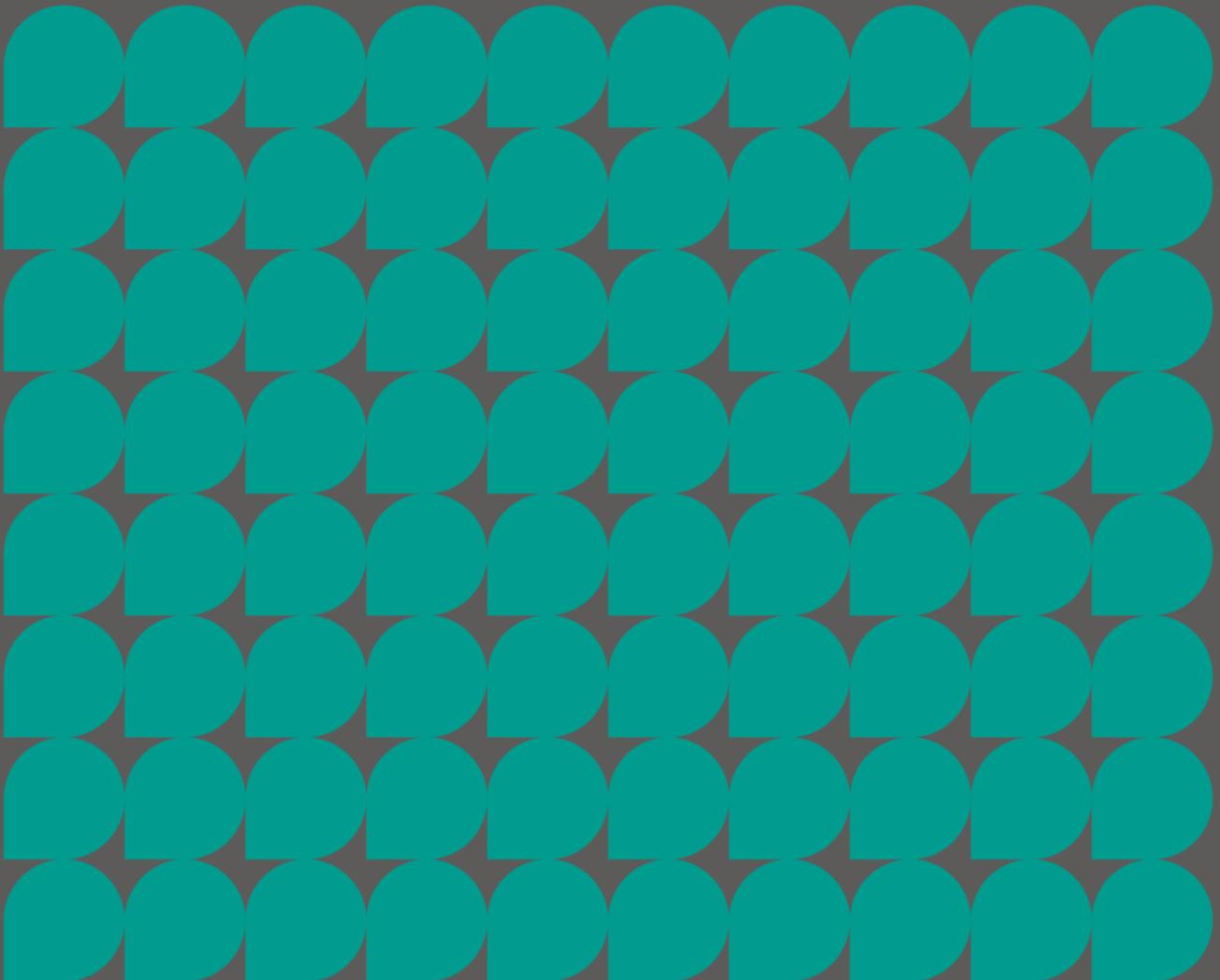


Existing Land Supply & Transport Technical Note Addendum

Places for Everyone - June 2021



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Technical Note Addendum

1. Introduction

- 1.1. The Existing Land Supply and Transport Technical Note was produced in October 2020 and was based on draft 2018 figures. This addendum is a review of the 2020 note following the publication of the final Greater Manchester Existing Land Supply figures for 2020.
- 1.2. The conclusions of the previous report remain broadly the same, although some changes have occurred due to the rolling nature of Greater Manchester's 5-Year land supply.
- 1.3. This summary addendum presents an overview of key changes identified as part of the refreshed Existing Land Supply growth cluster identification analysis, rather than set out a complete review of the 2020 Greater Manchester Land Supply dataset.

2. Land Supply Distribution

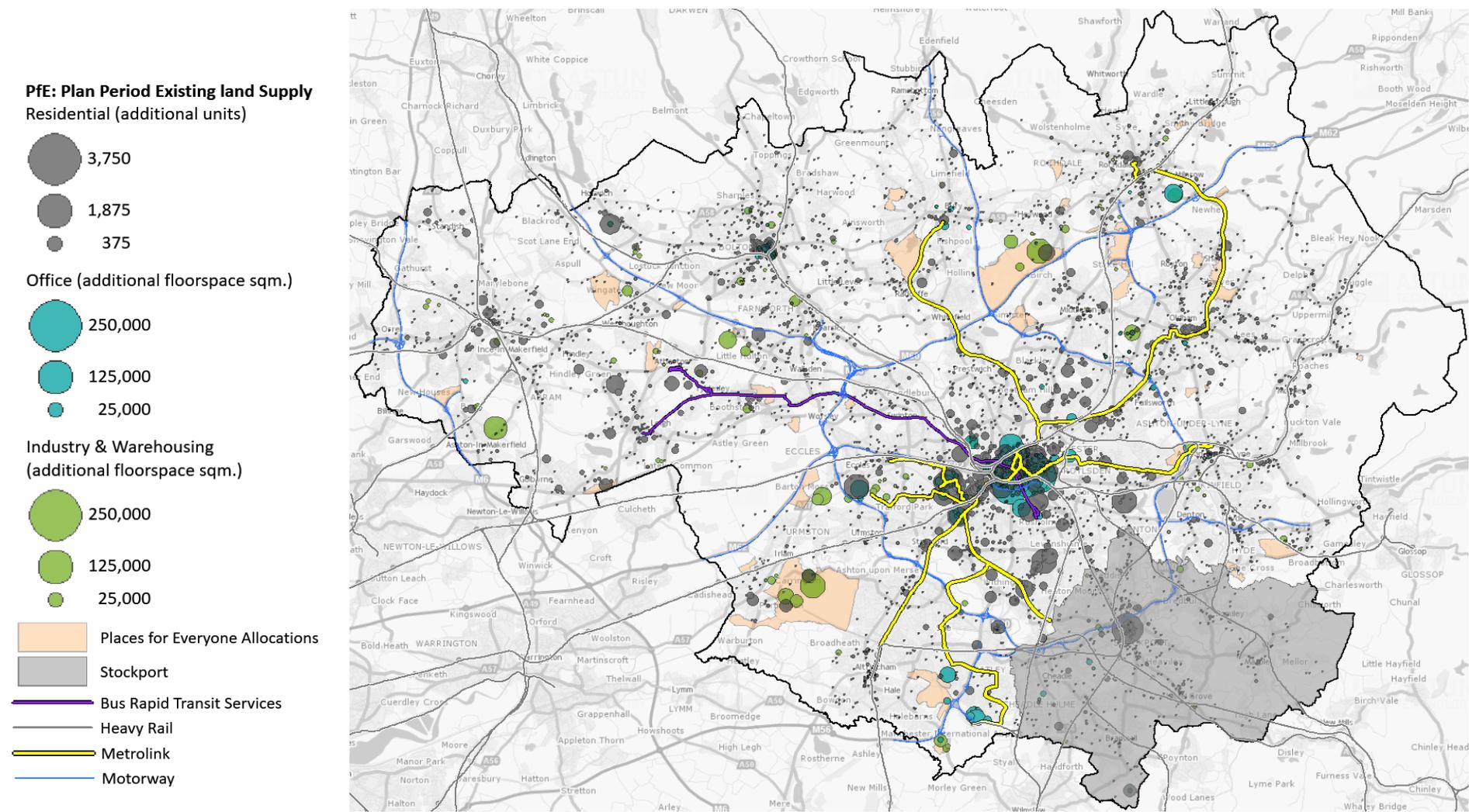
- 2.1. A review of the updated 2020 Existing Land Supply data has been conducted, with the broad conclusions being that the supply is similarly distributed as per the 2018 published dataset.
- 2.2. Due to the rolling nature of the dataset, the emergence of new site applications, and the delivery of specific sites, there has been some evolution within the supply within the first 5 years of the plan period. The main changes are:
 - The previously identified Growth Cluster of Atherton / Hindley / Little Hulton does not appear as prominent for development within the first 5-Years of the plan period.
 - There is renewed emphasis on the first 5-Year of the Plan Period within the Manchester Airport Growth Cluster.
 - There is a new, more apparent, cluster of growth spanning the plan period in an area surrounding the Wilmslow Road corridor, within Manchester.

3. Existing Land Supply Thematic Mapping

3.1. The following images present an updated overview of the Greater Manchester Existing Land Supply data published in 2020, for both the Plan-Period and the 5-Year Supply.

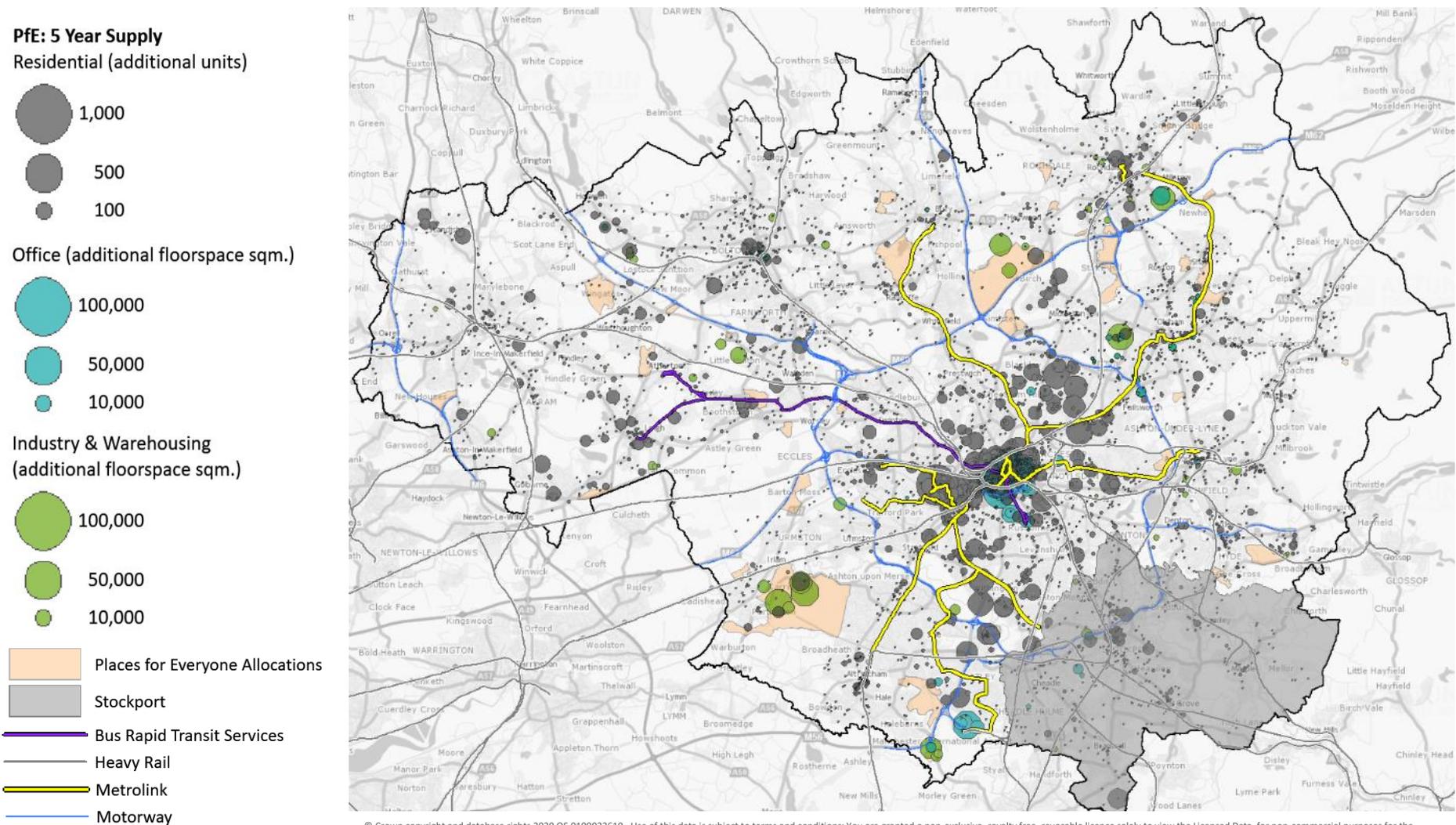
3.2. The images show key areas of growth by land supply type (Residential, Office and Industry & Warehousing space) alongside Places for Everyone allocations. Key sustainable and road-based transport infrastructure links are also illustrated for context.

Figure 1: 2020 Existing Land Supply Mapped Overview (Plan Period)



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Figure 2: 2020 Existing Land Supply Mapped Overview (5-Year Supply)



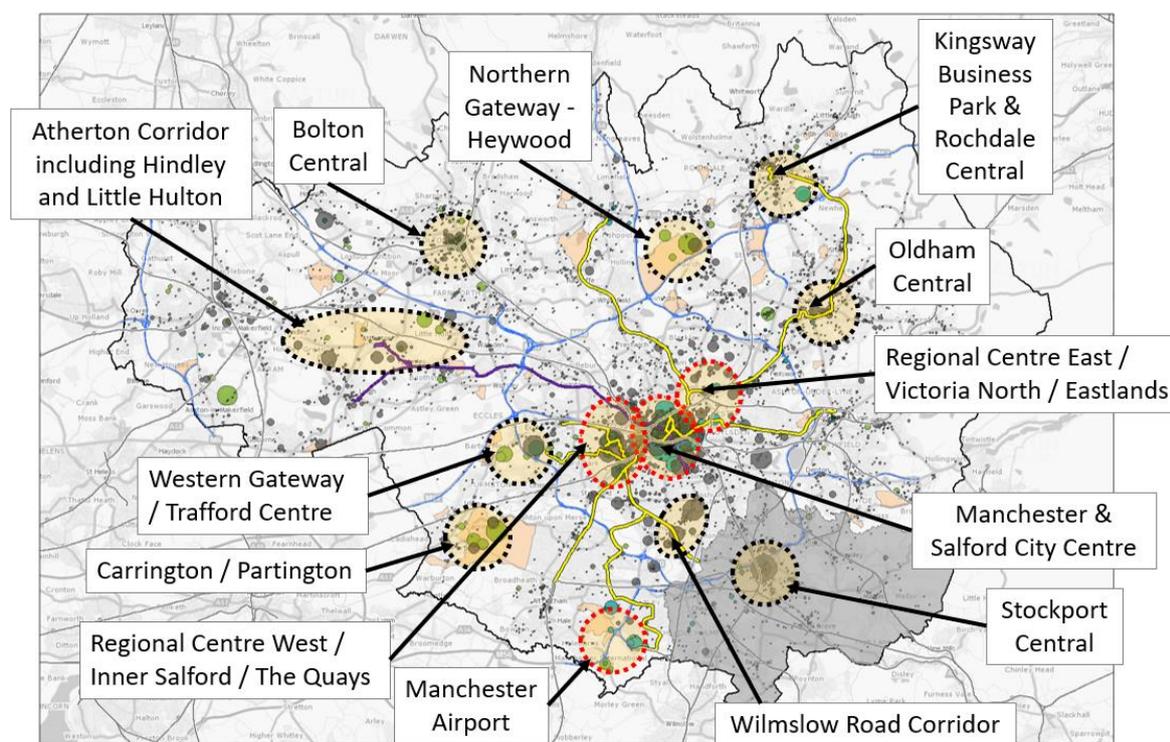
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4. Growth Cluster update

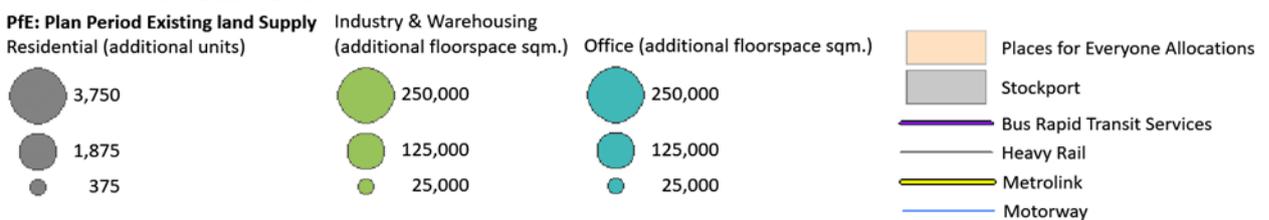
Growth Cluster Thematic Map

4.1. The following image is an update of the 2020 Key Growth Areas mapping. It uses the 2020 existing land supply data to identify clusters of growth across residential, office and industry and warehousing land supply, within the full plan period. The image also highlights, in red, those areas of growth that dominate the first 5 years land supply.

Figure 3: Existing Land Supply Growth Clusters



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4.2. The areas of near-term priority include Manchester and Salford City Centre, Regional Centre West / Inner Salford / The Quays, and Regional Centre East / Victoria North / Eastlands.

Key changes within previously identified Growth Clusters:

- Atherton Corridor now less prominent within first 5-Year

4.3. This growth cluster was identified within the Existing Land Supply Technical Note produced in autumn 2020 due to density of development within the first 5-Years of the plan period.

4.4. Situated to include Hindley and Atherton within Eastern Wigan to the west, and sites in southern Bolton adjacent to Little Hulton in the East, on the border with Salford. The area is situated surrounding the Manchester to Wigan via Atherton rail corridor and contained between the M61 and A580 East Lancashire Road highway corridors.

4.5. This growth cluster originally placed significant emphasis on the first 5-Years of supply, with residential areas dominated by several large sites surrounding Atherton and Hindley.

4.6. Much of this initial 5-Year supply has now been complete or is currently being delivered. However, this growth cluster remains an area of focus across the full plan period with a range of relatively smaller and dispersed sites across the area.

- Manchester Airport now more prominent within first 5-Year

4.7. This growth cluster was identified within the Existing Land Supply Technical Note produced in autumn 2020, though was not originally noted as a key area of focus for the first five years.

4.8. Located at the southern edge of Greater Manchester, close to the boundary with Cheshire East, this growth cluster includes the existing Manchester Airport, and the adjacent development sites that form Manchester Airport City, with development sites located close to the M56.

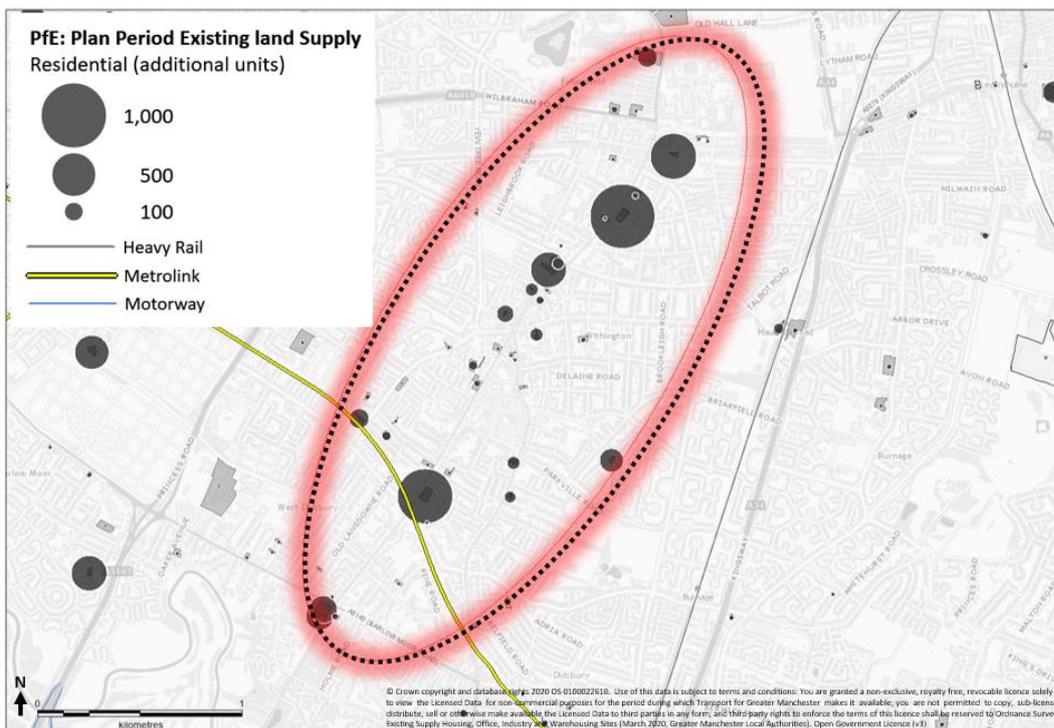
4.9. Residential supply within this area is negligible. Employment supply is the focus of this growth cluster. Over 200,000 square metres of office space and a further 115,000 square metres of Industry and Warehousing floorspace is identified for the plan period.

4.10. Updating the development phasing within this growth cluster in the 2020 data, gives rise to a renewed focus upon the first 5-Year of the Plan Period for developments within the Airport and nearby Medipark.

- **Additional Identified Growth Cluster - Wilmslow Road Corridor**

4.11. Following the cluster review of the updated existing land supply, the identified additional cluster within the M60 in south Manchester, is detailed below.

Figure 4: Wilmslow Road Growth Cluster



4.12. This cluster, south of Manchester city centre and loosely defined along the Wilmslow Road corridor, includes the suburbs of Fallowfield to the north, Withington and Didsbury to the south.

4.13. The cluster is entirely composed of residential supply, including almost 7,000 homes spread over 47 sites across the plan period, with approximately 1,500 identified for delivery within the first 5 years of the plan period. The vast majority of these are expected to be apartments or student accommodation. There is no office or industry and warehousing supply noted for this area.

- 4.14. Due to the proximity of Manchester city centre and the university corridor of Oxford Road to the north, with significant existing residential density in this location, this area is supported by excellent transport access, with high quality walking and cycling, local bus, rapid transit and strategic highway links within or adjacent to the area.
- 4.15. Walking and cycling access is supported by the high quality on-highway segregated infrastructure along the Wilmslow Road/Oxford Road corridor catering to north-south movements, while east-west movements are supported by the traffic-free Fallowfield Loop line, linking to the adjacent communities of Chorlton and Levenshulme.
- 4.16. Extensive, frequent, and reliable public transport is provided via local bus connections utilising Wilmslow Road in particular, while the Metrolink corridor in the south provides access across the wider city-region. Heavy rail access is also available to the immediate east of the cluster at Mauldeth Road and East Didsbury stations providing excellent journey times to Manchester city centre and Manchester Airport and beyond.

5. Supporting Transport Interventions

- 5.1. The original Existing Land Supply and Transport Technical Note, produced in October 2020, identified all the significant 2040 Transport Strategy Delivery Plan scheme proposals within each of the Growth Clusters in the report.
- 5.2. There have been no additional schemes identified as part of this addendum review process. Developments within the previously identified growth clusters are supported by transport interventions outlined within the Five Year Transport Delivery Plan, and the new cluster identified within the refreshed analysis is well served by existing transport infrastructure:

6. Public Transport Accessibility

- 6.1. Analysis of the 2020 land supply data set has shown very little change in the overall accessibility of the land supply.
- 6.2. With 78% of residential growth and 96% of office floorspace occurring in areas of good public transport accessibility which means that these sites will be relatively easily accommodated into the existing transport network.
- 6.3. As expected, industry and warehousing floorspace is concentrated in areas close in proximity to strategic transport links, most notable the Strategic Road Network to service freight demand.
- 6.4. The table below summarises the public transport accessibility of the 2020 Existing Land Supply:

Existing Land Supply Public Transport Accessibility
Residential (units)

| | 5 Year | % 5 Year | Plan Period | % Plan Period |
|---------------------------|---------------|-------------|----------------|---------------|
| Residential Units | Supply | Supply | Supply | Supply |
| Good PT Accessibility | 50,818 | 78% | 138,083 | 78% |
| Not Good PT Accessibility | 14,635 | 22% | 37,951 | 22% |
| Grand Total | 65,453 | 100% | 176,034 | 100% |

Existing Land Supply Public Transport Accessibility
Industry & Warehousing (sqm)

| Industry & Warehousing | 5 Year | % 5 Year | Plan Period | % Plan Period |
|---------------------------|----------------|-------------|------------------|---------------|
| Floorspace, sqm. | Supply | Supply | Supply | Supply |
| Good PT Accessibility | 226,696 | 28% | 718,118 | 37% |
| Not Good PT Accessibility | 589,656 | 72% | 1,247,795 | 63% |
| Grand Total | 816,352 | 100% | 1,965,913 | 100% |

Existing Land Supply Public Transport Accessibility
Office Floorspace (sqm)

| | 5 Year | % 5 Year | Plan Period | % Plan Period |
|---------------------------|------------------|-------------|------------------|---------------|
| Office Floorspace, sqm. | Supply | Supply | Supply | Supply |
| Good PT Accessibility | 1,092,381 | 94% | 3,207,212 | 96% |
| Not Good PT Accessibility | 71,389 | 6% | 123,659 | 4% |
| Grand Total | 1,163,770 | 100% | 3,330,871 | 100% |

Existing Land Supply Public Transport Accessibility

Residential Areas of Greatest and Least Car Travel to Work

| Residential Units | 5 Year Supply | % 5 Year Supply | Plan Period Supply | % Plan Period Supply |
|----------------------------------|----------------------|------------------------|---------------------------|-----------------------------|
| 1 - Areas of Greatest Car Travel | 6,616 | 10% | 16,511 | 9% |
| 2 | 5,903 | 9% | 15,825 | 9% |
| 3 | 8,761 | 13% | 23,524 | 13% |
| 4 | 16,764 | 26% | 42,681 | 24% |
| 5 - Areas of Least Car Travel | 27,409 | 42% | 77,493 | 44% |
| Grand Total | 65,453 | 100% | 176,034 | 100% |

7. Conclusion

6.1. The GMSF 2020 Existing Land Supply and Transport Technical Note was based on draft 2018 Existing Land Supply figures. This addendum is a review of the 2020 note for the Places for Everyone Plan, following the publication of the refreshed Greater Manchester Existing Land Supply data for 2020.

6.2. The conclusions of the previous report remain broadly the same, although some changes have occurred because of the rolling nature of Greater Manchester's 5-Year land supply. Key Changes Identified:

- **Atherton Corridor / Hindley / Little Hulton**

Delivery of developments within this area have resulted in a less intense development density within the first 5-Year of the Plan Period.

- **Manchester Airport**

This growth cluster is now more prominent within the first 5-Year of the Plan Period, reflecting progression of phasing plans for key developments within Manchester Airport and the nearby Medipark.

- **Wilmslow road**

This new cluster, south of Manchester city centre and loosely defined along the Wilmslow Road corridor, includes the suburbs of Fallowfield to the north, Withington and Didsbury to the south. Entirely composed of residential supply, 7,000 homes spread over 47 sites across the plan period, with approximately 1,500 identified for delivery within the first 5 years of the plan period. The area is already very well connected by public transport and has good walking and cycling links.

6.4. A review of the transport interventions outlined within the Greater Manchester Transport Strategy 2040 and Our Five-Year Transport Delivery Plan has identified that the Existing Land Supply is supported by current transport infrastructure. The majority of the Existing Land Supply is in areas of good public transport accessibility. Notably the changes outlined within the Airport Growth Cluster and Wilmslow Road growth cluster are well supported by existing and proposed local sustainable and strategic transport links.