people in Scotland: A call for discussion](#)
- [What's next for adaptations?](#)
- [Scottish Housing Day 2024 - Homes for Life](#)
- [Age Scotland Housing Report 2023](#)
- [Scotland's dementia strategy](#)

## Our changing households

Since 1999/2000 housing tenure has changed significantly. The latest Scottish Household Survey shows:

- Owner occupied households increased by 19 per cent (+260,000 households)
- Private rented households increased by 175 per cent (+210,000 households)
- Social rented households decreased by 15 per cent (-100,000 households)

**Figure eight: Tenure change as a percentage of households**



**Source:** [Scottish Household Survey 2023](#)

NRS reports that the average household size has decreased in recent years from 2.27 in 2001 to 2.08 people in 2024 and 17 per cent of the population now living alone. It suggests this reflects our ageing population with older people more likely to live alone and more continuing to live in their own home rather than move into a care home.

## Changes in the private rented sector

The private rented sector (PRS) has grown significantly and now provides a home for over 300,000 people across Scotland – it is an essential part of the housing system and our local authority members have told us that we need to make better use of all available homes to address homelessness. However, the PRS is a complex sector made up of thousands of individual landlords which can make it challenging to monitor and enforce standards.

Landlord [registration data](#) shows that there were 349,313 properties registered in July 2025 and 232,922 landlords, an average of 1.5 properties per landlord. While the landlord register provides some interesting insight, landlords are only required to update information every three years so there can be inaccuracies in the data.

Lack of robust data has made it difficult to track changes in the PRS but research is helping to build a better understanding.

The [Rent Better](#) project surveyed and interviewed tenants, landlords and letting agents over a five year period to find out how changing regulations have impacted the sector. It found:

- While most tenants are satisfied, low income renters and those in housing need are more likely to be dissatisfied
- An increasing imbalance between supply and demand is making it more difficult for tenants to find a good quality affordable home



- Over a quarter of tenants reported spending more than 40 per cent of their net income on housing costs
- Rent adjudication is used in under one per cent of private rented tenancies (PRTs) suggesting tenants are unaware of their rights
- Of those who do know their rights many will be unable or unwilling to challenge their letting agent or landlord due to perceived lack of security or a lack of alternative housing options.

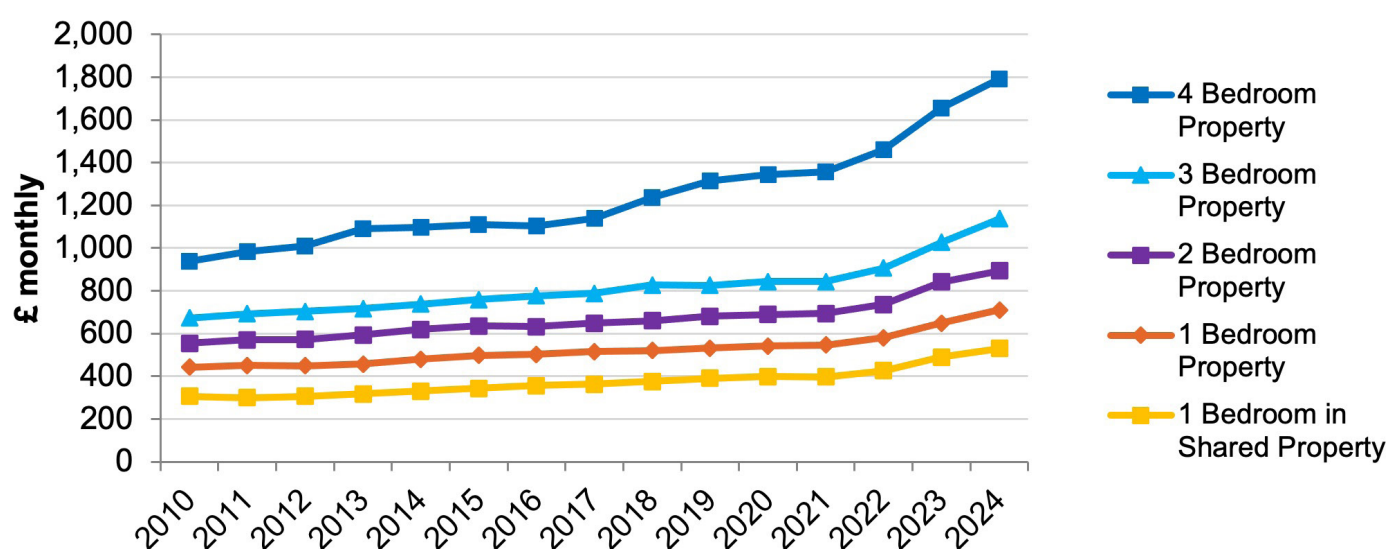
Similarly, a new annual [Voice of the Tenant](#) survey carried out by Safe Deposits Scotland (SDS) found that:

- While 85 per cent of issues reported to landlords or letting agents are fully or partially resolved, very few tenants will escalate a complaint
- 45 per cent of tenants don't know where to turn if their landlord or letting agent fails to resolve a problem
- One in four tenants fear retaliatory eviction.

SDS also intends to publish a regular Voice of the Landlord Survey to track views and experiences of private landlords.

[Emergency legislation](#) introduced by the Scottish government in 2022 in an attempt to protect tenants during the cost of living crisis does not seem to have had the intended impact as rents have continued to increase.

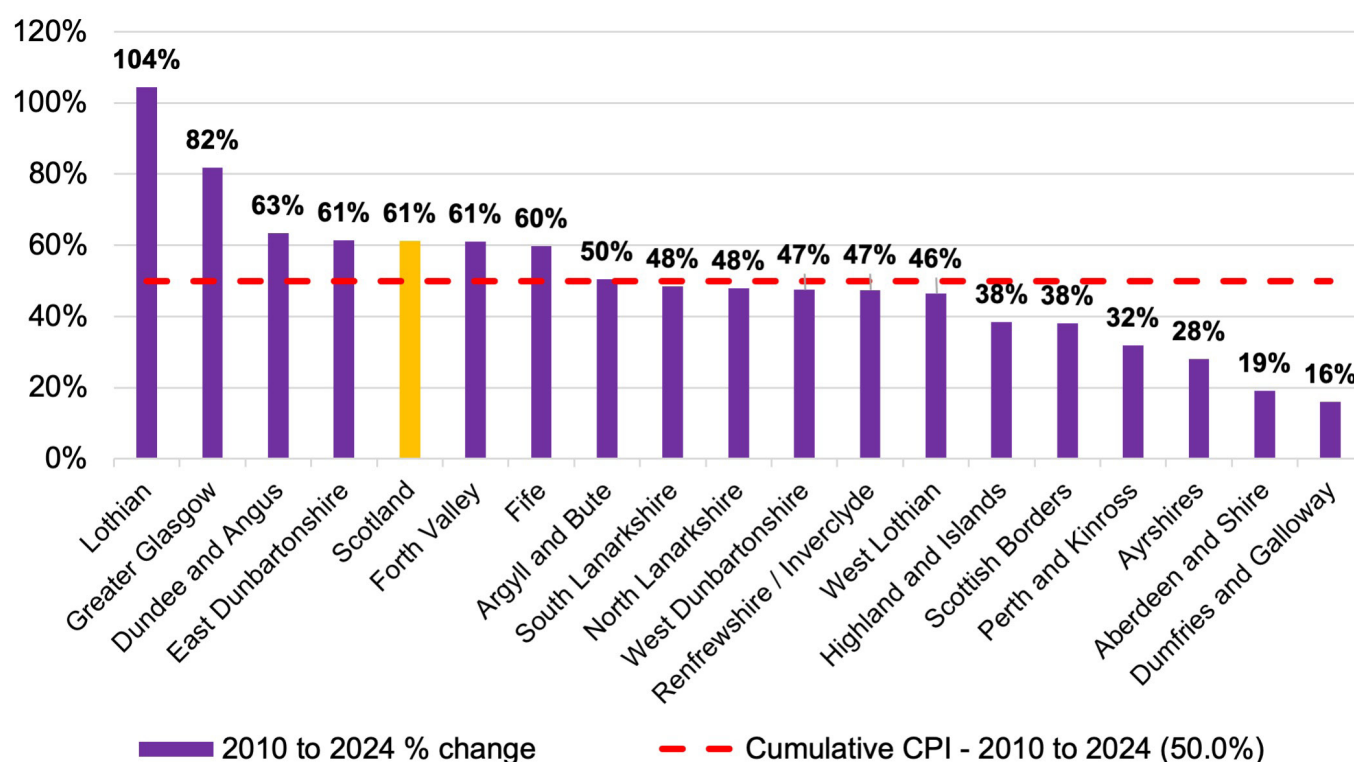
**Figure nine: Average (mean) monthly rent**



Source: [Scottish government private rented sector statistics](#)

However, it should be noted that rents are not increasing at the same rate across Scotland and in many areas, rent has increased around or below inflation.

**Figure 10: Two bedroom properties: 2010 to 2024 percentage change in average (mean) rents**



Source: [Scottish government private rented sector statistics](#)

Affordability remains a key concern and barrier to accessing the PRS. Local housing allowance (LHA) has been repeatedly frozen in recent years making it increasingly difficult for low income households to find suitable accommodation while demand for social housing outstrips demand.

Our [research into LHA shortfalls](#) published in 2024 showed that only one in 12 private rented homes in Scotland would be affordable to recipients of LHA.

### Other useful resources on the PRS:

- [Scottish government PRS statistics](#)
- [Rent Better research findings](#)
- [CaCHE research publications on the PRS](#)
- [Rapid Rehousing Transition Plans: Improving access to the private rented sector](#)
- [Rapid Rehousing Transition Plans: Assessing the affordability of the PRS for LHA recipients in Scotland](#)
- [Voice of the Tenant Scotland](#)

## Poverty rates in Scotland

The Joseph Rowntree Foundation (JRF) closely monitors poverty rates across the UK and annual reports consistently show that more affordable housing in Scotland has contributed to lower poverty rates. However, recent data shows that this positive trend could be starting to change. The latest JRF [statistics on poverty](#) show:

- More than one in five Scots are living in poverty. This includes one in every four children.
- Poverty in Scotland fell rapidly over the decade from 1999-2002 to 2009-12, from 24 per cent (1.2 million people) to a low of 18 per cent (900,000 people).
- Over the following decade the trend in the after-housing costs (AHC) relative poverty rate has reversed, creeping back up to a level of 21 per cent in 2020-23 (1.1 million people).

### Fuel poverty

Despite a [statutory target to reduce fuel poverty](#), rates have increased significantly in recent years due largely to increases in fuel costs. The [Scottish House Condition Survey 2023](#) shows:

- 34 per cent of all households were living in fuel poverty, of which 19.4 per cent were in extreme fuel poverty. This is higher than the 2022 estimates of 31 per cent in fuel poverty but similar for extreme fuel poverty at 18.5 per cent.
- Overall rates of fuel poverty differed between the social sector at 61 per cent of households and private sector at 25 per cent. Similarly, households in the social sector were more likely to be in extreme fuel poverty. 32 per cent compared to 15 per cent of households in the private sector.
- A higher proportion of households with a pre-payment meter (PPM: electricity, gas or both) were in fuel poverty compared to those without a PPM; 57 per cent compared to 31 per cent respectively.

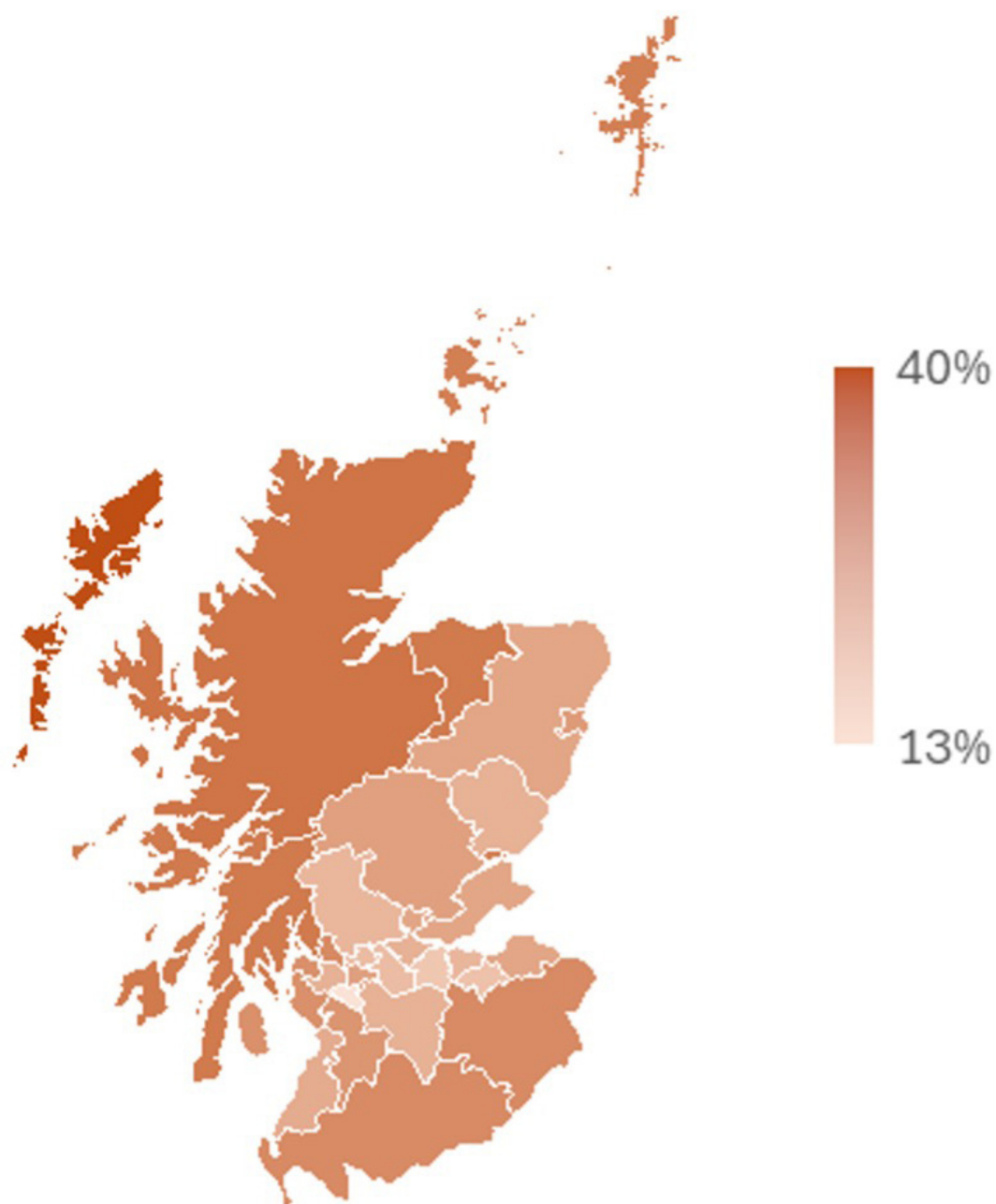
The higher rates of fuel poverty in the social rented sector, despite homes having a better average energy efficiency rating than those in the private sector, reflects the impact of other factors such as low income on fuel poverty rates.

Local authority level information on fuel poverty rates is limited due to gaps in data collection during the pandemic. However, looking back to the 2017-2019 data provides a useful picture of how fuel poverty rates differ across Scotland with the darker areas of the map on the next page representing the populations with the highest levels of fuel poverty. These are most concentrated in rural and island areas with Comhairle Nan Eilean Siar recording the highest rate at 40 per cent of households.





Figure 11: Percentage of households living in fuel poverty by local authority 2019



Source: [Scottish House Condition Survey local authority tables 2017-2019](#)

#### Useful resources on fuel poverty:

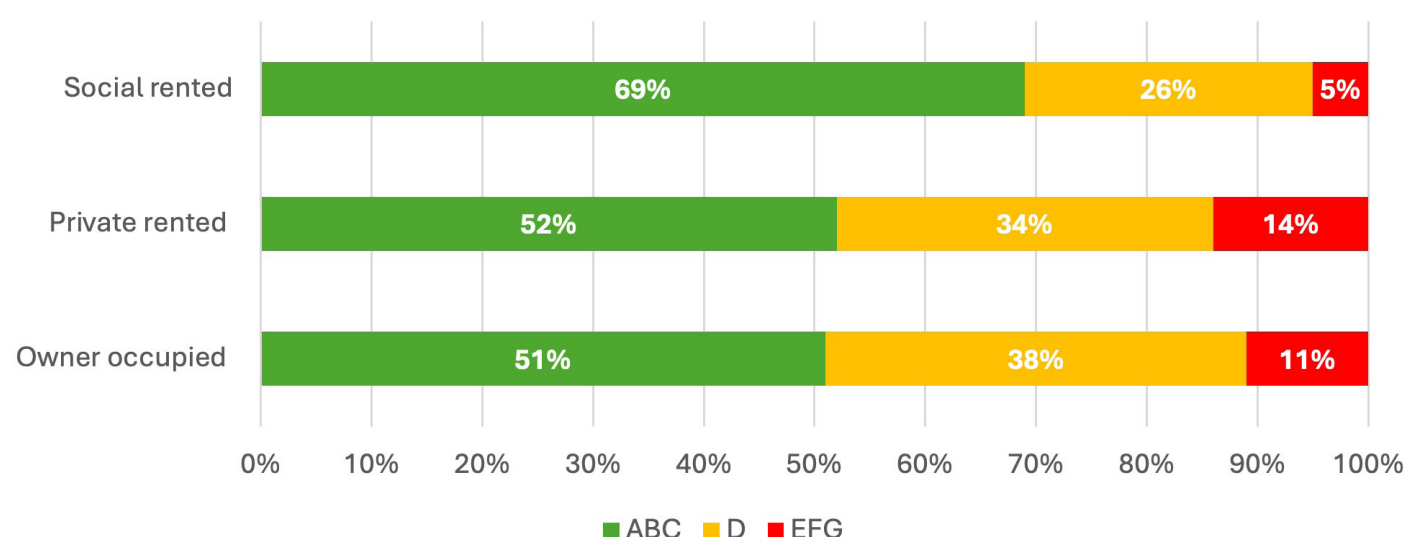
- [Scottish government fuel poverty strategy](#)
- [Scottish Fuel Poverty Advisory Panel](#)

## Energy efficiency and net zero

The Scottish government has a [statutory duty](#) to meet net zero emissions by 2045 and has set out plans for the decarbonisation of homes and non-domestic buildings in the [Heat in Buildings Strategy](#). Meeting the target will require work to improve the energy efficiency of homes so they require less energy to heat, and the majority of homes switching to a renewable energy heat source such as heat pumps or heat networks. It estimated that decarbonising homes and buildings would cost around £33 billion, but since its publication in 2021 inflation is likely to have significantly increased this figure.

Social landlords have been required to work towards minimum energy efficiency standards through the Scottish Housing Quality Standard (SHQS) which was replaced by the Energy Efficiency Standard for Social Housing (EESH) in 2014 and EESH2 in 2021. A new minimum standard is still under consultation but the drive towards energy efficiency over the last decade means that social housing has a better EPC rating than other tenures.

**Figure 12: Percentage of homes by EPC band and tenure**



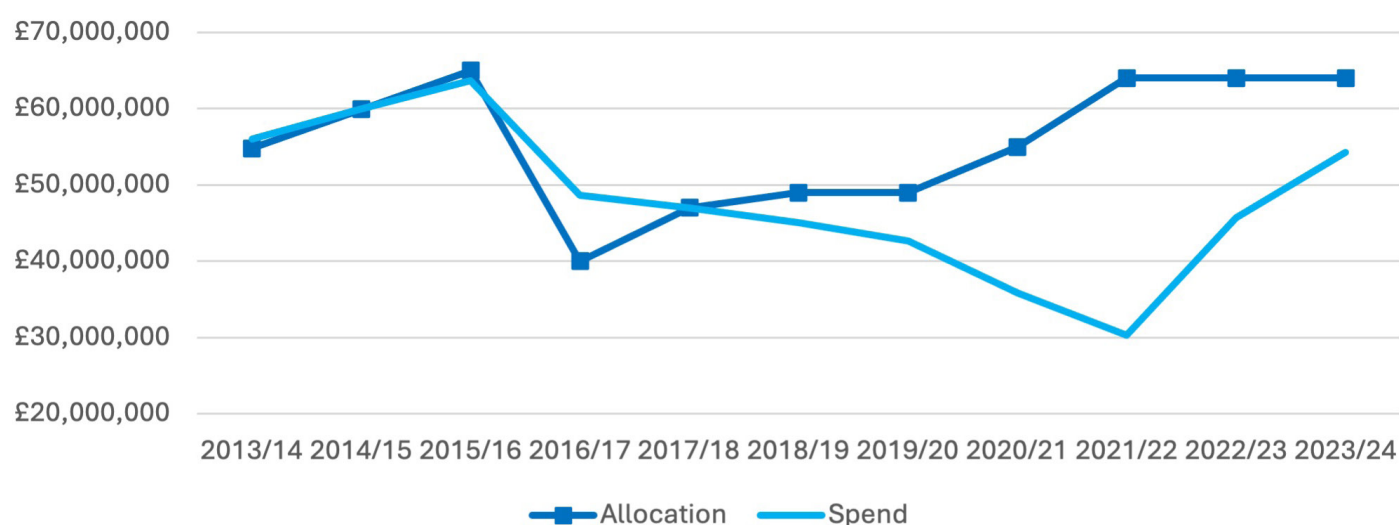
**Source:** [Scottish House Condition Survey 2023](#)

### Scottish government investment in energy efficiency

The Scottish government provides funding to local authorities to target energy efficiency measures in areas with high levels of fuel poverty. The Area Based Schemes (ABS) encourage a cross tenure approach providing an opportunity for owners and other social landlords to opt in, often with financial support. The Scottish government reports that its investment of almost £675 million since 2013 has supported over 125,000 households.

Local authority spend on ABS dipped during the COVID-19 pandemic but has started to recover.

**Figure 13: Area based schemes funding allocation and spend**



**Source:** [Scottish government area based schemes reporting](#)

The [Social Housing Net Zero Heat Fund](#) (SHNZHF), which was introduced in 2020, has made up to £200 million available up to 2026 to support social landlord energy efficiency and renewable heat projects.

Information on other Scottish government funded schemes including Home Energy Scotland loans for homeowners, Warmer Homes Scotland fuel poverty programme and the PRS landlord loan scheme is published in the [Heat in Buildings progress report](#).

## Meeting net zero

The Climate Change Committee (CCC) published regular progress reports on Scotland's journey to net zero across all sectors. The [latest report published in 2024](#) indicated that the Scottish government has repeatedly missed annual targets and the interim 2030 target of a 75 per cent reduction in emissions is no longer credible. It called on the Scottish government to urgently re-assess its climate change strategies and delivery plans. Specifically in relation to housing it highlighted:

- Just over 6,000 domestic heat pumps were installed in 2023, less than half the amount the CCC believe is required for a net zero trajectory
- The number of households receiving government-funded energy efficiency measures has fallen from a peak of 71,000 in 2013 to 7,600 in 2022.

The Green Heat Finance Taskforce has highlighted the financial challenge for social landlords in delivering net zero. Its [second report published in 2025](#) estimates that after accounting for other running costs, social landlords only have a surplus of just £120 million for investment in capital programmes. This calls into question the sector's ability to meet costs without further government investment.

## Useful resources on energy efficiency and net zero:

- [The Existing Homes Alliance regularly publish research and insights on retrofitting](#)
- [Climate Change Committee reports and recommendations to the Scottish government](#)
- [Scottish government reporting on energy efficiency schemes](#)
- [Green Heat Finance Taskforce: report - part 2](#)



## The housing profession

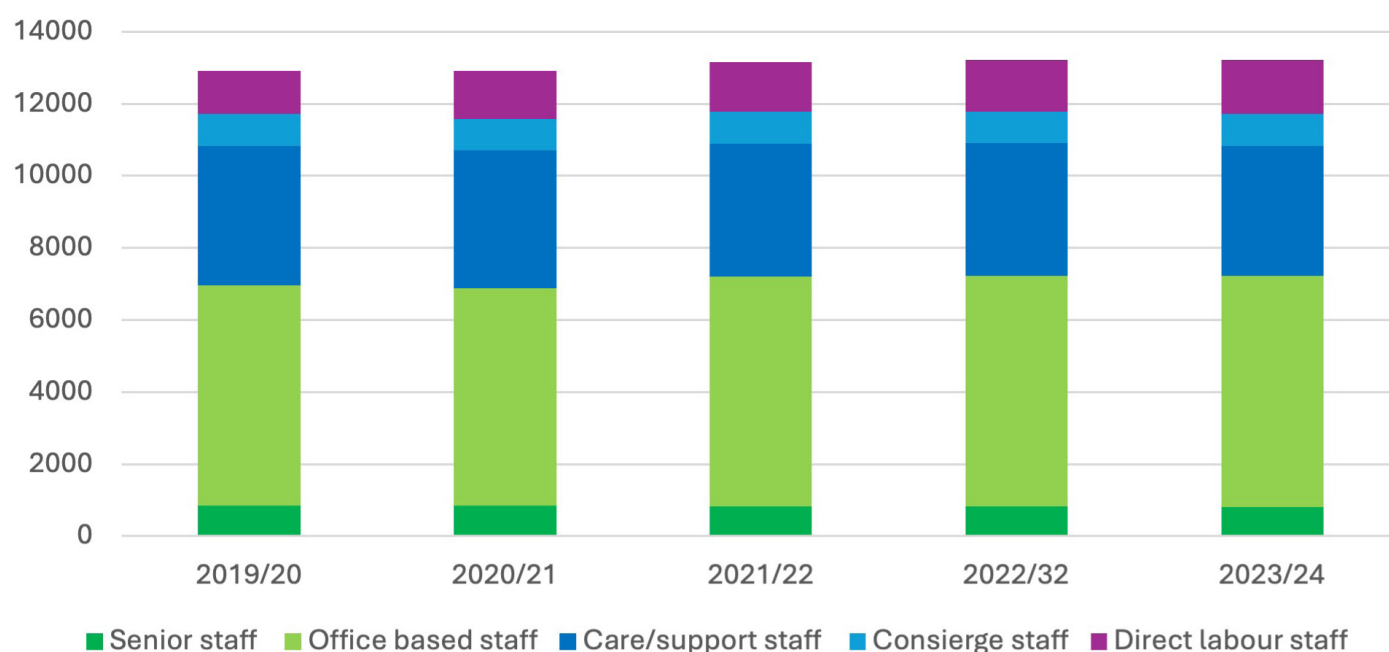
Housing practitioners provide vital services delivering new homes, supporting tenants and the wider community – but there is relatively little information available on the workforce and we don’t have a national workforce development strategy. However, CIH research and membership data does provide some useful insight.

CIH is the UK’s biggest housing professional network and we began gathering data on our members in 2022 to better understand the characteristics of the housing workforce. Findings from the [2024 UK census](#) show:

- 63 per cent of our members identify as female compared to 51 per cent of the UK population
- 13 per cent identify as Global Majority compared to nine per cent of the UK population
- 13.3 per cent have a disability compared to 20.9 per cent of the UK population
- 13 per cent are LGBTQIA+ compared to around three per cent of the UK population
- Our largest age group is 45-54 while the median age of the UK population is 40.7
- 11 per cent of our members speaks, reads or can write Cymraeg, Gaelic, Irish or Scots.

The Annual Return on the Charter provides some data on staffing levels in the social housing sector, but only for housing associations not local authorities. 13,221 people were employed by housing associations in 2023/24, an increase from 12,910 in 2019/20.

**Figure 14: Housing association employees by type 2019/20 - 2023/24**



**Source:** [Charter data, all social landlords complete dataset 2019/20 - 2023/24](#)

The letting agent sector is the only part of the housing system with a requirement for [mandatory qualifications and continuous professional development](#) (CPD) for some staff. Independent evaluation of letting agent qualifications and CPD commissioned by CIH found that the requirements had a positive impact on professionalism:

- 87 per cent of respondents indicated that undertaking a qualification had a positive impact on their own professional capabilities
- 93 per cent reported that CPD had a positive impact on their professional capabilities
- 95 per cent indicated that qualifications had a positive impact on employees
- 89 per cent felt that qualifications had a positive impact on their business generally.

### Useful resources on the housing profession:

- [Scottish Housing Regulator statistics on landlord performance](#)
- [Review of letting agent qualifications and CPD](#)



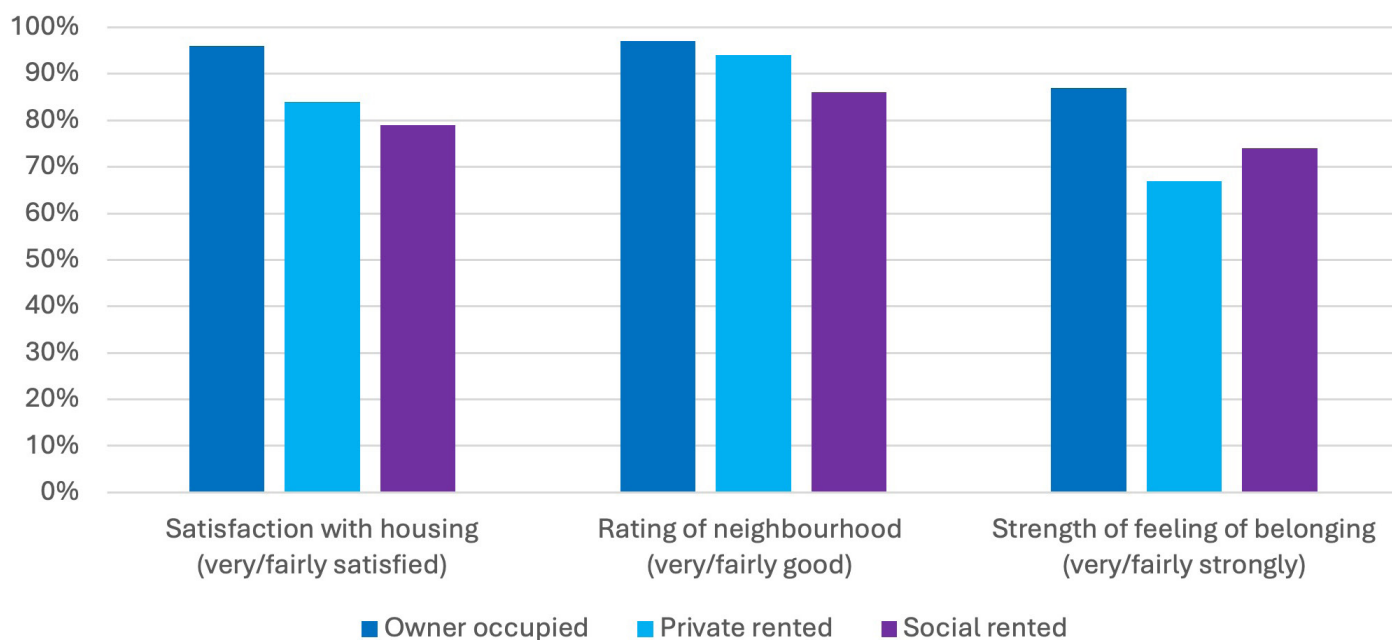
## Satisfaction with homes and communities

The vast majority of residents are happy with their housing and their communities, though opinions differ across tenures. The [Scottish Social Housing Charter National Report 2023/24](#) finds that:

- Almost nine out of 10 tenants are satisfied with the homes and services their social landlord provides
- 84 per cent of tenants are satisfied with the quality of their home
- 82 per cent find that their rent is good value for money
- 85 per cent of tenants are satisfied with their landlord's contribution to neighbourhood management

The Scottish Household Survey provides information on neighbourhood satisfaction by tenure.

**Figure 15: Housing and neighbourhood satisfaction by tenure 2023**



Source: [Scottish Household Survey 2023](#)

### Useful resources on resident satisfaction and attitudes:

- [Scottish Household Survey publications](#)
- [Scottish Housing Day report - Everybody Needs Good Neighbours](#)
- [National Panel of Tenants and Service Users](#)





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