

Authority Monitoring Report

AMR17

Companion Report – Underpinning Housing Market &
Population Evidence Report

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Review of latest housing market & population evidence

This report acts as a companion to the 2022-24 AMR and as part of the wider evidence update for the Local Plan. It continues and updates presented in the 2021/22 AMR.

House Price Context

The Local Plan identified a series of concerning issues that have clear links relevant to how the housing market operates on Scilly. In recent years there has been an acceleration of trends towards a greater use and demand of housing stock as holiday accommodation. For areas where there is an existing reliance on tourism, as in the case of the Isles of Scilly, it has resulted in a greater pressure on the use of housing of the islands from 2020.

This section updates the key context and sets out some of the contributory factors that led the Council, as of January 2022, to declare a 'housing crisis' across the islands.

The housing pressures that the Local Plan identified are likely to have been exacerbated, in part, as a result of the Covid pandemic. There is continuing evidence of population decline on St Marys, focused on Hugh Town from 2011 to 2021. The latest context to these issues and the response in terms of planning applications for accommodation is examined in the main AMR report.

The focus of this report is changes to the housing stock and establishing the relationship between this and population change. Data from the land registry is shown in the table below. This shows actual prices paid for sales.

Year	Detached	Semi-detached	Terraced	Flat	Overall
2011	£463,333	£377,50	£340,657	£251,400	£340,388
2012	£357,312	-	£390,625	£325,000	£365,077
2013	£497,500	£351,09	£240,000	£201,667	£326,859
2014	£384,625	£370,33	£304,500	£209,687	£291,842
2015	£309,875	£280,00	£328,750	£245,167	£286,594
2016	£428,125	£385,00	£352,500	£219,808	£295,937
2017	£456,800	£362,500	£391,667	£224,541	£320,824
2018	£520,000	£500,00	£314,700	£195,731	£346,285
2019	£435,000	£295,00	£280,000	£296,786	£344,868
2020	£572,565	-	£488,750	£237,916	£416,355
2021	£584,000	£475,000	£451,143	£257,150	£396,717
2022	£533,333	£537,50	£531,000	£210,000	£488,000
2023	£700,000	£310,00	£540,000	£275,000	£519,000

Table 1 Actual prices paid house sales 2011-2023.

House prices on Scilly can be skewed by individual sales –there have only been 2 sales recorded for 2024 (as of June 2024). Average prices across Scilly fluctuated but were broadly similar in 2011 and 2019 at £340k and £344k respectively. From 2019 to 2023 the average price increased by 50% (£174,000) to ££519k.

The Isles of Scilly had the 15th highest (out of 318 England and Wales local authorities) average house price for the year to Sept 2023.

Population Context Census totals

The main estimates for population for the Isles of Scilly by the Office for National Statistics (ONS) following the results of the 2021 Census are set out for 2001, 2011 and 2021. This shows a population increase for 2001-2011 and a fall from 2011-2021. While the population on St Marys grew by 3.4% from 2001-11 (an increase of 57 people), Tresco and St Martins had small falls in population, and Bryher and St Agnes a very small increase.

From 2011 to 2021 Tresco’s population fell by 13.1% (23) and St Mary’s population fell by 7.5% (130). Bryher and St Agnes saw 5 more people and the St Martin population was unchanged. Overall, the Islands as a whole saw a population decline of 7.1% or 148 less people from 2011-21.

Island	Sub Area	2001	2011	2021	2001-2011	01-11%	2001-2021	01-21%	2011-2021	11-21%
Bryher and St Agnes	Bryher and St Agnes	165	169	174	4	2.4	9	5.5	5	3.0
St Martin’s	St Martin’s	142	136	136	-6	-4.2	-6	-4.2	0	0.0
Tresco	Tresco	180	175	152	-5	-2.8	-28	-15.6	-23	-13.3
St Mary’s	Telegraph Hill	292	277	294	-15	-5.1	2	0.7	17	6.1
St Mary’s	Garrison Sandy Banks (Split	272	285	252	13	4.8	-20	-7.4	-33	-11.6
St Mary’s	Carn Thomas & School	254	284	253	30	11.8	-1	-0.4	-31	-10.6
St Mary’s	Church Street/Buzza Hill	277	276	235	-1	-0.4	-42	-15.2	-41	-14.9
St Mary’s	Old Town Airport	306	349	349	43	14.1	43	14.1	0	0.0
St Mary’s	The Bank/The Parade	265	252	210	-13	-4.9	-55	-20.8	-42	-16.7
Total	St Mary’s	1,66	1,72	1,59	57	3.4	-73	-4.4	-130	-7.5
Total	IOS	2,15	2,20	2,05	50	2.3	-98	-4.6	-148	-6.7

Table 2: Sub area population changes

Data used is at output area level. This combines Bryher and St Agnes into one, there are separate outputs areas for St Martins and Tresco. St Mary’s is split into 6 smaller areas¹.

¹ Census Data accessed via Nomisweb: ONS

Latest Post -Census Data: Mid-year estimates

ONS have revised previous estimates for the period 2012-2020 and released mid-year estimates for 2021 and 2022. The results of this revision are a reduction in the estimated population for each year 2012-20 as follows:

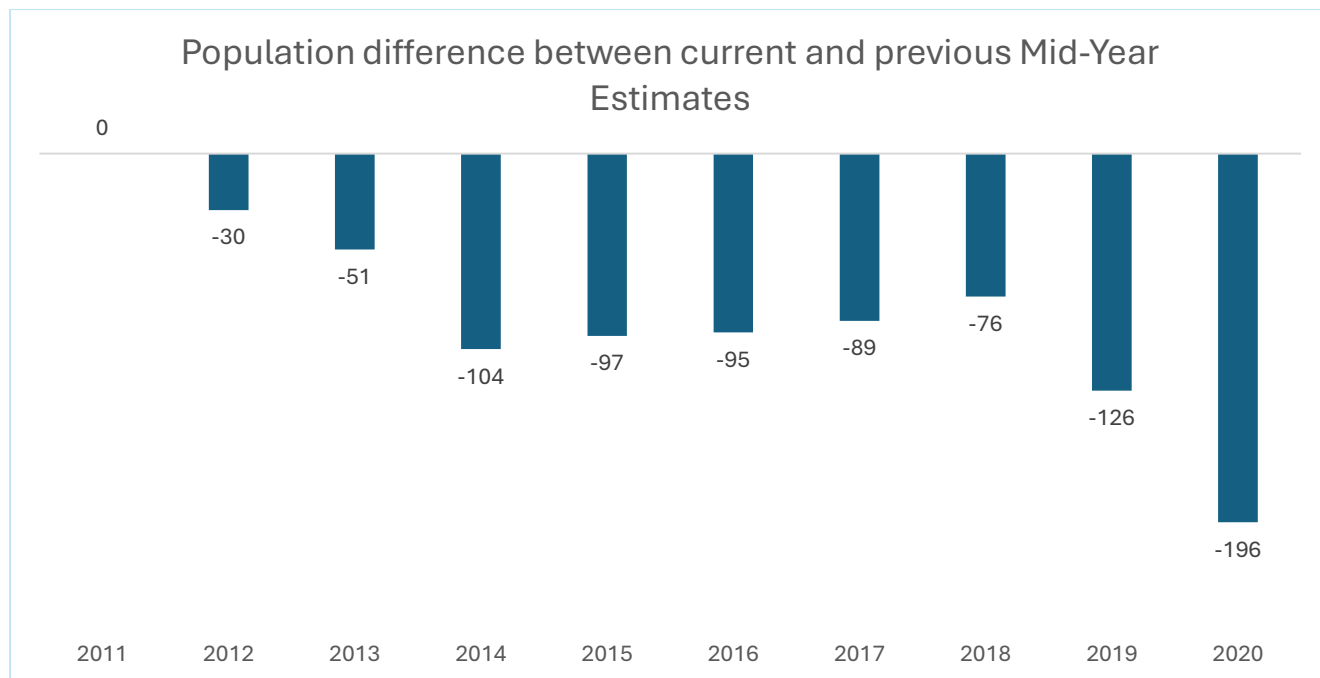


Figure 1 Population difference between current and previous Mid-year estimates.

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Current	2224	2249	2214	2188	2238	2236	2170	2166	2098	2030	2271	2281
Previous	2224	2279	2265	2292	2335	2331	2259	2242	2224	2226		

Table 3 The current and previous total population estimates for the Isles of Scilly

ONS estimates a significant increase in the population between 2020 and 2021 reversing the average annual change from 2011-2020 (which was a fall of 21 people a year). This is more extreme as in essence ONS suggest the population of the islands increased from Mar 2021 (2,055) to the end of June 2021 (2,271) an increase of 216 people in 3 months.

	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
Annual Change	25	-35	-26	50	-2	-66	-4	-68	-68	241	10

The 2020/21 estimated increase of 241 people – a percentage increase of 12% could be explained with behaviours associated with Covid lockdown, where more people may have registered with family on the IoS during lockdown or occupied second home/ holiday accommodation – as their permanent residence. This could

have caused a temporary increase in the population, although the official population estimates are assuming that this increase has been maintained into 2022. The 2023 estimates are not due to be released until later in 2024.

If a population increase of this scale had happened, it is expected that the Council would be able to confirm this.

Supporting data for the mid-year estimates show an additional 300 people moving to the Isles of Scilly in 2020/21. An alternative explanation for this very significant increase could be an error by ONS. The following table shows the differences between the actual figures and the average for 2012-20 and 2020/21 and 2021/22.

	Difference 2012-20 and average 2020/21	Difference 2012-20 and Average 2021/22
Births	1	-2
Deaths	-4	0
Natural Change	5	-2
Internal In	-298	-161
Internal Out	1	-142
Internal Net	-299	-19
International In	6	3
International Out	5	-14
International Net	0	16
Special	0	0
Unattributable	29	-26
Other	2	-1

Table 4 Population changes 2012-20 and 2020-21 and 2021-22

For 2020/21 in-migration was just under 300 higher than the long-term average, although out-migration was in essence the same. For 2021/2 in-migration was still considerably higher than the long-term average (+161) but has been balanced out in part by a significant increase in that years out migration (+142).

Implications for Local Plan approach & review

The Census data is clear – the population declined between 2011 and 2021. While subsequent growth may have occurred in 2021 and 2022, the scale of this growth seems extreme and could only be accommodated by a dramatic shift of occupation of otherwise holiday or vacant accommodation. The presence of a further 240 people in 2022 would likely have had a significant impact on local services. The Council will need to take a view on how realistic these latest estimates are and the impact on housing policy if they are.

Housing Stock Changes

The 2001 Census recorded 1,198 household space, 881 of which were occupied dwellings, with 19 recorded as vacant and 298 as second homes/holiday

accommodation. The 2011 Census reveals 1,389 household spaces² and 989 of these were occupied. 400 had no usual residents.

The 2021 Census sets out 1,297 household spaces, or which 942 were occupied, and 355 recorded as having no permanent resident.

Housing Stock Alternative Sources

Alongside this emerging Census data, we have explored experimental statistics from ONS³. This considers Valuation Office Agency (VOA) data but is introduced as follows: “These are not official statistics and should not be used for policy-making or decision-making. They are published as feasibility research into a new method for producing census-like statistics on housing using administrative data.” ONS advise caution when using the data.

It sets out all stock and occupied stock data and suggests a larger decrease in occupied stock than the Census (the data is for 2020). This suggests a slightly higher figure than the 2021 Census recorded of circa 950 occupied dwellings.

It also sets out a figure at 380 broadly in line with the 2021 census unoccupied dwelling figure.

Area	Total Dwellings	Occupied Stock	Implied Unoccupied Stock	% Unoccupied
Bryher/St Agnes	104	72	32	30.8%
St Martins	76	54	22	28.9%
Tresco	95	73	22	23.2%
St Mary's	1,023	924	356	27.4%
IoS	1,298	942	356	27.4%

Table 5: 2021 Census implied unoccupied dwellings

	House: Detached	House: Semi-Detached	House: Terraced	Purpose built block of flats	Flat: Part of a converted or shared house	Flat: in a commercial building	Annexe	Unknown	Total
All Addresses	340	210	230	60	150	70	10	80	113
Occupied Addresses	230	160	160	40	80	40	[c]	30	750
Percentage Occupied	110	50	70	20	70	30	-	50	380

Table 6: Occupied/Unoccupied by house type

	1-bed	2-bed	3-bed	4-bed	5 or more	Unknown	Total
All addresses	200	330	390	90	50	+70	1130

² In census terms a household space is the accommodation used or available for individual household occupation – household spaces can have a number of usual residents or be without usual residents - a proxy for second homes or empty homes.

³ 2020 Experimental Statistics on Housing Stock and Occupied Housing Stock

Occupied addresses	120	210	290	60	40	30	750
Difference	80	120	100	30	10	40	380
Percentage Unoccupied	40%	36.4%	25.6%	33.3%	20%	57.1%	33.6%

Table 7: Occupied/Unoccupied by house size

Self-Catering Holiday Accommodation

The Islands Partnership estimate that between 2012 and 2019 there was an increase in the number of self-catering units from 382 to 567 (186 or 48%). These estimates did not change in 2020 (567 units) but in 2021 increased to 736 units a change of 30% in a year.

There have been no subsequent estimates from the Islands Partnership available, and the sourcing of this estimate is not clear. This issue is clearly important to driving aims and ambitions of the Local Plan. The 2011 census suggested 400 unoccupied household spaces, and in 2021 the equivalent was 355. Further work to understand the differences in these estimates would be a key part of the Local Plan review.

Non-domestic Business Rates identified 344 properties that are classed as self-catering units across the islands as a whole. According to this data, Hugh Town has 152 of these self-catering units.

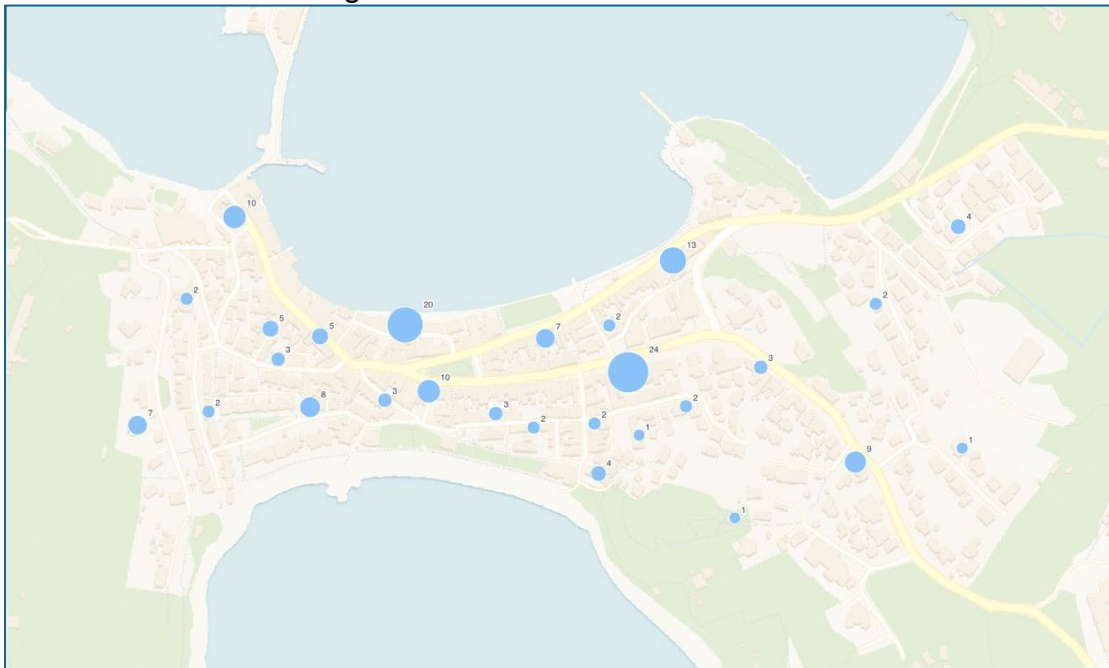


Figure 2: Distribution of Self-Catering Units in Hugh Town Postcode 2021. Created by Understanding Data in QGIS. Using data from Council Business rates and OS & Carto basemap

Council Tax records

Council Tax data is sourced from the published council Tax Statistics and the total Council Tax stock and chargeable stock for the Isles of Scilly is set out below. There has been both a total and a chargeable stock decline from 2015 to 2023. This data implies a fall of 49 and 58 units respectively since 2015. Both categories increased from 2022-23 by 6 and 9 respectively.

This can be seen in more detail in terms of Council Tax banding below with a greater loss of higher banded properties, which are typically larger in size.

Band	2015	2023	Difference	%
A	15	13	-2	-13.3
B	35	34	-1	-2.9
C	92	95	3	3.3
D	260	267	7	2.7
E	339	328	-11	-3.2
F	301	273	-28	-9.3
G	148	132	-16	-10.8
H	10	9	-1	-10.0
TOTAL	1,200	1,151	-49	-4.1

Table 5 All Council Tax Stock Change by Banding (2015-2023)

Band	2015	2023	Difference	%
A	15	12	-3	-20.0
B	35	31	-4	-11.4
C	90	94	4	4.4
D	258	266	8	3.1
E	339	324	-15	-4.4
F	299	269	-30	-10.0
G	146	129	-17	-11.6
H	10	9	-1	-10.0
TOTAL	1,192	1,134	-58	-4.9

Table 6: Chargeable Council Tax Stock Change by Banding (2015-2023)

There has been an ongoing reduction in available stock both in total and chargeable Council Tax stock. Council Tax statistics published nationally, record deletions from the overall stock if a property has changed to non-domestic use. Since 2015 this amounts to 110 dwellings overall, but it should be noted that the data is only published in a rounded form to the nearest 10, and this rounding is amplified as the data is published annually not for the whole period.

Using more detailed local data for the period since 2017-22 there have been 68 switches from domestic use. These are largely concentrated in Hugh Town (40) and these are shown below by postcode.



Figure 3 Domestic properties switched to non-domestic since 2017. Created by Understanding Data in QGIS using data from Cartodb, OS & Council of the Isles of Scilly.

Vacant Properties

It should be noted that there was an increase in vacant properties recorded by Council Tax statistics from 8 in 2015 to 44 in 2023 (peaking in 2020 at 45). This included 7 local authority (LA) owned vacant properties in 2020, this reduced to 0 in 2023. Long term (LT) vacancies fell from 31 in 2020 to 24 in 2023, but there were 0 during 2015-17.

	2015	2016	2017	2018	2019	2020	2021	2022	2023
All Vacancies	8	10	7	28	42	45	43	44	44
LT vacancies	0	0	0	9	22	31	28	24	24
LA owned vacancies	1	0	1	3	0	7	4	0	0

Table 7 Council Tax Vacant Properties 2017-2022

Issues

There appears to be a very clear trend of an increasing amount of self-catering holiday accommodation for the Isles of Scilly, although, there is no single definitive list of holiday accommodation. This increases pressure on housing stock availability. AMR issues include:

- The overall number of chargeable Council Tax stock has decreased by 67 since 2017 with the 2022 total being 1125.
- There has been a significant increase in recorded self-catering stock according to the Island Partnership by 169 from 2020 to 2021 to a total of 736 units.

- The 2011 Census recorded 400 unoccupied household spaces. The 2021 Census records 355 unoccupied dwellings.
- There are 344 self-catering units recorded by Business rates data.
- There appears to have been a significant shift in recorded in migration in 2021/22 which has acted to increase the population by around 240 in a year. This needs further confirmation.
- The available housing stock data does not appear to support a population increase in 2021/22.

END