

# **Greater Manchester**

## **Strategic Housing Market Assessment**

Update April 2021

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# Executive summary

This Strategic Housing Market Assessment (SHMA) has been produced by the Greater Manchester Combined Authority (GMCA) to provide an update to the SHMA produced in 2019<sup>1</sup>. The purpose of the SHMA is to present a clear, evidenced picture of the housing market in Greater Manchester. The SHMA shows how the housing market is changing and provides an assessment of the future needs for both market and affordable housing. The SHMA also explores the housing needs of different groups within the population over the next twenty years. To do that, this update includes a great deal of information and analysis, and an executive summary necessarily presents a very selective story in comparison. However, some key messages can be outlined, as follows:

Greater Manchester is a large and diverse city region that, while well connected to our neighbours, can reasonably be defined as a housing market for planning purposes. More than four out of every five households who move into a home in Greater Manchester already live here. Nearly nine in ten working people who live in Greater Manchester also work here, and of Greater Manchester residents who work here, two-fifths travel to another Greater Manchester district for work, showing how interconnected we are as a city region. See [Chapter 2](#) for how we have concluded that Greater Manchester can be defined as a housing market.

Using the Government's standard methodology, we calculate an annual housing need for Greater Manchester of 11,392 new homes per year. [Chapter 3](#) sets out that calculation in more detail.

With 2.84 million people living in 1.2 million homes across ten districts, Greater Manchester and our residents are hugely diverse. At a headline level, we can say that:

- we are relatively youthful, with 39% of residents under 30;<sup>2</sup>
- while numbers in the older age groups are growing fast too;
- Greater Manchester is slightly more ethnically diverse than England & Wales;
- A third of households consist of just one person;<sup>3</sup>
- we are increasingly likely to rent our home in the private sector, especially if we are young or if we are from a black and minority ethnic community;
- household incomes are significantly lower than the national average and Greater Manchester has higher levels of deprivation;
- homelessness rose in the year to 2019/20 and rough sleeping rose 2013-2017;

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<sup>1</sup> [Greater Manchester Strategic Housing Market Assessment Summary Report January 2019](#)

<sup>2</sup> Source: ONS, 2018-based subnational population projection for 2021.

<sup>3</sup> Source: ONS, 2018-based subnational household projection with rate for 2018.

- compared to the rest of the country, our homes are more likely be terraced or semi-detached and have one or two bedrooms, and less likely to be detached, bungalows or flats, or to have four or more bedrooms;
- Just over 60.2% of households are owner-occupiers, and nearly half of these have bought their property outright. Nearly 22% of households are in the social rented sector. 17.4% of households are private rented (or living rent free);<sup>4</sup>
- 4.7% of households are in overcrowded accommodation, and with a concentration in the rented sector;
- 67% of households (and 80% of owner-occupiers) are under occupied - having at least one spare bedroom.

[Chapter 4](#) gives you much more detail on these and other characteristics of Greater Manchester's housing.

Looking at the housing market, house prices in Greater Manchester have remained substantially below the national average. Between 2019 and 2020 there was an increase of 4% in house prices – the same rate as the North West region and slightly higher than the 3% rise across England & Wales. In 2020, the average price paid for a property in Greater Manchester was £180,947, compared to £249,647 in England & Wales. Our private rents are also lower than the national average – the median monthly rent (in the year to 30 Sept 2020) was £625 in Greater Manchester compared to £725 for England. However, given our relatively low average household incomes, that still means that many find meeting housing costs a real challenge.

Averages for Greater Manchester can mask patterns within the city region. For both buying and renting Trafford and Stockport's averages are significantly higher than the Greater Manchester average. Rents in Manchester are also higher, reflecting the city centre market. Within each district the variations in housing costs between neighbourhoods can be substantial.

21.9% of households in Greater Manchester were in the social housing sector at the time of the 2011 Census with just over half of these renting directly from the local authority. Even so, 78,717 households were on local authorities' housing registers in 2019/20, of which 30,351 were assessed as having a priority need for a home.

New housebuilding continues to recover slowly from the post-2008 collapse in delivery that followed the economic recession. There were 13,742 net additional dwellings built in Greater Manchester in 2019/20. This is a 19.2% increase on the 11,525 net additional homes delivered in 2018/19. The 2018/19 and 2019/20 totals are the highest net additional homes built since 2007/08, driven by new developments in the central areas of Salford and Manchester.

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<sup>4</sup> Source: ONS, 2011 Census, table KS402EW

Empty dwellings are at low levels, and matching rates for England - another sign of strong demand for additional homes. [Chapter 5](#) explores the housing market signals.

Different households need different types of homes. We know that people in Greater Manchester have relatively poor health. By 2035, 8.9% of Greater Manchester's population is projected to be aged 75 or more - and 2.8% are projected to be 85 or older – though our population profile will still be younger than the England average.<sup>5</sup> At the same time, the number of homes needed for families with dependent children will grow by 13.4%, though most of that growth will be in families with only one dependent child.<sup>6</sup> Again by 2035, almost one in three of us aged 65 or over will have a long-term illness that limits our day-to-day activities 'a lot', and just under 8% will have dementia.

Alongside changes in the population, we know the distribution across housing sectors is also changing. Private renting is likely to continue to grow, to evolve in terms of the investors and management of rented homes, and in the types of households living in the sector. National policy, regulation and taxation regimes may have a significant impact on changes in the sector, but on current trend, more families with children and older households will rent privately. [Chapter 6](#) looks more closely at the housing requirements of different groups.

It is important that our residents can find homes they can afford but defining 'affordability' is complex. Government gives us a wide definition of 'affordable housing' and a methodology to calculate how much of it is needed. Using that methodology gives an affordable housing need of 5,850 per annum for Greater Manchester. That is not a target for building new affordable housebuilding through the planning system, but it is something we need to consider in developing the Places for Everyone (PfE) plan, and in our work with Homes England, housing providers and other partners to deliver the affordable homes needed for the future. This is outlined further in [Chapter 7](#).

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<sup>5</sup> Source: ONS, 2018-based subnational population projections

<sup>6</sup> Source: ONS, 2018-based subnational household projections. Change is from 2018-2035.



# 1 Introduction and policy background

## 1.1 Background and objectives

- 1.1 This Strategic Housing Market Assessment (SHMA) has been produced for the Greater Manchester Combined Authority (GMCA). The purpose of the SHMA is to develop a robust understanding of housing market dynamics and to provide an assessment of future needs for both market and affordable housing and the housing needs of different groups within the population over the next twenty years.
- 1.2 The SHMA supports the aspirations in the Greater Manchester Strategy (GMS)<sup>7</sup>, which lays out an ambitious vision for Greater Manchester as one of the best places in the world to grow up, get on and grow old. The SMS defines a culturally and economically dynamic city region, with social justice and equality at its core, which prioritises achieving safe, decent and affordable housing for all Greater Manchester residents.
- 1.3 This document is being published alongside the final draft of the PfE plan. This plan provides a spatial and physical interpretation of the SMS that will help make Greater Manchester one of the best places in the world by providing the right land needed in the right places to deliver the jobs and homes required to match Greater Manchester's ambitions.
- 1.4 The SHMA provides an objective assessment of the need for housing within Greater Manchester<sup>8</sup> and sets out evidence to inform the overall housing requirements for the conurbation. These requirements will need to be informed by the SHMA but will also consider a range of other evidence, including land supply; Green Belt; other development constraints (such as flooding and areas of environmental protection) and infrastructure.
- 1.5 The SHMA also provides evidence that will be used to inform other housing-related activities of the GMCA, including monitoring the Greater Manchester Housing Strategy, as well as the local plans and strategies of individual districts.

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<sup>7</sup> [Greater Manchester Strategy](#)

<sup>8</sup> Greater Manchester is comprised of the following unitary authorities: Bolton, Bury, Manchester, Oldham, Rochdale, Salford, Stockport, Tameside, Trafford and Wigan.

- 1.6 This SHMA responds to and is compliant with the current requirements of both the National Planning Policy Framework (NPPF)<sup>9</sup> and the Planning Practice Guidance (PPG).<sup>10</sup> This study reflects the content of the PPG at the time of writing. It provides an assessment of the future need for housing, with the intention that this will inform future development of planning policies.
- 1.7 The SHMA presents the most up-to-date analysis of the Greater Manchester's housing market and updates where possible on that which was consulted upon in 2019.

Map 1.1: Greater Manchester's local authorities



Source: MappingGM

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<sup>9</sup> [National Policy Planning Framework February 2019](#)

<sup>10</sup> [Planning Practice Guidance October 2019](#)

## 1.2 Policy background

### *National Planning Policy Framework*

- 1.8 The NPPF provides the national policies for plan making. It details key policies against which development plans will be assessed and with which they must comply. NPPF requires plans to be justified and based on proportionate evidence, taking into account relevant market signals.
- 1.9 The original NPPF was published in March 2012. A revised NPPF was issued in July 2018. Since then, the NPPF was updated with a further version published in February 2019. Paragraph 10 of the updated NPPF sets out a presumption in favour of sustainable development whereby plans should positively seek opportunities to meet the development needs of their area and be sufficient flexible to respond to rapid change.
- 1.10 Paragraphs 60 and 61 of the NPPF requires local authorities to plan for a mix of housing, based on current and future demographic trends, market trends and the needs of different groups in the community. This includes the recommendation that planning authorities should assess the size, type and tenure of housing needed for affordable housing, families with children, older people, students, people with disabilities, service families, travellers, people who rent their homes and people wishing to commission or build their own homes.
- 1.11 Paragraph 31 of the NPPF states that each local planning authority should ensure the local plan uses a proportionate evidence base that is relevant and up to date. This should be adequate and focused tightly on supporting and justifying policies and considering the relevant market signals. This SHMA brings together the relevant evidence to comply with this.

### *Planning Practice Guidance*

- 1.12 The PPG on “*Housing and economic needs assessment*” was originally issued by Government on 20 March 2015 and last updated on 22 July 2019.<sup>11</sup> This provides advice on how key elements of the NPPF are to be interpreted, including the

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<sup>11</sup> [MHCLG Housing and economic needs assessment](#)

approach to deriving an assessment of Local Housing Need (LHN). The approach used in this report takes account of this PPG.

- 1.13 Throughout this document, relevant sections of the NPPF and PPG are referenced. The guidance provides the basis for the evidence presented in the corresponding chapters of the SHMA.

#### *Local Housing Need methodology*

- 1.14 On 14 September 2017, the Government published a wide-ranging consultation entitled *“Planning for the right homes in the right places.”*<sup>12</sup> This followed the publication of the Housing White Paper, *“Fixing our broken housing market”*, in the spring of 2017<sup>13</sup> that included a proposed standardised national methodology for calculating housing need.
- 1.15 The consultation ran until 9 November 2017, and in March 2018, the Government published their response to this consultation. This response concluded their LHN methodology as the most appropriate method to assess need.<sup>14</sup>
- 1.16 Government subsequently published the revised NPPF in July 2018 (updated in July 2019), which sets out plans to *“consider adjusting the [Local Housing Need] method after the household projections<sup>15</sup> are released in September 2018.”*<sup>16</sup> On 26 October 2018, the Government released their consultation to update PPG on housing need assessment (and the LHN methodology), taking account of the 2016-based household projections.<sup>17</sup> Specifically, they proposed, *“that the 2014-based data will provide the demographic baseline for assessment of local housing need.”*

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<sup>12</sup> [MHCLG Planning for the right homes in the right places: consultation proposals](#)

<sup>13</sup> [Government Housing White Paper. Fixing our broken housing market. February 2017](#)

<sup>14</sup> [MHCLG Government response to the Planning for the right homes in the right places consultation](#)

<sup>15</sup> As of 23 January 2017, responsibility for household projections transferred from the then Department of Communities and Local Government (DCLG) to the Office for National Statistics (ONS).

<sup>16</sup> See: [MHCLG Government response to the draft revised National Planning Policy Framework Consultation \(pp. 25 – 26\)](#)

<sup>17</sup> [MHCLG Changes to planning policy and guidance including the standard method for assessing local housing need](#)



1.17 At the time of writing the latest methodology was published in December 2020, and results in an annual need figure of 11,392 per annum, further details are set out in [Chapter 3](#) of this report.

### 1.3 Report structure

1.18 This report provides a Greater Manchester SHMA, presenting evidence on the housing market and estimates of housing demand and housing need for the conurbation.

1.19 The report is structured as follows:

- [Chapter 2](#) considers the definition of the Housing Market Area (HMA);
- [Chapter 3](#) sets out the Greater Manchester LHN;
- [Chapter 4](#) presents characteristics of the HMA;
- [Chapter 5](#) reviews housing market signals including affordability;
- [Chapter 6](#) presents the housing needs of particular groups;
- [Chapter 7](#) provides an affordable housing need assessment.

1.20 The report includes an Appendix in [Chapter 8](#). This provides more detailed sources of the material that underpins the core outputs of the SHMA.

## **2 Defining the Housing Market Area**

## Chapter summary

Is Greater Manchester the right area for us to think about and plan for as a housing market? Such a large and diverse city region must be well connected to our neighbours, but practically we need to understand how most people make their choices about where to live if we are to make decisions about the future. We have looked at three main kinds of evidence to see if Greater Manchester makes sense as a coherent area where different places are bound together.

Our analysis shows that more than four out of every five households who move into a home in Greater Manchester already live here. That proportion is higher for households moving into homes in the districts around the boundary of Greater Manchester but lower for Manchester and Salford, which are the main arrival destinations for households moving into the city region, which will include large numbers of students.

Looking at where people live and work, we see that nearly nine in ten working people who live in Greater Manchester also work here, with Wigan the only district where more than 15% of their residents who work travelling outside Greater Manchester to their place of work. Of those residents who work in Greater Manchester, two-fifths travel to another district for work, an indicator of the interconnectedness within the city region.

Looking at house prices as an indicator of the way the housing market is functioning, we see a general pattern of lower house prices in the inner urban areas and higher prices around the periphery of Greater Manchester. However, this is not universal and all Greater Manchester's ten districts have areas of both high and low value housing, sometimes in close proximity to each other.

Although Greater Manchester has important and valuable relationships with neighbouring districts and further afield, we can reasonably define the Greater Manchester area as a single HMA for strategic planning purposes.

## 2.1 Introduction

2.1 This chapter has two primary purposes:

- To identify the appropriate areas of assessment for determining the need/demand for housing and employment floor space that should be planned for through the PfE; and
- To consider the implications of those areas of assessment for translating the geography of need/demand into district requirements for housing and employment floor space in the PfE.

### *National guidance*

2.2 Paragraph 39 of the plan-making PPG states that authorities will need a clear understanding of housing needs in their area, in part by working with key stakeholders to establish the housing market area, or geography which is the most appropriate to prepare policies for meeting housing need across local authority boundaries.

2.3 The PPG defines a housing market area as follows:

*A housing market area is a geographical area defined by household demand and preferences for all types of housing, reflecting the key functional linkages between places where people live and work.*

(Paragraph 018 Reference ID: Reference ID: 61-018-20190315)<sup>18</sup>

2.4 The same paragraph in that PPG states that housing market areas can be broadly defined by using three different sources of information, which are detailed below:

### *Housing demand and supply*

2.5 The relationship between housing demand and supply across different locations, using house prices and rates of change in house prices. This should identify areas which have clearly different price levels compared to surrounding areas.

### *Migration flow and housing search patterns*

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<sup>18</sup> [PPG, Plan-making](#)



- 2.6 This can help identify the extent to which people move house within an area, in particular where a relatively high proportion of short household moves are contained, (due to connections to families, jobs, and schools).
- *Contextual data such as travel to work areas, retail and school catchment areas*
- 2.7 These can provide information about the areas within which people move without changing other aspects of their lives (e.g., work or service use). This chapter considers these in turn and summarises the key factors identified in the PPG, with a particular focus on migration and commuting.

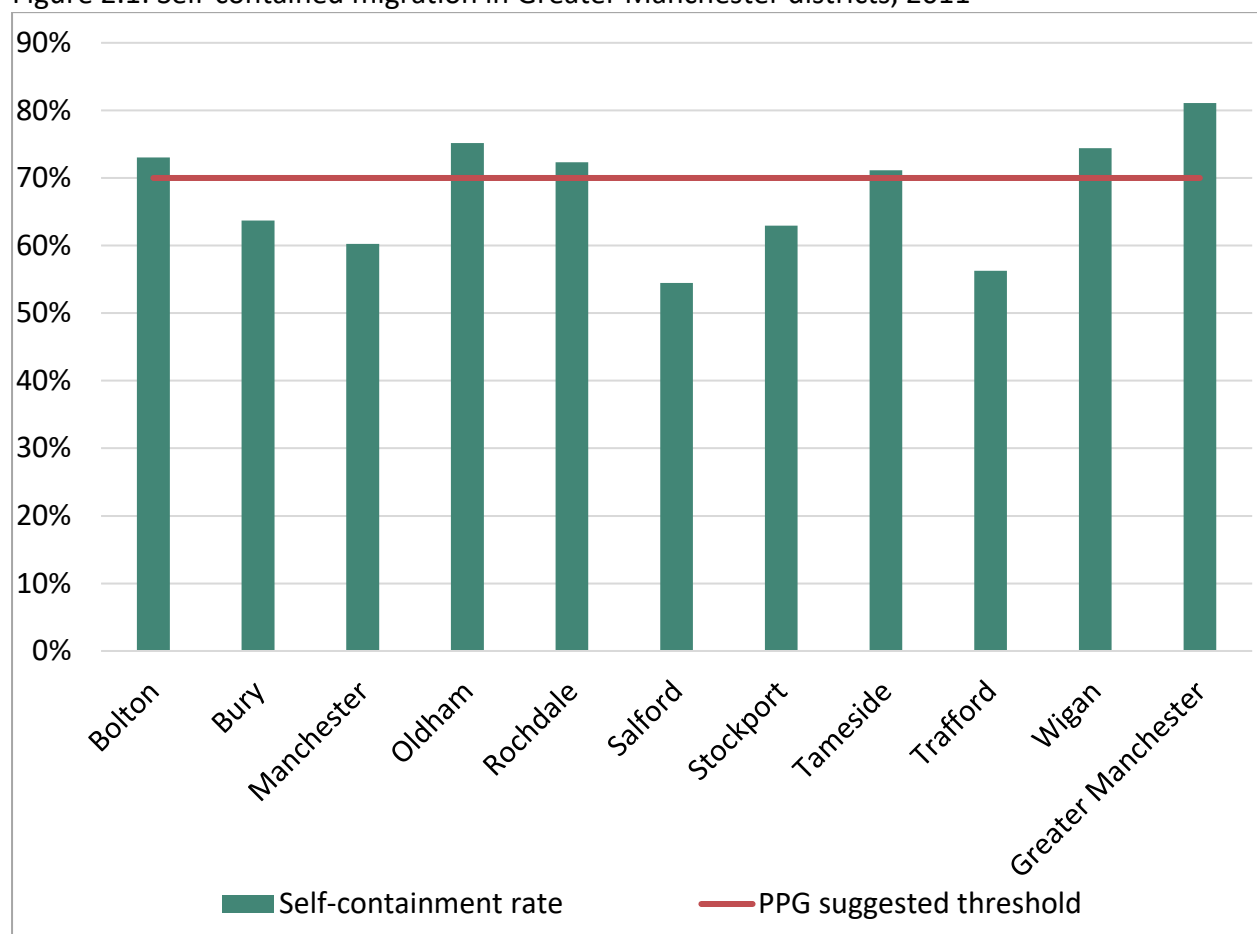
## 2.2 Household migration

- 2.8 The use of migration data in the identification of HMAs tends to focus on analysing migration flow patterns to help identify the extent to which people move house within an area, determining the level of self-containment. A high degree of self-containment supports the case for an HMA. For comparison the previous PPG (dated March 2015, archived June 2018<sup>19</sup>) referred to 70% as an appropriate threshold. The data also helps to establish the levels of connectivity between places.
- 2.9 Migration data from the 2011 Census can be used to identify self-containment rates of districts, by examining the origins of those who moved into Greater Manchester from elsewhere in the year preceding the Census.

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<sup>19</sup> [Archived PPG, Housing and Economic Development Needs Assessments](#)

Figure 2.1: Self-contained migration in Greater Manchester districts, 2011



Source: ONS, 2011 Census

2.10 Figure 2.1 shows that five of the ten Greater Manchester districts have self-containment rates below the 70% threshold and five have self-containment rates above. The northern districts of Greater Manchester (Oldham, Wigan, Bolton, Rochdale and Tameside) are more self-contained than districts in the south (Stockport, Manchester, Trafford and Salford) apart from Bury. However, when taken as a whole, Greater Manchester has a self-containment rate of 81%. This is higher than rates for the individual districts, suggesting a level of interdependence between districts in the conurbation.

Figure 2.2: Proportion of migration from England & Wales into Greater Manchester districts, 2011



Source: ONS, 2011 Census

- 2.11 Figure 2.2 shows that of those who moved to an address in Greater Manchester from England & Wales in the year preceding the 2011 Census, over 80% were existing residents of Greater Manchester. Around 7% were from the rest of the North West and the remaining 12% from the rest of England & Wales.
- 2.12 There are variations within districts. Manchester and Salford attracted more migrants from outside Greater Manchester than any of the other districts, with Wigan also attracting a larger proportion of migrants from the rest of the North West. This suggests that Manchester and Salford are performing the traditional function of cities, in terms of attracting a larger number of migrants from further afield, while Wigan has strong connectivity to the west, with Merseyside and also with Lancashire.

Table 2.1: Proportion of moves to Greater Manchester districts from England & Wales, 2011

Origin- moved from	Destination- moved to									
	Bolton	Bury	Manchester	Oldham	Rochdale	Salford	Stockport	Tameside	Trafford	Wigan
<b>Bolton</b>	73.00%	3.90%	0.50%	0.30%	0.50%	2.20%	0.40%	0.30%	0.70%	3.10%
<b>Bury</b>	2.80%	63.70%	0.90%	1.00%	2.60%	2.70%	0.40%	0.60%	0.90%	0.30%
<b>Manchester</b>	1.70%	6.50%	60.20%	4.80%	5.10%	10.60%	11.40%	6.70%	16.20%	1.20%
<b>Oldham</b>	0.50%	1.00%	1.10%	75.20%	4.80%	0.80%	0.40%	3.30%	0.40%	0.30%
<b>Rochdale</b>	0.60%	3.50%	0.80%	4.10%	72.30%	1.10%	0.50%	0.70%	0.60%	0.20%
<b>Salford</b>	3.00%	4.10%	2.90%	0.70%	1.20%	54.50%	1.40%	1.10%	4.00%	2.50%
<b>Stockport</b>	0.30%	0.40%	2.40%	0.30%	0.50%	1.00%	62.90%	4.80%	1.80%	0.30%
<b>Tameside</b>	0.20%	0.70%	1.10%	3.40%	0.70%	1.10%	3.70%	71.10%	0.80%	0.20%
<b>Trafford</b>	0.50%	1.00%	2.80%	0.30%	0.40%	3.20%	1.90%	0.60%	56.20%	0.40%
<b>Wigan</b>	3.40%	0.50%	0.60%	0.20%	0.30%	2.20%	0.30%	0.30%	0.80%	74.40%
<b>Greater Manchester</b>	86.00%	85.20%	73.30%	90.60%	88.50%	79.30%	83.30%	89.50%	82.40%	83.00%
<b>Rest of England &amp; Wales</b>	14.00%	14.80%	26.70%	9.40%	11.50%	20.70%	16.70%	10.50%	17.60%	17.00%

Source: ONS, 2011 Census

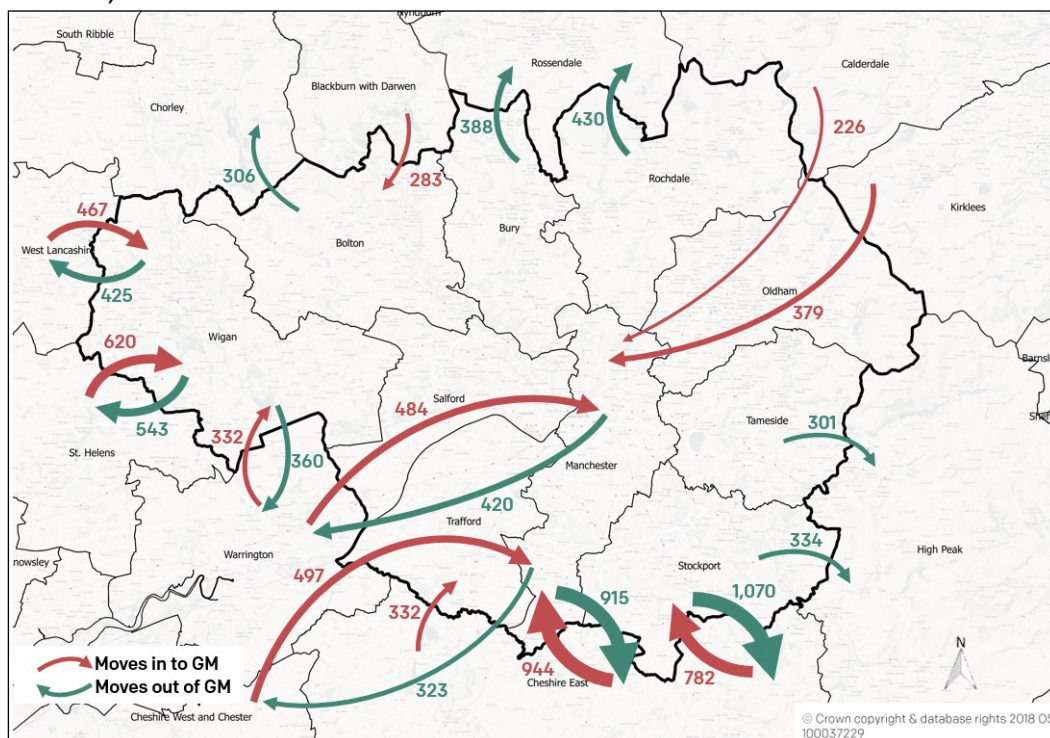


2.13 The table above shows the different patterns of connectivity of moves between districts, with Bolton and Wigan, Oldham and Rochdale and Manchester and Salford showing obvious links. The data also reiterates the role of Manchester and Salford in attracting migrants from further afield, with over 20% of moves to each city from the rest of England & Wales. Census data shows that the north of the conurbation has greater self-containment than the south. However, the table also shows increasing rates of moves between areas that did not show particularly strong migration relationships in the 2001 Census, indicating greater integration across Greater Manchester districts, such as:

- Bury - with Manchester and Rochdale;
- Tameside - with Manchester and Stockport;
- Salford - with Trafford and Bury.

2.14 These relationships demonstrate that most migration flows operate at an intra-Greater Manchester level and as such, there is strong justification to consider Greater Manchester as a distinct HMA.

Map 2.1: Absolute migration flows into and out of Greater Manchester and surrounding districts, 2010-11



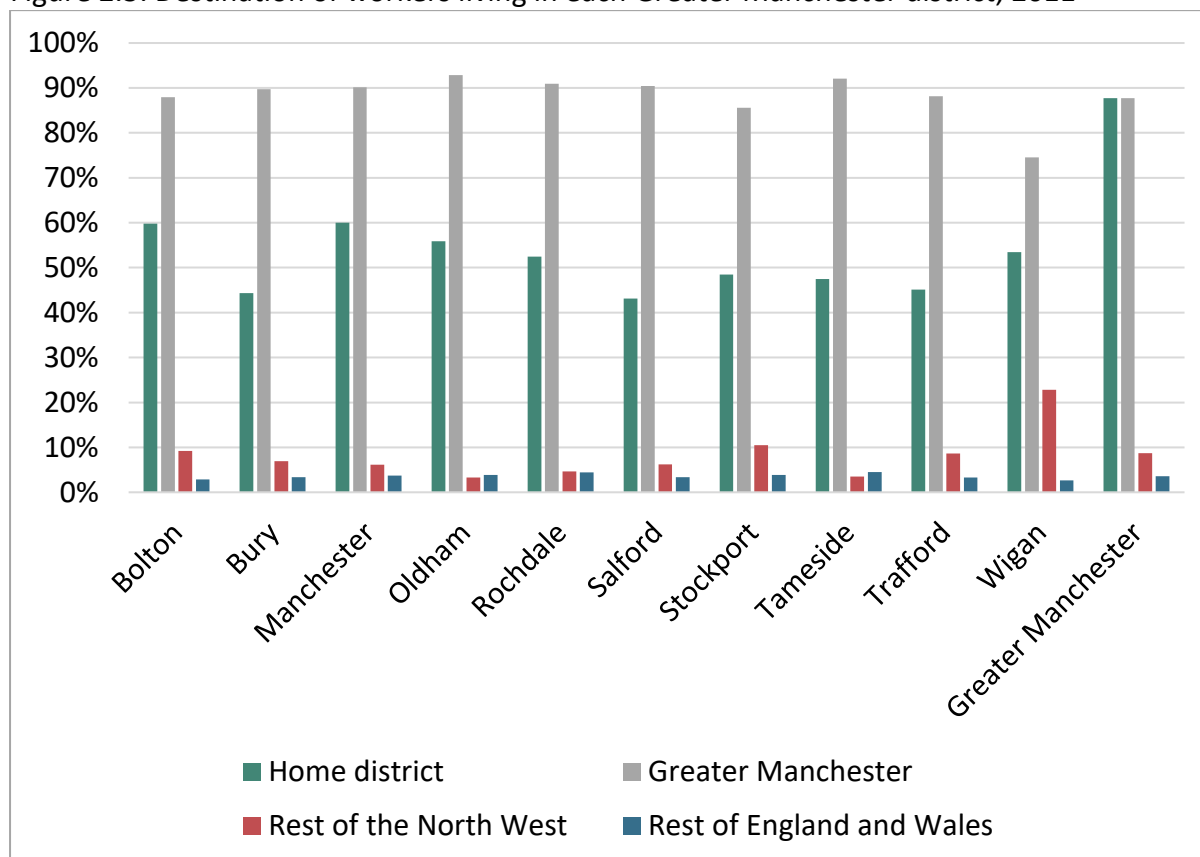
Source: ONS, 2011 Census

- 2.15 Map 2.1 shows the largest flows of moves into and out of Greater Manchester from each of the surrounding districts. The analysis suggests that there is a greater level of movement in the south and west of Greater Manchester to the surrounding districts, with Manchester having relationships with Cheshire East, Cheshire West and Chester, Warrington and to a lesser extent Kirklees. Wigan also has several relationships with areas to the south and west: Warrington, St Helens and West Lancashire. Trafford and Stockport also have relatively strong relationships with Cheshire East. In the north of Greater Manchester, Bury and Rochdale have workplace flows with Rossendale and to a lesser extent with Bolton with Chorley.
- 2.16 The analysis also shows that flows out of Greater Manchester are generally slightly stronger than flows in (except for Manchester), leading to a small net loss in population to the surrounding districts. The largest net outflows are in the east of Greater Manchester, with around 300 more moves from Stockport to Cheshire East than vice versa, and around 60 more moves from Tameside to High Peak than vice versa.
- 2.17 Oldham and Salford were the only Greater Manchester districts without 300 people moving in from or out to a district outside Greater Manchester.

## 2.3 **Commuting patterns**

- 2.18 Commuting patterns have been analysed both in terms of where Greater Manchester residents work and in terms of where people who work in Greater Manchester travel from. The analysis shows very strong commuting links within the Greater Manchester conurbation. Of Greater Manchester residents that are in work, 88% work inside Greater Manchester and 85% of those working in Greater Manchester are resident in the conurbation.

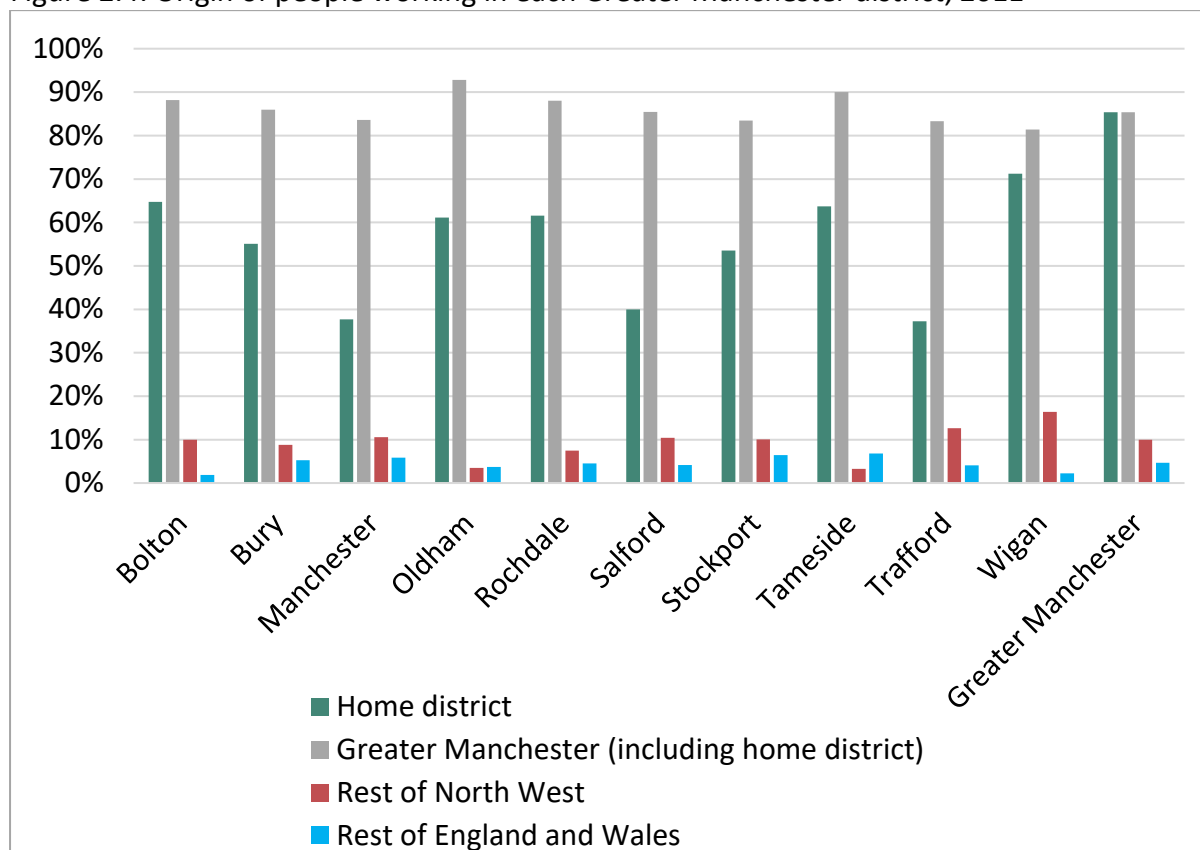
Figure 2.3: Destination of workers living in each Greater Manchester district, 2011



Source: ONS, 2011 Census

2.19 Figure 2.3 shows that although the districts have varying levels of self-containment in terms of commuting, 88% of Greater Manchester residents in work are working in Greater Manchester. Manchester has the highest self-containment rate at 60% and Salford the lowest at just over 40%. Wigan is the only district where fewer than 85% of residents who work are working in Greater Manchester, with 23% of workers travelling to the rest of the North West, reflecting the strong links with Warrington and Merseyside (as evidenced by its inclusion in the Warrington Travel to Work Area (TTWA), shown in Map 2.3). On average 9% of workers living in Greater Manchester travel to the rest of the North West for work, suggesting a generally self-contained labour market at a Greater Manchester level.

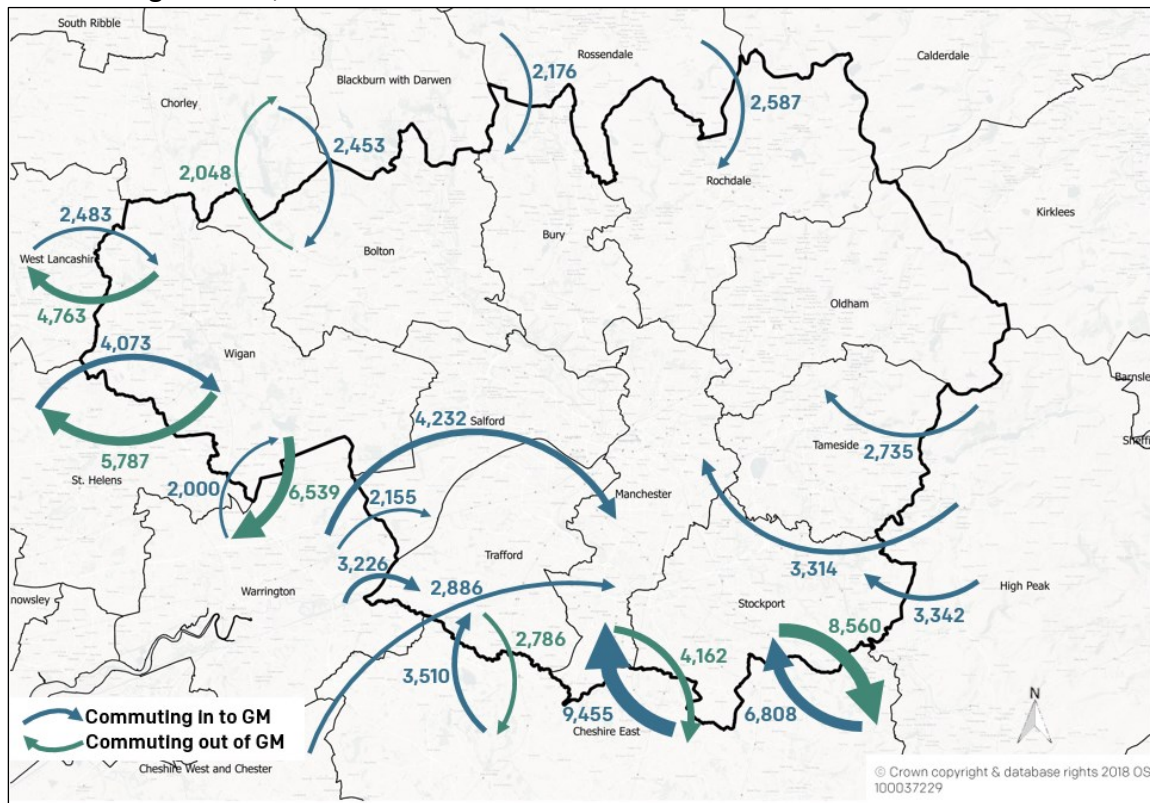
Figure 2.4: Origin of people working in each Greater Manchester district, 2011



Source: ONS, 2011 Census

2.20 Figure 2.4 shows slightly more variation in the usual residence of people working in Greater Manchester districts. Overall, 85% of people working in Greater Manchester are also resident here. No district has fewer than 80% of workers coming from within Greater Manchester. Manchester, Salford and Trafford have far lower levels of workers from their home districts, due to the larger concentrations of jobs in these areas but also due to the higher skill level of jobs in these districts. Data from the 2011 Census shows that those who are at a skill level of 4 or above (equivalent to an undergraduate degree) are more likely to travel further to work, with 31.5% of Greater Manchester residents in work with a level 4 qualification travelling more than 10km to work compared to just 14.6% of those with no qualifications. This means that Manchester and Salford have a wider reach in terms of attracting employees. All other districts have significantly higher self-containment on this measure, with Wigan having a particularly high level of over 70%.

Map 2.2: Flows of more than 2,000 commuters between Greater Manchester and surrounding districts, 2011



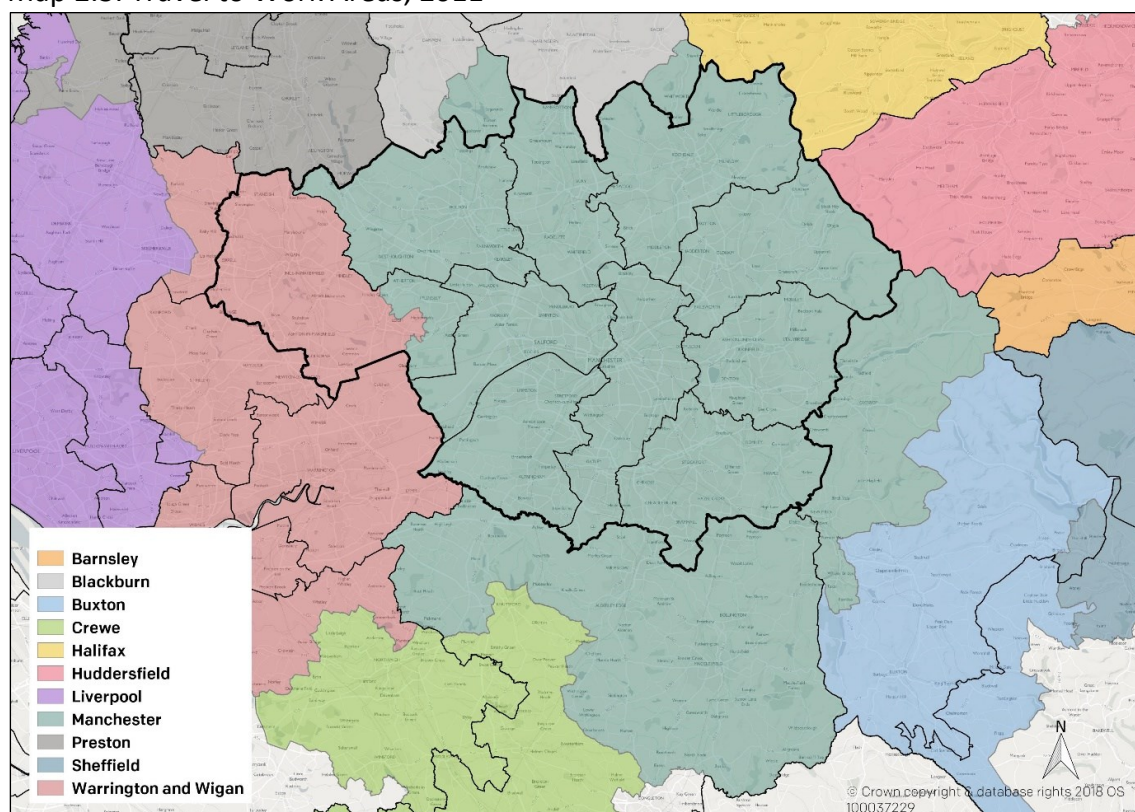
Source: ONS, 2011 Census

- 2.21 Map 2.2 shows daily flows of commuters into and out of Greater Manchester where there are more than 2,000 commuting trips. The map shows that there are strong patterns of commuting both into and out of southern Greater Manchester, with Manchester, and Trafford attracting more commuters from neighbouring districts than residents commuting out. There are also draws in the north of Greater Manchester with Bury and Rochdale attracting commuters from Rossendale, and Bolton attracting commuters from Chorley.
- 2.22 As suggested in previous figures, the map shows Wigan displaying a more distinctive pattern than the other districts, with higher levels of out-commuting to Chorley, West Lancashire, St Helens and Warrington than in commuting from those areas to Wigan.



2.23 Another source of commuting data is the Office for National Statistics (ONS) Travel to Work Areas (TTWAs)<sup>20</sup>.

Map 2.3: Travel to Work Areas, 2011



Source: ONS Travel to Work Areas, ONS Open Geography Portal

- 2.24 The TTWAs reflect the analysis shown in Map 2.3, as most of the borough of Wigan forms part of the Warrington and Wigan TTWA, with the rest of the conurbation falling into the Manchester TTWA. The Manchester TTWA further incorporates a proportion of areas within the authorities of Cheshire East High Peak, Rossendale and Blackburn with Darwen.
- 2.25 In 2001, ONS identified separate Bolton and Rochdale & Oldham TTWAs, but these were subsumed into the Manchester TTWA in 2011, suggesting increasing commuting integration of different parts of Greater Manchester. From a commuting

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<sup>20</sup> A TTWA is a statistical tool used by UK Government agencies and local authorities, especially by the Department for Work and Pensions and Jobcentres, to indicate an area where the population would generally commute to a larger town, city or conurbation for the purposes of employment.

perspective, it is sensible to consider Greater Manchester to be a functional employment area.

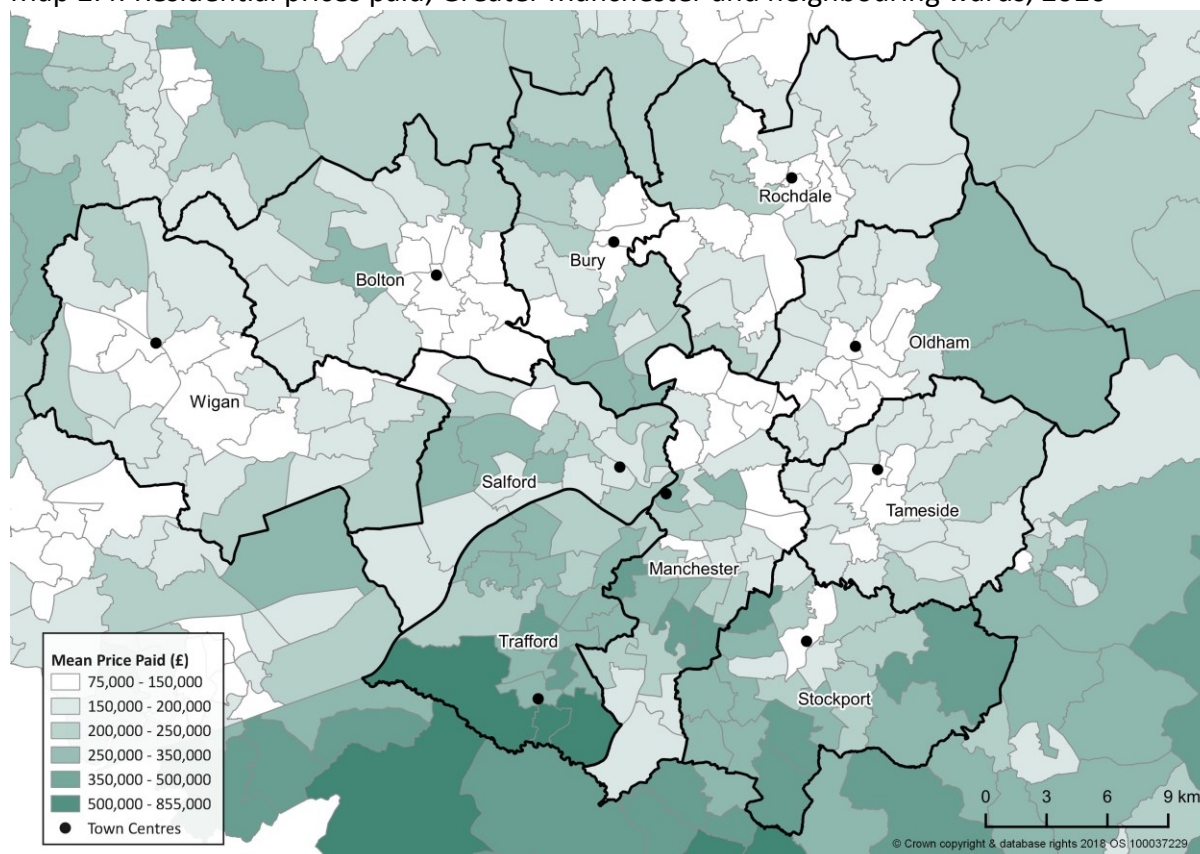
## **2.4 House prices**

- 2.26 PPG<sup>21</sup> states that house prices can be analysed to identify areas in which house prices are significantly different from those in other neighbouring areas. Analysis of house prices can also provide information on the differences across an area in terms of the price people pay for similar housing, market 'hotspots', low demand areas and volatility.
- 2.27 House prices are affected in the short-term by factors such as economic and market conditions, employment trends, migration patterns and interest rates and mortgage availability. Longer-term, population and economic trends such as changing household formation rates and sizes of households have an impact on demand for housing of different types.
- 2.28 House prices are also affected by a few local factors, including:
- Availability and suitability of housing;
  - Location of family, friends and cultural communities;
  - Quality of schools and catchment areas;
  - Commuting times/routes to work;
  - Lifestyle factors such as access to shops, facilities, etc.; and
  - The quality of place and environment.
- 2.29 The relative importance of these factors can vary significantly between different households and some may generally be more important for particular household types and age groups than others may.

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<sup>21</sup> [Planning Practice Guidance October 2019](#)

Map 2.4: Residential prices paid, Greater Manchester and neighbouring wards, 2020



Source: [ONS House Price Statistics for Small Areas \(HPSSAs\)](#)

- 2.30 Map 2.4 shows mean ONS House Price Statistics for Small Areas for year ending September 2020 at ward level. The map reveals some clear variations within Greater Manchester. Areas in the south of Trafford and Stockport as well as Saddleworth in Oldham presenting higher house prices than those seen in most town centres across Greater Manchester.
- 2.31 The wards surrounding Greater Manchester present a mixed picture, with wards to the south of Stockport and Trafford displaying moderately higher prices than the majority of Greater Manchester, while the reverse is true to the north of Rochdale and along the south-western boundary of Wigan. The map illustrates how localised the patterns of house prices are and whilst there are broad trends, there are pockets of relatively high and low prices throughout Greater Manchester and its immediately surrounding areas.



## 2.5 Summary

- 2.32 The analysis of migration and commuting patterns strongly suggests that overall Greater Manchester has very high levels of self-containment, reflecting both its size and the distance and travelling time separating the conurbation from many of the nearest settlements beyond the Greater Manchester boundary.
- 2.33 Furthermore, Greater Manchester is an important administrative unit, establishing the first Combined Authority in England under the devolution deal in 2014, extending a long history of joint working by the ten local authorities as the Association of Greater Manchester Authorities (AGMA) after the abolition of the Greater Manchester Council (GMC) in 1986.
- 2.34 The evidence on both migration and commuting shows that there are important connections with areas adjoining Greater Manchester that need to be taken into account. The nature of these connections varies depending on the proximity of settlements within and outside Greater Manchester, the location and relative strength of key employment areas and the availability of direct transport connections. Broadly the connections are as follows:
- To the south and east of Greater Manchester there are strong connections to Cheshire West and Chester, Cheshire East and High Peak.
  - To the west of Greater Manchester there are links with Warrington, Merseyside and Lancashire - this is particularly true in Wigan; and
  - To the north of Greater Manchester, there are connections with Rossendale and Blackburn with Darwen.
- 2.35 Many of the interactions are localised, contained around the boundaries of Greater Manchester, but the strength of the regional centre as an employment location is felt across a much broader area. In some cases, the importance of the interactions may be important to the districts adjoining Greater Manchester but are of less relative significance to Greater Manchester and the districts within it. This is due to the differing size of the areas involved and the availability of alternative sources of employment and labour.

- 2.36 The migration analysis shows that in Greater Manchester most people migrate over relatively small distances (as is generally the case in the UK), resulting in a series of small, overlapping markets rather than relatively discrete HMAs. Migration patterns are generally quite predictable, based on issues such as proximity, transport connections, employment opportunities and local identity, rather than reflecting previously identified HMAs.
- 2.37 Similarly, most employment areas see people commuting primarily from quite nearby, again leading to overlapping catchments. However, the major concentration of employment opportunities around the regional centre has a different effect, drawing people in from longer distances and limiting the commuting catchment of some of the other employment areas within Greater Manchester.
- 2.38 The analysis also reveals other broader patterns across Greater Manchester. There are higher levels of self-containment in the north of Greater Manchester; a generally more fluid market in the south; in-migration in the west and out-migration in the east. There is an extensive in-migration catchment for the core of the conurbation. This is redistributed to some extent to surrounding areas. Wigan tends to have weaker connections to the rest of Greater Manchester than the other nine districts, both in terms of migration and commuting, as might be expected given its location.
- 2.39 This complex functioning of housing and labour markets within Greater Manchester means that there is no simple way of subdividing the conurbation into identifiable HMAs or functional economic areas. Any internal boundaries or divisions would essentially be arbitrary and risk masking important relationships.
- 2.40 Based upon the migration, commuting and house price evidence to some extent, as well as historically strong institutional relationships between authorities in the area, it is sensible to conclude that Greater Manchester forms a functional HMA. Given the complexity of the housing and labour markets within Greater Manchester, together with the relatively small distances involved in most migration and commuting, the issues of district identity and the availability of population and household projection data, it is considered that the most appropriate unit of analysis below the Greater Manchester level is the individual districts. This is the approach adopted in this SHMA.

### 3 Local Housing Need

## Chapter summary

Government wants local authorities to have a clear and consistent understanding of the number of new homes needed in an area. They have set out a standard methodology to calculate a figure for 'local housing need'. The updated method was published in December 2020 and sets out the method for the minimum housing need for an area. It does not work out the housing requirement for an area. Under the current methodology the overall annual housing need for Greater Manchester is **11,392** homes per annum.

The total housing need figure is worked out district-by-district and added together to give a Greater Manchester total figure. However, if it makes sense to do so, we can decide to share out that total between districts differently, through the plan making process.

### 3.1 Introduction

- 3.1 The NPPF sets out that all plans should determine the minimum number of homes needed using the standard method.

*“To determine the minimum number of homes needed, strategic policies should be informed by a local housing need assessment, conducted using the standard method in national planning guidance – unless exceptional circumstances justify an alternative approach which also reflects current and future demographic trends and market signals. In addition to the local housing need figure, any needs that cannot be met within neighbouring areas should also be taken into account in establishing the amount of housing to be planned for.”*  
(NPPF, Paragraph 60, February 2019).

- 3.2 PPG (Housing and Economic Needs Assessment)<sup>22</sup> sets out in more detail the standard method to assess the minimum number of homes needed in an area. Housing need in the guidance is defined as below:

*“Housing need is an unconstrained assessment of the number of homes needed in an area. Assessing housing need is the first step in the process of deciding how many homes need to be planned for. It should be undertaken separately from assessing land availability, establishing a housing requirement figure and preparing policies to address this such as site allocations.”* (Paragraph: 001 Reference ID: 2a-001-20190220, Revision date: 20-02-2019).

### 3.2 Standard methodology: Local Housing Need (LHN)

- 3.3 The LHN methodology consists of four steps. The first step is to set a demographic baseline. There is then a modification for market signals and a cap is applied to ensure that local authorities are left with a deliverable and achievable housing need figure after updating their plans.
- 3.4 The LHN methodology states that local authorities should be encouraged to work together to identify their housing need, including at a Combined Authority level, where appropriate:

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<sup>22</sup> [MHCLG Housing and economic needs assessment](#)

*“Local housing need assessments may cover more than one area, in particular where strategic policies are being produced jointly, or where spatial development strategies are prepared by elected Mayors, or combined authorities with strategic policy-making powers.*

*In such cases the housing need for the defined area should at least be the sum of the local housing need for each local planning authority within the area. It will be for the relevant strategic policy-making authority to distribute the total housing requirement which is then arrived at across the plan area.” (Paragraph: 013 Reference ID: 2a-013-20190220, Revision date: 20 02 2019)<sup>23</sup>*

- 3.5 Therefore, the LHN has been calculated for each of the ten local authorities within Greater Manchester. The summed figure is the Greater Manchester LHN.

**Step 1: Setting the baseline**

- 3.6 As described above, the starting point for the LHN calculation is projections of future household growth. The starting point is to use the 2014-based household projections.

- 3.7 The household projections are derived using the ONS Sub National Population Projections (SNPP), which provide projections of the future size and age structure of the population of regions and local authorities in England. The Department of Communities and Local Government (now MHCLG) produced the 2014-based Sub National Household Projections (SNHP). Since 2016 ONS have produced the SNHP. The PPG states that the 2014-based projections should be used in order to:

*“The 2014-based household projections are used within the standard method to provide stability for planning authorities and communities, ensure that historic under-delivery and declining affordability are reflected, and to be consistent with the Government’s objective of significantly boosting the supply of homes.” (Paragraph: 005 Reference ID: 2a-005-20190220, Revision date: 20-02-2019)*

- 3.8 It is recommended that ten-year average household growth figures are used for the calculation - this should be ten consecutive years using the current year as the starting point - as plans are expected to be reviewed every five years and so average

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<sup>23</sup> [MHCLG Housing and economic needs assessment](#)

growth over a ten-year period gives a baseline for effective planning for the preparation and duration of the plan.

- 3.9 These projections should be seen as the minimum housing need figure for the area. The 2014-based household projections for Greater Manchester local authorities are set out below for the period 2021 to 2031.

Table 3.1: Household growth projections for Greater Manchester, 2021-2031

Area	Total household growth, 2021-31	Average annual household growth over the 10-year period
Bolton	7,078	708
Bury	5,071	507
Manchester	23,340	2,334
Oldham	6,329	633
Rochdale	4,582	458
Salford	12,122	1,212
Stockport	8,688	869
Tameside	5,680	568
Trafford	10,140	1,014
Wigan	7,927	793
<b>Greater Manchester</b>	<b>90,957</b>	<b>9,096</b>

Source: MHCLG Table 406: Household projections by district, England, 1991-2039 (2014-based household projections)

- 3.10 For Greater Manchester as a whole, these base projections would therefore imply an annual need figure of 9,096 dwellings per annum.<sup>24</sup>

Step 2: An adjustment to take account of market signals

- 3.11 Government considers household growth alone to be an insufficient indicator of need, as household formation can be constrained to the supply of new homes and the household projections do not take into account people moving to other areas (for example for work) and not being able to find affordable accommodation.

- 3.12 As with previous methods for assessing housing need, the methodology states that an adjustment should be made to consider market signals, specifically the

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<sup>24</sup> The MHCLG standard methodology does not make any adjustment for the difference between households and dwellings (to reflect a vacancy rate).

affordability of housing. The methodology is based on the aim to increase the overall national rates of housing delivery, by setting the rate of market signals adjustment so that across England it will lead to a substantial uplift in housing delivery over and above the base demographic household projections.

- 3.13 The methodology proposes using the relevant ONS median affordability ratio as the basis for this adjustment. The ratio compares median house prices in an area to the median full-time earnings of those working in the area. This considers the fact that if areas have higher house prices, they may not be less affordable if earnings in the area are also high. As before, the most recently published data should be used, which at the time of writing was the 2020 data, released in March 2021.
- 3.14 The method applies an affordability uplift *“For each 1% the ratio is above 4 (with a ratio of 8 representing a 100% increase), the average household growth should be increased by a quarter of a percent”*. The reason the adjustment factor is applied is set out below:

*“An affordability adjustment is applied as household growth on its own is insufficient as an indicator of future housing need because:*

- household formation is constrained to the supply of available properties – new households cannot form if there is nowhere for them to live; and*
- people may want to live in an area in which they do not reside currently, for example to be near to work, but be unable to find appropriate accommodation that they can afford.*

*The affordability adjustment is applied in order to ensure that the standard method for assessing local housing need responds to price signals and is consistent with the policy objective of significantly boosting the supply of homes. The specific adjustment in this guidance is set at a level to ensure that minimum annual housing need starts to address the affordability of homes.”* (Paragraph: 006 Reference ID: 2a-006-20190220, Revision date: 20-02-2019).

- 3.15 The calculation for the market signals uplift is shown in Figure 3.1.



Figure 3.1: LHN market signals uplift calculation

$$\text{Adjustment factor} = \left( \frac{\text{Local Affordability Ratio} - 4}{4} \right) \times 0.25 + 1$$

The overall housing need is therefore calculated as set out in Figure 3.2.

Figure 3.2: LHN calculation

$$\text{Local Housing Need} = \text{Adjustment factor} \times \text{projected household growth}$$

The table below outlines the results of these calculations for Greater Manchester.

Table 3.2: Median workplace affordability ratios, the adjustment factors and total LHN for Greater Manchester

Area	Median workplace affordability ratio (2020)	Adjustment factor (based on affordability ratio)	Adjustment factor plus 1	Total Local Housing Need (Adjustment factor plus 1 x annual projected household growth)
Bolton	5.71	0.11	1.11	783
Bury	6.65	0.17	1.17	591
Manchester	5.91	0.12	1.12	2,613
Oldham	5.11	0.07	1.07	677
Rochdale	5.58	0.10	1.10	503
Salford	5.47	0.09	1.09	1,324
Stockport	8.02	0.25	1.25	1,087
Tameside	6.34	0.15	1.15	651
Trafford	9.72	0.36	1.36	1,377
Wigan	5.61	0.10	1.10	872
<b>Greater Manchester</b>				<b>10,478</b>

Source: ONS, Ratio of house price to workplace-based earnings (lower quartile and median) Table 5c: Ratio of median house price to median gross annual (where available) workplace-based earnings by local authority district, England & Wales, 1997 to 2020.

3.16 The effect across Greater Manchester of the application of step 2 is to increase the annual housing need figure by 1,382 (15%) to 10,478. This calculation is carried out in the case of Greater Manchester at a district level, as there is no median affordability data available for Greater Manchester as a whole. However, the resultant need figure summed from individual districts must be seen as a Greater Manchester-wide need figure.

### Step 3: Capping the level of any increase

3.17 The final stage of the method is to cap the LHN figure to ensure that the housing need figures are deliverable. A cap is applied to local authorities' housing need figures as follows:

- 1) Where the local strategic housing policies were adopted in the last five years or reviewed and not updated, "the local housing need figure is capped at 40% above the average annual housing requirement figure set out in the existing policies."
- 2) *"Where the relevant strategic policies for housing were adopted more than 5 years ago (at the point of making the calculation), the local housing need figure is capped at 40% above whichever is the higher of:*
  - a. the projected household growth for the area over the 10-year period identified in step 1; or*
  - b. the average annual housing requirement figure set out in the most recently adopted strategic policies (if a figure exists)."*

3.18 Under these criteria, none of the LHN figures for the Greater Manchester districts requires capping.

### Step 4: Cities and urban uplift

3.19 The new methodology released in December 2020 requires that a 35% uplift is applied to the largest cities and urban areas to reflect Government objectives to deliver housing into the existing urban areas.

3.20 Manchester is the only district in Greater Manchester which comprises one of these 20 areas in the country based on population <sup>25</sup>and as such an uplift has been applied to its Standard Method figure. This means that Manchester has an uplift of 914 dwellings per year. The final table is, therefore below.

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<sup>25</sup> [ONS Geography: Open Geography Portal: Major Towns and Cities \(December 2015\) Names and Codes in England and Wales](#)

Table 3.3: Local Housing Need in Greater Manchester

<i>Area</i>	Total Local Housing Need per year
Bolton	783
Bury	591
Manchester	3,527
Oldham	677
Rochdale	503
Salford	1,324
Stockport	1,087
Tameside	651
Trafford	1,377
Wigan	872
<b>Greater Manchester</b>	<b>11,392</b>

## **4 Characteristics of the Housing Market Area**

## Chapter summary

What is Greater Manchester like as an HMA? With 2.84 million people living in 1.2 million homes across ten districts, it is of course hugely diverse and a challenge to sum up in a few words. However, it is possible to pick out some of the more important factors and trends.

- Greater Manchester has a youthful population, with 39% of residents under 30, but at the same time, the numbers in the older age groups are growing fast.
- We are very slightly more ethnically diverse (21.0% in 2019) than England & Wales (20.1%)<sup>26</sup> and more of the population are living alone (almost 400,000)<sup>27</sup>.
- We are increasingly likely to rent our home in the private sector, especially if we are young or if we are from a black and minority ethnic community.
- We are slightly less likely to be economically active than the national average and more of us have no qualifications than in the country as a whole, although over a third of us are qualified to degree level or above.
- Our household incomes are significantly lower than the national average, contributing to high levels of multiple deprivation, and homelessness rose in the year to 2019/20 and rough sleeping rose 2013-2017.
- The homes we live in are more likely to be terraced or semi-detached and have one or two bedrooms than nationally. They are less likely to be detached, bungalows or flats or to have four or more bedrooms.
- About six out of ten households are owner-occupiers and almost half of those have bought their property outright. About two in ten households rent from a housing association or local authority, with the remainder renting privately.
- 4.7% of households are in overcrowded accommodation, disproportionately concentrated in the rented sector. Conversely, two-thirds of households (and 80% of owner-occupiers) have at least one spare bedroom, according to the official definition.
- Given the diversity of our population and households, we have considered a number of scenarios to ensure that we are planning to build the right mix of type and size of

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<sup>26</sup> [Population denominators by broad ethnic group and for White British, local authorities in England and Wales: 2011 to 2019 - Office for National Statistics \(ons.gov.uk\)](#)

<sup>27</sup> Source: ONS, 2018-based subnational household projections

housing to cater to our residents and make sure we are attractive to potential new residents over the next 20 years.

All these factors do vary greatly across Greater Manchester, between districts and down to neighbourhood and street level.

#### **4.1 Introduction**

- 4.1 This chapter provides demographic and socio-economic information about the residents of Greater Manchester, as well as those working in the conurbation and provides information on the housing stock in terms of numbers and characteristics.
- 4.2 Data is analysed at a district and Greater Manchester level and where appropriate includes national and regional comparators. The purpose of this chapter is to strengthen understanding of the economic and demographic dynamics of the conurbation to help inform future housing needs.

#### **4.2 Population and household profile**

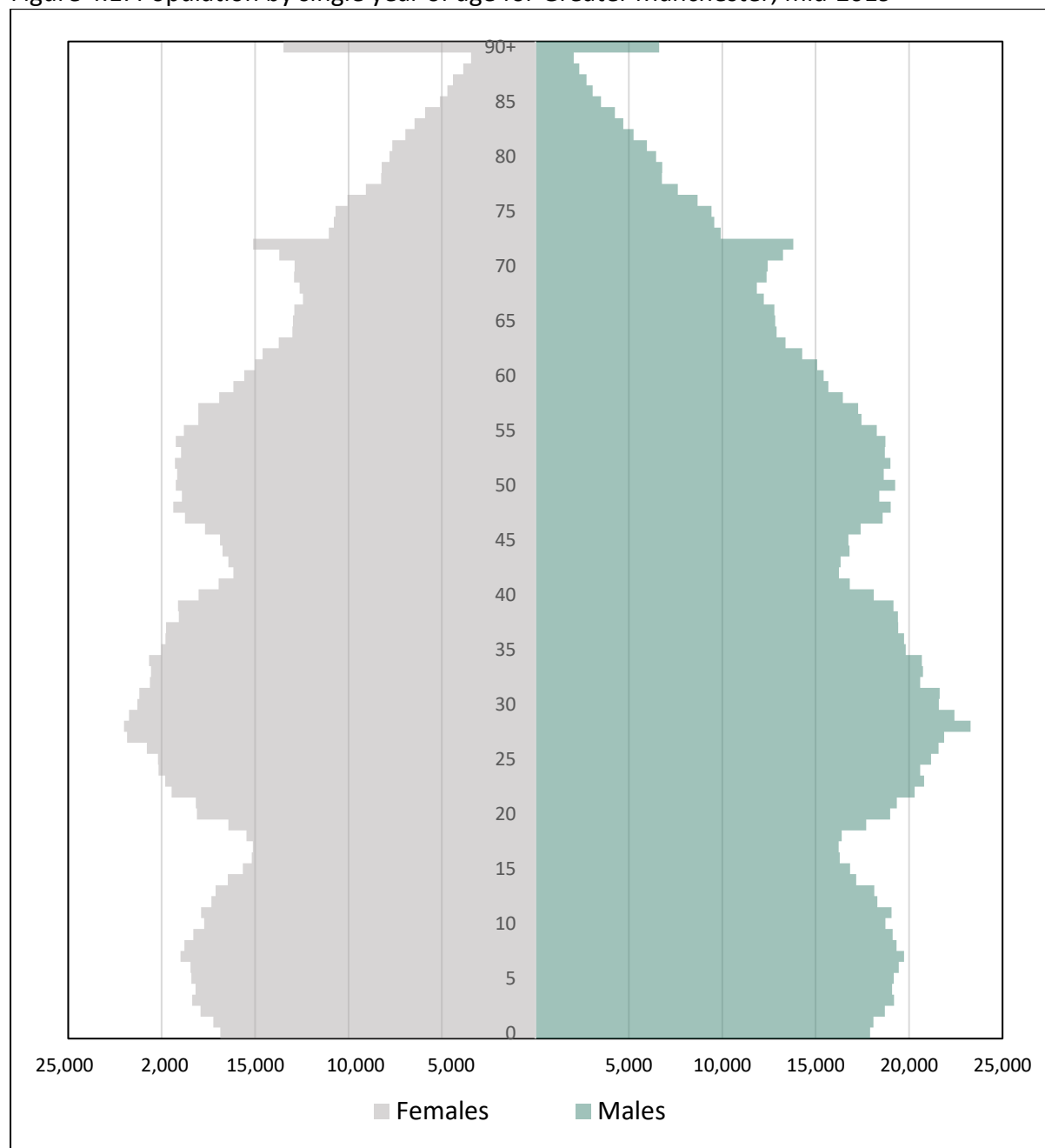
##### Population and age structure

- 4.3 Greater Manchester at mid-2019 had an estimated total population of 2.84 million people, making it the second largest of the metropolitan county areas after the West Midlands (2.93 million).<sup>28</sup>

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<sup>28</sup> Source: ONS, 2019-based mid-year population estimates by local authority and single year of age.

Figure 4.1: Population by single year of age for Greater Manchester, mid-2019



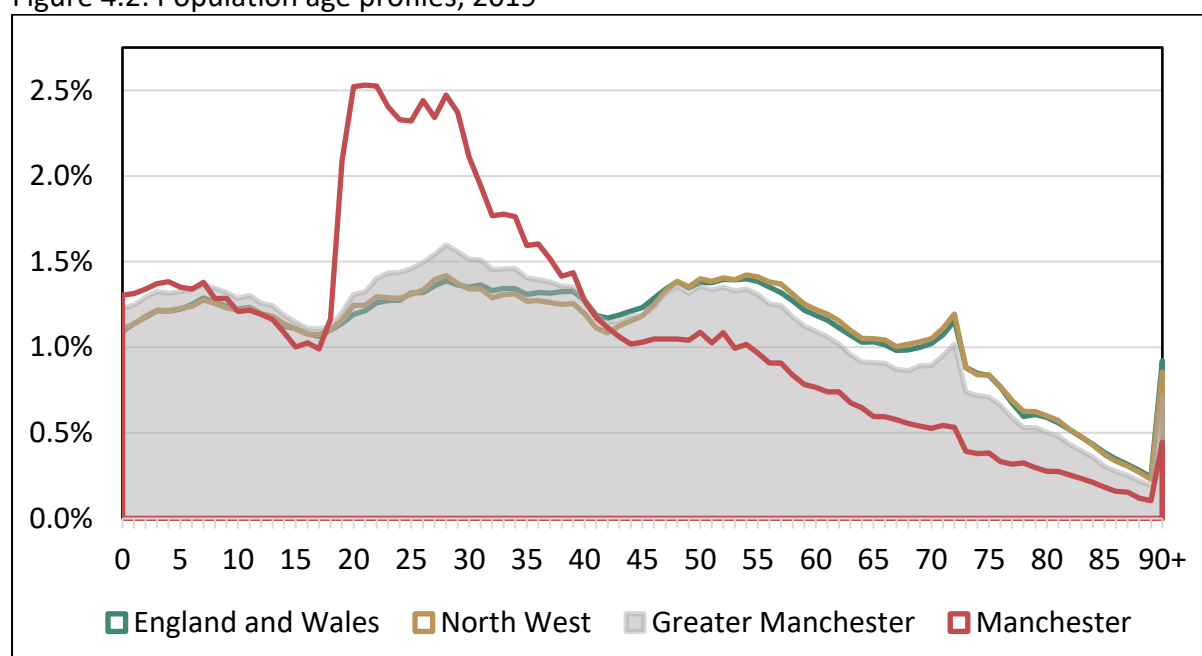
Source: ONS, mid-year population estimates by local authority and single year of age, 2019.

4.4 Across Greater Manchester the residents in their 20s account for a total of 412,697 (14.6%) of the total population. Those in this age decile are the most abundant due mainly to the large number of students and those who stay on after their studies. There are 404,944 (14.3%) in their 30s - the second most numerous age decile. There are slightly more in their 50s (363,336 or 12.8% of the population) than there are in the 40s (350,402 or 12.4%) due to past peaks and troughs in birth rates. There are

581,722 children (0-15) who make up 20.5% of the population. Those of the present pension age (66 and over) account for 424,988 or 15.0% of the population. The population of working age is 1,828,976 or 64.5% of the total population. There are 4.3 times as many of working age as there are of pension age, but a proportion will of course be students, unemployed, disabled, sick or have care needs or work just part-time.

- 4.5 The Greater Manchester picture masks variation between districts. For example, Manchester has a high proportion of 19–26-year-olds (105,927) who account for 19.2% of the total population – many of whom will be students.

Figure 4.2: Population age profiles, 2019



Source: [ONS Populations Estimates UK Mid 2019](#)

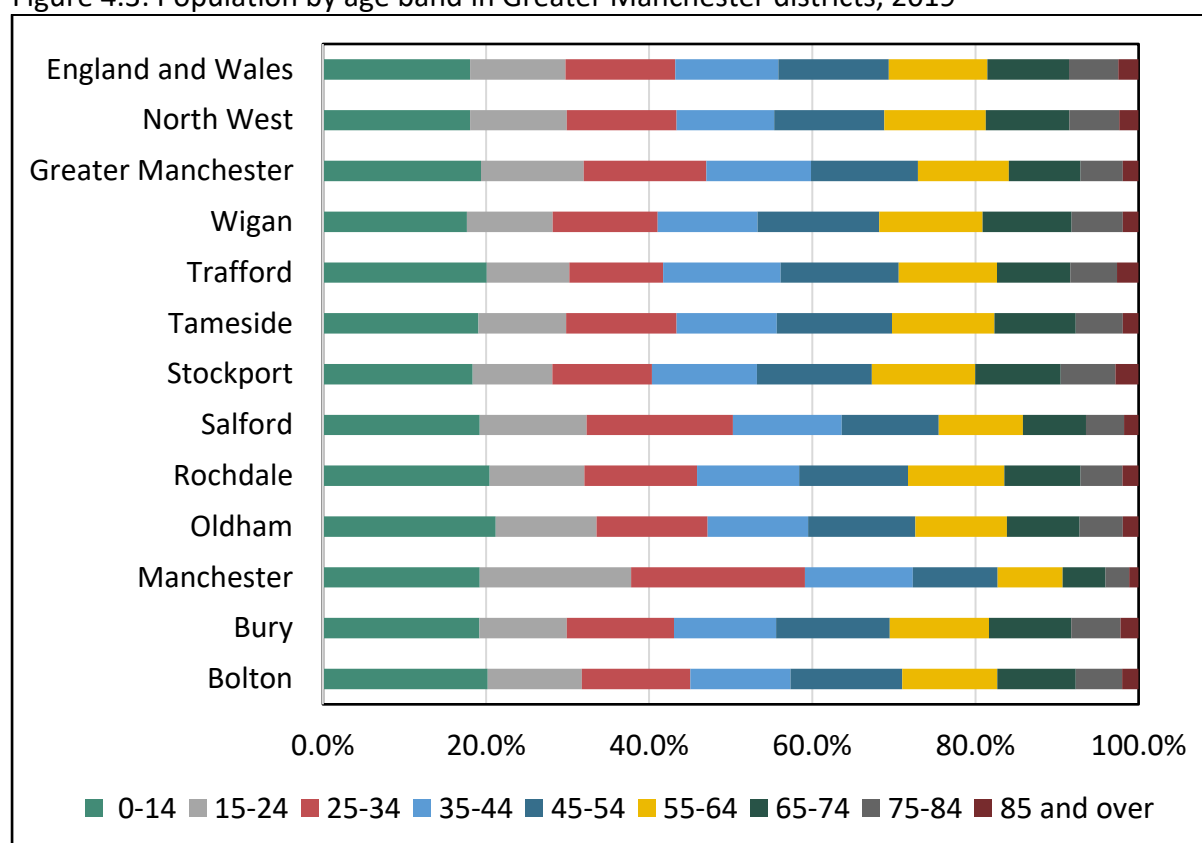
- 4.6 Figure 4.2 shows the variation in the proportion in single years of age for Manchester, Greater Manchester plus the regional and England & Wales rates. The chart shows that Manchester has a markedly different population profile compared to Greater Manchester and that the population profile of Manchester contributes to setting Greater Manchester apart from the regional and England & Wales profiles.
- 4.7 Greater Manchester has a younger population profile than the North West and England & Wales. The median age in the conurbation is 37.1 years compared to 40.3



years in the North West and 40.2 years for England & Wales. Manchester's median age is just 30.1 years. Only Nottingham (29.7 years) and Oxford (28.9 years) have younger median ages at mid-2019 than Manchester has.

- 4.8 All Greater Manchester districts, apart from Wigan, have a higher proportion of their populations under 5 than is the case for England & Wales (5.8%). The same is true for all children under 16 where the England & Wales proportion is 19.1%. However, for those aged 19-29 only Manchester (26.3%) and Salford (18.2%) have higher proportions than for England & Wales (14.1%). The large student and young professional population in these districts, as well as higher levels of international migration are key contributors to the higher rates in Manchester and Salford.

Figure 4.3: Population by age band in Greater Manchester districts, 2019



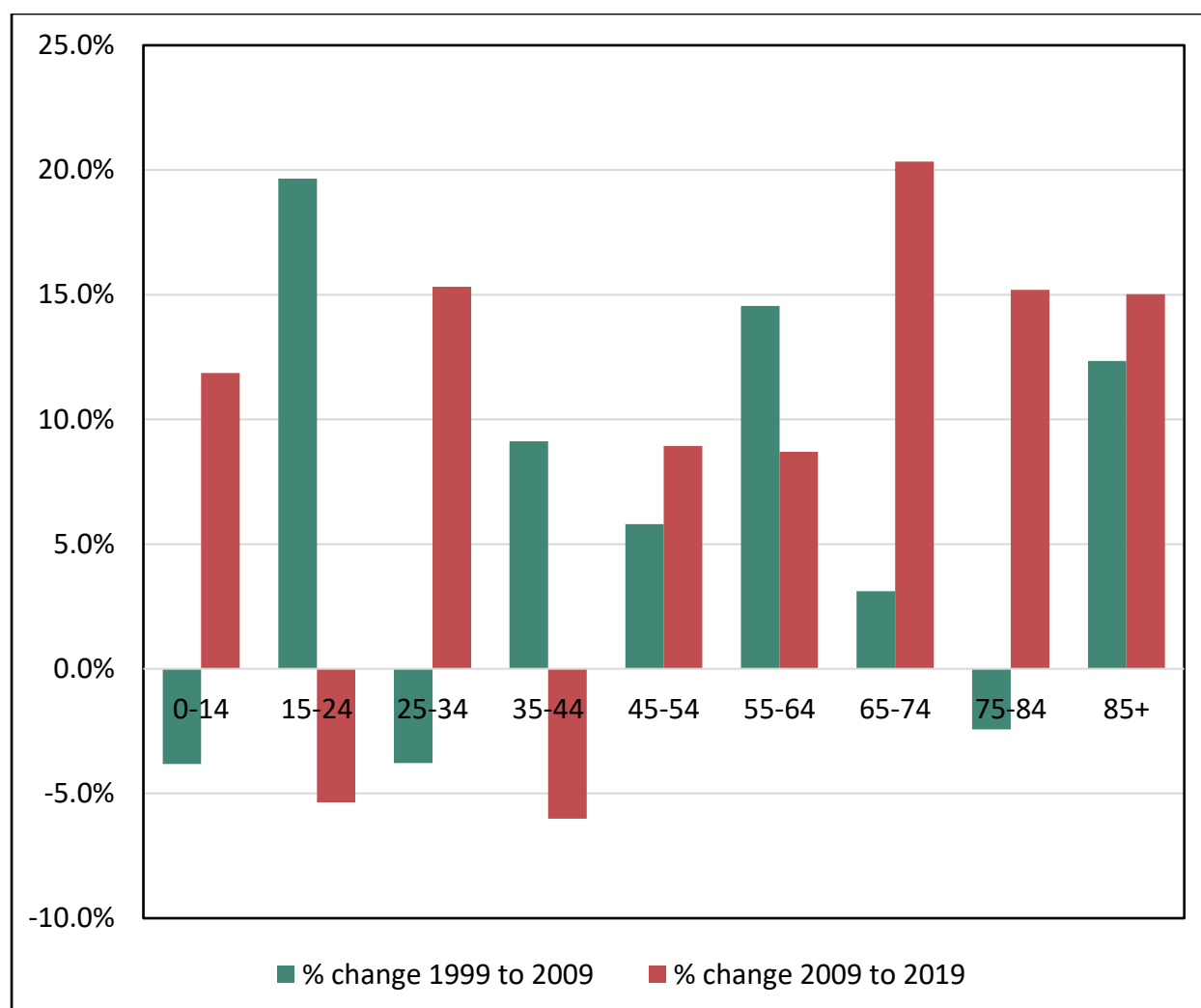
Source: [Estimates of the population for the UK, England and Wales, Scotland and Northern Ireland - Office for National Statistics](#)

- 4.9 Figure 4.3 illustrates further the variations between Greater Manchester districts in terms of age profiles. There are patterns among districts, though Manchester does show a younger age profile overall.

4.10 In the other districts (except Stockport and Tameside) and in Greater Manchester as a whole, children aged under 16 make up a higher proportion of the population than is the case in Manchester (20.2%). In Oldham, children make up 22.5% of the population – the highest rate in the conurbation.

4.11 Those aged 15-24 and 25-34 account for 27.6% of Greater Manchester's population, with higher concentrations within these age bands found in Manchester (39.9%) and Salford (31.1%). Those aged 35-44 account for 12.8% of the population and those aged 45-54 account for 13.1%. The population in the 55–64-year-old age band contribute 11.1% to the Greater Manchester population total. At the conurbation level, 15.9% of the population is aged 65 or more but with a significant variation at the district level: with 9.3% of Manchester's population aged 65 and over but 20.0% of Stockport's population of that age.

Figure 4.4: Changes to the age structure of Greater Manchester, 1999-2009 and 2009-2019



*Source: ONS Mid-year Population Estimates (MYPE) 2019.*

4.12 Over the last 20 years, the age structure in Greater Manchester has broadly been characterised by an increase in the above age groups. In total the population has increased by 320,198 or 12.7% in 20 years. The changes are as follows:

- The number of children under 15 changed by -3.8% between 1999 and 2009. However, this cohort subsequently increased by 11.9% in the decade between 2009 and 2019, to 549,231;
- The population of young adults aged 15-24 increased by 19.7% over the period 1999-2009, but then changed by -5.4% between 2009 and 2019;
- The 25–34-year-old cohort, after a decline of -3.8% during the period 1999-2009, increased by 15.3% between 2009 and 2019, to 426,581;
- After growth (9.1%) between 1999 and 2009, the 35–44-year-old cohort experienced a decline (-6.0%) over the period 2009-2019, reflecting the earlier decline in 25–34-year olds;
- An increase in the 45-54 cohort (5.8%) between 1999 and 2009 was followed by growth of 8.9% in the decade to 2019;
- The 55-64 age cohort experienced growth of 14.5% over the first decade and further growth of 8.7% in the period 2009-2019;
- Population growth for the 65-74 age cohort (3.1%) in the first decade was followed by much stronger growth of 20.3% in the second decade;
- The 75-84 age band had a small decrease (-2.4%) followed by a 15.2% increase; and
- The cohort of people aged over 85 increased by 12.3% rise over the period 1999-2009 followed by a 15.0% increase between 2009 and 2019.<sup>29</sup>

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<sup>29</sup> For further discussion of the growth of the older population in Greater Manchester, see Older persons housing in [Chapter 6](#).

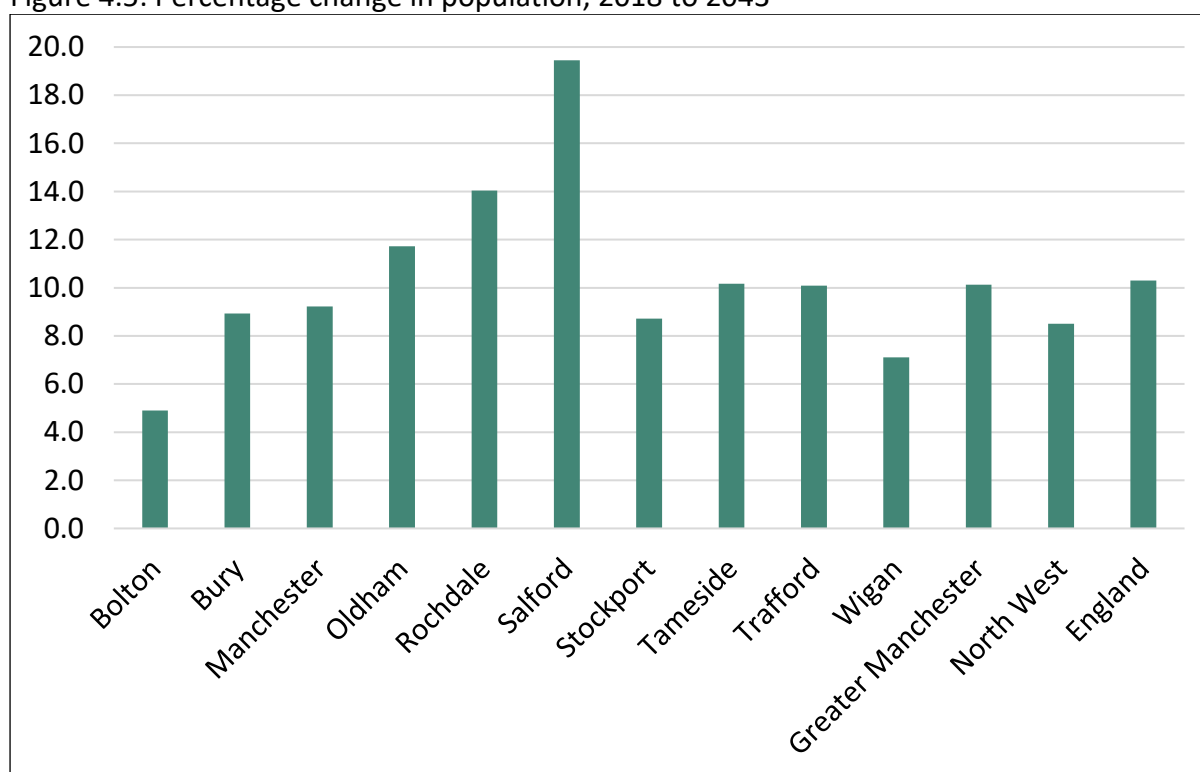


## Population projections

### Population change

4.13 Figure 4.5 shows the percentage change in population using the 2018-based SNPP between the years 2018 and 2043.<sup>30</sup> The largest percentage population growth in this period is in Salford (19.4%) and Rochdale (14.0%). In terms of projected change, the largest increases are for Manchester (50,522) and Salford (49,481). The lowest percentage population growth is in Bolton (4.9%) and Wigan (7.1%). Bolton (13,966) and Bury (16,983) are projected to have the smallest absolute growth. The percentage change across Greater Manchester (10.1%) is higher than the North West rate (8.5%) but is slightly lower than the rate for England (10.3%).

Figure 4.5: Percentage change in population, 2018 to 2043



Source: ONS 2018-based SNPP for local authorities and higher administrative areas in England.

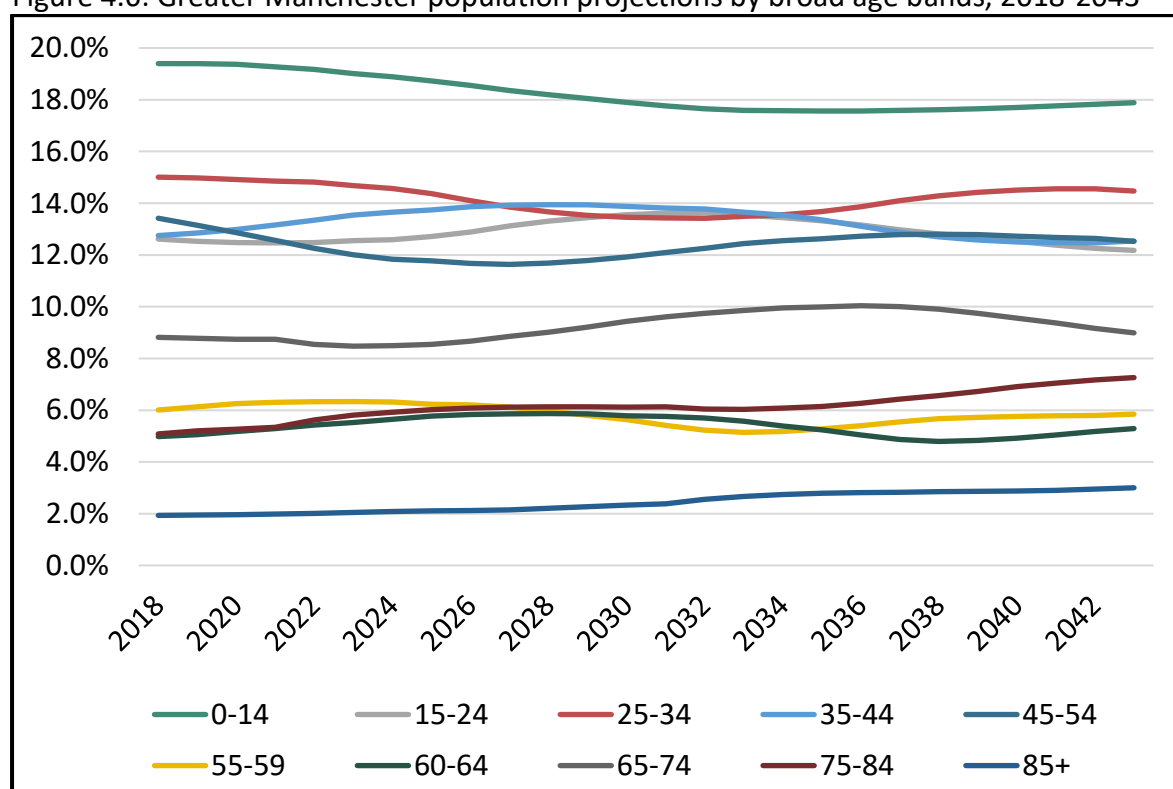
<sup>30</sup> More information on ONS SNPP, including the methodology used to produce the projections and information on changes to this methodology is available [here](#)

- 4.14 Figure 4.6 provides the percentage population change by broad age bands for the Greater Manchester districts between 2018 and 2043. The 2018-based SNPP show those aged 14 or under account for 19.4% of the population at the start of the projection. The percentage of those aged 0-14 years declines to 17.9% of the population by 2043 despite the actual number in 2043 being 8,493 higher than in 2018 though this represents an increase of just 1.6%. This age group is projected to have year on year decreases from 2021 to 2032. The number of residents aged 0-14 will then rise steadily from 2032, though the projection is less likely to be accurate in the later years.
- 4.15 Those aged 15-24 accounted for 12.6% of the population at mid-2018 and by 2043, this is projected to decline slightly to 12.2% of the Greater Manchester population. The population in this age cohort is projected to rise by 22,503 - a 6.3% rise.
- 4.16 The population in the age band 25-34 accounted for 15.0% of the total population in 2018 and their share of the total population is projected to decline slightly to 14.5% by 2043 despite a projected increase of just over 26,000.
- 4.17 The proportion of those aged 35-44 is set to decrease slightly over the period, from 12.8% of the total population in 2018 to 12.5% in 2043 due to older age groups increase by more. The population within this age range is projected to increase by 8.3% or 29,819 residents.
- 4.18 The proportion of Greater Manchester's population aged 45-54 is projected to change from 13.4% of the overall population at mid-2018 to 12.5% of the Greater Manchester population at 2043. The actual projected number within the age band is projected to increase by 10,696 or 2.8% more than at mid-2018.
- 4.19 For the 55-59 age group the change is from 6.0% of the total population at 2018 to 5.8% in 2043. The population within the age group is set to rise in the long term with an additional 12,261 residents of this age by 2043 representing an increase of 7.3%.
- 4.20 Those aged 60-64 are projected to increase in numerical terms and as a proportion of the total population. In 2018, they accounted for 5.0% of the population and by 2043 this will increase to 5.3%. This rise is projected to be 23,866 or 17.1% more than in the age group at mid-2018.
- 4.21 The 65-74-year-olds are projected to account for 9.0% of the Greater Manchester population by 2043 – a slight increase from 8.8% of the population at mid-2018. The

actual population within the age group is projected to increase by 30,572 or 12.3% higher than at mid-2018.

- 4.22 Those aged 75-84 are projected to change the most over the full projection period. At the start of the projection there were 142,959 residents in this cohort, which accounted for 5.1% of the 2018 population across Greater Manchester. By 2043, the population in this cohort is projected to be 224,877. This represents an increase of 81,918 on the 2018 population equivalent to a 57.3% rise. By 2043, this age group is projected to account for 7.3% of all residents in Greater Manchester.
- 4.23 The population aged 85 or more are also projected to show large increases in the years to 2043. At the start of the projection period at mid-2018 the population aged 85 or more was 54,368 across Greater Manchester. The projection shows that by 2043 there will be 92,932 residents aged 85 or more. This is an increase of 38,564, which is equivalent to an increase of 70.4% in the numbers in this age group. As a proportion of the Greater Manchester population, this age range is projected to change from 1.9% in 2018 to 3.0% of the total population in 2043.

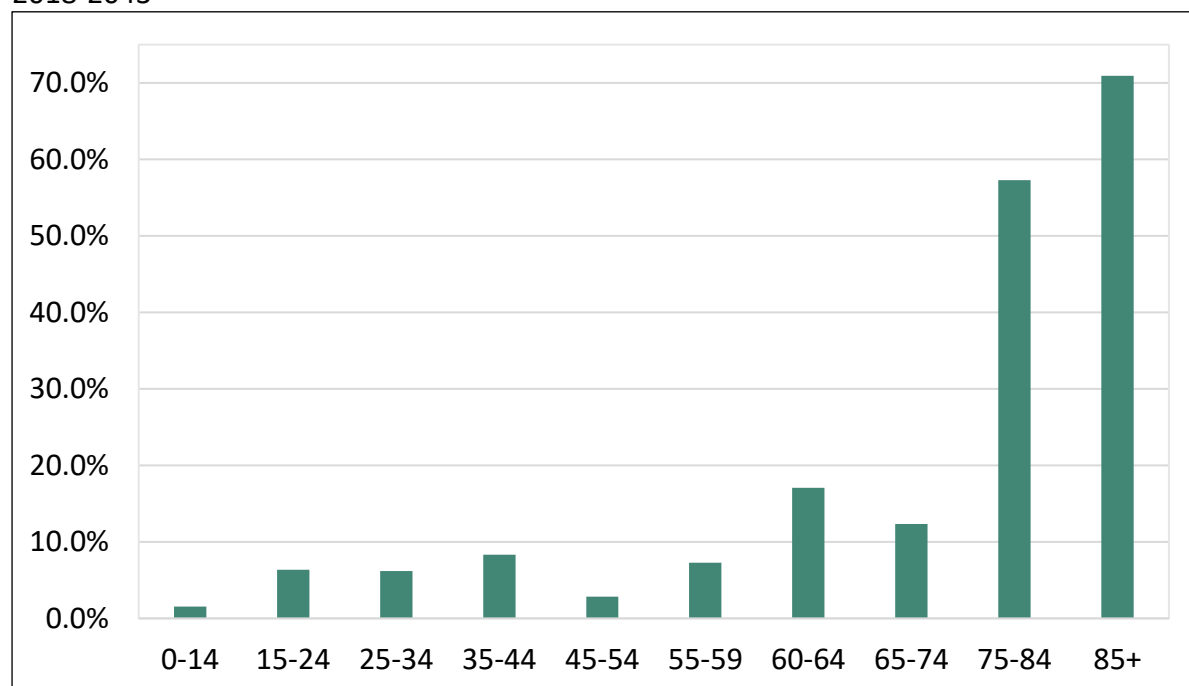
Figure 4.6: Greater Manchester population projections by broad age bands, 2018-2043



*Source: ONS 2018-based SNPP for local authorities and higher administrative areas in England.*

4.24 Figure 4.7 below shows that the greatest percentage rise in population between 2018 and 2043 is projected to be in the older age groups, with those aged over 85 increasing by 70.9% over the period. There will be strong growth in all age groups over 60. The 75-84 age group are projected to rise by 57.3%. The smallest growth will be in the number aged 0-14 with just a 1.6% rise. Overall, across all bands the population is projected to rise by 10.1%.

Figure 4.7: Percentage population change for Greater Manchester by broad age bands, 2018-2043



*Source: ONS, 2018-based SNPP for local authorities and higher administrative areas in England.*

#### *Components of change*

4.25 A change in population for an area from one year to the next consists of the sum of the natural change plus the net migration. Natural change is the total number of births minus the total number of deaths within the year; migration is the sum of inward migration plus 'other' changes minus the outbound migration.





Table 4.1: Components of population change, 2018-2043

Area	2018-based SNPP		
	Population change	Natural change	Net migration
Bolton	13,966	15,611	-1,605
Bury	16,983	7,562	9,306
Manchester	50,522	105,943	-54,445
Oldham	27,617	23,433	4,227
Rochdale	30,882	15,710	15,153
Salford	49,481	39,603	9,861
Stockport	25,414	8,118	17,059
Tameside	22,903	7,341	15,484
Trafford	23,838	12,896	10,736
Wigan	23,159	-8,835	31,814
Greater Manchester	284,764	227,380	57,589
North West	620,494	65,930	554,595
England	5,766,920	1,375,784	4,378,960

Source: ONS 2018-based SNPP for local authorities and higher administrative areas in England.

#### Natural change

4.26 For Greater Manchester natural change is far more important to overall population growth than migration, accounting for 79.8% of the population increase between 2018 and 2043, or 227,380 people. This contrasts with England as a whole and the North West where net migration is of greater importance than natural change. In the North West natural change accounts for just 10.6% of growth and in England natural change accounts for 23.8% of growth.

4.27 The number of births in the 25-year period is projected to be 896,354 for Greater Manchester and the number of deaths projected is 658,974.

#### Net migration

4.28 Over the period 2018-2043, Manchester loses population due to net migration (-54,445 residents), though many of the movers will be relocating to other parts of Greater Manchester. Bolton is projected to experience negative migration over the

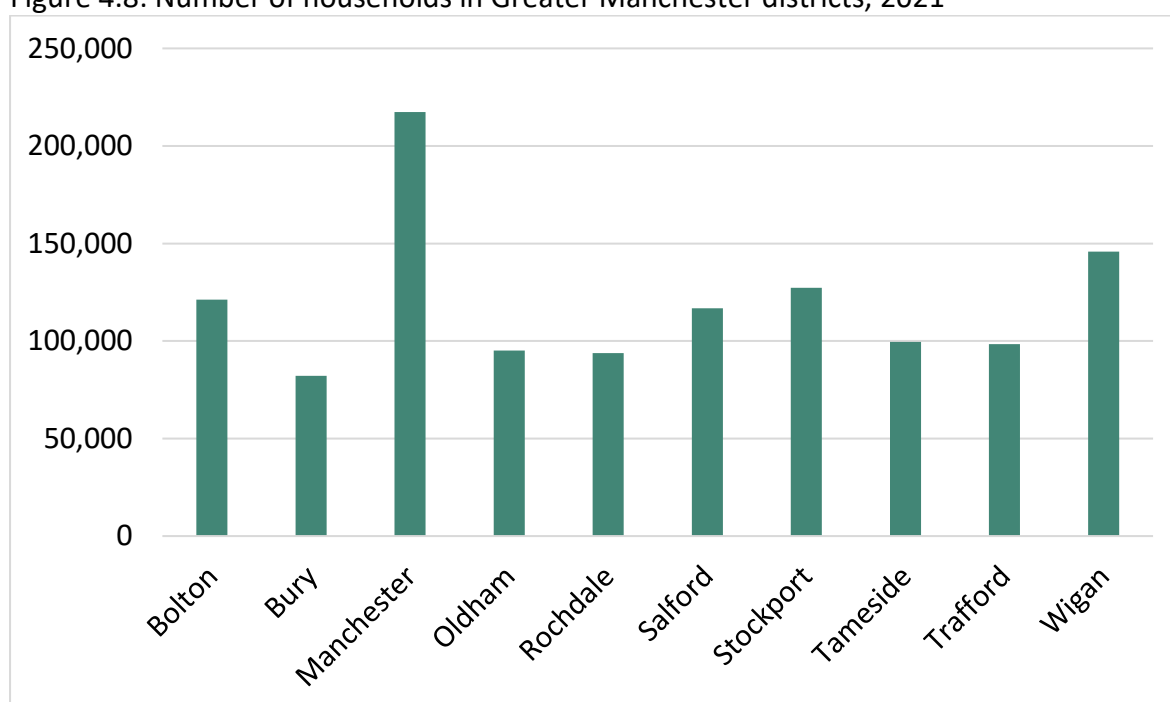
period totalling -1,605. Overall, the population of Greater Manchester is projected to have a net migration figure of 57,589 over the full projection period to 2043.

## Household characteristics

### *Number of households*

4.29 The 2018-based projection for the number of households in 2020 was 1,197,196 households in Greater Manchester, the district breakdown of which is shown below.

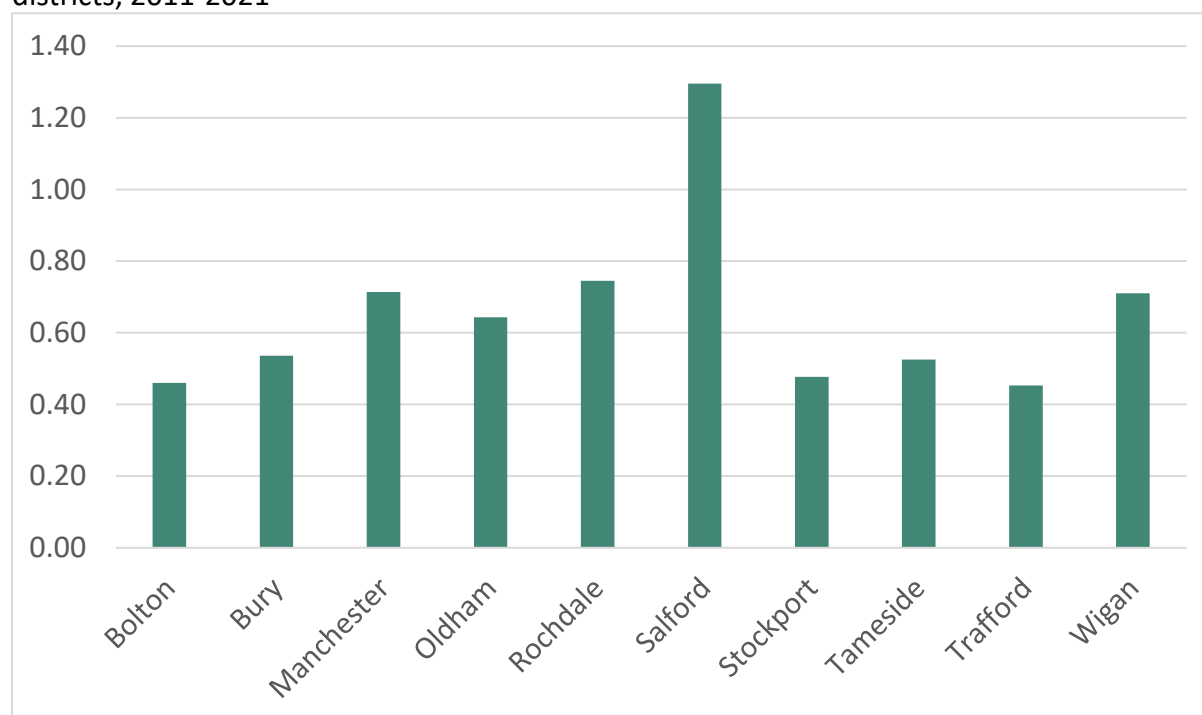
Figure 4.8: Number of households in Greater Manchester districts, 2021



Source: ONS, 2018-based SNHP

4.30 Figure 4.9 below shows the average annual growth in households by district in Greater Manchester since 2011. Overall, there was an increase of around 76,614 households in Greater Manchester from mid-2011 to mid-2021.

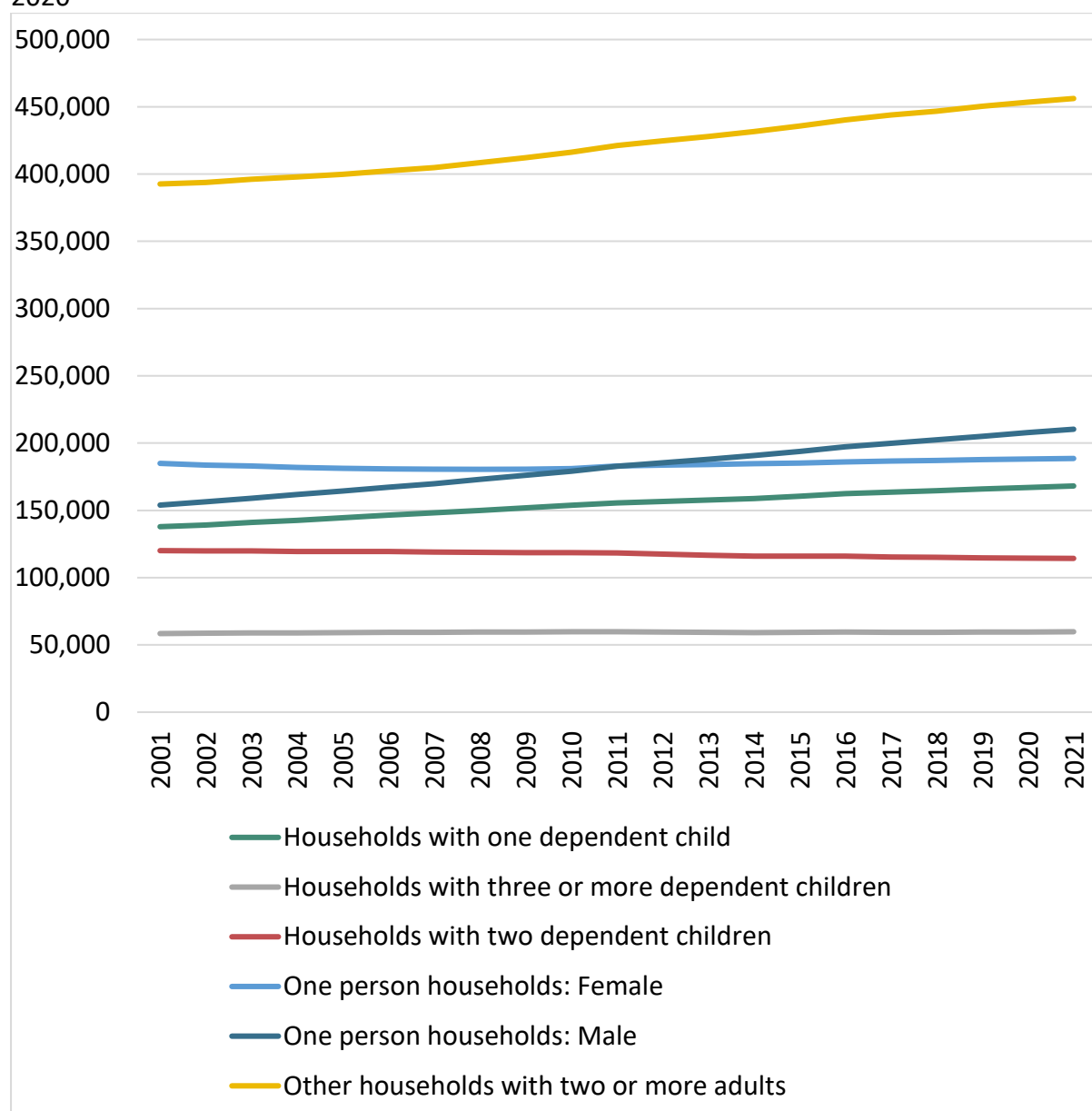
Figure 4.9: Average annual growth rate in the number of households in Greater Manchester districts, 2011-2021



Source: ONS, 2018-based SNHP

- 4.31 The highest rates of annual growth over the last decade have been in Salford (1.30% per annum) and Rochdale (0.75% pa). Manchester and Wigan (both 0.71% pa) had the next highest average annual rates of growth.
- 4.32 The lowest average annual rates of growth are in Trafford (0.44% pa) and Bolton (0.46% pa). For Greater Manchester the average annual growth rate in households was 0.66% pa.

Figure 4.10: Change in households by household composition in Greater Manchester, 2001-2020



Source: MHCLG Household Projections model.

4.33 Figure 4.10 shows the change in numbers of households in Greater Manchester by household type, between 2001 and 2020. The most frequently occurring household type throughout the period is “other households with two or more adults”. This household type also shows the largest actual rise over the time-period increasing by 60,742 households but the largest percentage rise occurs with “one-person male households” which increase by 35.0%. In contrast “one-person female households”

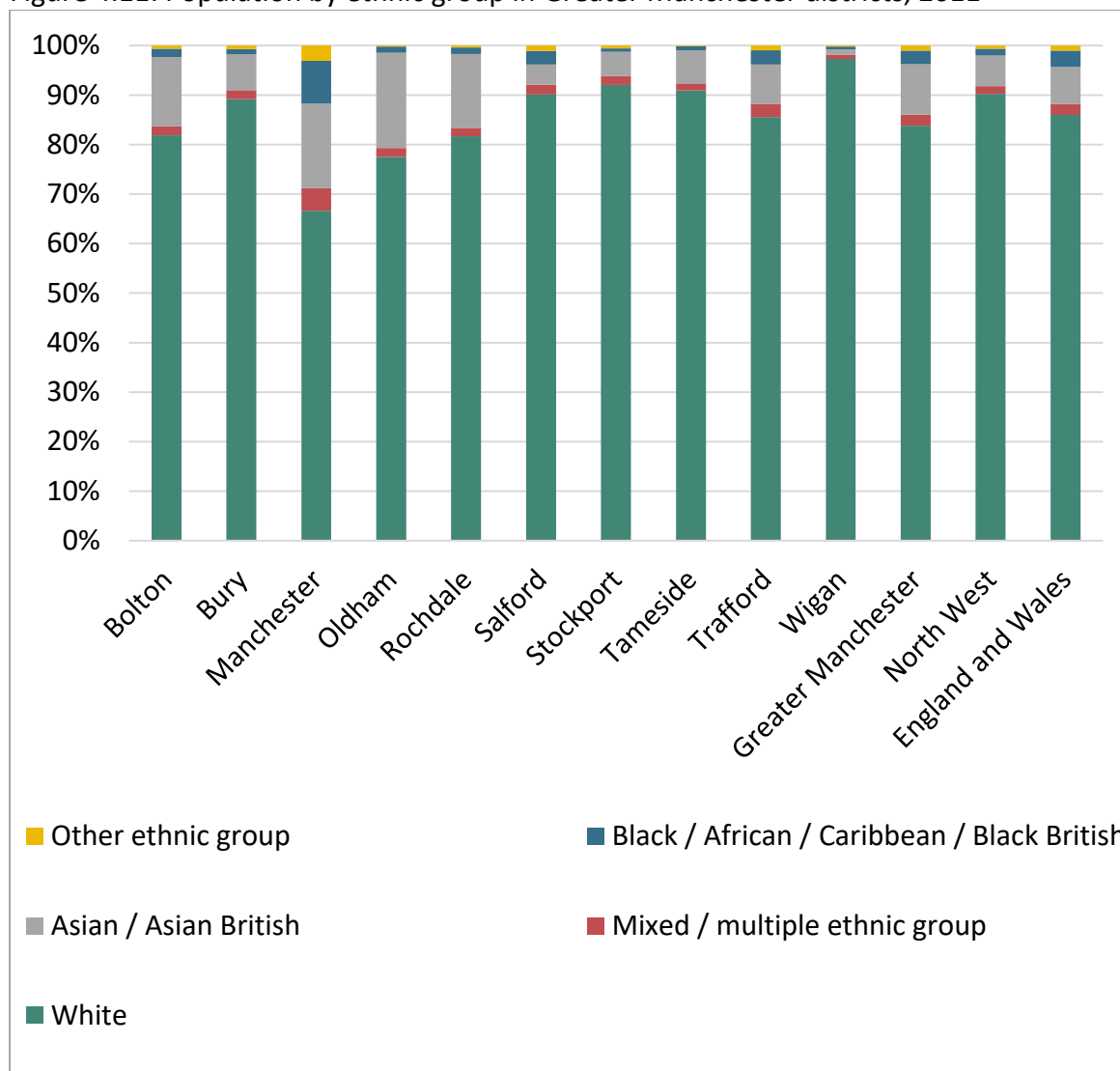
increases by just 1.7%. Single male households are now outnumbering single female households.

- 4.34 Households with one dependent child increases by 21.1% over the period. The number of households with three or more children increases by 2.0%. The number of households with two dependent children falls by -4.6%.
- 4.35 The total increase in households from 2001 to 2020 is 142,555 or 13.6%. At mid-2002, the 2018-based projections show a total number of 1,190,464 households in Greater Manchester.

#### Ethnic minority communities

- 4.36 Greater Manchester is a little more ethnically diverse than England & Wales as a whole, with a larger proportion of the population who identify as Asian/Asian British but a slightly lower proportion who identify as Black/African/Caribbean/Black British.

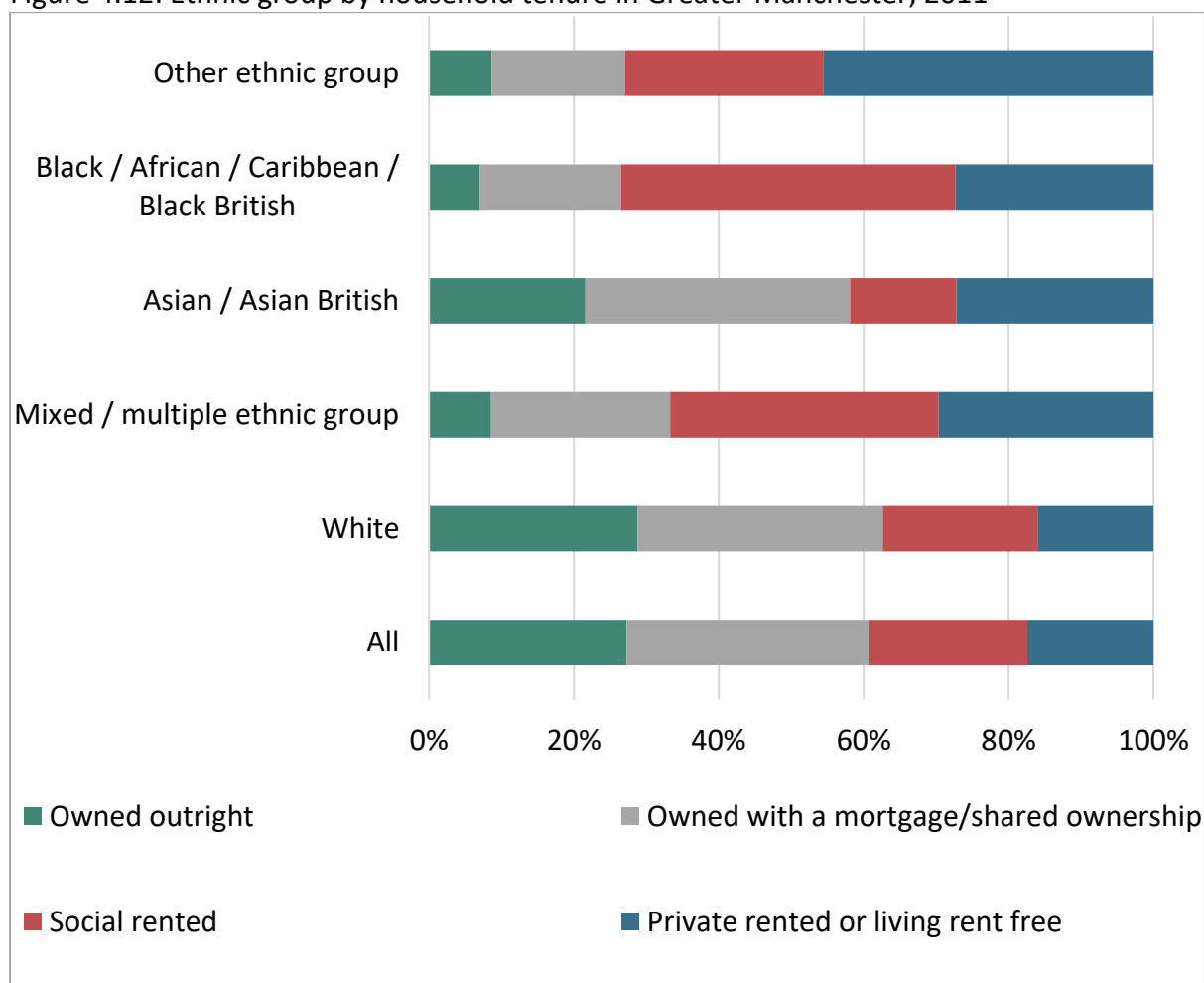
Figure 4.11: Population by ethnic group in Greater Manchester districts, 2011



Source: ONS, 2011 Census

4.37 Figure 4.11 shows the breakdown of districts by ethnic group. In Greater Manchester 84% of residents identified as white as opposed to 86% in England & Wales and 90% in the North West. People identifying as Asian or Asian British account for 10% of the Greater Manchester population, compared to 7.5% nationally and 6% in the North West. Manchester is the most ethnically diverse district within the conurbation, with 67% of the population identifying as white, 17% as Asian or Asian British, 9% as Black African, Caribbean or Black British, 5% as a mixed or multiple ethnic groups and 3% as an other ethnic group.

Figure 4.12: Ethnic group by household tenure in Greater Manchester, 2011



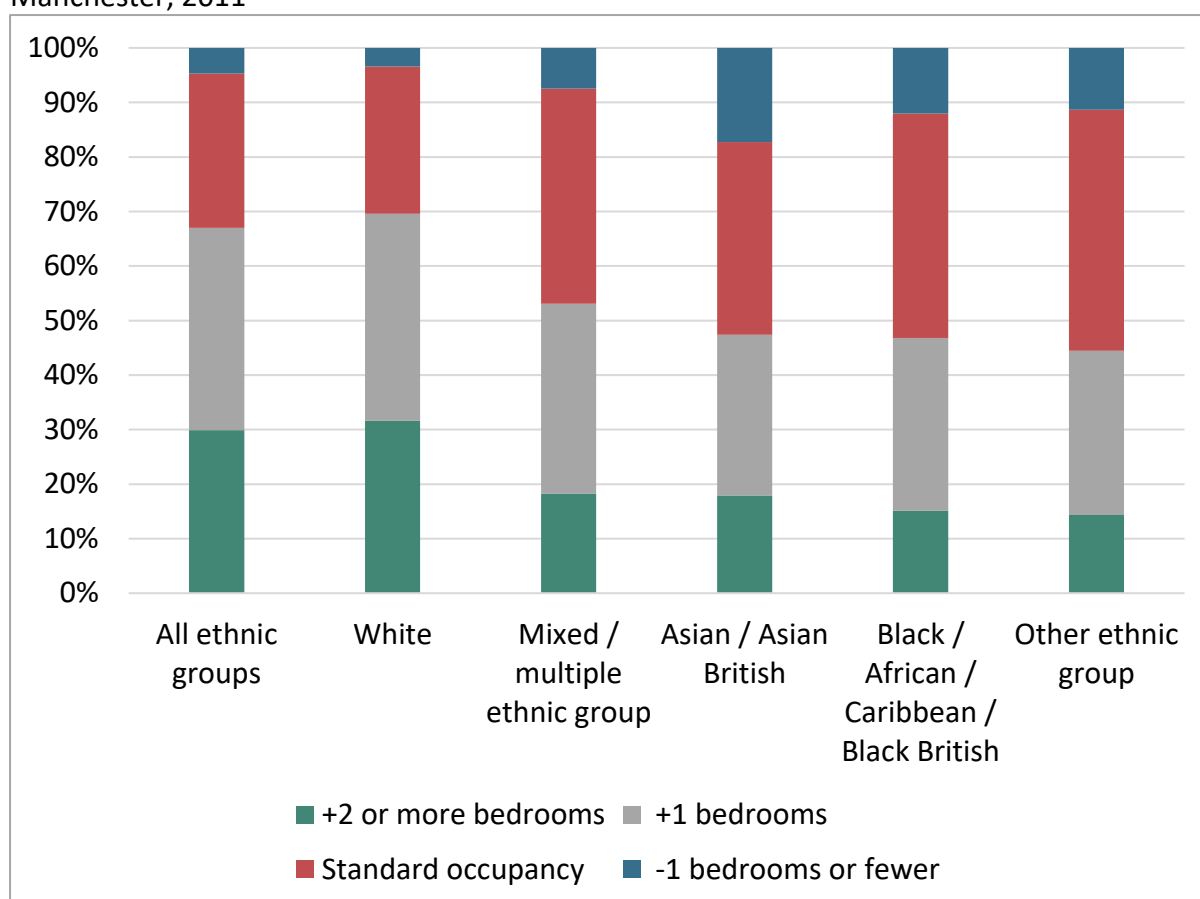
Source: ONS, 2011 Census

4.38 Figure 4.12 shows that there is some variation in tenure by the ethnic group of household head in Greater Manchester. Overall, just over 60% of Greater Manchester residents are owner-occupiers, with 27% of the population owning their home outright. Households headed by someone identifying as white are most likely to own their own home, with 28% of households owning outright and 34% with a mortgage. Households headed by someone identifying as being in a black ethnic group are least likely to be owner-occupiers in Greater Manchester, with 7% of households owning outright and 20% with a mortgage. Social renting is the majority tenure of households in this ethnic group, accounting for 46% of households and this is also the case for those whose household head identifies as belonging to mixed or multiple ethnic groups, 37% of whom are social renters. Most Asian households are



owner-occupiers and conversely show the smallest proportion of social renters at 15%. Those identifying as another ethnic group are most likely to be private renters, with 45% of households in this sector.

Figure 4.13: Ethnic group by occupancy rating (bedrooms) of accommodation in Greater Manchester, 2011



Source: ONS, 2011 Census

4.39 Figure 4.13 shows the occupancy rating of homes by the ethnic group of the household representative. Across the Greater Manchester population 67% of homes are under-occupied, as residents have at least one more bedroom than would be expected based on the number of occupants; 32% have two more than expected. Around 28% of homes are occupied at the expected standard and 5% are overcrowded.

- 4.40 Households in the white ethnic group are more likely to be under-occupied, with 70% of the households having spare bedrooms. Only 3% of white households are overcrowded.
- 4.41 Around 53% of households comprising mixed or multiple ethnic groups are under-occupied, with 40% of homes occupied to standard and 7.5% overcrowded, which is above the Greater Manchester average. Those who are Asian or Asian British are also more likely to have at least one bedroom fewer than needed, with 17% of households overcrowded. Black African, Caribbean and British households, as well as those from another ethnic group, are also more likely to be overcrowded (12% and 11% respectively), but over 40% of both groups are occupied to the expected standard.

### Young people

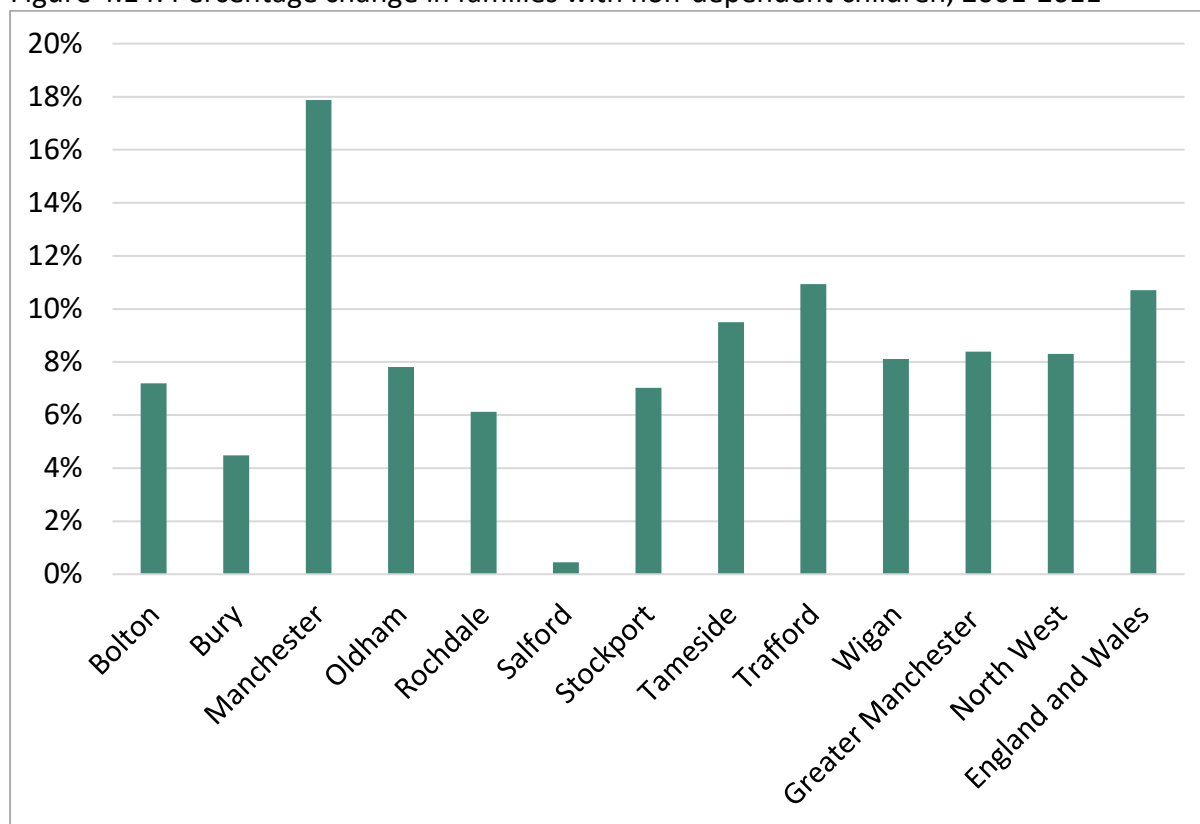
- 4.42 As already noted, Greater Manchester has a young population, with 39% of residents aged under 30; this compares to 36% in the North West and 36% for England.<sup>31</sup> The cities of Manchester and Salford have younger than average populations, with 49% of Manchester residents aged under 30 and 41% of Salford's residents under 30.<sup>32</sup>
- 4.43 In recent years, household formation among younger people has been suppressed due to housing affordability issues, with non-dependent children living at home for longer than previously, as shown below.

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<sup>31</sup> Source: ONS, 2018-based population projections for England rates are for 2021.

<sup>32</sup> Source: ONS, 2018-based population projections for 2021.

Figure 4.14: Percentage change in families with non-dependent children, 2001-2011



Source: ONS, 2001 Census and 2011 Census.

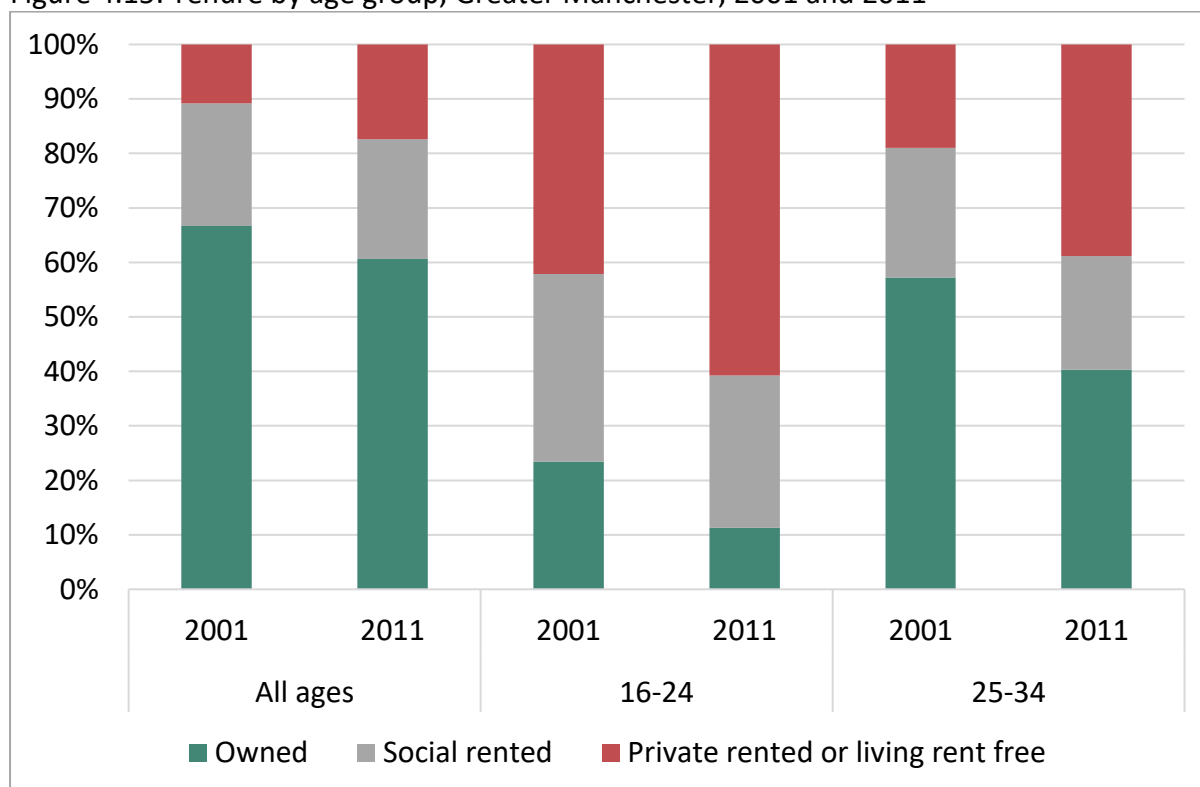
4.44 Figure 4.14 shows that there has been an increase of 11% in families with non-dependent children in England & Wales between 2001 and 2011. At a Greater Manchester level, the change has been smaller, at 8%, roughly in line with the regional figure. However, Manchester has seen an increase that is far above average at 17% over the period. Trafford and Tameside have also seen increases in these family types. Salford has seen only a very small increase in this family type over the decade.

#### Tenure

4.45 The housing situation of young people has traditionally been different from that of the general population, with a far larger proportion of young people living in the private rented sector (PRS). This is partly due to the flexibility of the tenure allowing people to move for work or study, as well as young people being less likely to have

had time to save for a deposit to buy a home. Between 2001 and 2011, the concentration of young people in the PRS in Greater Manchester increased significantly, because of the increases in barriers to homeownership for young people over this period.

Figure 4.15: Tenure by age group, Greater Manchester, 2001 and 2011



Source: ONS, 2001 Census and 2011 Census

4.46 Figure 4.15 shows that in 2001, 67% of all Greater Manchester households owned their own homes; in 2011, this had reduced to 61%. In 2001, 23% of households headed by 16–24-year-olds were homeowners; by 2011, this had reduced to only 11%. Of those aged 25-34, over 57% were homeowners in 2001; by 2011, this had reduced to 40%.

4.47 Although there has been an increase in households in the PRS across all ages, this has been particularly pronounced for households aged under 35. Over 60% of those aged 16-24 lived in the PRS in 2011, compared to 42% in 2001. Similarly, almost 40% of households, aged 25-34 were in the PRS in 2011; in 2001, this was less than 20%.

### 4.3 Socio-economic profile

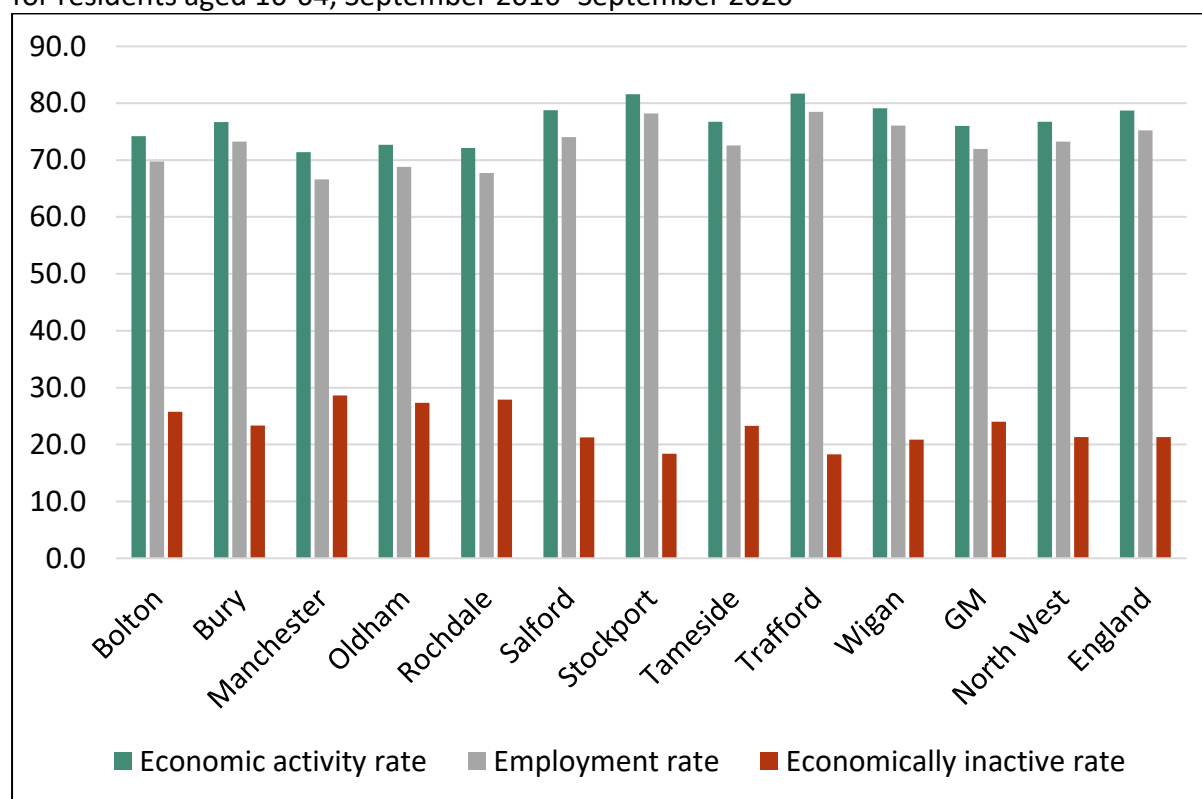
#### Economic activity and employment rate

4.48 Economically active people are those in employment or seeking employment.

Economically inactive people are those who are not in work and are not seeking work, for example students, those who are temporarily or long-term sick or disabled, retired people and those who are looking after a family or home.

4.49 The economic activity and employment rates for Greater Manchester are in line with the North West average levels, but both areas experience lower rates of economic activity and employment than the national average.

Figure 4.16: Average economic activity rate, employment rate and economic inactivity rate for residents aged 16-64, September 2016- September 2020

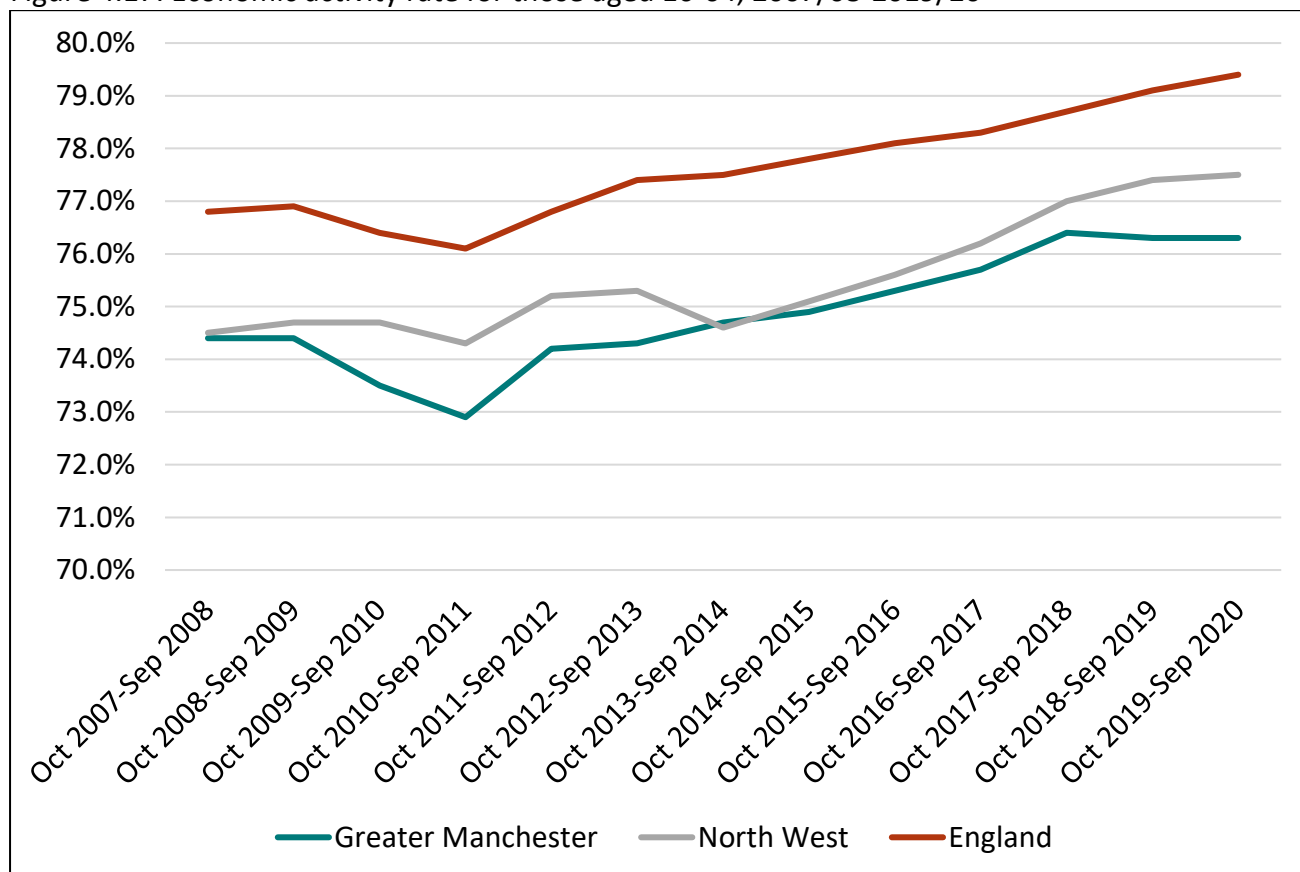


Source: Annual Population Survey. Defined as the total; number economically active as a percentage of all those aged 16 to 64. The sample sizes and margins of error are greater below the Greater Manchester level.

4.50 There are variations between Greater Manchester districts in terms of resident economic activity and employment rates. Manchester has the lowest employment

rate (66.6%) and the lowest rate of economic activity (71.4%) in the conurbation. This is likely to be influenced by the large student population in the district, the majority of whom are considered economically inactive. Stockport, Trafford, and Wigan have economic activity and employment rates that are above the national average.

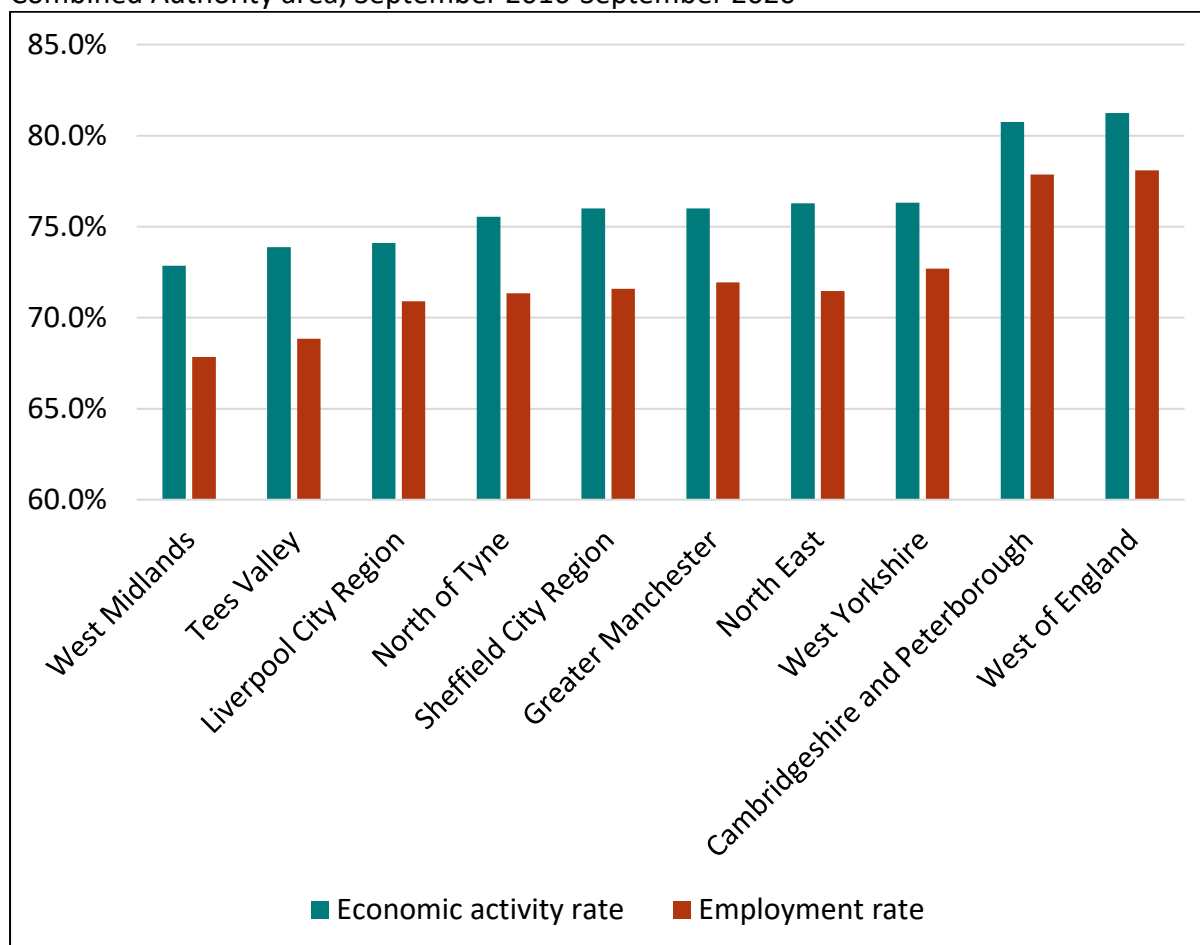
Figure 4.17: Economic activity rate for those aged 16-64, 2007/08-2019/20



Source: Annual Population Survey

4.51 Figure 4.17 shows that Greater Manchester has experienced fairly consistent levels of economic activity between 2007/08 to 2019/20. Greater Manchester's rate has been similar to the North West level of economic activity over the period but in most years slightly lower. Both the North West and Greater Manchester have been a few percentage points below the national average in terms of economic activity rate.

Figure 4.18: Average economic activity rate and employment rate of those aged 16-64 by Combined Authority area, September 2016-September 2020



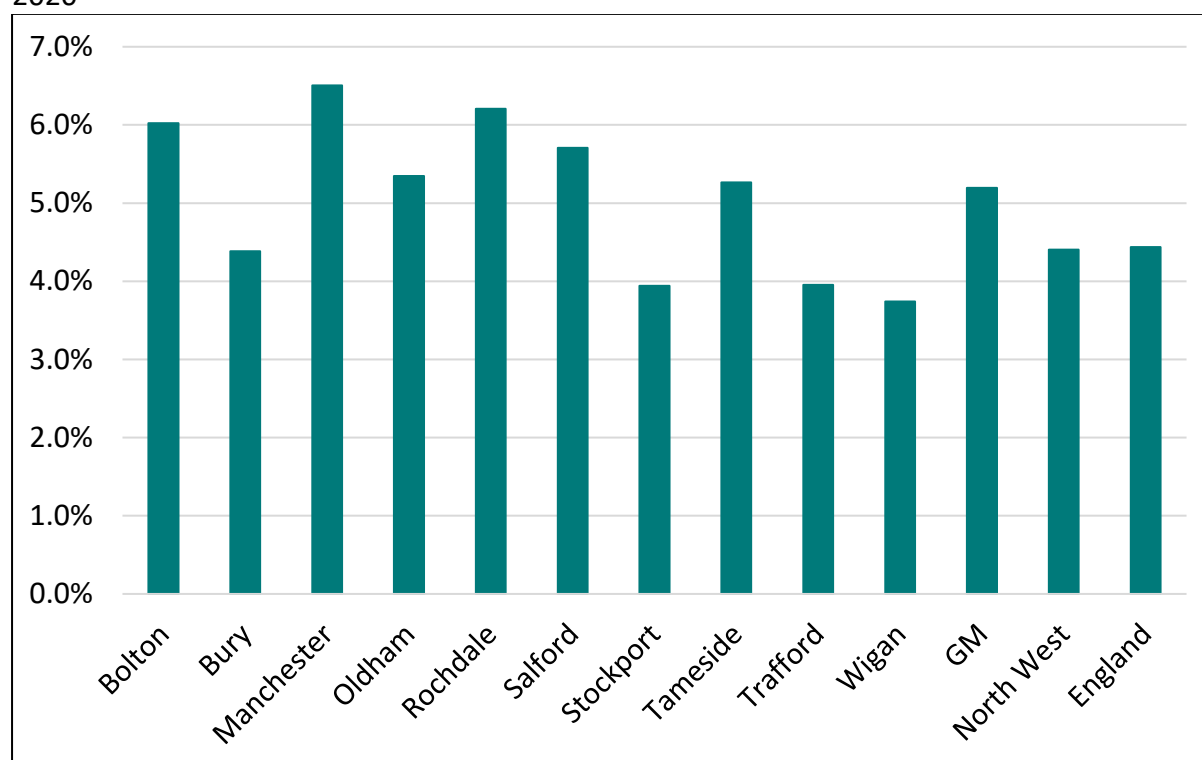
Source: Annual Population Survey

4.52 Figure 4.18 shows the performance of Greater Manchester relative to the other Combined Authority areas in terms of employment rate and economic activity rates. This shows that Greater Manchester performs well in relation to the other northern Combined Authority areas, with higher employment rates (except West Yorkshire) and higher or equal economic activity rates (except West Yorkshire and North East). The Combined Authority areas of Cambridgeshire and Peterborough and also West of England have economic activity and employment rates higher than the other Combined Authorities.

#### Worklessness

4.53 The unemployment rate reported by the ONS in the UK uses the International Labour Organisation (ILO) definition of unemployment, that is, unemployed people are those without a job who have been actively seeking work within the last four weeks and are available to start work within the next two weeks. Greater Manchester has an unemployment rate above the national and regional average figures. In 2018/19, 4.8% of people aged 16-64 in Greater Manchester were unemployed.

Figure 4.19: Average unemployment rate of those aged 16-64, September 2016-September 2020



Source: Annual Population Survey

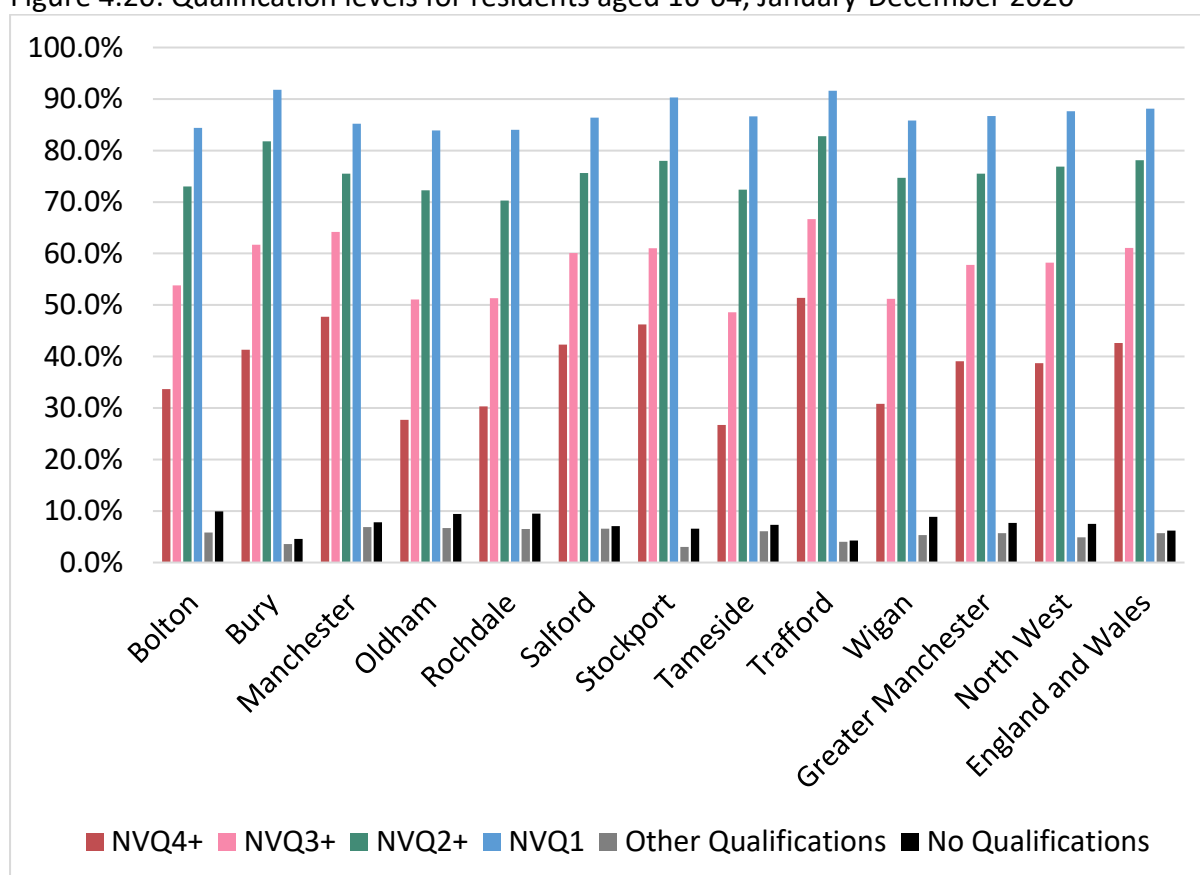
4.54 Figure 4.19 shows that over the last four years unemployment was highest in Manchester at 6.5% of the working age population, with Rochdale the second highest at 6.2%. Only Wigan (3.7%) and Stockport (3.9%) and Trafford (4.0%) had average rates below the national average. Bury (4.4%) had the same rate as the national average which is also the same as the regional rate.



## Qualifications

4.55 The qualifications profile of Greater Manchester differs somewhat from the regional and national picture. Greater Manchester has a higher proportion of residents with no qualifications than the regional and national averages. Greater Manchester has a slightly smaller proportion of the population qualified to National Vocational Qualification (NVQ) level 4 or above (equivalent to an undergraduate degree) than the North West or England & Wales.

Figure 4.20: Qualification levels for residents aged 16-64, January-December 2020



Source: Annual Population Survey (APS)/NOMIS

4.56 Figure 4.20 shows that 57.8% of Greater Manchester's residents are qualified to NVQ level 3 or above, which is equivalent to A-Level or higher. This is slightly lower than the national average for these qualification levels. The England & Wales rate is higher than the Greater Manchester and the North West rate.

- 4.57 There is some variation within districts, with 66.7% of Trafford residents having level 3 or above qualifications and 51.4% with level 4 and above. This contrasts with Tameside, where 26.7% of residents have level 4 or above qualifications. Across the conurbation, Trafford has the highest rate qualified to level 4 or above, followed by Manchester (47.7%) and then Stockport (46.2%). All well above the England & Wales average of 42.6%.
- 4.58 In terms of the proportions with no qualifications only Bury and Trafford have lower rates than the England & Wales average. The rate with no qualifications is highest in Bolton (9.9%).
- 4.59 Rochdale and Oldham have very similar qualifications profiles, with above average percentage of residents with no qualifications and below average percentage with level 4 and above qualifications.

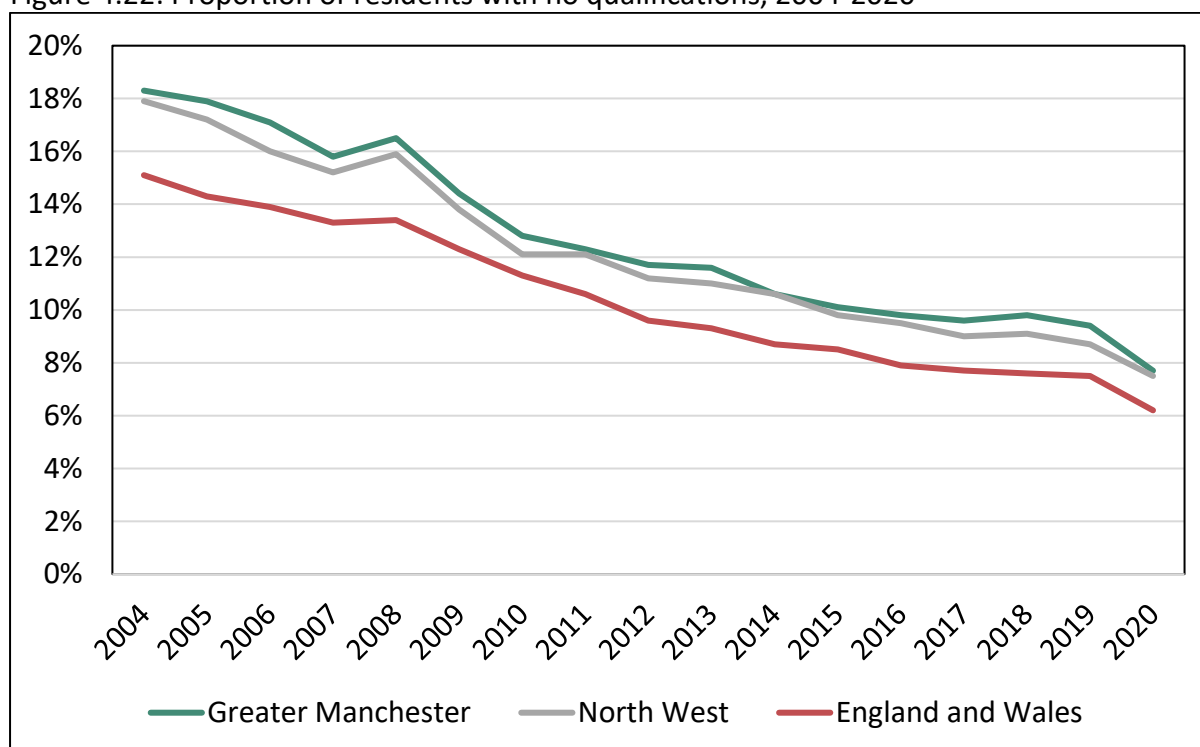
Figure 4.21: Proportion of residents qualified at level 4 or above, 2004-2020



Source: Annual Population Survey

4.60 Figure 4.21 shows the change in level 4 and above qualifications over the period 2004 to 2020. The chart shows that the proportion of the population qualified to this level has increased by over fifteen percentage points over the period, with rates in Greater Manchester being higher than in the North West since 2011. Greater Manchester and the North West still lag somewhat behind the average for England & Wales for this indicator.

Figure 4.22: Proportion of residents with no qualifications, 2004-2020



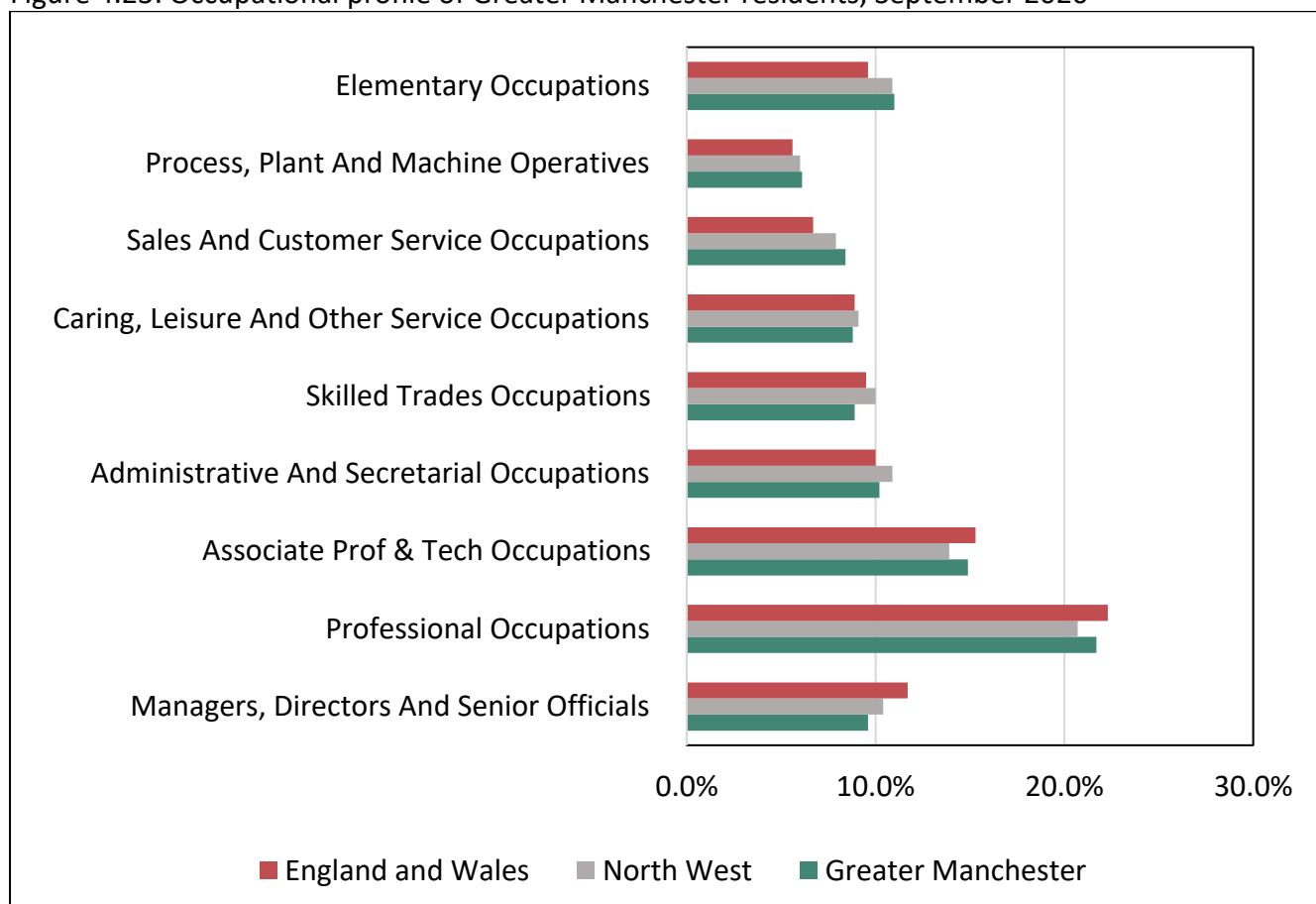
Source: Annual Population Survey

4.61 Figure 4.22 shows that Greater Manchester has seen a steady decline in the percentage who have no qualifications over the last fifteen years, from 18.3% of residents in 2004 to 7.7% in 2020. The proportion of Greater Manchester residents with no qualifications however remains slightly higher than the North West rate (7.5%) which in turn is higher than the rate for England & Wales (6.2%).

## Occupation

4.62 Residents of Greater Manchester are more likely to work in elementary occupations, sales and customer services occupations and caring, leisure and other service occupations, compared to regional and national averages. Furthermore, those who work in Greater Manchester are more likely to be employed as Managers, Directors and senior officials than Greater Manchester residents, meaning that more of those roles in Greater Manchester are filled by non-Greater Manchester residents as there is a net inflow of more skilled workers (as is common in other city regions).

Figure 4.23: Occupational profile of Greater Manchester residents, September 2020

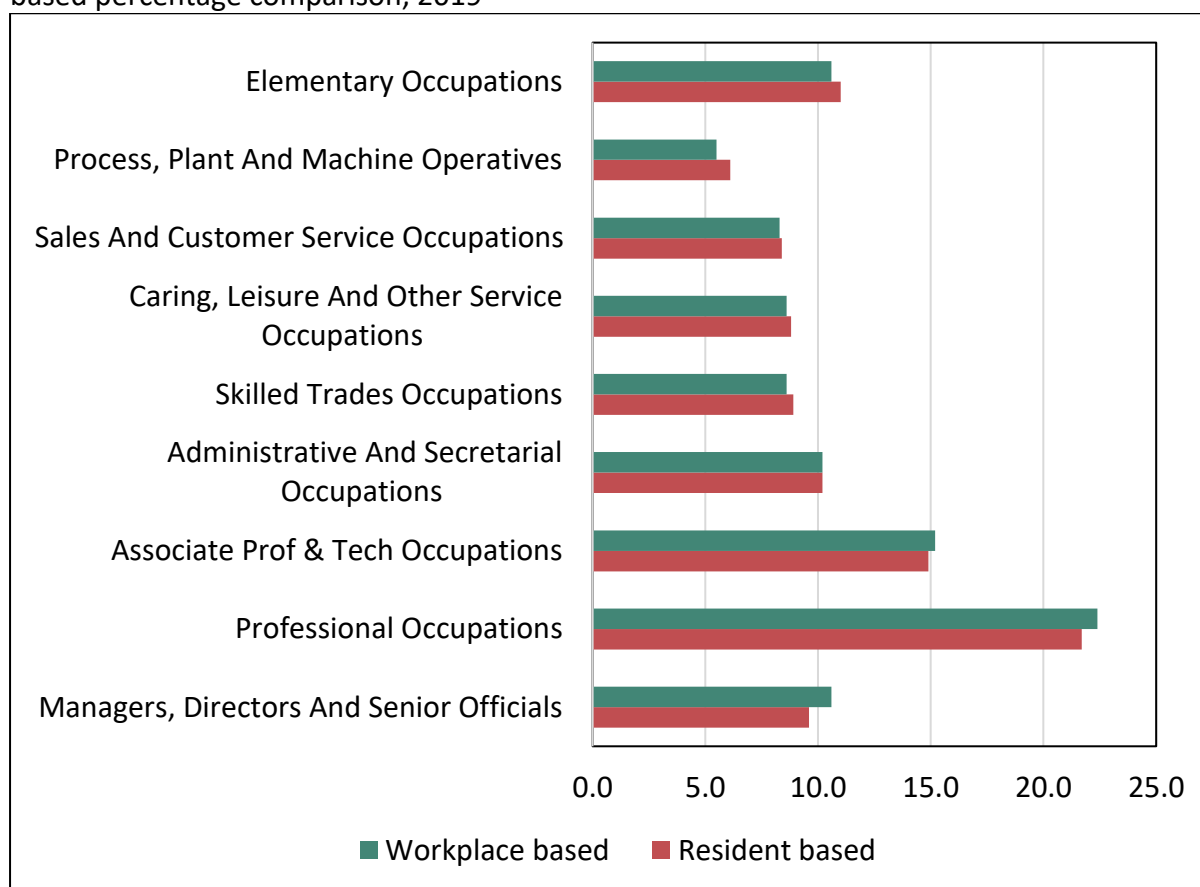


Source: Annual Population Survey

4.63 Figure 4.23 shows that Greater Manchester (9.6%) has a smaller proportion of Managers, Directors and Senior Officials than both the North West (10.4%) and

England & Wales (11.7%). Greater Manchester has a slightly larger proportion of professional occupations (21.7%) than the North West (20.7%) but is below the England & Wales (22.3%) average. Greater Manchester (8.9%) is also under-represented in skilled trades occupations compared to the North West (10.0%) and England & Wales (9.5%).

Figure 4.24: Occupation profile of Greater Manchester, workplace-based and residence-based percentage comparison, 2019



Source: Annual Population Survey

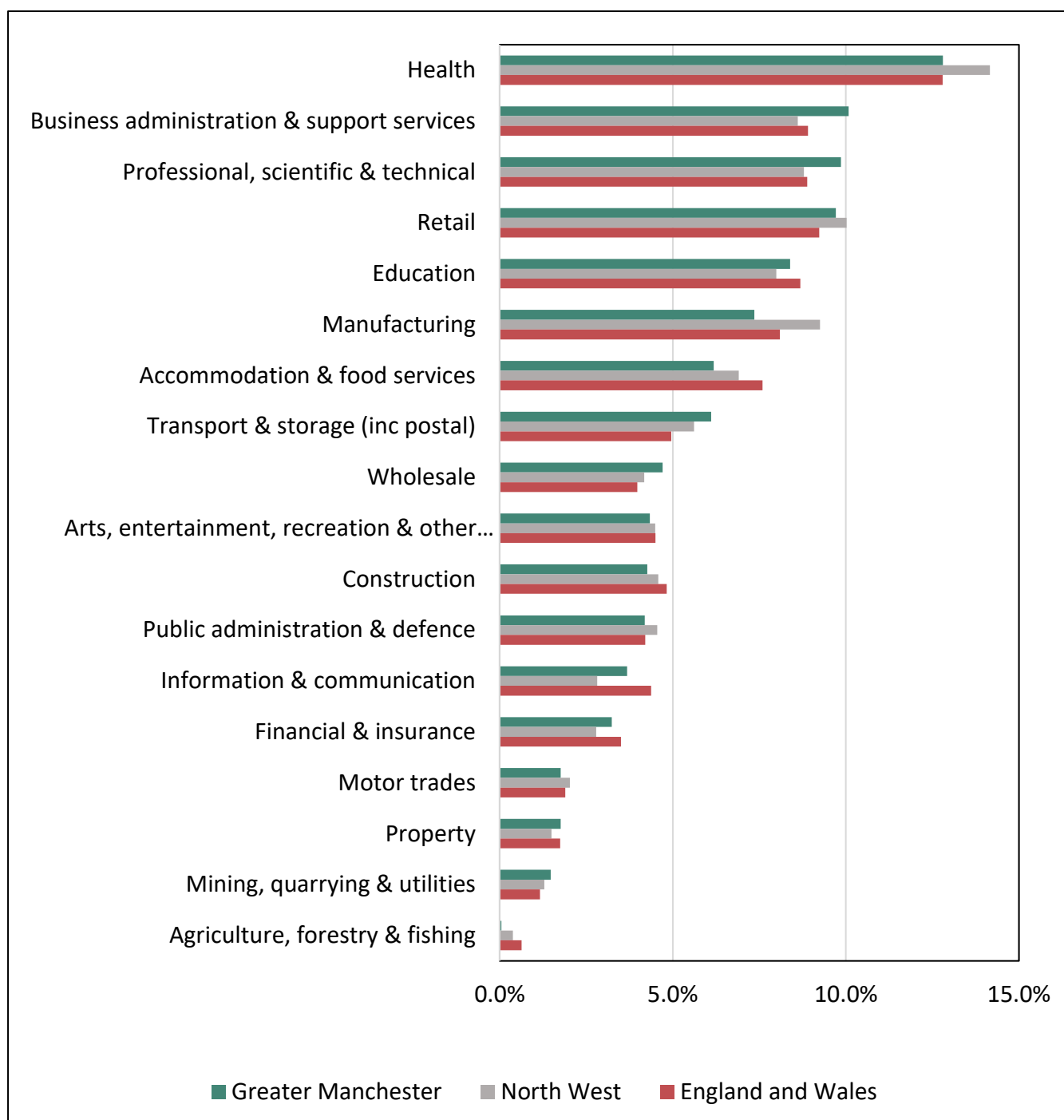
- 4.64 Figure 4.24 shows that for Managers, Directors and senior officials the workplace rate is higher than the resident-based rate; this is also the case for professional occupations and, to a lesser extent, associate professional and technical occupations. Conversely, resident-based rates are higher than workplace-based rates for

remaining sectors apart from administrative and secretarial occupations for which rates are equal.

#### Industry of employment

- 4.65 Greater Manchester's key employment sectors include specialisms in Business, Financial and Professional Services and Manufacturing, as well as growth areas of Digital and Creative industries. Overall, Greater Manchester aligns closely with the national sector picture, suggesting the conurbation has a diverse economy.

Figure 4.25: Workers' industry of employment, 2019



Source: Business Register and Employment Survey (BRES), 2019

4.66 Figure 4.25 shows that Greater Manchester has a higher proportion of people employed in Business Administration and Support Services than both the North West and national averages, with 10.1% of employees working in this sector. This is likely

to be due to several major regional and national firms operating here, including for example: The Co-operative Banking Group, BNY Mellon, Royal Sun Alliance Group, DWF LLP, Freshfields Bruckhaus Deringer, Eversheds, KPMG and Addleshaw Goddard LLP. Greater Manchester also has higher rate than regionally or nationally for Professional, scientific and technical sector too with 9.9% working in this sector and this could be attributed to work in and around the universities.

- 4.67 Retail and Wholesale is a significant employment sector for Greater Manchester accounting for 9.7% of employment but the largest sector is Health and Social Care that employs 12.8% of workers.
- 4.68 The Education sector employs 8.4%, manufacturing accounts for 7.4%. Accommodation and Food Services account for 6.2%. The Transport and Storage sector employs 6.1% which is above the North West (5.6%) and England & Wales (5.0%) average levels. The key locations for logistics employment include Port Salford and Carrington, Logistics North and Manchester Airport.
- 4.69 Wholesale (4.7%) industries also account for an above average proportion of workers in Greater Manchester compared to the North West and England & Wales.

#### *Salaries by industry of employment*

- 4.70 Table 4.2 shows the median annual pay by sector in the North West region in 2020. The data shows that some of the most important sectors for Greater Manchester have some of the highest median salaries in the North West (£24,294), with Information and Communication, Electricity, Gas, Steam and Air Conditioning Supply also having a median salary over £30,000 in the North West. Ten other sectors have median salaries above the North West median. Seven sectors have salaries below the North West median. Accommodation and Food Services median pay (£12,000) is the lowest paying much less than any other sector in the North West.

Table 4.2: Annual pay (North West) – gross (£) – for all employee jobs, 2020 (revised)

Sector	Median full-time equivalent salary (£)
Mining and Quarrying	40,771
Electricity, Gas, Steam and Air Conditioning Supply	38,603



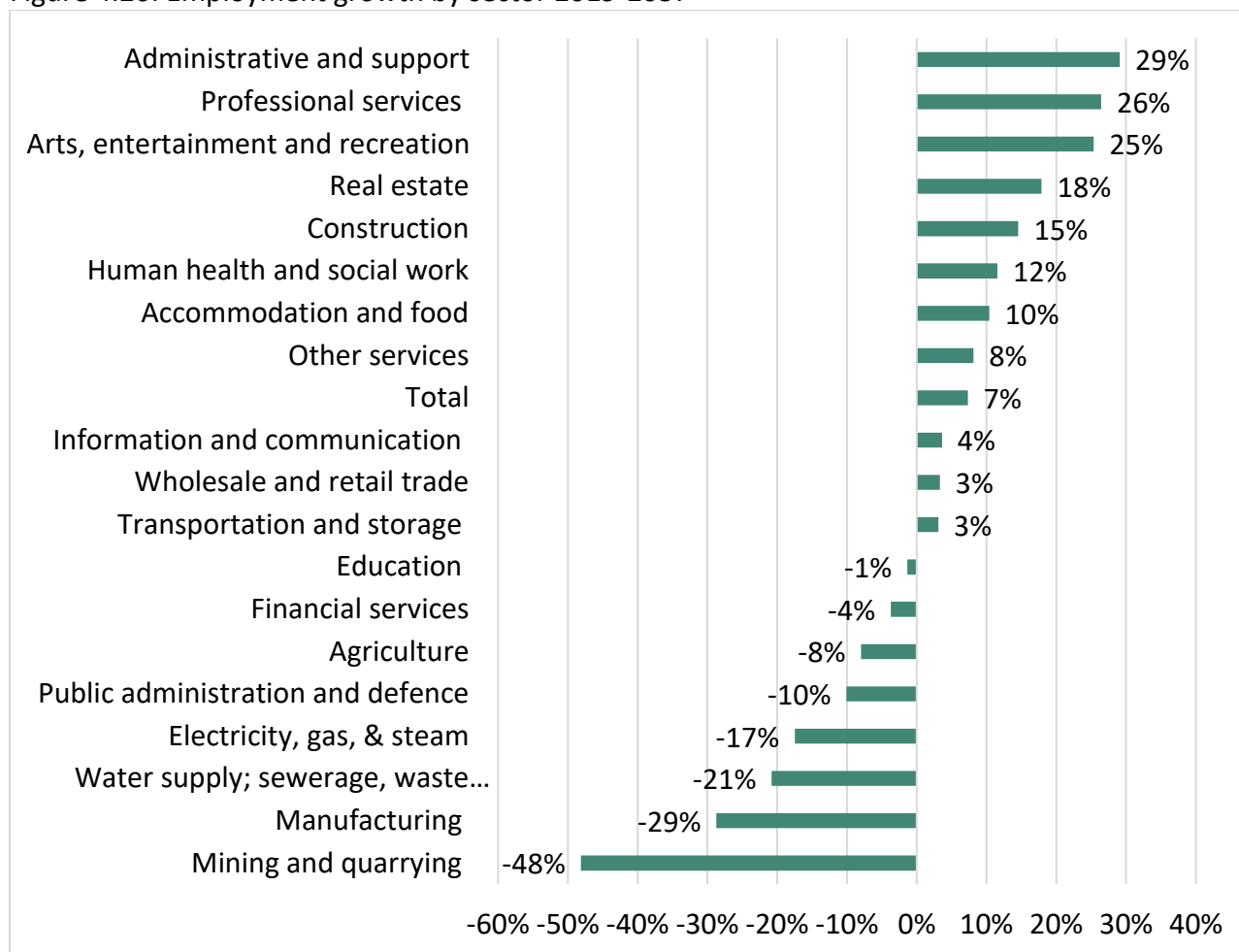
Information and Communication	33,741
Manufacturing	32,122
Construction	31,161
Public Administration and Defence, Compulsory Social Security	29,231
Financial and Insurance	28,603
Transportation and Storage	28,210
Professional, Scientific and Technical activities	27,675
Water Supply, Sewerage, Waste Management and Remediation Activities	27,029
Education	23,336
Real Estate activities	23,320
Human Health and Social Work activities	22,351
Administrative and Support Services	21,300
Wholesale and Retail Trade; repair of motor vehicles and motorcycles	19,172
Arts, Entertainment and Recreation	15,739
Accommodation and Food Service Industries	12,000
Other service activities	n/a
Agriculture, Forestry, Fishing	n/a
<b>All Industries and Services</b>	<b>24,294</b>

Source: Annual Survey of Hours and Earnings (ASHE, 2020). [Earnings and hours worked, UK region by industry by two-digit SIC: ASHE Table 5.](#)

#### *Future Employment Growth*

4.71 The Greater Manchester Forecasting Model (GMFM) forecasts employment growth by sector for the period 2018-2037.

Figure 4.26: Employment growth by sector 2019-2037



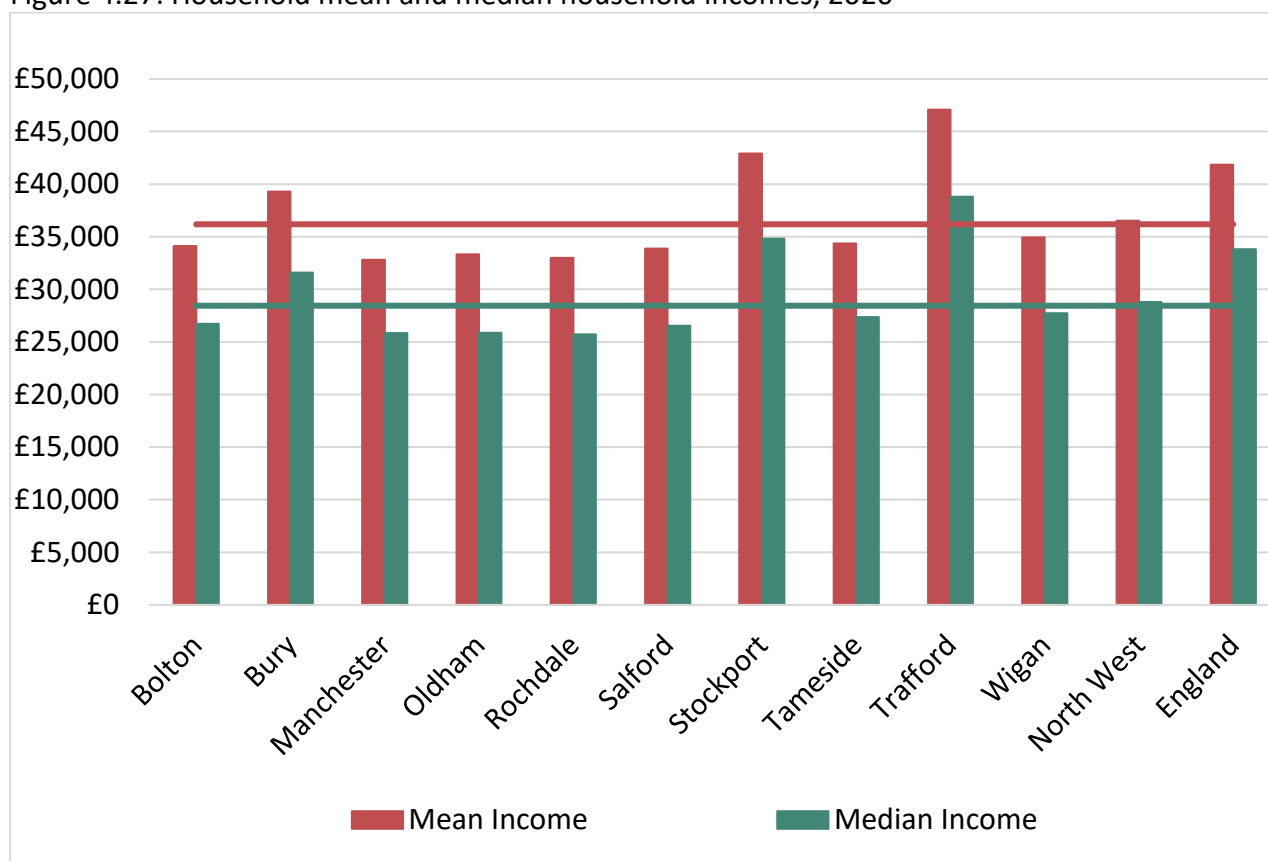
Source: Greater Manchester Forecasting Model (GMFM) 2019

- 4.72 Figure 4.26 shows that the total growth in employment over the period will be 7%. Administrative and Support, Professional Services, and Arts, entertainment and recreation sectors are going to see the greatest increases in employment of more than 250% over the period 2019 to 2037. Real Estate and Construction are set to grow by 18% and 15% respectively. Seven other industries will see an increase in employment from 3-12%. The greatest percentage decline in employment will be seen in Mining and quarrying, which is currently an extremely small sector in Greater Manchester; however, sectors that are currently significant employers such as Manufacturing, Public Administration and Financial Services are also set to see decreases in employment over the period.

## Household incomes

4.73 Mean household incomes are somewhat lower in most of Greater Manchester's districts than the regional average and significantly lower than the mean for England.

Figure 4.27: Household mean and median household incomes, 2020



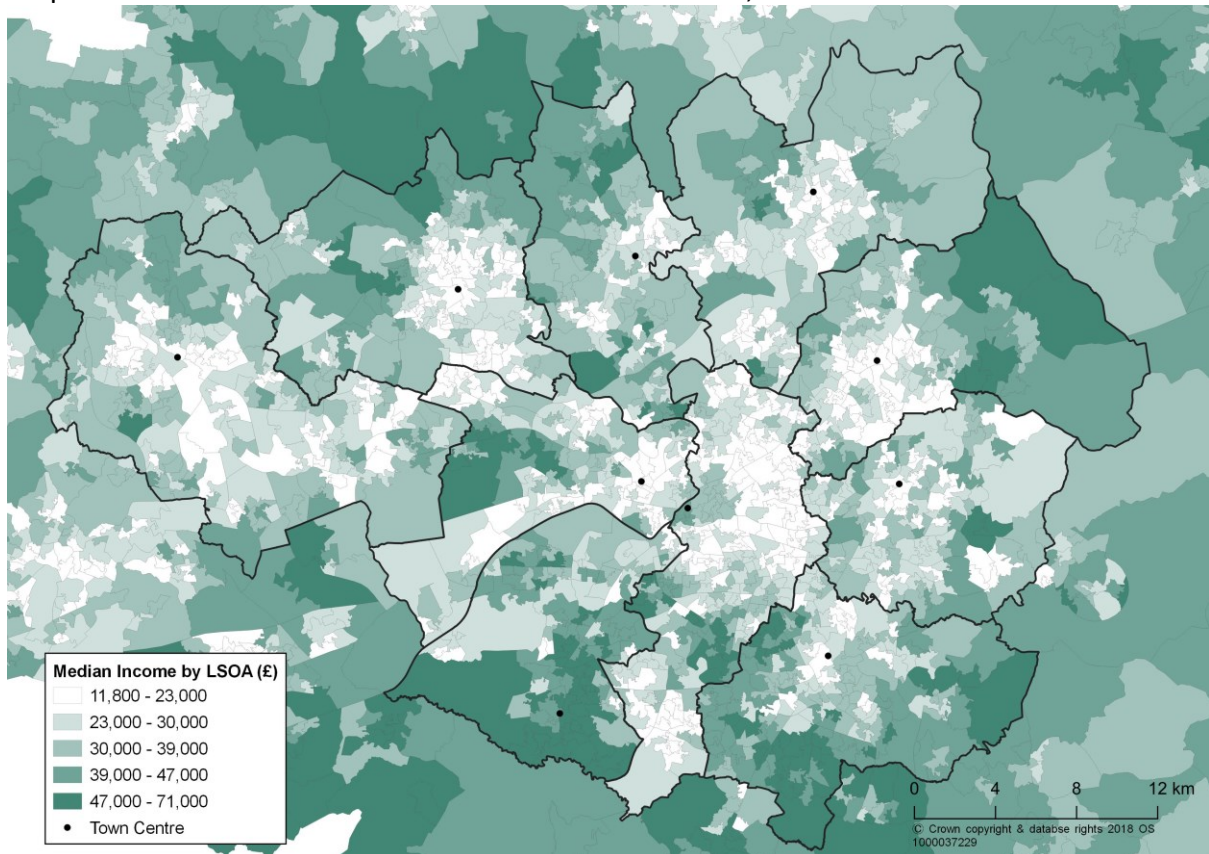
Source: CACI Paycheck 2020

4.74 The chart above shows that there is significant variation between the districts in terms of mean and median income levels. Manchester residents have the lowest mean incomes, at £32,821 and Rochdale the lowest median income at £25,725. These are significantly below the Greater Manchester mean of £36,184 and median of £28,442. Bury, Stockport and Trafford all have median and mean incomes significantly above the Greater Manchester averages. In general, mean incomes are higher than median, as they are skewed upwards by a relatively small number of households with very high incomes. Areas where the gap between the two measures

is relatively small have a more equal household income distribution within the district.

- 4.75 The spatial pattern of household income is much more fine-grained than can be captured in district averages. The neighbourhood-level picture of median household income across Greater Manchester is shown below.

Map 4.1: Greater Manchester median household income, 2020



Source: CACI Paycheck 2020

- 4.76 All districts have a mixture of higher and lower median income areas. The highest median income areas are in Lower Layer Super Output Areas (LSOAs) on the perimeter of Greater Manchester, especially to the south of the conurbation. LSOAs in and around the town centres are largely lower median income areas with exceptions in Manchester and Trafford. Trafford and Stockport have the most LSOAs with the highest median income areas that reflects the southern neighbourhoods

being the wealthiest areas of Greater Manchester. Rochdale, Tameside and Wigan have the fewest LSOAs in the highest median income band.

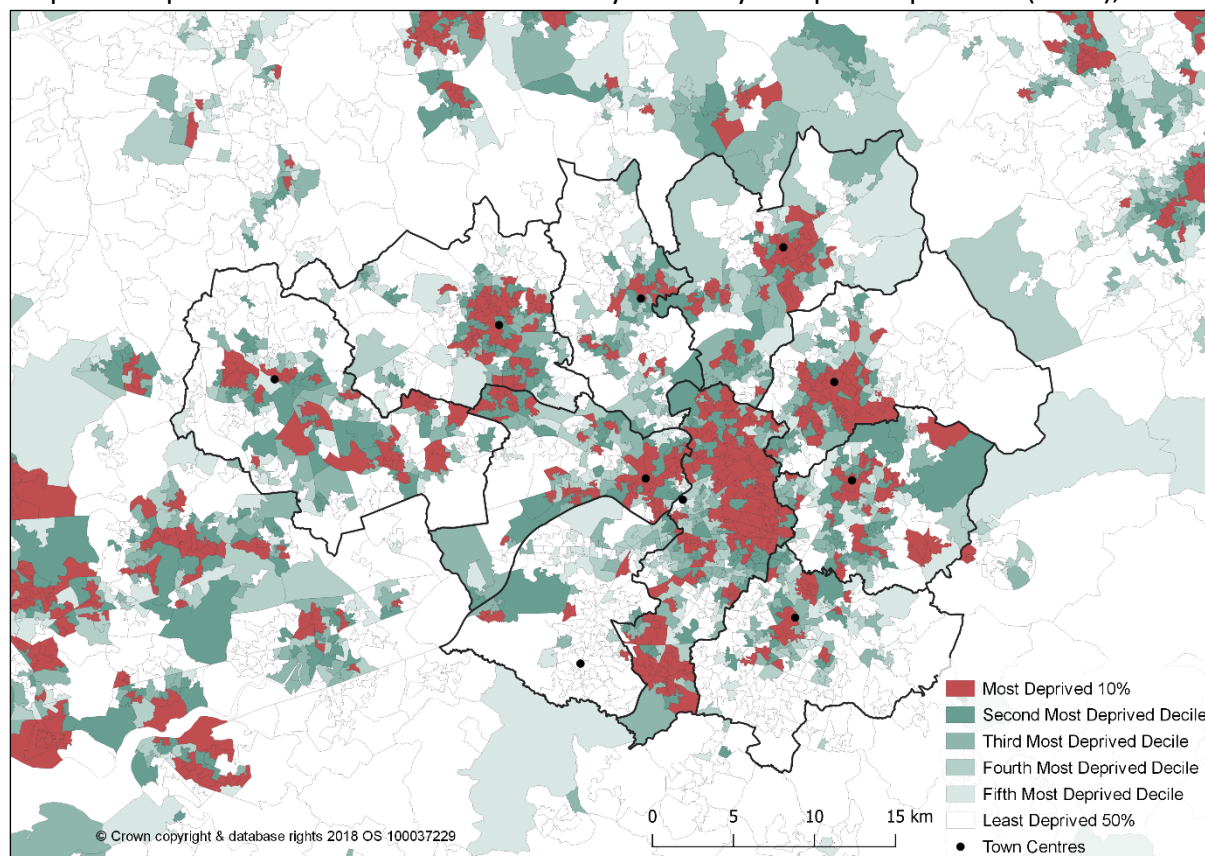
## Deprivation

- 4.77 There is a concentration of deprivation in the North West as a whole, with 20% of North West LSOAs<sup>34</sup> within the 10% most deprived in England and 59% in the 50% most deprived. The more severe deprivation occurs in the major urban conurbations, including within Greater Manchester, with cities such as Manchester most affected. The Index of Multiple Deprivation (IMD) is a relative, not absolute, approach to measuring deprivation.
- 4.78 Map 4.2 below shows the deprivation deciles in Greater Manchester and the surrounding areas and uses the rankings from the IMD. The white areas represent the least deprived 50% LSOAs nationally and the red are the most deprived decile. All Greater Manchester districts contain some LSOAs in the most deprived decile, with deprivation more concentrated in Manchester and Trafford having the least deprivation. The pattern of areas around town centres being more deprived can also be seen here, except for in Trafford, with clusters of LSOAs in the most deprived decile near or around the centres.

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<sup>34</sup> A LSOA is an ONS statistical geographical boundary with, in most cases, a population of less than 3,000 residents and less than 1,200 households.

Map 4.2: Deprivation in Greater Manchester by lower layer super output area (LSOA), 2019



Source: MHCLG, *English Indices of Deprivation (IoD)*, 2019

- 4.79 Six local authorities in the North West are among the ten most deprived authorities in England on the rank of average score measure from the 2019 IMD. They are Blackpool (1), Knowsley (2), Liverpool (3), Manchester (6), Burnley (8) and Blackburn with Darwen (9).
- 4.80 Greater Manchester has a disproportionate number of areas with severe income deprivation. In five of our authorities over 25% of their LSOAs are within the most deprived decile of neighbourhoods in the country.
- 4.81 Table 4.3 shows that Manchester ranks number 8 in the overall ranking on the rank of average score measure – the most frequently used measure. On the same measure Rochdale ranks 15<sup>th</sup> and Oldham 21<sup>st</sup>. Manchester is the second most deprived on Rank of Extent - a measure that looks into the proportion of the local population that live in areas classified as the most deprived in the country. Greater Manchester's

districts have risen (relatively more deprived) in the Rank of Average Rank measure on the income domain compared to the 2015 rankings.<sup>35</sup>

Table 4.3: Summary of Index of Deprivation rankings for Greater Manchester districts by measures on the income domain, 2019<sup>36</sup>

Area	Rank of average rank	Rank of average score	Rank of proportion of LSOAs in most deprived 10% nationally	IMD Rank of Income scale
Bolton	44	29	20	24
Bury	97	83	82	87
Manchester	12	8	6	2
Oldham	33	21	23	39
Rochdale	22	15	13	44
Salford	32	24	25	37
Stockport	155	135	95	62
Tameside	34	37	47	52
Trafford	191	166	107	98
Wigan	98	77	62	36

Source: MHCLG, *English Indices of Deprivation, 2019*

Note: 1= most deprived, 317=least deprived

## Homelessness

4.82 There are many different forms of homelessness. For example, those who are rough sleeping, those who are ‘sofa-surfing’ (i.e., staying with family or friends) and those who are living in concealed families.

4.83 In Greater Manchester and nationally, levels of all forms of homelessness have increased over the last five years. Homelessness is a complex issue. There are several reasons why an individual (or household) might experience homelessness. For example, relationship breakdown, mental health issues, offending issues and

<sup>35</sup> There are 317 English local authorities in the 2019 Index and 326 in the 2015 Index. The Income domain measures were not recast to 2019 boundaries.

<sup>36</sup> The Index of Multiple Deprivation (IMD 2019 uses the same data sources and combines them in the same way for every small area in England. This means you can directly compare the ranks of different small areas in England. If a small area’s rank is closer to 1 than that of another area, it is more deprived. Extent looks how relatively widespread deprivation is in a district and concentration looks at how relatively localised deprivation is. Rank of average score and average rank is a combination of all the variables used.



substance misuse issues. However, these are inter-related with wider housing and economic issues. The leading cause of homelessness in England in 2019/20 was Family or Friends no longer willing or able to accommodate.

Table 4.4: Homelessness Reduction Act cases in Greater Manchester districts, 2018/19 and 2019/20<sup>37</sup>

Area	Homelessness Reduction Act Cases 2018/19 and 2019/20			
	Total households assessed as owed a Prevention or Relief duty 2018/19	Total households assessed as owed a Prevention or Relief duty 2019/20	Total Main duty (acceptances) 2018/19	Total Main duty (acceptances) 2019/20
Bolton	1,741	1,718	53	41
Bury	918	894	139	232
Manchester	4,239	5,185	895	891
Oldham	1,119	1,272	48	216
Rochdale	1,238	1,243	111	151
Salford	2,448	2,840	341	525
Stockport	939	1,052	140	129
Tameside	1,430	1,345	152	169
Trafford	949	1,191	172	243
Wigan	1,566	1,117	27 <sup>38</sup>	81
<b>Greater Manchester</b>	<b>16,587</b>	<b>17,857</b>	<b>2,078<sup>39</sup></b>	<b>2,678</b>

Source: [MHCLG: Live tables on homelessness](#)

Table 4.4 shows that in Greater Manchester there has been an 8% rise in total households assessed as owed a Prevention or Relief duty from 2018/19 to 2019/20. The percentage increase has been highest in Trafford; with a 26% increase in households owed a Prevention or Relief duty over the period. Manchester has by far the highest number of households assessed as owed a Prevention or Relief duty in Greater Manchester at 5,185 in 2019/20, an increase of 22% from 2018/19. There has been an 8% increase in households owed a Prevention or Relief duty by local authorities in Greater Manchester over the past year, indicating that the number of people who are homeless or are threatened with homelessness within 56 days in the conurbation has increased. For those owed a Main Duty

<sup>37</sup> 'Decisions' refer to all households that apply for advice or assistance under the Housing and Homelessness Acts ([Housing \(Homeless Persons\) Act 1977](#), [Housing Act 1996](#) and the [Homelessness Act 2002](#)); 'Acceptances' refer to all applicants owed a 'main homelessness duty', or are 'statutorily homeless', where the authority is satisfied that the applicant is eligible for assistance, unintentionally homeless and falls within a specified priority need group. For more information, see [here](#).

<sup>38</sup> Data does not include Q4 2018/19

<sup>39</sup> Data does not include figures for Wigan from Q4 2018/19.



(acceptances), Greater Manchester has seen a 29% rise from 2018/19 to 2019/20. The increase has been the highest in Oldham; with a 350% increase in households owed a Main Duty (acceptance).

### *Homelessness Prevention and Relief*

- 4.84 Following the introduction of the Homelessness Reduction Act 2017 and its implementation in April 2018, all households who approach the local authority and are homeless or threatened with homelessness, eligible for assistance are entitled to receive meaningful support and assistance.
- 4.85 The Prevention and Relief duties see the household being helped by the local authority to prevent them becoming homeless, or by finding them alternative accommodation and relieving homelessness.

Table 4.5: Homelessness Prevention and Relief, 2018/19 and 2019/20

<i>Area</i>	Total owed a Prevention Duty 18/19	Total owed a Prevention Duty 19/20	Total owed a Prevention Duty % change	Total owed a Relief Duty 18/19	Total owed a Relief Duty 19/20	Total owed a Relief Duty % change
Bolton	697	724	4%	1,044	994	-5%
Bury	315	152	-52%	603	742	23%
Manchester	1,417	2,286	61%	2,822	2,899	3%
Oldham	571	683	20%	548	589	7%
Rochdale	597	586	-2%	641	657	2%
Salford	549	720	31%	1,899	2,120	12%
Stockport	542	576	6%	397	476	20%
Tameside	770	684	-11%	660	661	0%
Trafford	575	665	16%	374	526	41%
Wigan	882	444	-50%	684	673	-2%
<b>Greater Manchester</b>	<b>6,915</b>	<b>7,520</b>	<b>9%</b>	<b>9,672</b>	<b>10,337</b>	<b>7%</b>

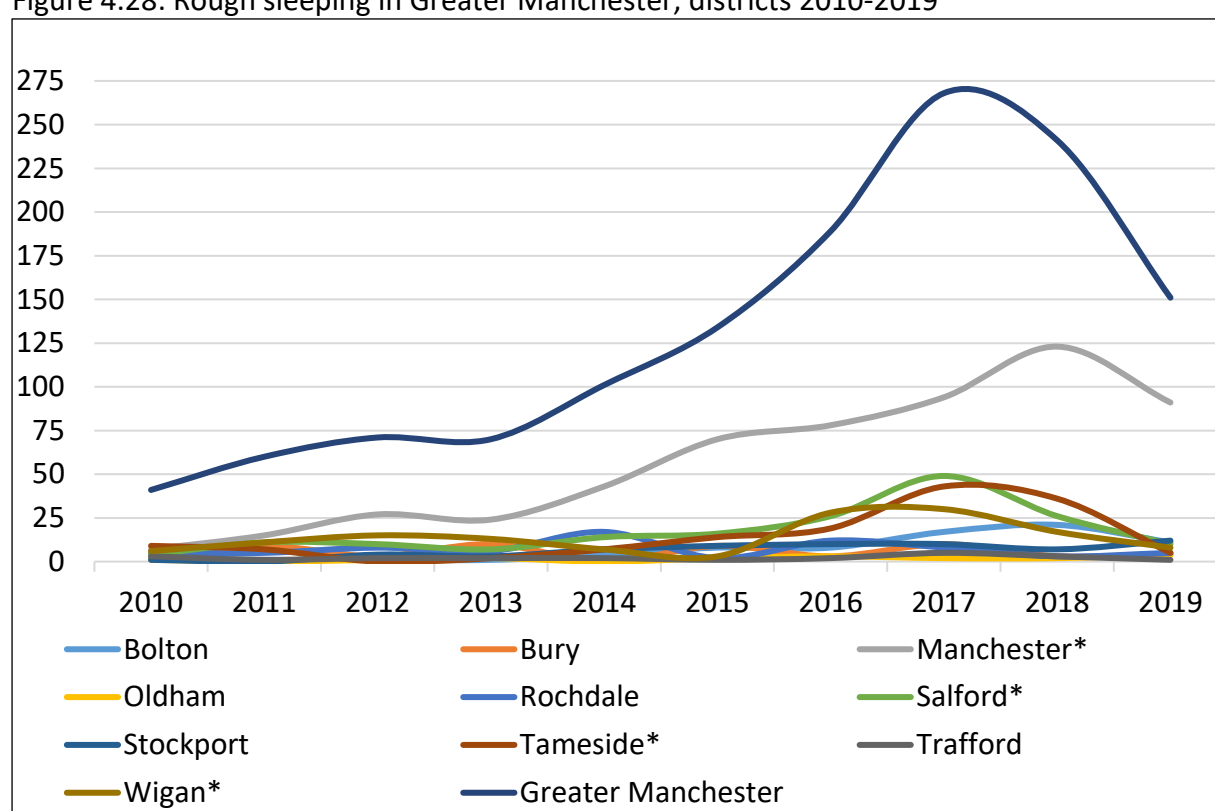
Source: [MHCLG: Live tables on homelessness](#)

4.86 The table above shows that in 2018/19 Greater Manchester Local Authorities assessed 16,587 cases as being owed either a Prevention or Relief Duty. Of these around 58% were owed Relief Duty. This remained broadly constant in 2019/20.

### *Rough Sleeping*

4.87 Rough sleeping has increased significantly in Greater Manchester since 2010, with Manchester experiencing the highest levels of rough sleeping.

Figure 4.28: Rough sleeping in Greater Manchester, districts 2010-2019



Source: MHCLG Rough sleeping statistics England autumn 2019 Table 1: Street counts and estimates of rough sleeping in England, autumn 2010 – 2019.

\* Denotes local authority was one of 83 receiving funding as part of the Rough Sleeping Initiative in 2018/19.

4.88 The chart above shows that the number of people sleeping rough in Greater Manchester increased from 41 in 2010 to a high of 268 in 2017, an increase of 554% but has sharply decreased since to 151 by 2019, a 44% decrease after consecutive

years in the reduction of people rough sleeping. Manchester has seen both the highest number of rough sleepers and the largest increase in numbers, from seven in 2010 to 123 in 2018, an increase of 1,657% - but it saw a 26% reduction for 2019 to 91. Rough sleeper data are based on estimates and counts of rough sleepers on one night and as such is not seen as a very robust data source. It is likely that the true number of rough sleepers in Greater Manchester and particularly in Manchester is higher than the totals presented here.

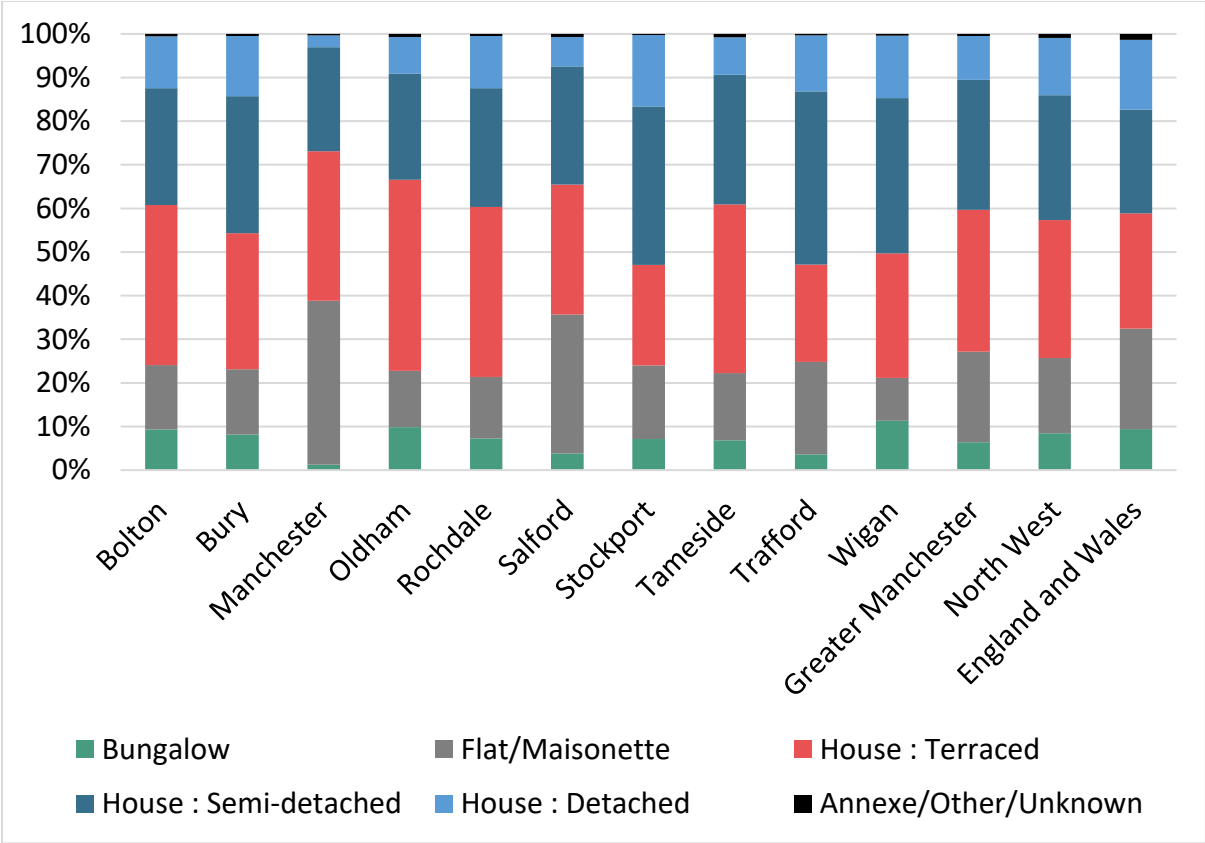
#### 4.4 Dwelling stock profile

##### Profile of current dwellings

###### Type and size of dwellings

4.89 In September 2019, just over 1.22 million dwellings were recorded in Greater Manchester for Council Tax purposes. Of these, the largest proportion are terraced houses (accounting for just over 400,000 dwellings), closely followed by semi-detached houses (just over 365,000).

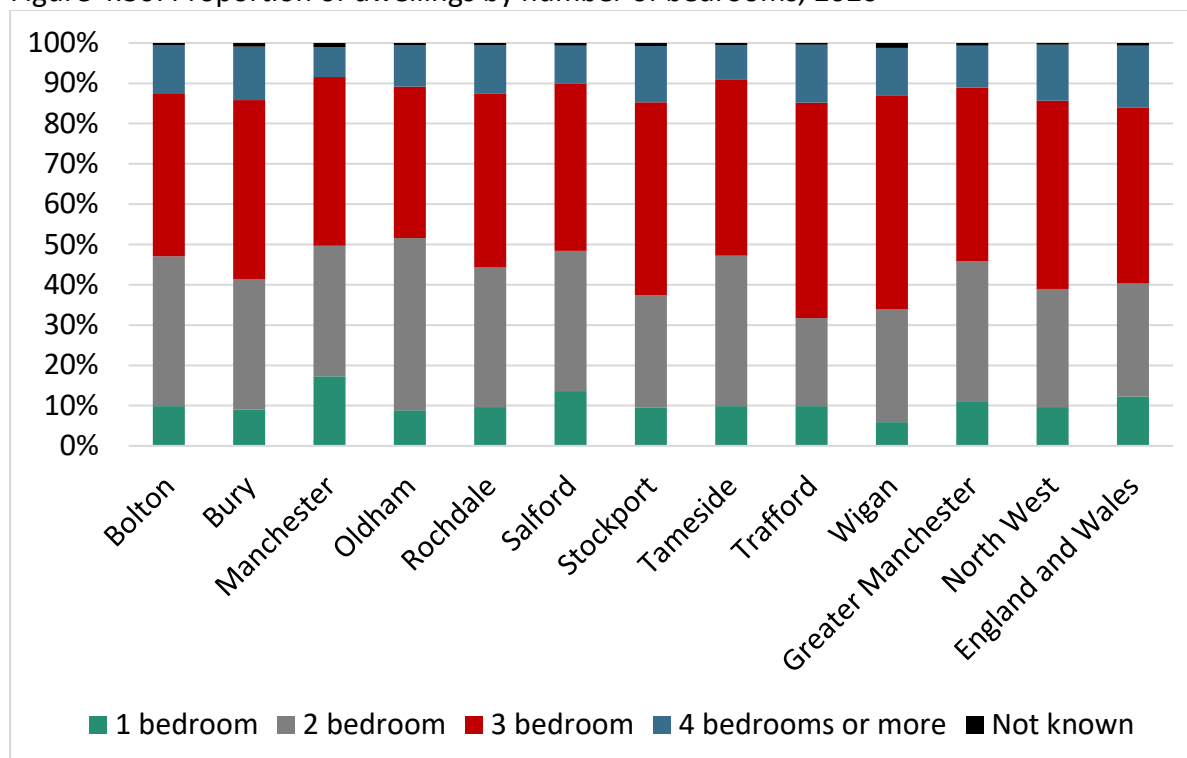
Figure 4.29: Total dwellings by type, 2020



*Source: Valuation Office Agency, Table CTSOP3.0: Number of properties by Council Tax band, property type and region, county and local authority district, 2020.*

- 4.90 Figure 4.29 shows that Greater Manchester's dwelling composition differs from the national and regional picture, with higher proportions of terraced and semi-detached housing and lower proportions of bungalows, flats and detached housing.
- 4.91 Oldham, Rochdale, Tameside, Bolton and Manchester have higher levels of terraced housing than the Greater Manchester average, and Stockport and Trafford have considerably lower levels. The latter districts have larger proportions of detached housing than the Greater Manchester average, as do Bolton, Bury, Rochdale and Wigan. Manchester has only 2.7% detached housing. Manchester and Salford both have significantly higher proportions of flats than the Greater Manchester, regional and national averages; in Manchester, flats are the most prevalent property type. This is a reflection of the past tower block social housing construction, the relatively new city centre apartment market and the number of large houses split into flats to cater for students and young professionals as well as housing with multiple occupation (HMO) in light of the bedroom tax.

Figure 4.30: Proportion of dwellings by number of bedrooms, 2020



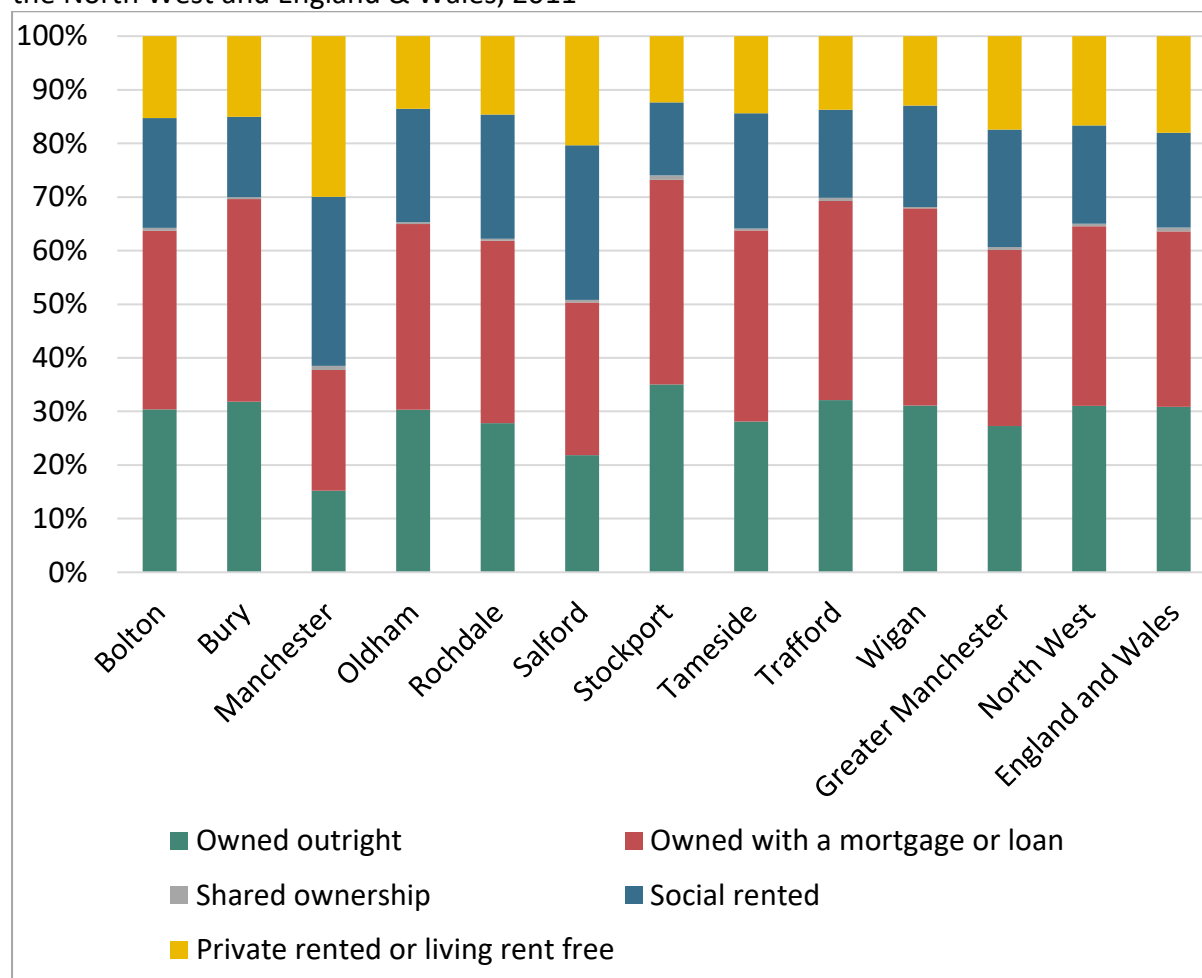
Source: Valuation Office Agency, Table CTSOP3.0: Number of properties by Council Tax band, property type and region, county and local authority district, 2020.

- 4.92 Figure 4.30 shows that England & Wales has a higher proportion of one-bedroomed dwellings than Greater Manchester and North West as a whole.
- 4.93 Greater Manchester has a larger proportion of two-bedroomed dwellings than the North West and nationally. Three and four-bedroomed dwellings are lower in Greater Manchester than they are in England & Wales and the North West.
- 4.94 Manchester has the highest proportion of one-bedroomed dwellings at 17% and Salford (14%) has a larger proportion than the national average (13%). Wigan's proportion of one-bedroom properties is nearly half the national average, but Wigan has a higher proportion of three-bedroom properties than the other Greater Manchester districts, and the regional and national averages.
- 4.95 Half of the districts have similar proportions of four-bedroom or more houses as the Greater Manchester (10%), North West (14%) and England & Wales (15%) averages – Salford, Tameside and Manchester are those that differ with under 10%.

#### Tenure of housing

4.96 Figure 4.31 shows that overall, Greater Manchester is largely in line with the national average in terms of tenure types, with a slightly higher proportion of social rented (21% as opposed to 17%) and slightly lower proportion of people that own their property outright (27% as opposed to 31%), with overall homeownership at 60%.

Figure 4.31: Proportion of households by tenure type in GM districts, Greater Manchester, the North West and England & Wales, 2011



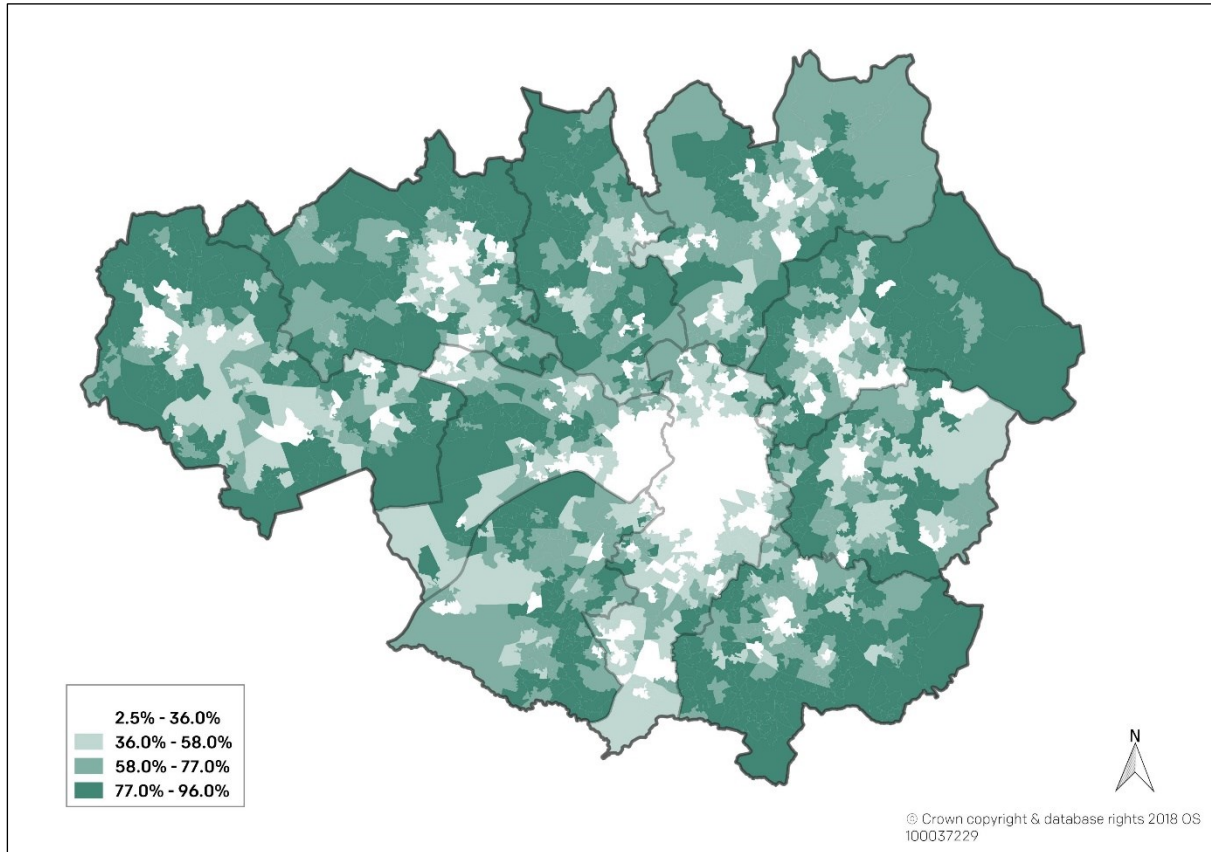
Source: 2011 Census, Table KS402EW

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4.97 The above chart shows that, at the time of the 2011 Census, Manchester and, to a lesser extent, Salford present a different tenure structure to the rest of Greater Manchester, with both having lower proportions of owner-occupation (38% and 50% respectively). In Manchester, this is due to a larger proportion of households living in social housing, which accounts for almost 32% of households, and private

rented/rent free which accounts for 30% of households in Manchester. Salford also has above average levels of social rented (29%) and private rented/living rent free (20%) compared to both Greater Manchester and England & Wales.

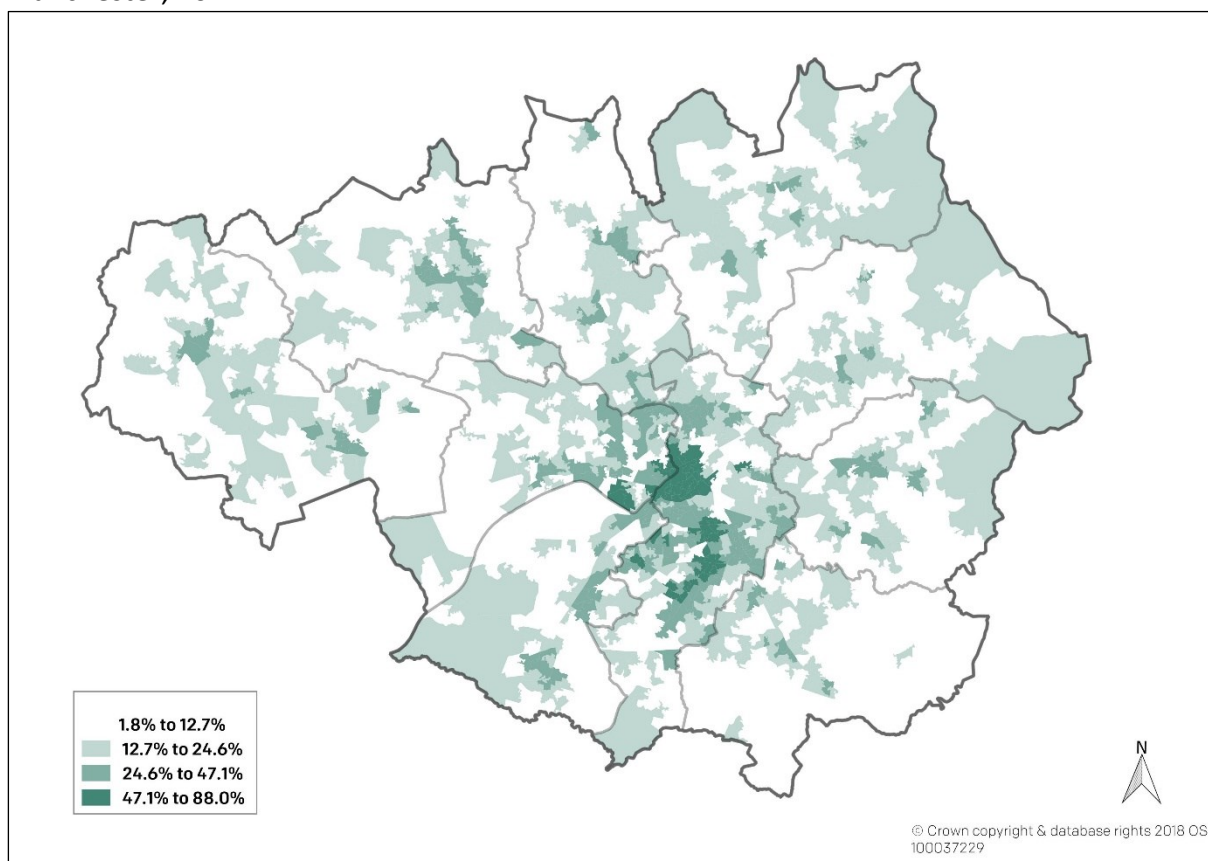
Map 4.3: Spatial distribution of owner-occupation rates in Greater Manchester, 2011



Source: ONS, 2011 Census

4.98 Map 4.3 shows that levels of owner-occupation are low in the regional centre, towards south Manchester and in most of the major town centres in Greater Manchester (notably Bolton, Oldham and Rochdale). In contrast, the outer areas of the conurbation see higher levels of owner-occupation, in particular the outer suburban and semi-rural areas of Wigan, Trafford, Oldham, Rochdale and Stockport.

Map 4.4: Spatial distribution of rates of households renting privately across Greater Manchester, 2011

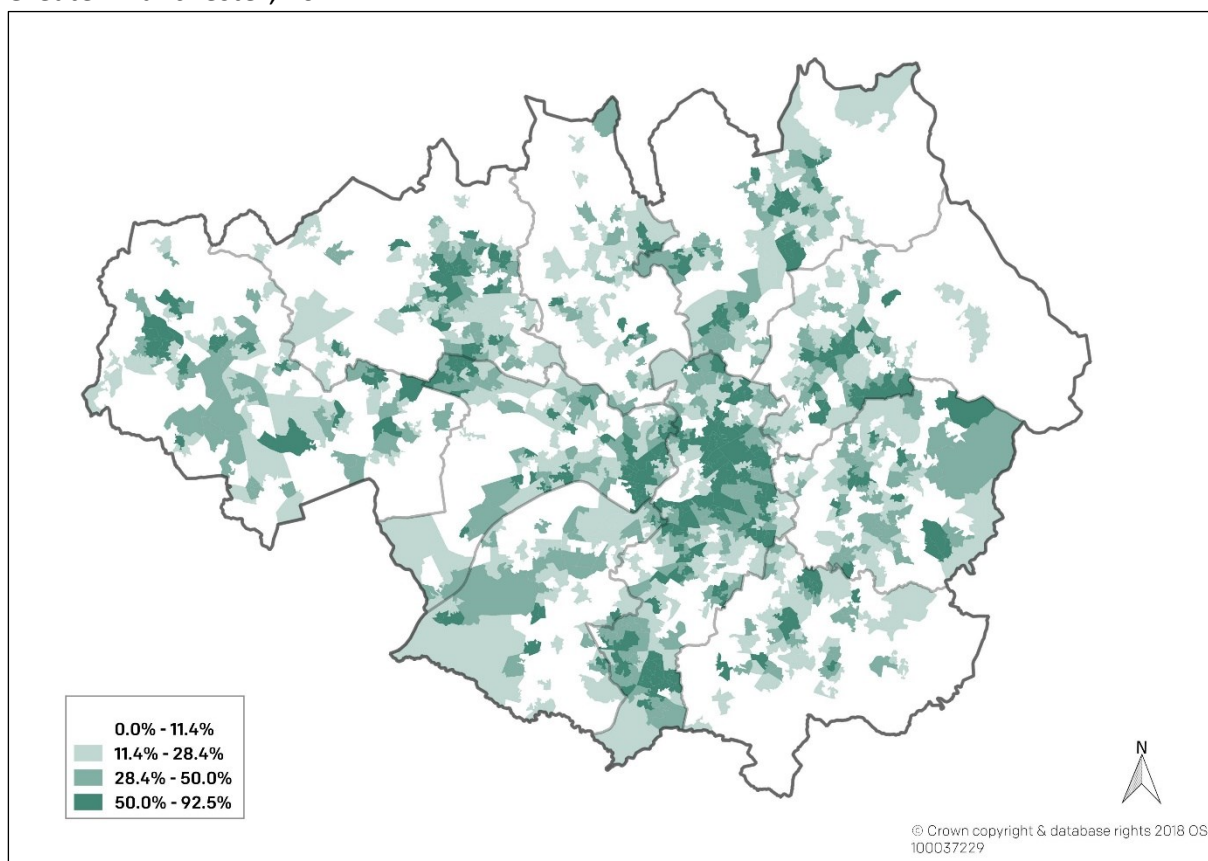


Source: ONS, 2011 Census

4.99 Map 4.4 shows the spatial distribution of privately renting households across Greater Manchester and shows – unsurprisingly - that private renting is more prevalent in the areas where Map 4.3 showed low levels of owner-occupation. In the regional centre and central to south Manchester, there are high levels of private renting, reflecting the city centre apartment market and residential areas popular with students. Aside from Stockport, the major town centres in Greater Manchester also have higher levels of private renting than owner-occupation. Conversely, areas on the edge of the conurbation show lower levels of private renting, though in many areas of the city region at least 10% of households rent privately. For more information on private renters, see [Chapter 6.5 Private renters](#).



Map 4.5: Spatial distribution of rates of households in social rented accommodation across Greater Manchester, 2011



Source: ONS, 2011 Census

4.100 Map 4.5 shows that social housing is widely distributed across Greater Manchester, with areas with a high proportion of social renters present in every district. There are high proportions of social renters in some town centres, such as Rochdale, Oldham and Bolton, as well as in the Salford part of the regional centre. The area surrounding Manchester city centre to the east and north also has a high level of social renting. As before with private renting, outer suburban and more rural areas with high owner-occupation have low levels of social renting.

## Overcrowding, under-occupation and concealed households

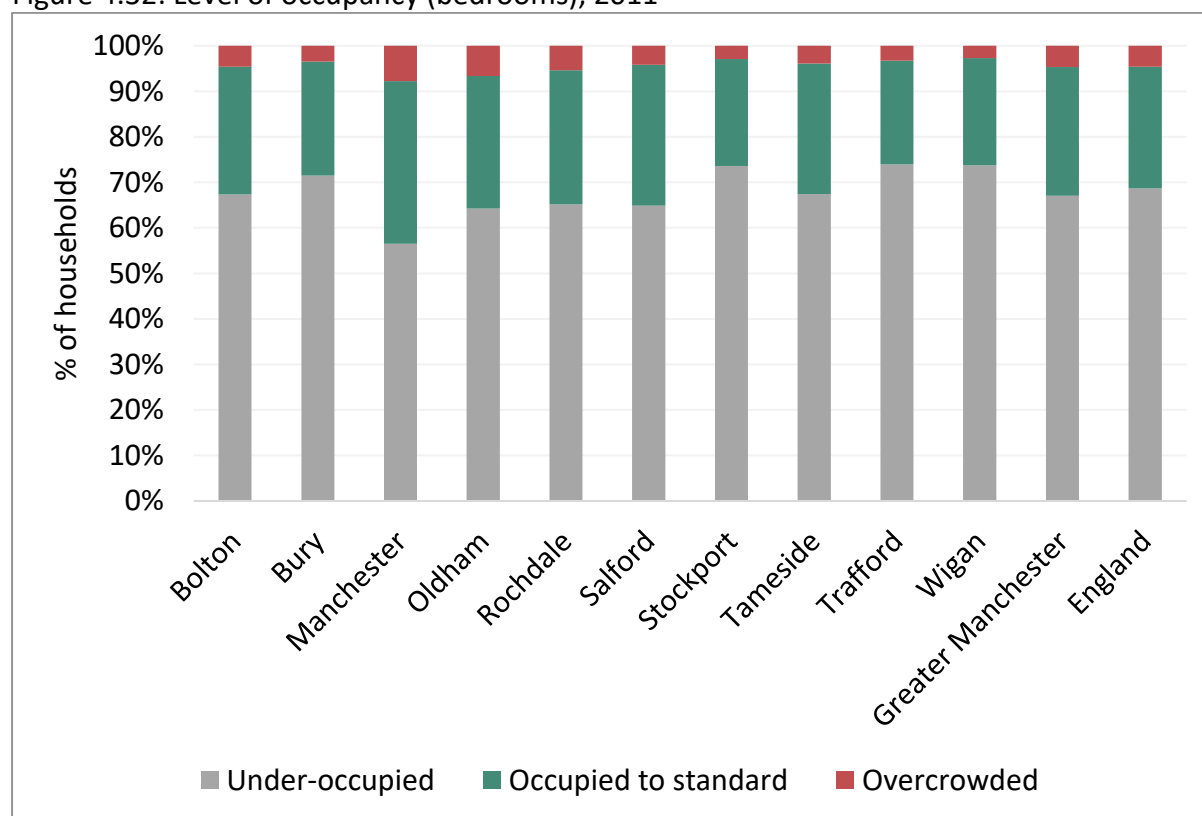
### *Overcrowding and under-occupation*

4.101 To determine levels of overcrowding and under-occupancy, the Census uses the ages of the household members and their relationships to each other to derive the number of bedrooms they require, based on a standard formula. The number of

bedrooms required is subtracted from the number of bedrooms in the household's accommodation to obtain the occupancy rating.

4.102 Using this occupancy-based measure of overcrowding, 4.7% of Greater Manchester households lived in overcrowded accommodation in 2011, compared to 4.6% nationally. Over 67% of households in Greater Manchester under-occupy homes against this measure a rate relatively similar to that seen across England as a whole (69%). Within Greater Manchester, the highest proportions of overcrowded households are in Manchester, Oldham and Rochdale, with low levels observed in Wigan, Stockport, Trafford and Bury. Levels of overcrowding and under-occupancy as a proportion of total households across Greater Manchester are shown in Figure 4.32 below.

Figure 4.32: Level of occupancy (bedrooms), 2011



Source: ONS, 2011 Census

4.103 Manchester has the lowest levels of under-occupancy across the districts at 57% and above Greater Manchester and national average levels of both homes occupied to the expected standard and overcrowded homes (8% of homes). In addition, Oldham, Rochdale and Salford have lower levels of under-occupancy than the Greater Manchester and national average, with Oldham and Rochdale in particular experiencing higher levels of overcrowding at 7% and 6% respectively. Wigan and Stockport have notably low levels of overcrowding, with overcrowded households accounting for less than 3% of households in both districts.

Figure 4.33: Occupancy rating (bedrooms) by tenure, Greater Manchester, 2011



Source: ONS, 2011 Census

4.104 Figure 4.33 shows occupancy ratings by tenure across Greater Manchester. In the PRS and social rented sector, most homes are occupied to standard, meaning residents have the expected number of bedrooms needed based on the number of occupants. However, a high proportion of owner-occupiers have at least two more bedrooms than needed in their homes; in total over 80% of homeowners are under-

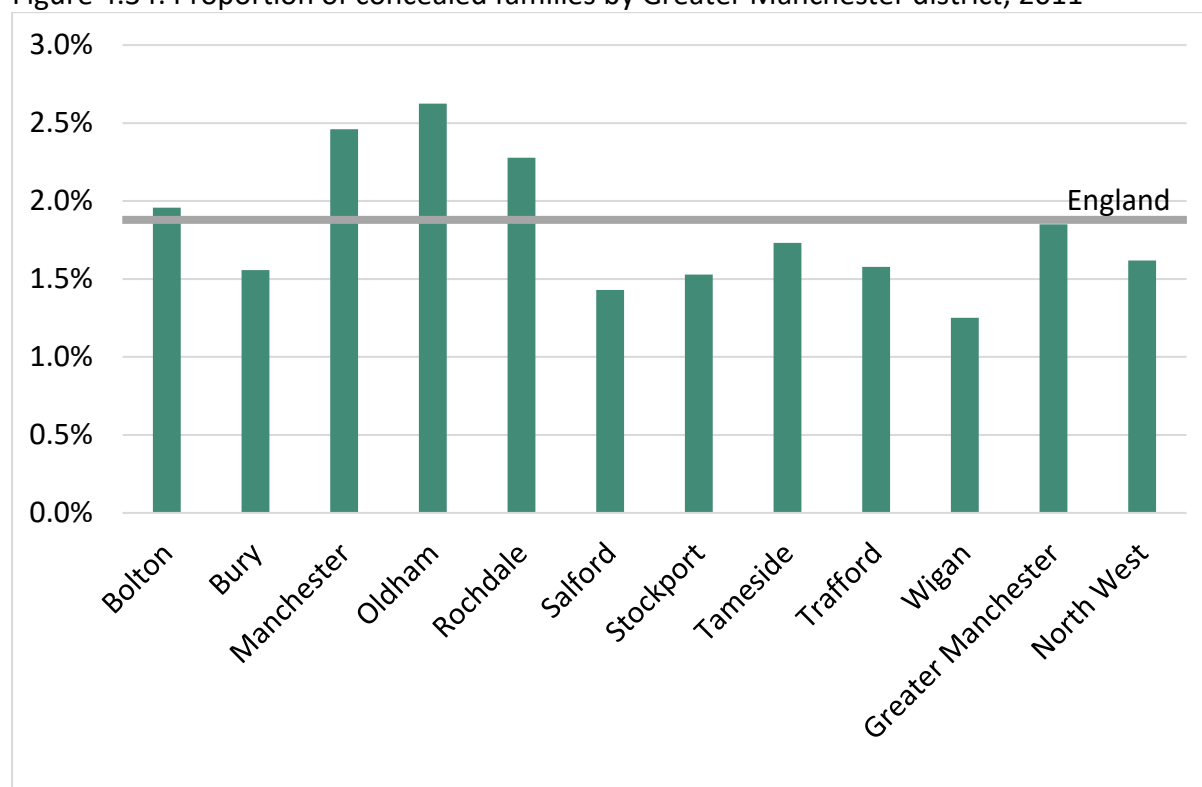
occupying their homes, in contrast with 43% of social renters and just over half of private renters.

- 4.105 Overcrowding is most common in the PRS, with 8% of homes having at least one bedroom fewer than would be expected. Around 7% of social housing tenants are overcrowded, which is more than double the figure for those who own their own homes (3%).

### *Concealed families*

- 4.106 The Census provides data on the number of 'concealed families'. A concealed family is one living in a multi-family household in addition to the primary family, such as a young couple living with parents. It can indicate that a family is unable to afford their own accommodation and/or may suggest overcrowding. A single person is not considered a concealed family and so one elderly parent living with their adult child and family, or an adult child returning to the parental home, is not counted as a concealed family. Because of these definitions, the data presented here reflects families rather than households.

Figure 4.34: Proportion of concealed families by Greater Manchester district, 2011



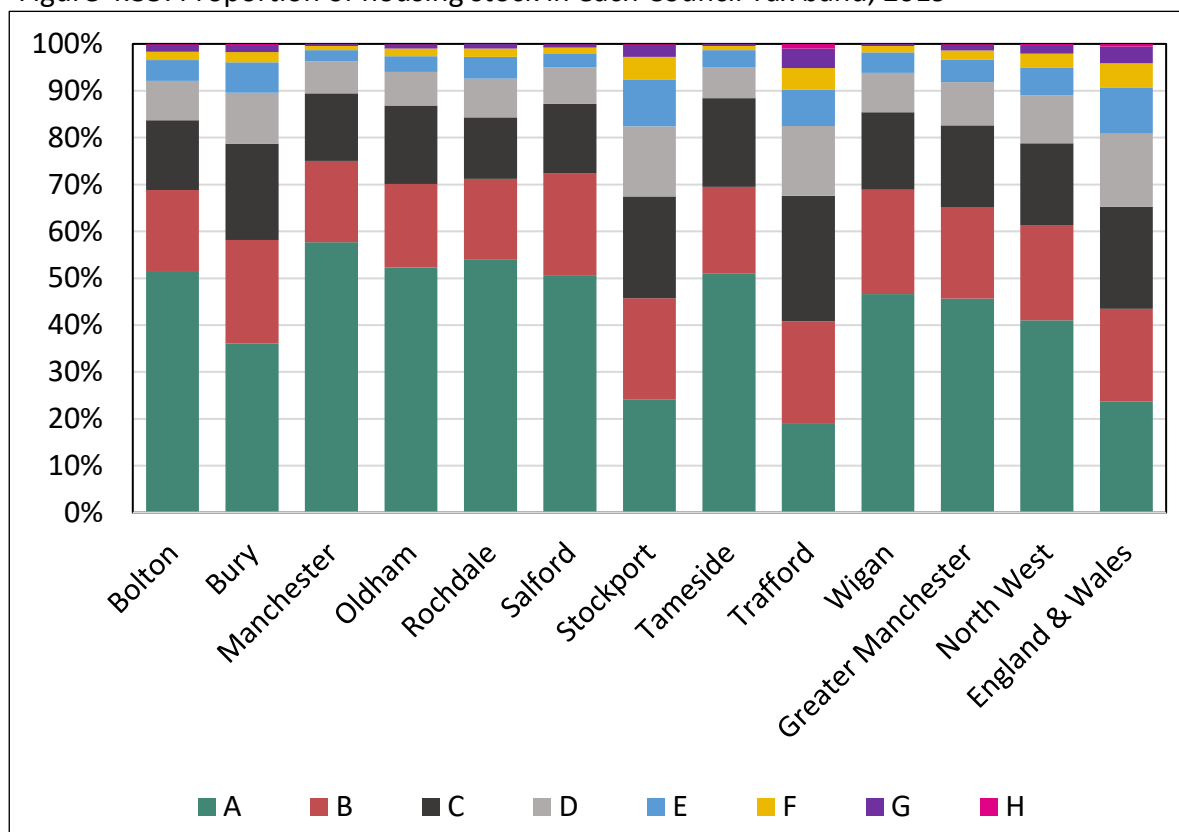
*Source: ONS, 2011 Census*

- 4.107 There were around 13,000 concealed families recorded in the 2011 Census, representing almost 2% of families in Greater Manchester, which is in line with the rate for England but slightly above the average for the North West. Manchester has the highest absolute number of concealed families. The highest proportion of concealed families is in Oldham, followed by Manchester, Rochdale and Bolton, which all have rates above the national average. Wigan and Salford show the lowest rates of concealed families, with less than 1.5% of households in each district classed as concealed households.
- 4.108 In [Chapter 5](#), there is further information on occupancy ratings and concealed households.

#### Council Tax bands

- 4.109 The Valuation Office Agency (VOA) sets Council Tax bands based on the value of properties in 1991. In Greater Manchester, over 80% of properties are in Council Tax band C or below, which covers properties valued at £68,000 or less in 1991. Annual charges for bandings vary between districts; the average Greater Manchester resident living in a band C property would pay around £1,430 per year in Council Tax. This increases to around £3,000 for those in band H, which account for only 0.2% of dwellings in Greater Manchester.

Figure 4.35: Proportion of housing stock in each Council Tax band, 2019



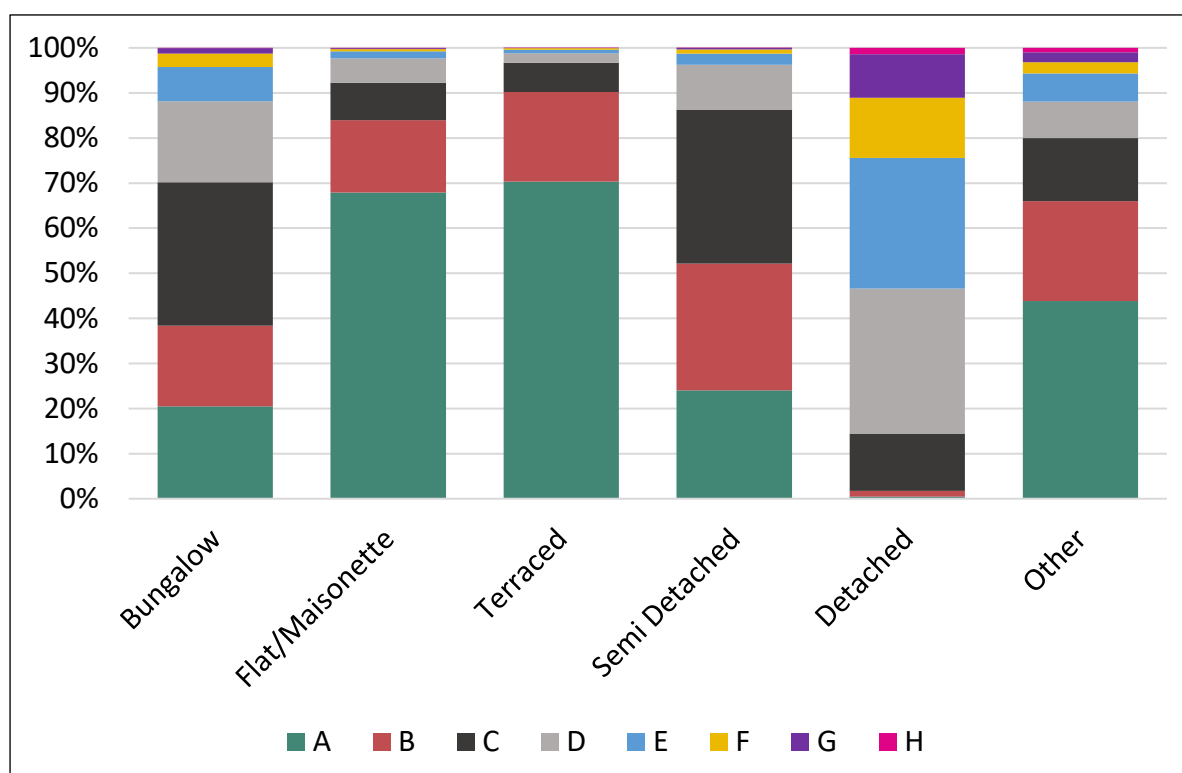
Source: Valuation Office Agency, Table CTSOP3.0: Number of properties by Council Tax band, property type and region, county and local authority district, 2019.

4.110 Figure 4.35 shows that Greater Manchester has a higher proportion of band A properties than the North West and nearly double the rate for England & Wales. Band B properties are largely in line with the North West and England & Wales averages; the proportion of properties in band C is in line with the North West average but below the England & Wales average. Greater Manchester has slightly lower proportions of properties in the remaining bands than the North West average, and both Greater Manchester and the North West have significantly lower proportions of these properties than the national average.

4.111 Trafford and Stockport have the lowest proportions of band A stock, reflecting the larger share of higher value properties in these districts. These districts, alongside Bury and Wigan are the only ones not to have over half of properties in band A. In the North West, 41% of stock is band A, and 24% for England & Wales. Stockport is in line with national averages in all tax bands. Manchester has the largest proportion of

its housing in band A at 58%, followed by Rochdale at 54%. There is less variation between districts in terms of band B properties. In band C, Trafford (27%) has nearly double the proportion of houses that Manchester does (14%). Apart from Trafford and Stockport, and Bury to a lesser extent, the remaining districts have similar proportions to each other in bands D-H.

Figure 4.36: Property type by Council Tax band in Greater Manchester, 2019



Source: Valuation Office Agency, Table CTSOP3.0: Number of properties by Council Tax band, property type and region, county and local authority district, 2019.

- 4.112 Figure 4.36 shows the relationship between property type and Council Tax band. The majority of flats, maisonettes and terraced houses are in band A in Greater Manchester, at around 70% of properties; there is a slightly larger proportion of terraced houses than flats in band B and a slightly higher proportion of flats falling into bands C and D. Very few properties of these types are in bands E and above. Bungalows and semi-detached houses have a similar proportion of stock classified as band A (20% and 24% respectively); however, there is a larger proportion of semi-detached housing in band B at 28% as opposed to 18%. Around one third of

properties of each type are classed as band C. Around 30% of bungalows are in bands D and above, compared to around 14% of semi-detached houses. However, over 85% of detached houses are in bands D and above, with more than half in bands E and above.

#### Energy Performance Certificate ratings

4.113 An Energy Performance Certificate (EPC) is required for properties when constructed, sold or let. This is one of a range of measures that could provide a proxy for 'decent' homes. Data is available for properties built, let or sold from 2008 onwards via MHCLG's *Energy Performance of Buildings Data England and Wales*.

4.114 As from 1 April 2018, there will be a requirement for any properties rented out in the PRS to have a minimum energy performance rating of E on an EPC. Any property with a rating of F or G would therefore not meet Government's minimum standards and could be assumed to be non-decent.

4.115 There are however limitations with EPC data:

- The data is drawn from EPCs issued for domestic buildings only constructed, sold or let since 2008;
- Properties that have not been built, sold or let since 2008 are not captured, so may disproportionately exclude older owner-occupied households (although unlikely to have a large implication for using EPC as a Decent Homes measure in the PRS); and
- 'Tenure' is not directly captured in the dataset, although Transaction Type of *rental* and *rental (private)* has been assumed to cover PRS lets (highlighted in the table below).

4.116 Table 4.6 provides EPC data for Greater Manchester districts and shows the number of domestic properties meeting rating standards. Across Greater Manchester, 95% of domestic dwellings were above Government's minimum advised rating of E in 2017, however this dropped to 89% in the 2018 data. However, the proportion of properties with a rating of B and above more than doubled from 7% in 2017 to 15.7% in 2018.





Table 4.6: Greater Manchester domestic property EPC ratings - all transactions, 2018

Area	EPC rating						
	A	B	C	D	E	F	G
Bolton	0.1%	9.7%	33.4%	44.4%	9.5%	2.4%	0.6%
Bury	0.0%	11.4%	30.0%	45.5%	11.0%	1.5%	0.6%
Manchester	0.0%	13.9%	41.3%	35.3%	8.1%	1.0%	0.4%
Oldham	0.0%	12.1%	33.7%	39.4%	12.6%	1.7%	0.6%
Rochdale	0.0%	17.8%	30.8%	40.1%	9.0%	1.5%	0.9%
Salford	0.0%	24.2%	41.5%	27.8%	5.2%	1.1%	0.2%
Stockport	0.1%	14.6%	24.9%	45.7%	11.7%	2.5%	0.6%
Tameside	0.1%	11.7%	33.8%	42.4%	9.9%	1.5%	0.7%
Trafford	0.0%	8.6%	33.5%	41.2%	13.9%	2.1%	0.7%
Wigan	0.3%	23.6%	24.3%	39.4%	10.3%	1.6%	0.5%
<b>Greater Manchester</b>	<b>0.1%</b>	<b>15.6%</b>	<b>34.5%</b>	<b>38.4%</b>	<b>9.4%</b>	<b>1.5%</b>	<b>0.5%</b>

Source: MHCLG, *Energy Performance of Buildings Data England & Wales, 2018*.

## 4.5 Migration characteristics

4.117 The use of migration data to determine the Greater Manchester market area was discussed in [Chapter 3.1 Household Migration](#). This section looks in a little more detail at the characteristics of the migrating households between areas of England & Wales in terms of composition and age.

### *Household Composition*

4.118 Table 4.7 below shows that in the 12 months before the Census was taken in 2011, 30,200 households moved into Greater Manchester and 26,432 moved out (from both the rest of the UK and outside the UK) – a net figure of 3,768 households moving into Greater Manchester. Of this household flow, 52.5% were one-person households and 40.4% were one family households. In percentage terms, 45.6% of outflows were families and 50.7% were one-person households. The North West shows similar patterns to Greater Manchester but there were slightly more in flows of one-person households (54.9%) and consequently less one family households at

40.4%. Similarly, there was more outflow of one-person households in the North West at 52% compared to 50.7% in Greater Manchester.

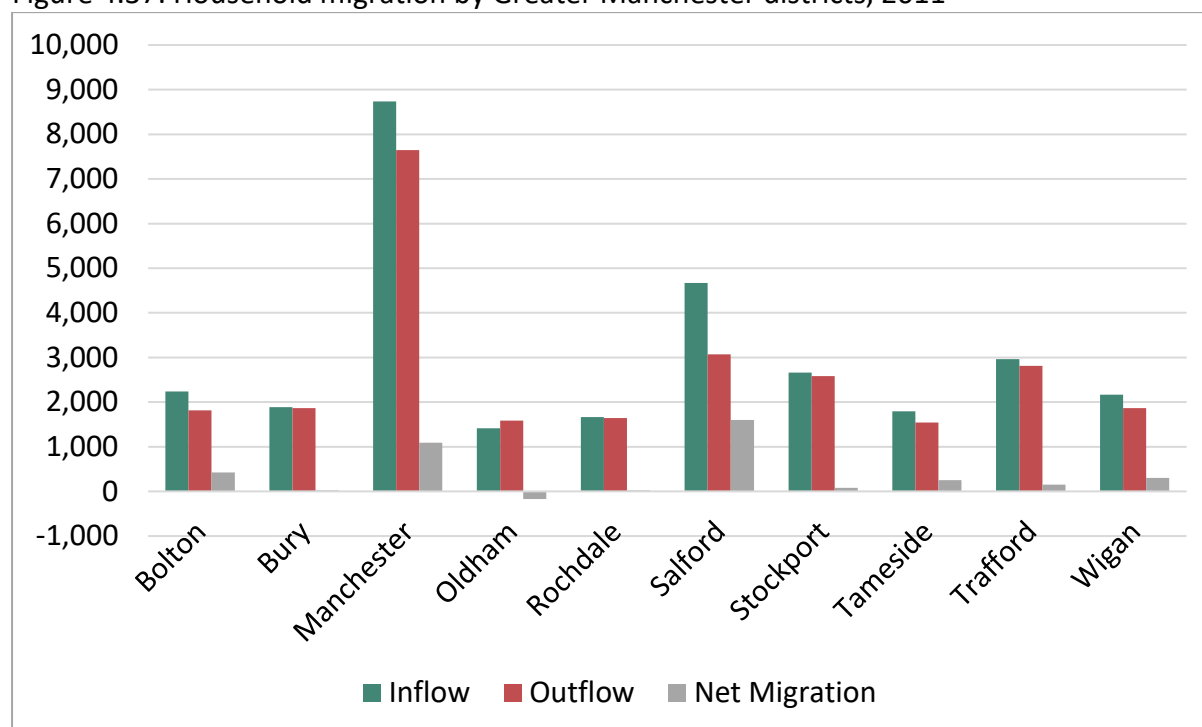
Table 4.7: Household migration by household composition, 2011

	Inflow				Outflow				Net change	
	GM		North West		GM		North West		GM	North West
	#	%	#	%	#	%	#	%	#	#
One-person household	15,851	52.5	17,203	54.9	13,401	50.7	10,823	52.0	2,450	6,380
One Family household	12,820	42.5	12,654	40.4	12,055	45.6	9,342	44.9	765	3,312
Other household	1,529	5.1	1,455	4.6	976	3.7	655	3.1	553	800
<b>Total</b>	<b>30,200</b>	<b>100</b>	<b>31,312</b>	<b>100</b>	<b>26,432</b>	<b>100</b>	<b>20,820</b>	<b>100</b>	<b>3,768</b>	<b>10,492</b>

Source: ONS, 2011 Census

4.119 Figure 4.37 shows these household flows by district in Greater Manchester. The only district to experience a net outflow of households was Oldham with -173 and Salford had the highest net inflow of households with 1,598.

Figure 4.37: Household migration by Greater Manchester districts, 2011



Source: ONS, 2011 Census

## Age

4.120 Table 4.8 below shows the inflow and outflow of households by age group (by age of the head of household or household reference person [HRF]) for Greater Manchester and the North West. In Greater Manchester, most incoming households were aged between 26 and 49 (68.3%), 16.8% were aged over 50 and 14.9% were aged under 24. The North West region had a slightly higher percentage of HRFs aged under 24 flowing into the area and a significantly higher percentage of HRF inflows over 50 at 23.8%.

Table 4.8: Household migration by age, 2011

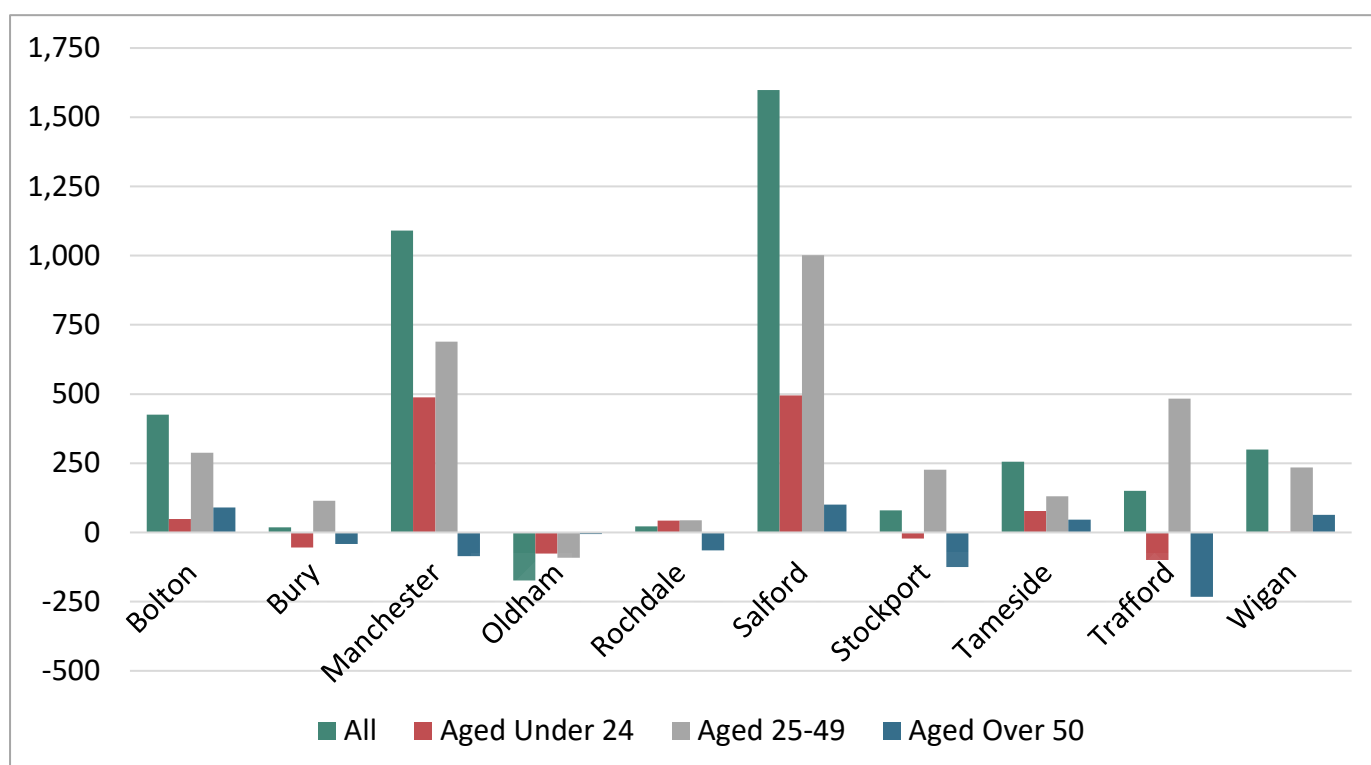
Area	Inflow				Outflow				Net	
	GM		North West		GM		North West		GM	North West
	#	%	#	%	#	%	#	%	#	#
Under 24	4,494	14.9	4,956	15.8	3,592	13.6	2,687	12.9	902	2,269
Aged 25 to 49	20,622	68.3	18,897	60.4	17,499	66.2	11,847	56.9	3,123	7,050
Aged 50+	5,084	16.8	7,459	23.8	5,341	20.2	6,286	30.2	-257	1,173
<b>Total</b>	<b>30,200</b>	<b>100</b>	<b>31,312</b>	<b>100</b>	<b>26,432</b>	<b>100</b>	<b>20,820</b>	<b>100</b>	<b>3,768</b>	<b>10,492</b>

Source: ONS, 2011 Census

4.121 Greater Manchester showed a net decrease in the number of households where the HRF was aged over 50 at a reduction of 257 compared to an increase in the North West of 1,173. Most net growth was in the 25 to 49-age range.

4.122 Figure 4.38 below shows the net household migration numbers by age of the HRF person broken down by Greater Manchester district. Salford, Bolton, Tameside and Wigan had positive net migration in each age group and Manchester only had a negative net migration in the oldest age group (over 50). Oldham was the only district to experience a negative net migration in all age groups and Trafford had the highest negative net migration whose HRF was over 50 and under 24.

Figure 4.38: Household migration by age and Greater Manchester district, 2011



Source: ONS, 2011 Census

#### 4.6 Need for different sizes, types and values of homes

4.123 Following on from Chapter 3, which set out the LHN for Greater Manchester, the analysis in this chapter aims to estimate the need for homes of different types, sizes and values in Greater Manchester. The type, size and tenure of housing needs to be considered separately from the LHN, which is not broken down by these variables.

4.124 The NPPF suggests that analysis of current and future trends in the age profile, household composition, housing stock and tenure should be brought together, in order to examine whether continuing trends in dwelling type, size and tenure would meet the future needs of households.

4.125 The NPPF states that local plans should consider:

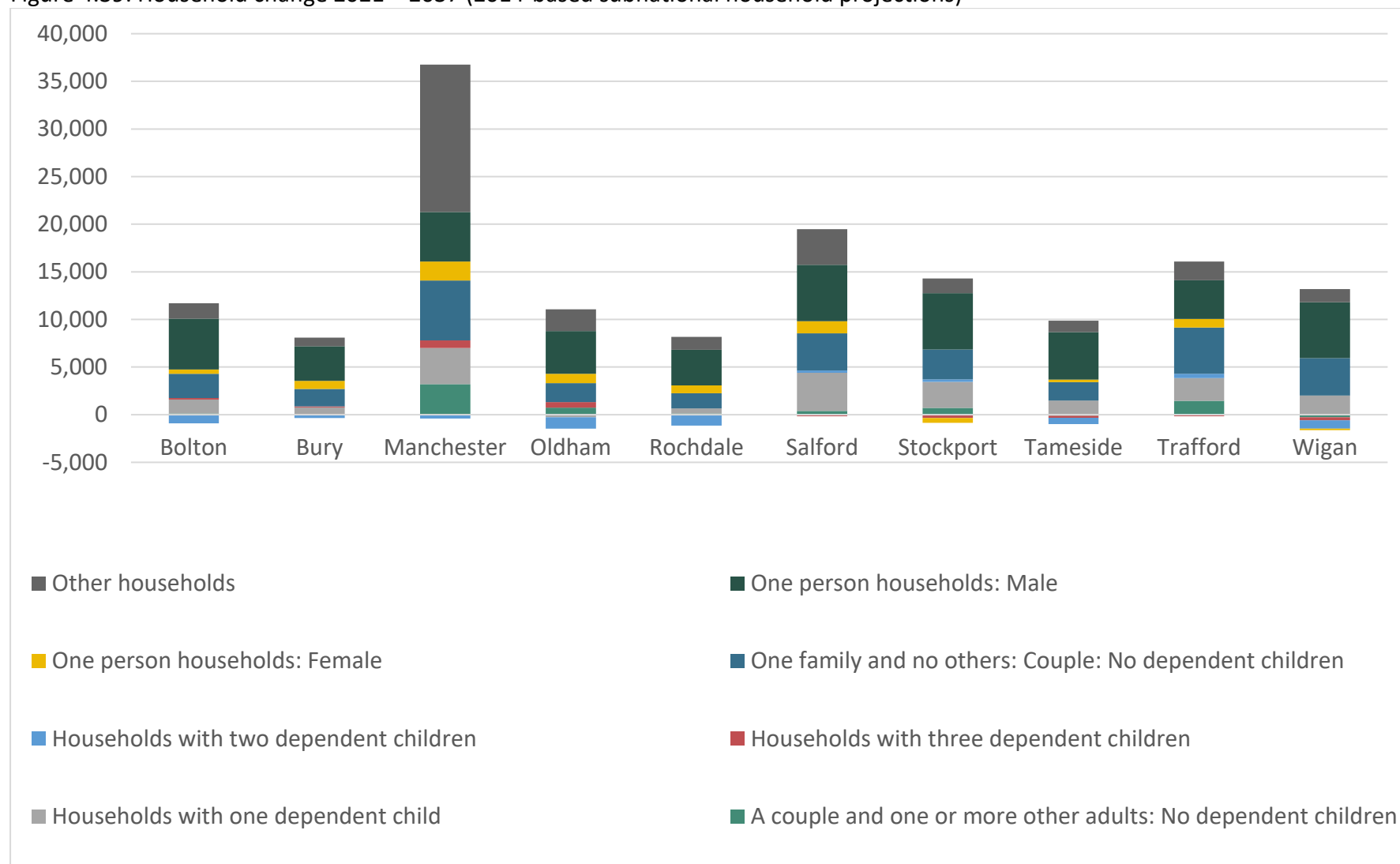
*“60. To determine the minimum number of homes needed, strategic policies should be informed by a local housing need assessment, conducted using the standard method in national planning guidance – unless exceptional circumstances justify an alternative approach which also reflects current and future demographic trends and market signals. In addition to the local housing need figure, any needs that cannot be*

*met within neighbouring areas should also be taken into account in establishing the amount of housing to be planned for.*

*61. Within this context, the size, type and tenure of housing needed for different groups in the community should be assessed and reflected in planning policies (including, but not limited to, those who require affordable housing, families with children, older people, students, people with disabilities, service families, travellers, people who rent their homes and people wishing to commission or build their own homes).” (NPPF, February 2019).*

- 4.126 The LHN for Greater Manchester is based on the 2014-based subnational household projections. The projections for 2020–2030 are used alongside an affordability uplift to calculate the minimum number of homes needed for Greater Manchester. The data provides a view of the household type over the period that in turn provides an indication of the size of homes that may be needed. It should be noted that some ‘new’ households e.g., single person households of older people may be households which are existing households but have changed in size due to bereavement so one household becoming a smaller household as opposed to one household splitting into multiple households.
- 4.127 The 2014-based subnational household projections show an overall increase in households over the period 2020-2037 as shown below.

Figure 4.39: Household change 2021 – 2037 (2014-based subnational household projections)



Source: MHCLG, 2014-based subnational household projection



4.128 In the 2014-based SNHP, Manchester (36,349) and Salford (19,300) are the districts with the largest projected household increase (2021-2037) which is also reflective of the population projections for the two cities (58,600 and 31,979 between 2021 and 2037).<sup>40</sup> In terms of overall household change in the period 2021 - 2037, the 2014-based household projections show that 'One person households: Male' will have the largest actual change with an increase of 49,121.households. The largest percentage change however is in the "other households" with an increase of 29.6%. Other households are defined as:

*"Other Households – This is a household type within Stage Two of the household projections. This category is of multi-person households and will contain the majority of adults living in house shares." (Household Projections 2014-based: Methodological Report, MHCLG, July 2016)*

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<sup>40</sup> Source: 2014-based subnational population projections

Table 4.9: Projected household type change in Greater Manchester, 2021-2037

	2021	2037	2021 - 2037 actual change	2021 - 2037 percentage change
A couple and one or more other adults: No dependent children	86,432	92,836	6,404	7.4%
Households with one dependent child	183,646	202,498	18,852	10.3%
Households with three dependent children	64,033	64,437	404	0.6%
Households with two dependent children	122,874	118,411	-4,463	-3.6%
One family and no others: Couple: No dependent children	270,947	302,943	31,996	11.8%
One person households: Female	184,225	191,105	6,880	3.7%
One person households: Male	210,472	259,593	49,121	23.3%
Other households	106,060	137,499	31,439	29.6%
Grand Total	1,228,689	1,369,322	140,633	11.4%

Source: MHCLG, 2014-based subnational household projections

4.129 The methodology for household projections changed in the 2016-based subnational household projections and the publishers also changed from MHCLG to ONS. An impact of the methodology changes was a reduction in the number of household types for which data was provided for. Also the new methodology used just two census reference periods as opposed to five in order to calculate the headship rates. The table below sets out the projected household growth by summarised household type for the period 2021-2037 in each case, for the most recent sets of projections namely 2014, 2016 and 2018-based subnational household projections.

Table 4.10: Percentage projected growth in broad household types 2021-2037 in Greater Manchester by base year of projection

	2021 - 2037 percentage change		
	2014-based household projections	2016-based household projections (Principal)	2018-based household projections (Principal)
One person households - % change 2021-2037	14.2%	13.3%	12.2%
Households with dependent child(ren) - % change 2021-2037	4.0%	1.1%	4.3%
Other households (multi adult households) - % change 2021-2037	15.1%	10.9%	10.3%

*Sources: MHCLG (2014-based subnational household projections) and ONS (2016-based subnational household projections and 2018-based subnational household projections.)*

4.130 All three projections show an increase in one person households and multi-adult households with a smaller increase in households with dependent children.

4.131 The rise in one-person households is mainly amongst older people in all projections reflecting the ageing population this means that some of the new one-person households are existing households, which maybe a multi adult household that becomes a one-person household. The rise in multi adult households is amongst a younger cohort. The 2016 and 2018-based household projections include couple multi adult households under other households, so it is not possible to distinguish those other households defined in the 2014 method that are mainly adults in house shares. Below sets out the difference in households' type in the 2014-based household projections where the household reference person is aged 15-64 compared to those older – the best approximation available to “working age” and “non-working age”.

Table 4.11: Approximate working age and non-working age projections by household type of household reference person (HRF) for Greater Manchester, 2021-2037  
(age relates to the age of the household reference person)

	2014-based household projections (2021 - 2037 projected change)	
	"Working age" Aged 15-64	"Non-working age" Aged 65 and over
One person households: Male	19,809	29,313
One person households: Female	-1,581	8,466
One family and no others: Couple: No dependent children	-21,906	53,898
A couple and one or more other adults: No dependent children	-6,454	12,859
Households with one dependent child	14,976	3,875
Households with two dependent children	-4,815	346
Households with three dependent children	397	2
Other households	19,429	12,011

Source: MHCLG, 2014-based household projections

4.132 The 2016 and 2018-based household projections do not provide such data in quite so much detail. The above household projections are based on the ONS's SNPP that in turn are based on past trends of population change. The Accelerated Growth Scenario (AGS) for Greater Manchester sets out a forecast that supports Greater Manchester's overall economic growth ambitions and has a population derived from the economic forecasts. Within these forecasts, there is a net migration of 67,740 residents in the period 2021 – 2037.<sup>41</sup> This is higher than the net migration figures in the ONS's 2014, 2016 and 2018-based subnational population projections for the same time period (14,500, 4,200 and 34,400 respectively). The AGS does not provide an age breakdown of the migrants. However, projections are set out for the sectors that are forecast to grow, the largest growth in employment in Greater Manchester is forecast for the professional services sector (32,800 growth 2021-2037). In the

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<sup>41</sup> Source: Greater Manchester Forecasting Model (GMFM) – Accelerated Growth Scenario (AGS) 2019 produced by Oxford Economics for the GMCA.

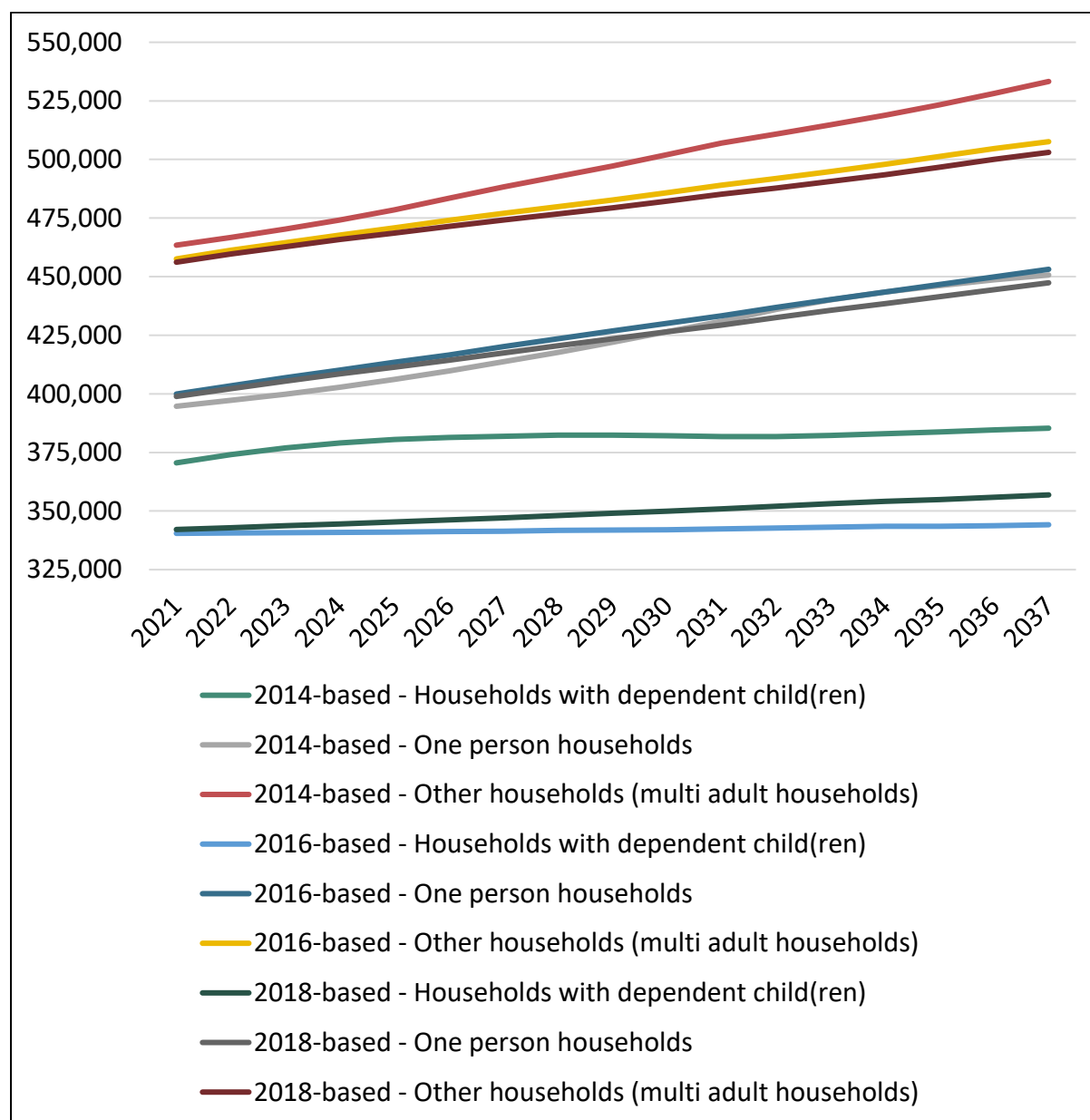
2011 Census, 36% of those with a professional occupation in Greater Manchester were aged 16-34.<sup>42</sup>

- 4.133 The SNHPs data show a trend of an increasing proportion of the total number of households consisting of “Other households”. Conversely, households with dependent children will be forming a lower proportion of the total number of households but still increasing in terms of actual numbers of households. The chart below shows these trends for the period 2021–2037.

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<sup>42</sup> Source: 2011 Census table LC6112EW “Occupation by age”.

Figure 4.40: Comparison of subnational household projections for Greater Manchester, 2021 to 2037



Source: MHCLG (2014-based subnational household projections), ONS (2016-based and 2018-based subnational household projections.)

4.134 Reflecting on this growth in households, the type of dwellings which are likely to be wanted, may not be aligned with the current housing stock on offer. Smaller households and multi-adult households may want a diverse housing offer. Recent evidence is that Manchester city centre has the strongest housing market in Greater

Manchester in terms of sales volumes, with the apartments being a significant part of that offer.

- 4.135 The 2018 SNHP shows growth in the number of older people in the “one person households” category - increasing by 42,691 from 2021 to 2037 across Greater Manchester. There is demand from different sizes of households with a growing market for purpose-built accommodation for older people. They will seek a range of accommodation that may or may not be adapted to specialist needs.
- 4.136 The three sets of subnational household projections show a growth in households without dependent children. A combination of migration and natural change drives population change. The natural change component being partly to an ageing population with improvements in life expectancy.

## 5 Market Signals



## Chapter summary

What can we tell from the housing market that might help us make decisions about the housing we will require for the future?

- Average house prices in Greater Manchester have historically been below the national average. Between 2019 and 2020 there was an increase of 4% compared to 4% for the North West region and 3% for England & Wales. In 2020, the average price paid in Greater Manchester was £180,947, compared to £249,647 in England & Wales.
- Government estimates show average land values for residential land in Greater Manchester are also below national levels, even when those exclude the exceptional values in London.
- Our private rents are also lower than national averages – the median monthly rent was £625 in Greater Manchester and £725 in England (for the year to 30 September 2020).
- Average figures such as these for Greater Manchester mask patterns within the city region. For both sale and rental costs Trafford and Stockport averages are significantly higher than Greater Manchester as a whole, and rents in Manchester are higher, reflecting the city centre market. In all districts, variations between neighbourhoods are of course substantial.
- 21.9% of households in Greater Manchester<sup>43</sup> are in the social housing sector and around 95% of those are rented at social rents, which are generally substantially below private sector rents, though in some neighbourhoods there can be little difference in cost.
- In Greater Manchester, there were over 78,700 households on the housing register in 2019/20. Of these households, over 30,300 (38%) were in reasonable preference, meaning they were identified by the local authority as being in housing need.
- New housebuilding levels continue to recover slowly from the post-2008 collapse in delivery, with the 2019/20 total around 13,742 net additional homes

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<sup>43</sup> Source: ONS, 2011 Census, table KS402EW.

being the highest since 2007/08. New developments in the central areas of Salford and Manchester drove the increase.

- At the same time, the numbers of empty dwellings are still declining, having reached historically low levels close to and in some districts below national averages. This indicates strong demand for more homes whilst also plugging a gap in the shortfall in new build development in the recent years.

## 5.1 Introduction

5.1 This chapter examines the operation of the housing market in Greater Manchester and identifies market signals that provide evidence of housing requirements. It firstly examines house prices and land values across Greater Manchester, followed by a review of the PRS. Following that is information on rental affordability and allocations in the social and affordable rented sector with analysis of the intermediate sector (such as rent to buy and shared ownership products). The evidence is used to derive a range of threshold cost levels for market housing for sale and to rent, for intermediate tenures and for social and affordable rented housing. These thresholds form an important input into the calculation of the need for affordable housing presented in [Chapter 7](#). This chapter then presents an analysis of overcrowding, under-occupation and concealed households, before finally examining vacancy levels in Greater Manchester.

5.2 The NPPF paragraph 31 states that in the preparation and review of local plans and spatial strategies:

*...all policies should be underpinned by relevant and up-to-date evidence. This should be adequate and proportionate, focused tightly on supporting and justifying the policies concerned, and take into account relevant market signals.*

5.3 The LHN methodology as discussed in [Chapter 3](#), includes an adjustment for housing signals in the form of an affordability uplift.

5.4 It is however important to monitor the performance of the housing market, and so this chapter considers a range of market signals for Greater Manchester including house prices, rents, affordability and overcrowding.

## 5.2 House prices

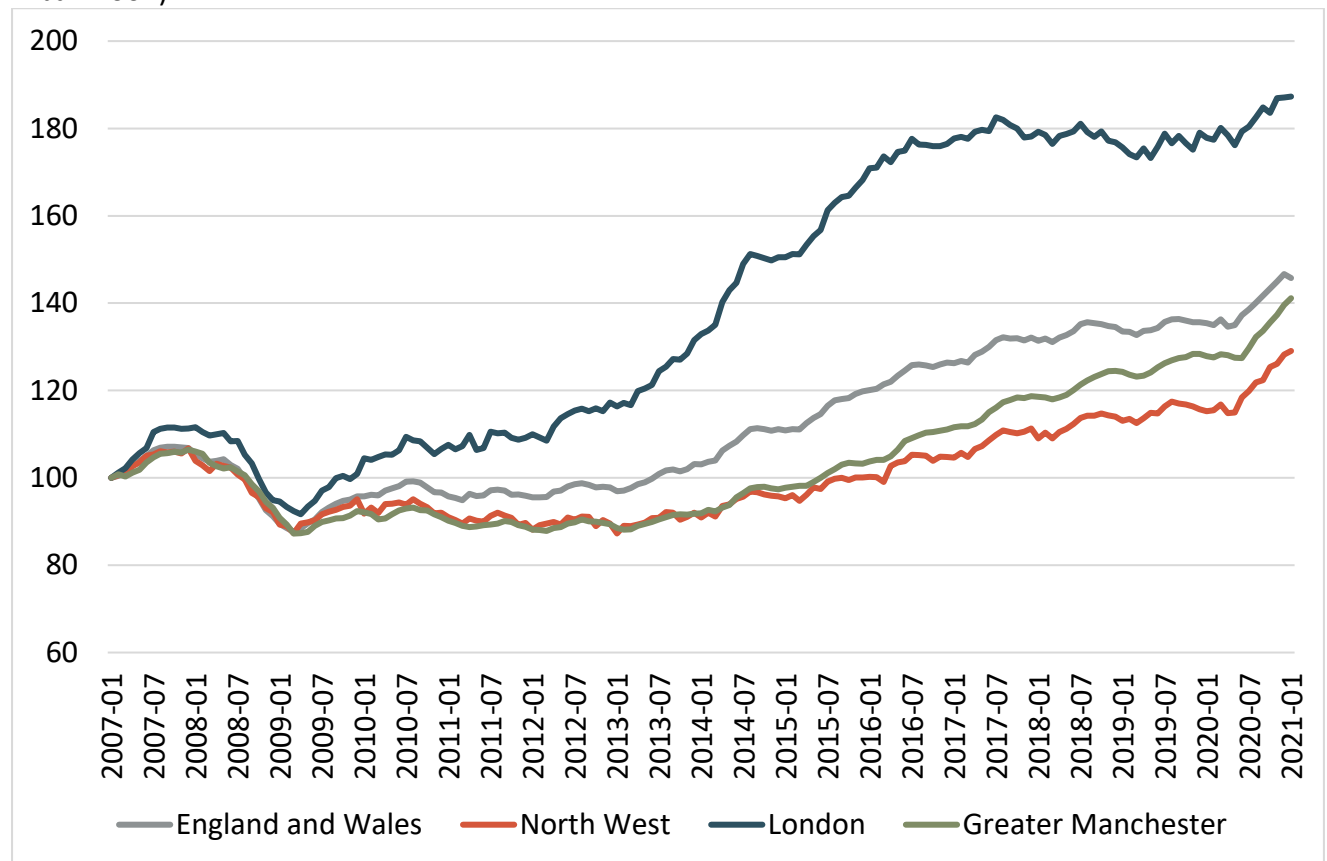
### *Long-term trends*

- 5.5 There are two key sources of house price data, the H M Land Registry House Price Index (HPI) and the ONS House Price Statistics for Small Areas (HPSSAs).<sup>44</sup> H M Land Registry data is used at district level and above and ONS at ward level for the purposes of this report. Figure 5.1 shows this data in Greater Manchester between January 2007 and January 2021.
- 5.6 Average house prices in Greater Manchester increased steadily until March 2009, when they dipped before levelling out in the next three years. Prices returned to growth from September 2012 onwards. The relatively stark increase in London compared to the other areas illustrated in the chart below. Whilst there has been similar peaks and troughs, Greater Manchester has narrowed the gap to that nationally in the last couple of years. In Greater Manchester mean house prices remain consistently below levels in England, although have followed similar patterns of growth since 2012. Greater Manchester median house prices closely match the median house price pattern for England & Wales.

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<sup>44</sup> HPSSAs use data from the H M Land Registry to provide statistics on the price paid and composition of residential property transactions for properties that were sold in England & Wales. Properties sold at a discount to market level, such as properties sold under the Right to Buy scheme, are excluded from the data.

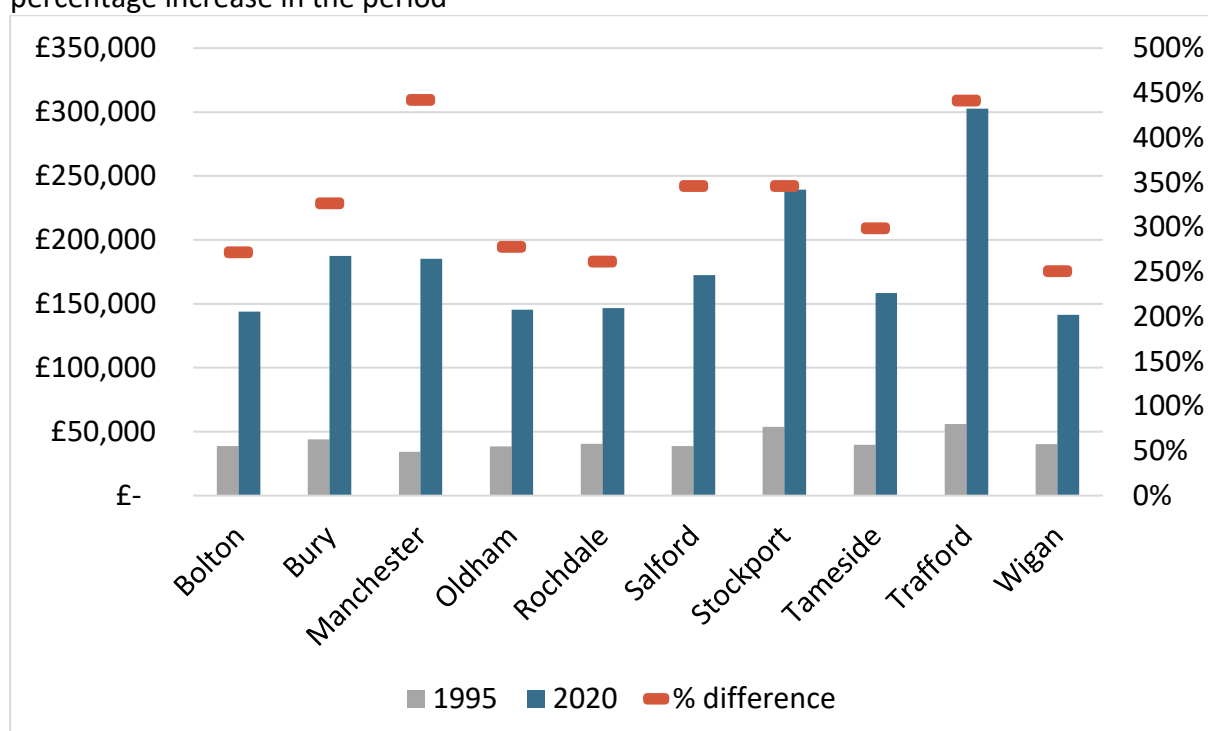
Figure 5.1: Average Residential prices paid in Greater Manchester, 2007 to 2021 (Index =100 in Jan 2007)



Source: H M Land Registry House Price Index (April 2021)

5.7 H M Land Registry data is useful in demonstrating the scale of house price rises in Greater Manchester, shown below in Figure 5.2. It charts the rise in house prices since the year 1995 - the earliest available data.

Figure 5.2: Average residential prices in Greater Manchester districts 1995 and 2020 and percentage increase in the period



Source: H M Land Registry Price Paid data (April 2021).

- 5.8 In 1995, the average property price in Manchester (£34,188) was the lowest in Greater Manchester. Property prices have risen the most in Manchester in percentage terms and Manchester is now the fourth most expensive area in Greater Manchester. Wigan now has the lowest mean house price across the conurbation at £141,417. Wigan has experienced the least increase too.
- 5.9 There has been a geographical element to house price inflation with districts to the north experiencing rates lower than those districts located in the south of Greater Manchester. This may partly be a function of the type and value of housing rather than just the level of underlying demand.
- 5.10 Table 5.1 shows the figure highlighted above in more detail.

Table 5.1: Average residential prices and change 1995, 2019 and 2020

Area	1995	2019	2020	1995 to 2020 % change	2019 to 2020 % change
Bolton	£38,715	£137,401	£143,863	272%	5%
Bury	£43,965	£178,748	£187,354	326%	5%
Manchester	£34,188	£181,198	£185,243	442%	2%
Oldham	£38,494	£136,136	£145,336	278%	7%
Rochdale	£40,604	£141,243	£146,672	261%	4%
Salford	£38,703	£165,730	£172,436	346%	4%
Stockport	£53,687	£228,074	£239,233	346%	5%
Tameside	£39,731	£150,965	£158,325	298%	5%
Trafford	£55,952	£289,296	£302,685	441%	5%
Wigan	£40,353	£134,772	£141,417	250%	5%
Greater Manchester	£41,342	£173,368	£180,947	338%	4%
North West	£43,928	£164,419	£171,241	290%	4%
England & Wales	£52,712	£241,898	£249,647	374%	3%

Source: H M Land Registry Price Paid data (April 2021)

- 5.11 All areas highlighted above have experienced significant house price increases both in the long and short term. In Greater Manchester between 2019 and 2020 there was an increase of 4% compared to 4% for the region as a whole and 3% for England & Wales.
- 5.12 At the district level, the highest increase in the year 2019 to 2020 was in Oldham (7%) and the lowest in Manchester (2%). In 1995, Trafford and Stockport had the highest house prices in Greater Manchester, and this remained the case throughout.
- 5.13 Table 5.2 below highlights average house prices in Greater Manchester, the North West and nationally broken down by house type for 2020. There are similar differences in each type ranging from an average detached property in Greater Manchester selling for £308,756 in 2020, compared to £378,265 nationally to a flat selling for £143,861 in Greater Manchester compared to £222,551 nationally. The average new build property sold for £219,631, compared to over £306,852 in England & Wales. Existing properties in Greater Manchester had an average selling price in 2020 of £178,736 and £245,866 for England & Wales.

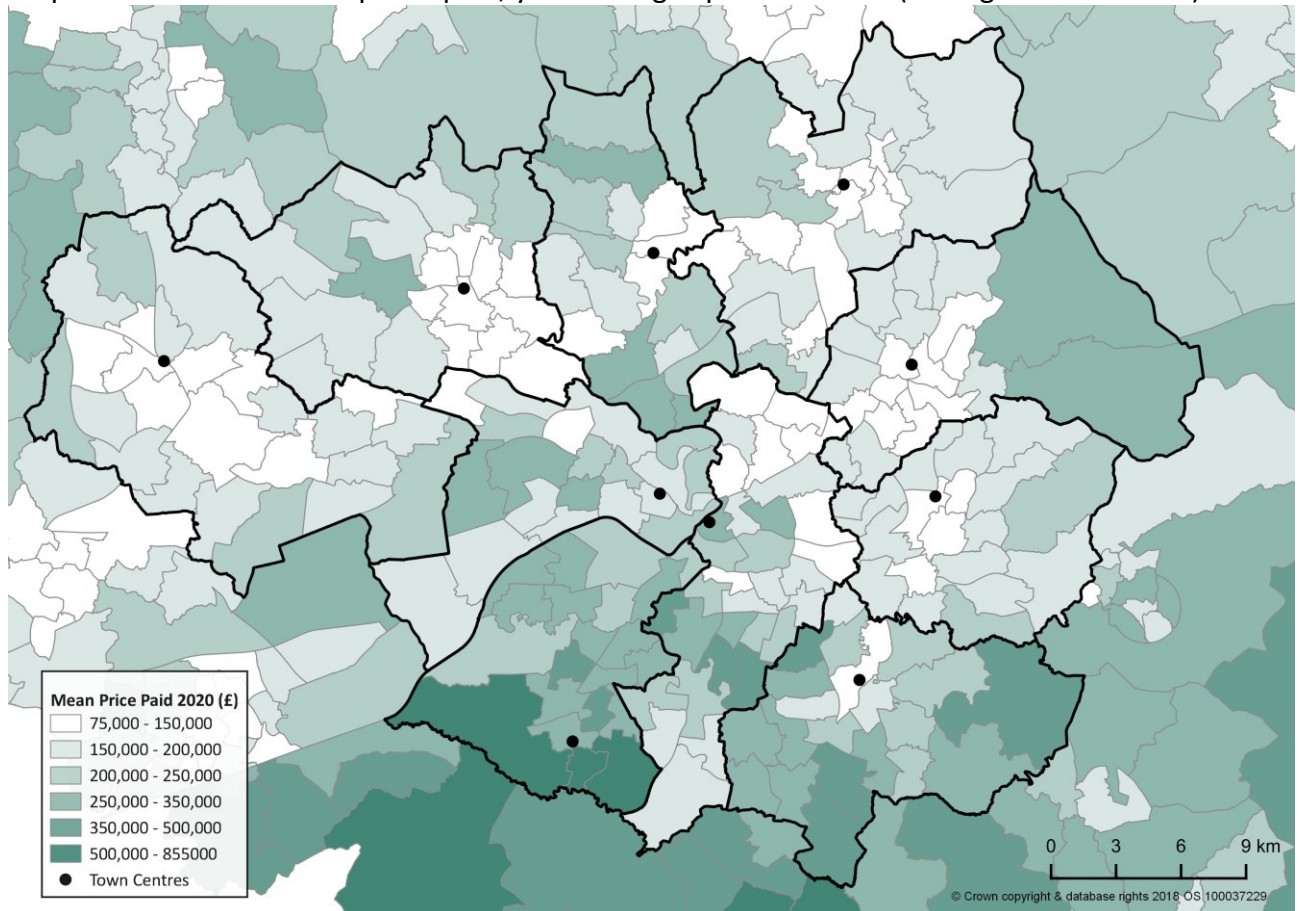
Table 5.2: Average prices by type, 2020 (average of 12 months)

Area	All properties	Detached	Semi-detached	Terraced	Flat	New	Existing
Bolton	£143,801	£254,478	£153,302	£113,936	£92,806	£177,021	£143,282
Bury	£187,255	£313,916	£203,011	£145,059	£106,652	£274,937	£183,490
Manchester	£185,040	£332,408	£228,838	£173,161	£173,042	£213,788	£182,305
Oldham	£145,246	£254,544	£163,262	£118,513	£104,280	£196,435	£142,908
Rochdale	£146,353	£247,474	£154,269	£114,021	£82,127	£203,557	£141,489
Salford	£172,028	£312,679	£205,881	£153,200	£136,856	£208,246	£168,502
Stockport	£239,302	£407,908	£254,797	£182,413	£146,529	£252,879	£239,202
Tameside	£158,140	£268,659	£173,228	£131,089	£104,882	£210,865	£154,615
Trafford	£302,561	£553,842	£332,160	£253,724	£191,822	£288,497	£303,359
Wigan	£141,323	£231,818	£142,647	£108,576	£79,090	£230,871	£138,193
<b>Greater Manchester</b>	<b>£180,786</b>	<b>£308,756</b>	<b>£201,278</b>	<b>£144,495</b>	<b>£143,861</b>	<b>£219,631</b>	<b>£178,736</b>
North West	£171,036	£294,366	£182,210	£131,162	£123,533	£228,496	£168,079
England & Wales	£249,286	£378,265	£235,267	£202,207	£222,551	£306,852	£245,866

Source: H M Land Registry House Price Paid Data (April 2021).

5.14 Map 5.1 shows the mean residential prices for all properties at ward level across Greater Manchester districts in 2019. Properties over £450,000 are predominantly to the south of Greater Manchester and neighbouring areas. Properties sold for less than £150,000 in 2019 are predominantly in the central areas of the districts in the north of Greater Manchester.

Map 5.1: Mean residential prices paid, year ending September 2020 (average of 12 months)

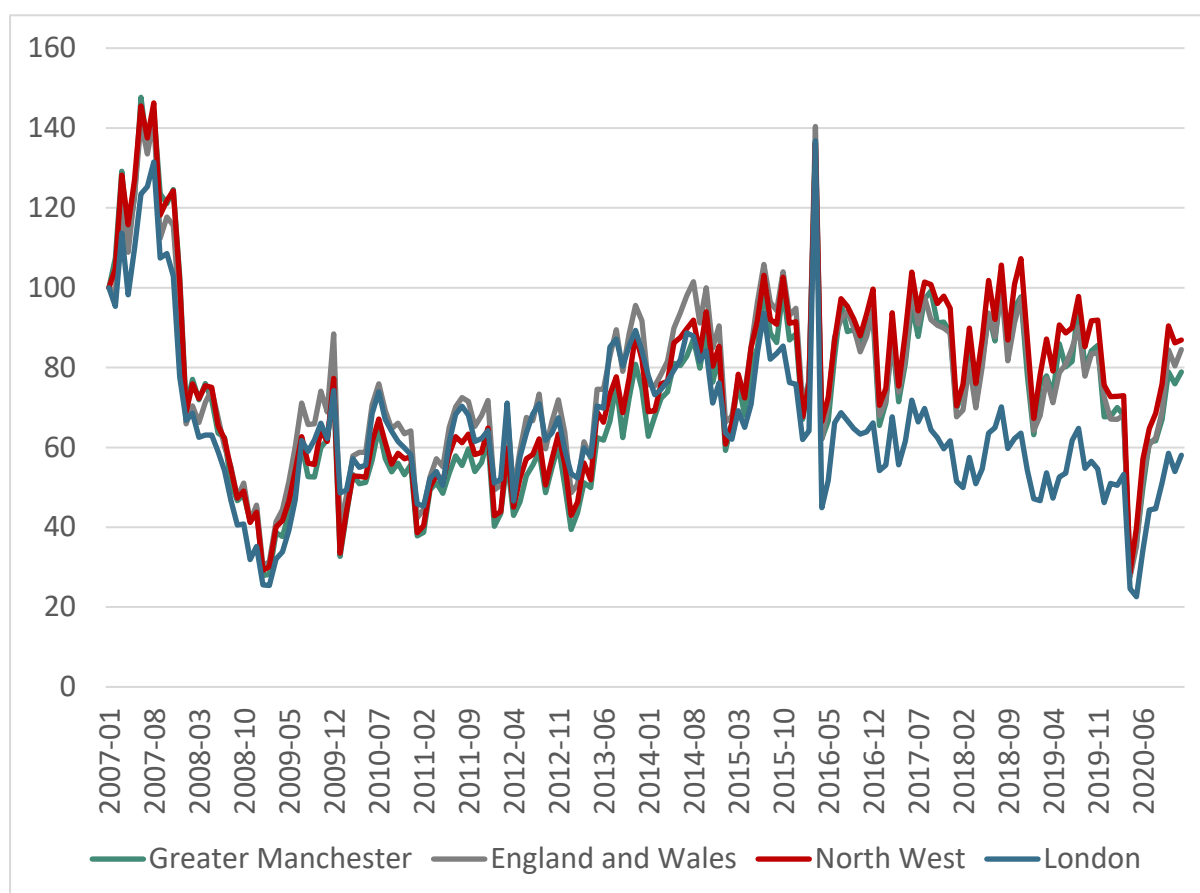


Source: [ONS House Price Statistics for Small Areas \(HPSSAs\)](#)



## Transactions

Figure 5.3: Residential transactions 2007 to 2020 (January 2007=100)



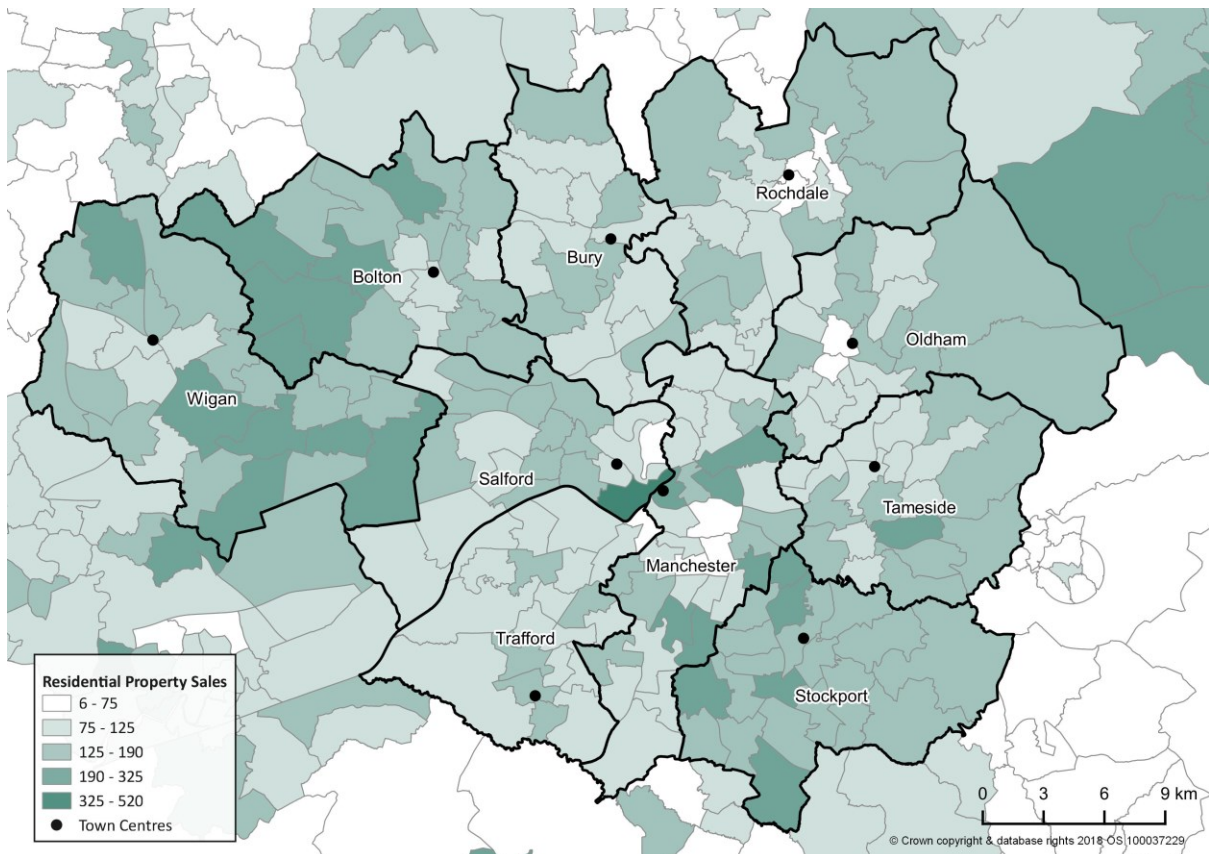
Source: H M Land Registry House Price Paid Data (April 2021)

5.15 Figure 5.3 details residential property sales since January 2007 and indexed to this date for Greater Manchester, London, England & Wales and the North West. The Index peaked for most of the areas shown in August 2007 and has not reached this level since for Greater Manchester, even when there was a stamp duty change in January 2016. All areas had their lowest sales point in April 2020 after the announcement of the COVID-19 lockdowns. Transactions were lower in April 2020 than in January 2009, after the financial crisis. Since then, sales have recovered sharply, exceeding pre-COVID-19 levels in Greater Manchester.

5.16 The most recent sales figures, whilst still quite variable shows that the market, in terms of actual number of sales, is still only about 80% of the base figures in August

2007. This is up from about 70% in February 2020. For most months, both Greater Manchester and the North West had lower Index values than England & Wales albeit relative to the figures of January 2007. The most recent significant change over the last few years has been the relative decline in sales in London since 2016 and not returning to levels experienced in January 2017.

Map 5.2: Residential sales, Greater Manchester and neighbouring wards, year ending Sept 2020



Source: [ONS House Price Statistics for Small Areas \(HPSSAs\)](#)

5.17 In terms of sales over the year ending September 2020, Map 5.2 shows that the regional centre had the highest number of sales over the year. There are several neighbouring wards that had less than 75 sales during the time frame whilst there were significant sales activity to the south east and west of Greater Manchester.

### 5.3 Land values

5.18 MHCLG's publication *Land Value estimates for Policy Appraisal* provides estimates of residential land values (post planning permission) for local authorities in England.

5.19 The table below outlines the values recorded in April 2017 and April 2019 for the ten Greater Manchester districts, compared with the averages for England.

Table 5.3: Residential Land Values (per Hectare), 2017 and 2019

Area	April 2017	April 2019	Percentage change
Bolton	£1,790,000	£1,110,000	-38.0
Bury	£1,440,000	£1,380,000	-4.2
Manchester	£1,890,000	£2,130,000	12.7
Oldham	£1,110,000	£850,000	-23.4
Rochdale	£1,140,000	£900,000	-21.1
Salford	£1,345,000	£1,500,000	11.5
Stockport	£2,655,000	£2,400,000	-9.6
Tameside	£1,870,000	£1,950,000	4.3
Trafford	£2,095,000	£2,240,000	6.9
Wigan	£1,400,000	£900,000	-35.7
England (including London)	£6,220,086	£6,014,000	-3.3
England (excluding London)	£2,773,031	£2,686,981	-3.1

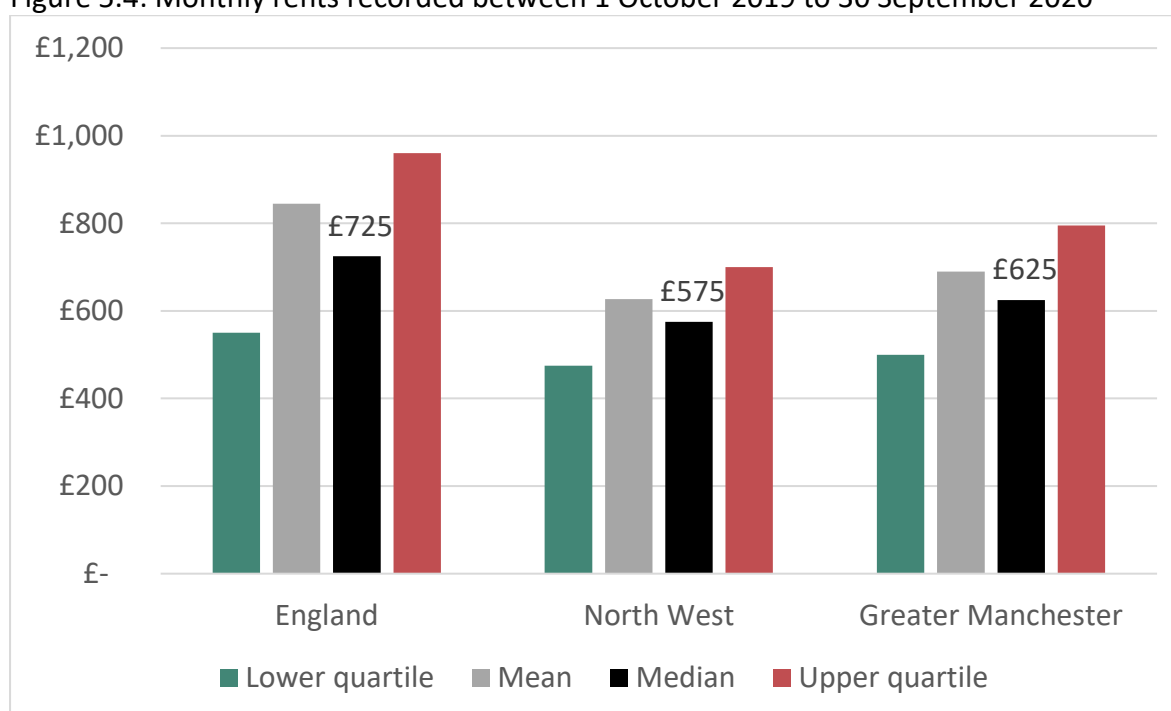
Source: MHCLG, *Land Value estimates for Policy Appraisal* (2019).

5.20 Land values in Greater Manchester are low compared to the national average. No Greater Manchester district exceeds the national average even when London is excluded. There is quite considerable variation across Greater Manchester with Oldham, Rochdale and Wigan having the lowest land values. Stockport, Trafford and Manchester had the highest values. Manchester and Salford had the largest increases over this period. Bolton, and Wigan had the largest decreases. The MHCLG advises that the figures are appropriate for a single, hypothetical site and should not be taken as appropriate for all sites in the locality.

## 5.4 Rental trends

5.21 In 2019/20, average monthly private rent levels in Greater Manchester were higher than in the North West, but lower than England as a whole. The median monthly rent was £625 in Greater Manchester, compared to £575 in the North West and £725 for England. Lower quartile private rents were £500 in Greater Manchester, which is higher than that of the North West but lower than in England as a whole (£550).

Figure 5.4: Monthly rents recorded between 1 October 2019 to 30 September 2020

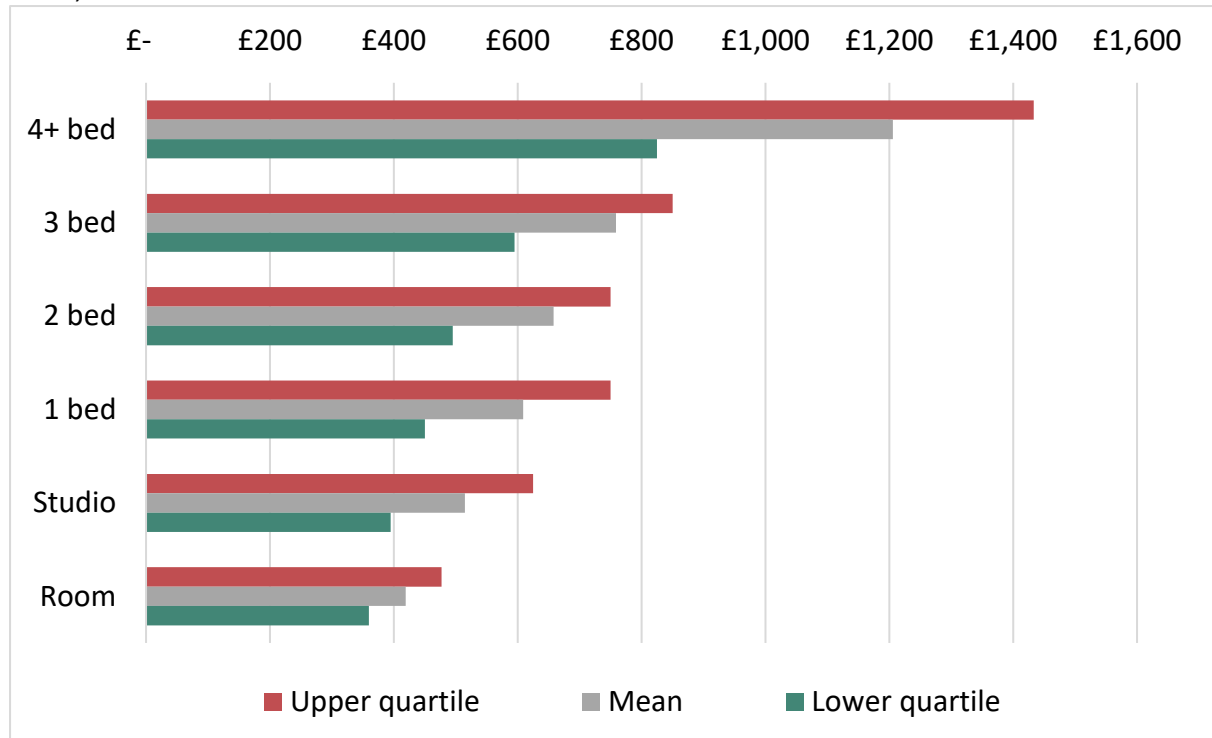


Source: Valuation Office Agency, *Private Rental Market Statistics, Private rental market summary statistics: 1 October 2019 to 30 September 2020*

5.22 Figure 5.5 outlines rental costs for different sizes of property in Greater Manchester, based on transactions recorded by the VOA in 2019/20. Monthly rental costs for most properties vary between £450 for a one bedroomed property at lower quartile rents, to £850 for a three bedroomed property at upper quartile rents. Mean rental costs for a three-bedroomed home in Greater Manchester are £759 per calendar month. For the room measure, monthly rental costs range from £477 at upper

quartile rents to £360 at lower quartile rents. The mean room rent is £419 per calendar month, up from £416 the previous year.

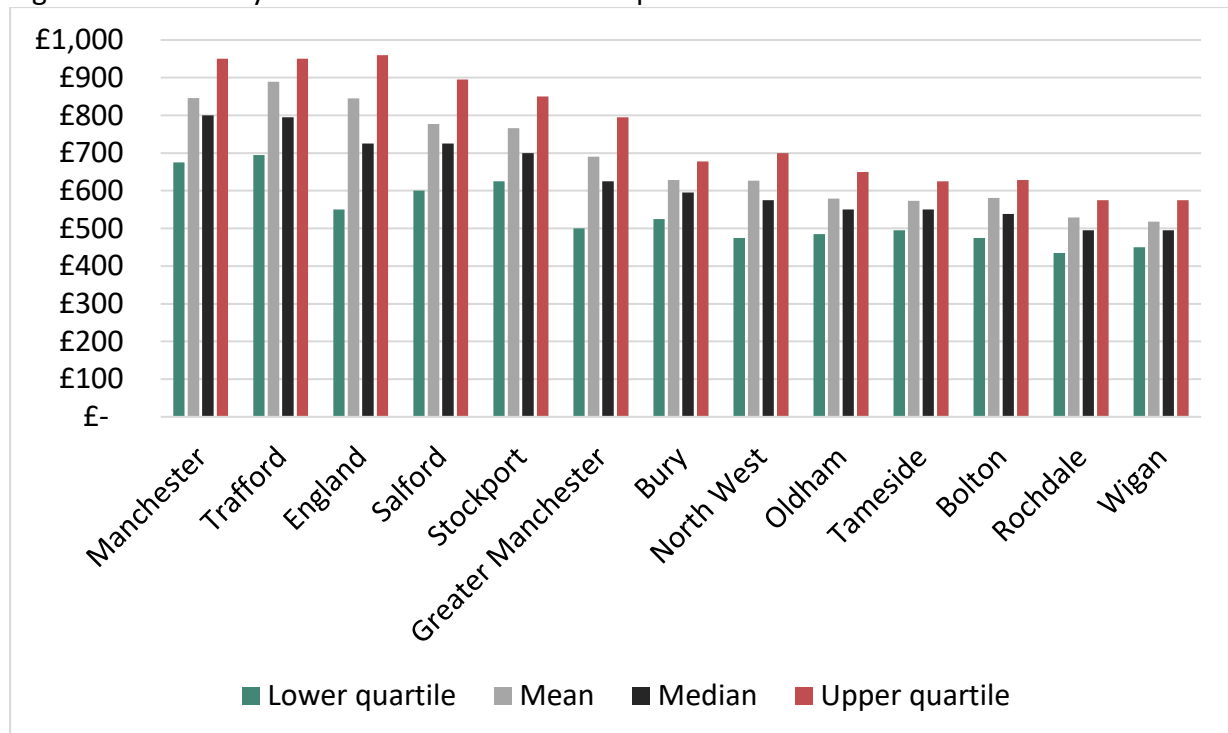
Figure 5.5: Monthly rents by property size recorded between 1 April 2019 and 31 March 2020, Greater Manchester



Source: Valuation Office Agency Private Rental Market Statistics, Private rental market summary statistics: April 2019 to March 2020.

5.23 As shown in Figure 5.6 below, Manchester has the highest monthly rents across Greater Manchester, with a median monthly rent of £800 compared with £475 in Rochdale and Wigan. Trafford has the next highest rent averages whereas rents in Bolton, Rochdale and Wigan are relatively low.

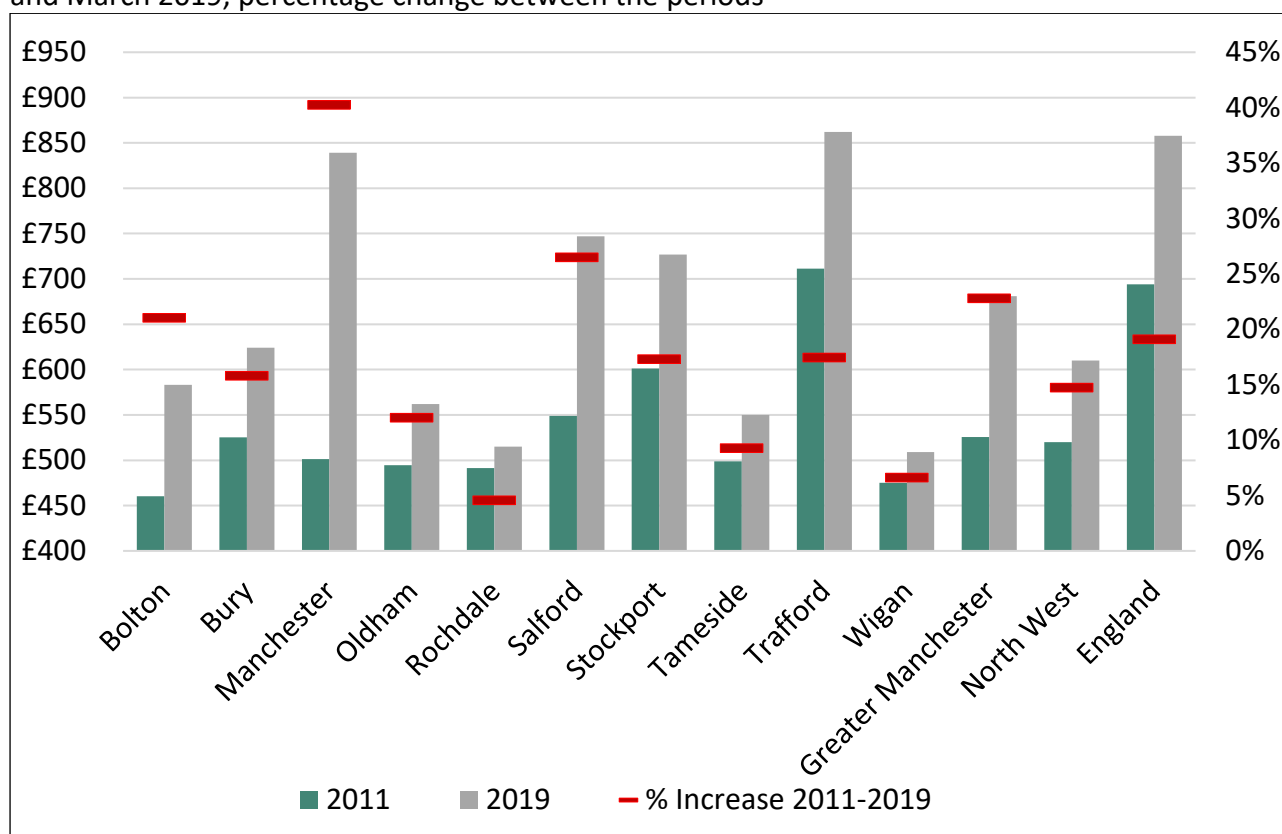
Figure 5.6: Monthly rents recorded between 1 April 2019 and 31 March 2020



Source: Valuation Office Agency Private Rental Market Statistics, Private rental market summary statistics: April 2019 to March 2020.

5.24 Figure 5.7 shows average monthly rents observed in 2011 and 2019, as well as the percentage change in this period to provide an indication of rental change in recent years. Rental growth in Greater Manchester from 2011-19 is shown to be above the national and regional average. Within Greater Manchester, rental growth was particularly significant in Manchester where the percentage change was more than double that recorded nationally. This reflects the changing profile of the rental sector in Manchester as well as increases in rents on individual properties.

Figure 5.7: Mean monthly rents recorded between May 2010 and June 2011 and April 2018 and March 2019, percentage change between the periods



Source: Valuation Office Agency Private Rental Market Statistics, Private rental market summary statistics: June 2011 and April 2018 to March 2019.

5.25 The Index of Private Housing Rental Prices (IPHRP)<sup>45</sup> provides another source of rental data that measures the change in price of renting residential property from private landlords. This experimental data is indexed to January 2015 and is available at the regional level. Table 5.4 provides this data for January of each year and for December 2020 – the latest data available at the time of analysis.

<sup>45</sup> The IPHRP is constructed using administrative data, making use of data that are already collected for other purposes to estimate rental prices. The source of private rental prices for England is the VOA.

Table 5.4: Index of Private Housing Rental Prices\* 2015-2020

Year	Region										
	North West	North East	Yorkshire and the Humber	East Midlands	West Midlands	East	London	South East	South West	England	England excl. London
Jan-15	100	100	100	100	100	100	100	100	100	100	100
Jan-16	101	100.9	101.2	102.3	101.8	102.9	103.9	102.9	101.3	102.7	102
Jan-17	102.2	101.7	102.7	105.2	104	106	106.1	106.3	104.2	105.1	104.6
Jan-18	103.5	101.8	104.1	107.8	105.8	108.1	106.3	108.2	106.4	106.3	106.4
Jan-19	104.6	102.2	106	110.5	107.6	109.5	106.4	109.9	108.2	107.4	108.1
Jan-20	102.8	105.7	108.2	112.9	109.4	111.3	107.7	111.4	110.8	109.1	109.8
Dec-20	104.0	107.3	109.6	115.2	111.4	112.7	108.6	112.4	113.1	110.4	111.4

Source: ONS, Index of Private Housing Rental Prices (IPHRP) 2020

\*Index level (January 2015 = 100)

5.26 The North West region has seen the smallest regional index rise in private rents since January 2015. This could however mask significant differences across the region. The regional indexes have increased the most in the East Midlands (15.2%) and the South West (13.1%).

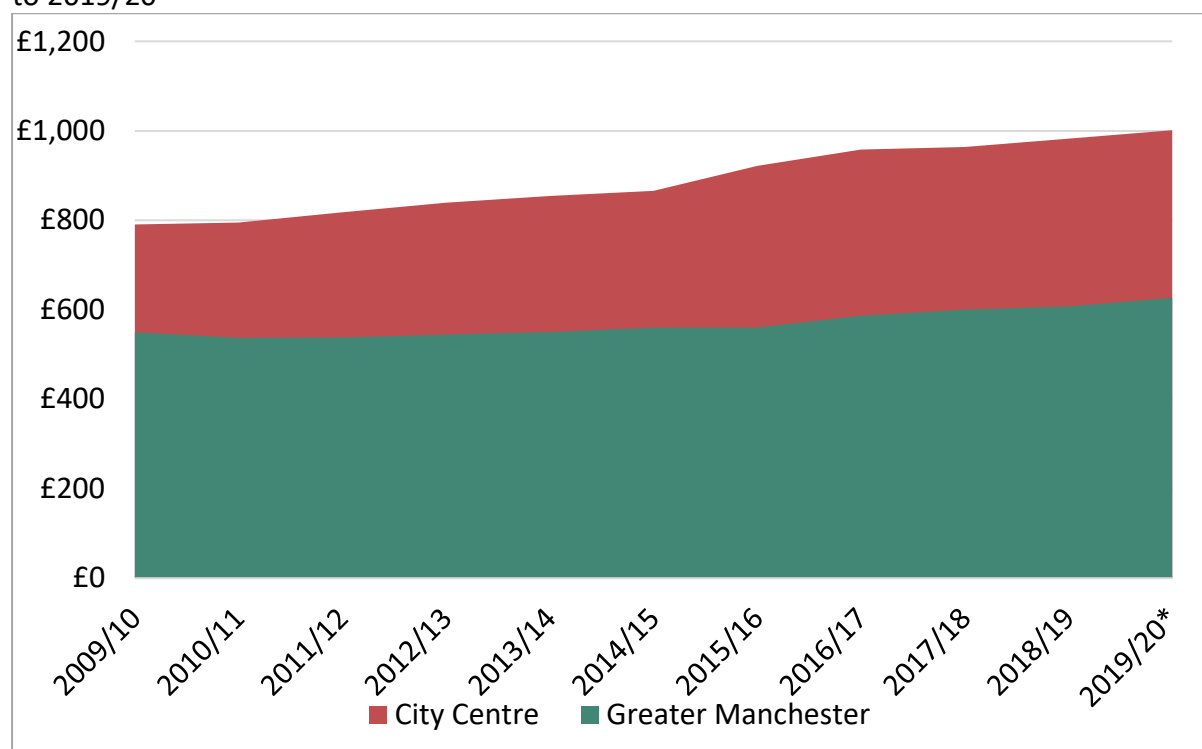
#### City centre rental market

5.27 Within Greater Manchester, rental growth was particularly significant in Manchester and Salford where percentage change was higher than the level recorded nationally. This growth is mainly driven by the city centre new build apartment market that has expanded significantly especially so in the last decade.

5.28 Zoopla data shows rents in the city centre have been increasing steadily since 2011/12, with a 16.2% change in rents over the last five years. This is higher than the rate observed across Greater Manchester (excluding the city centre), which was 10.2% for the same period.



Figure 5.8: Average 2-bed monthly rents in Greater Manchester and the city centre 2009/10 to 2019/20



Source: Zoopla, \*2019-20 figures include up to the end of December 2020

## 5.5 Households in need and affordability

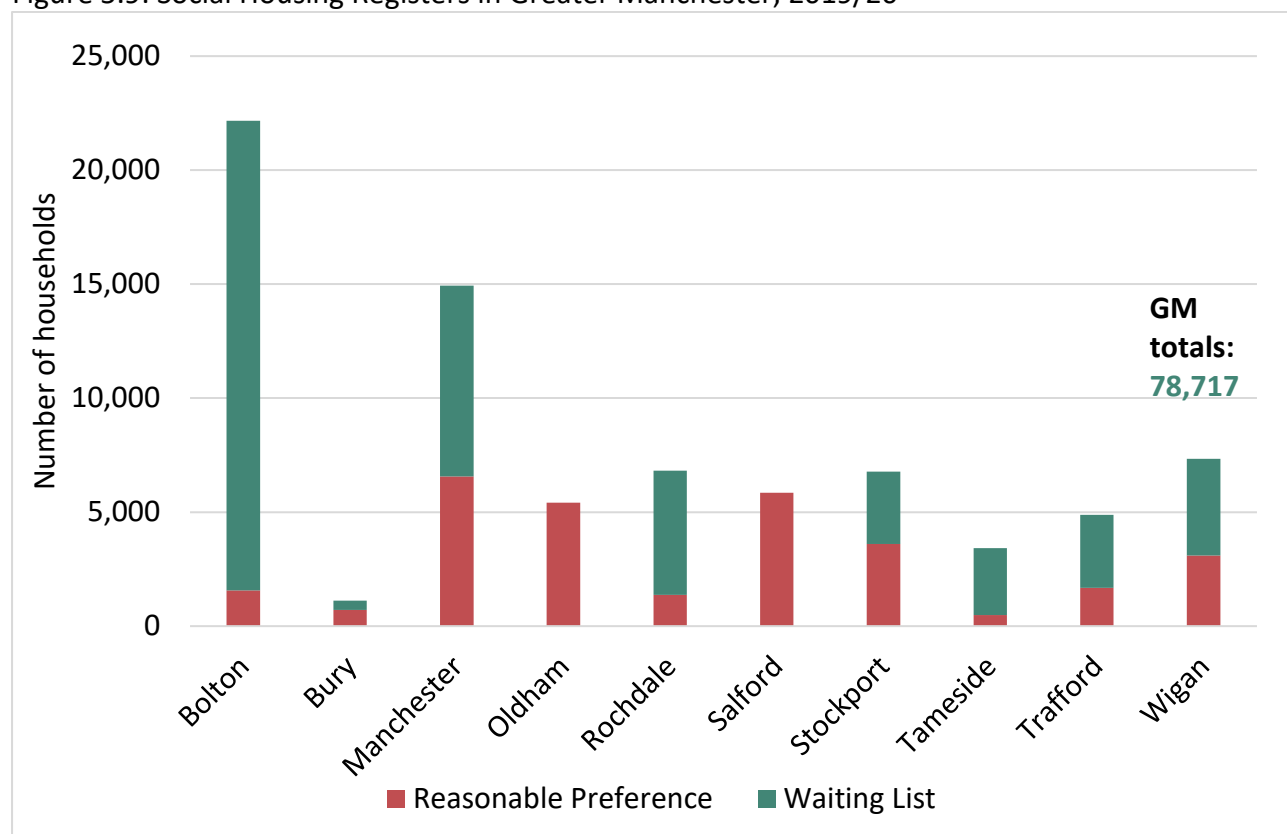
### *Households in need*

#### Housing Registers

5.29 Each local authority in Greater Manchester holds a housing register of those who have applied for social housing, with some applicant households being placed into reasonable preference, meaning that they have a priority need for a home. Reasonable preference can be awarded to people who are homeless, living in overcrowded households or who need to move on medical or welfare grounds. The number of people on the housing register and in reasonable preference can give an indication of how many households there are across the conurbation that may be in need of affordable housing, although it will also to some degree reflect variations in individual local authorities' approaches. How the local authorities manage their registers do vary so this does need to be taken into account when comparing across districts.

5.30 Figure 5.9 charts the social housing registers for the local authorities in Greater Manchester in 2019/20.

Figure 5.9: Social Housing Registers in Greater Manchester, 2019/20

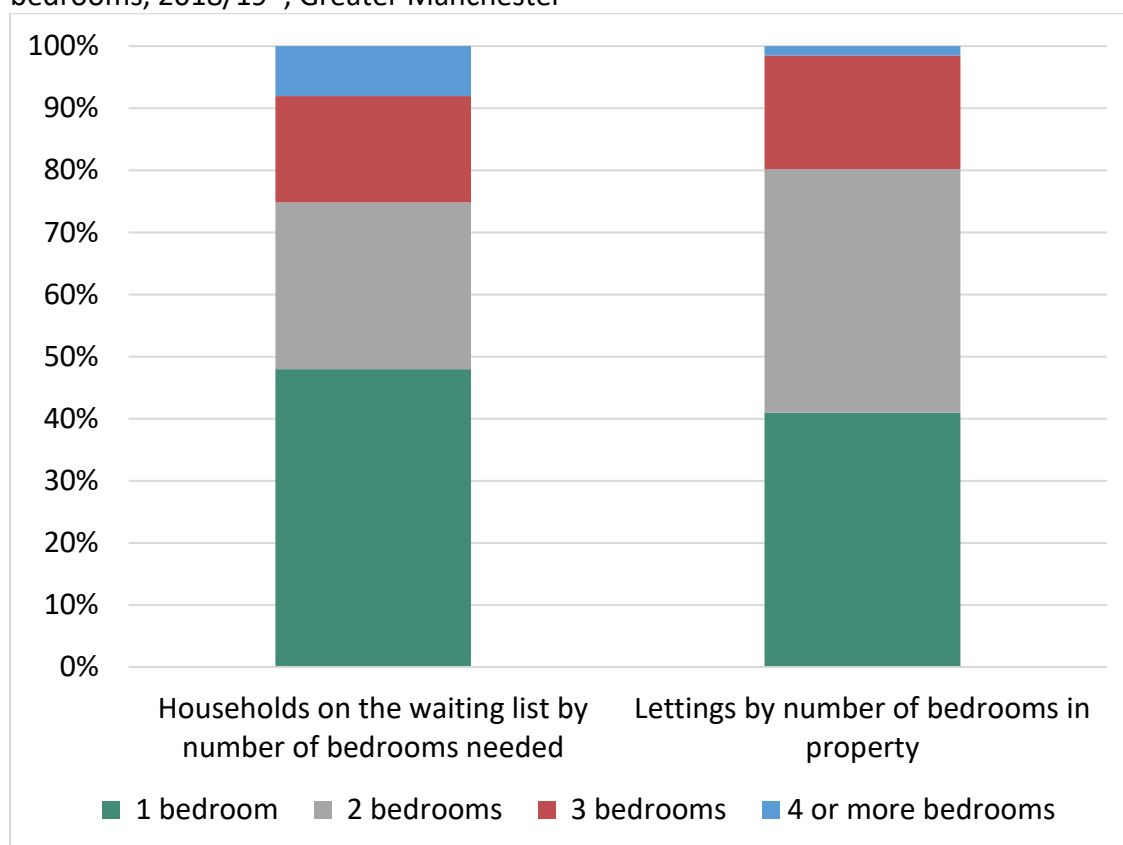


Source: Local Authority Housing Statistics dataset, England 2019/20: Section C – Allocations

5.31 In Greater Manchester, there were over 78,717 households recorded on the housing register in 2019/20. Of these households, 30,351 (35%) were in reasonable preference, meaning they were identified by the local authority as being in housing need<sup>46</sup>. The chart suggests that in all districts other than Bury, Oldham, Salford and Stockport there are more households not in reasonable preference than those that are. It should be noted that Salford, and now more recently Oldham, registers now just record those in reasonable preference.

<sup>46</sup> See [Chapter 4.3 Homelessness](#) for definitions of homeless decisions.

Figure 5.10: Households on the housing register and local authority lettings by number of bedrooms, 2018/19\*, Greater Manchester



Source: Local Authority Housing Statistics dataset, England 2018-19: Section C – Allocations and MHCLG Social Lettings Local Authority Live Tables 2018/19: Affordable & Social Rent General Needs Local Authority and Private Registered Provider.

\*Note that data for Greater Manchester excludes figures for a large number of households in Bolton that are recorded as requiring an unspecified number of bedrooms.

5.32 Figure 5.10 compares local authority lettings data with housing register data. In Greater Manchester, just under half of those on the registers are in need of a one-bedroomed home (48%), with a further 27% requiring a two-bedroomed home. 41% of lets were to those in one-bedroomed homes in 2018/19. 39% of lets were to those in two-bedroomed homes and 18% to those needing three-bedroomed homes.

## Affordability

### Defining affordability

5.33 The Institute for Public Policy Research (IPPR) looked at definitions of affordability in their 2017 report on the affordability crisis in London.<sup>47</sup> They found that:

*“the commonly accepted way of assessing upfront affordability is as a proportion of net household income (after taxes and benefits). Within this, the most widely accepted measure is a 35 per cent threshold of total household income (Bibby 2015), below which housing is considered to be affordable and above which it is deemed unaffordable.”*<sup>48</sup>

5.34 However, in the report they note that this is not applied universally, with other examples including:

- The Mayor of London applies a measure of 40% of net income to intermediate housing.
- The Joseph Rowntree Foundation (JRF) has devised the Minimum Income Standard to determine the necessary income needed to maintain an adequate standard of living.<sup>49</sup>
- The other measure IPPR use is a loan-to-income ratio (mortgage to household income) to ensure that where upfront costs are affordable under the 35% net income cap, a household would actually be capable of getting a mortgage.

5.35 IPPR conclude that:

*“In truth, no measure is perfect because some households will always be willing to pay more than others and one might argue that those at the upper end of the income spectrum with greater levels of disposable income can more easily afford higher housing costs.”* (IPPR, 2017)

5.36 The definition of affordable housing used by Government and set out in the NPPF<sup>50</sup> is as follows:

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<sup>47</sup> [IPPR \(2017\), \*Priced Out? The affordability crisis in London\*:](#)

<sup>48</sup> [Bibby \(2015\), \*What is ‘affordable housing’?\*](#) Shelter

<sup>49</sup> The Minimum Income Standard is calculated based on research with groups of members of the public specifying what items need to be included in a minimum household budget. See more [here](#).

<sup>50</sup> [NPPF Annex 2, July 2018](#)

Affordable housing: housing for sale or rent, for those whose needs are not met by the market (including housing that provides a subsidised route to home ownership and/or is for essential local workers); and which complies with one or more of the following definitions:

a) Affordable housing for rent: meets all of the following conditions: (a) the rent is set in accordance with the Government's rent policy for Social Rent or Affordable Rent, or is at least 20% below local market rents (including service charges where applicable); (b) the landlord is a registered provider, except where it is included as part of a Build to Rent scheme (in which case the landlord need not be a registered provider); and (c) it includes provisions to remain at an affordable price for future eligible households, or for the subsidy to be recycled for alternative affordable housing provision. For Build to Rent schemes affordable housing for rent is expected to be the normal form of affordable housing provision (and, in this context, is known as Affordable Private Rent).

b) Starter homes: is as specified in Sections 2 and 3 of the Housing and Planning Act 2016 and any secondary legislation made under these sections. The definition of a starter home should reflect the meaning set out in statute and any such secondary legislation at the time of plan-preparation or decision-making. Where secondary legislation has the effect of limiting a household's eligibility to purchase a starter home to those with a particular maximum level of household income, those restrictions should be used.

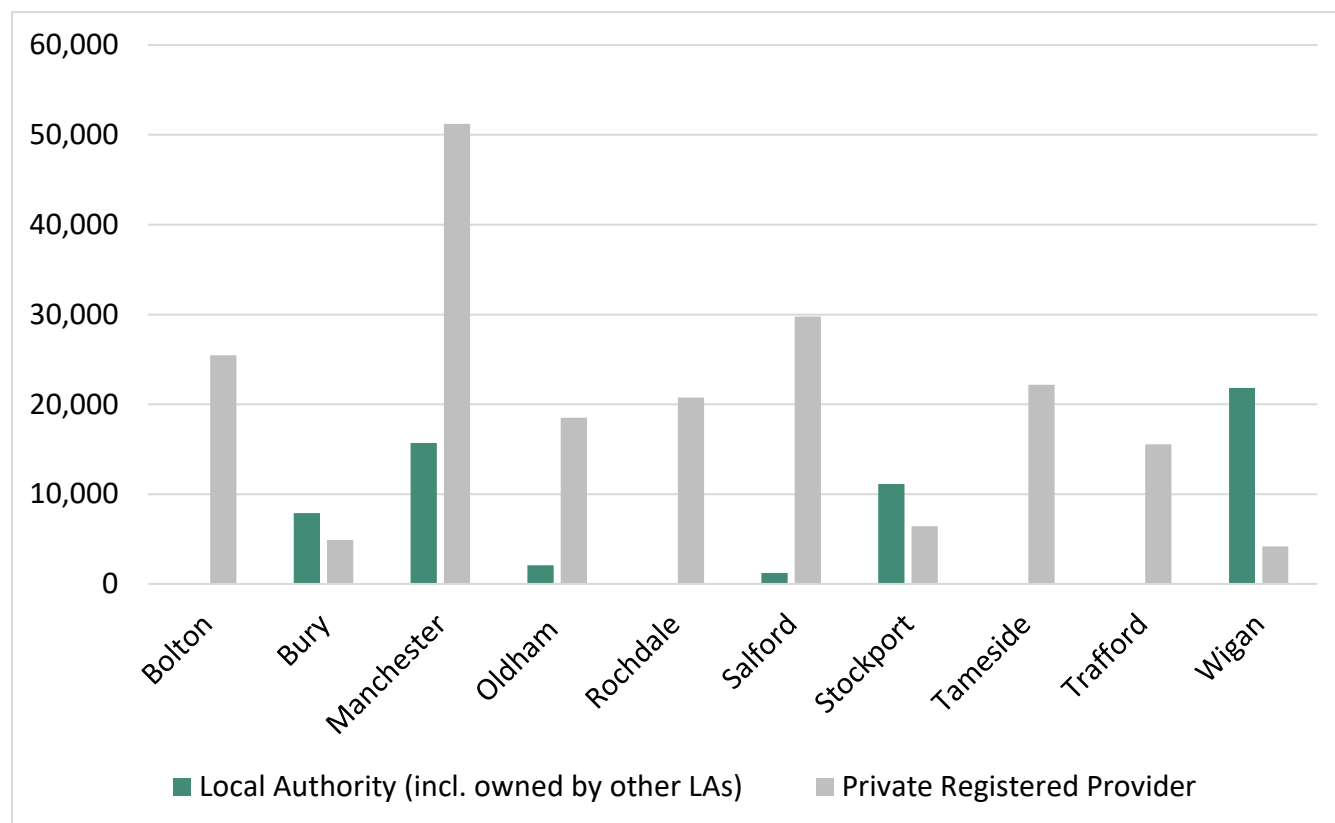
c) Discounted market sales housing: is that sold at a discount of at least 20% below local market value. Eligibility is determined with regard to local incomes and local house prices. Provisions should be in place to ensure housing remains at a discount for future eligible households.

d) Other affordable routes to home ownership: is housing provided for sale that provides a route to ownership for those who could not achieve home ownership through the market. It includes shared ownership, relevant equity loans, other low-cost homes for sale (at a price equivalent to at least 20% below local market value) and rent to buy (which includes a period of intermediate rent). Where public grant funding is provided, there should be provisions for the homes to remain at an affordable price for future eligible households, or for any receipts to be recycled for alternative affordable housing provision, or refunded to Government or the relevant authority specified in the funding agreement.

## Affordable Housing Stock and Delivery

### Affordable housing stock

Figure 5.11: Social housing stock in Greater Manchester, 2020



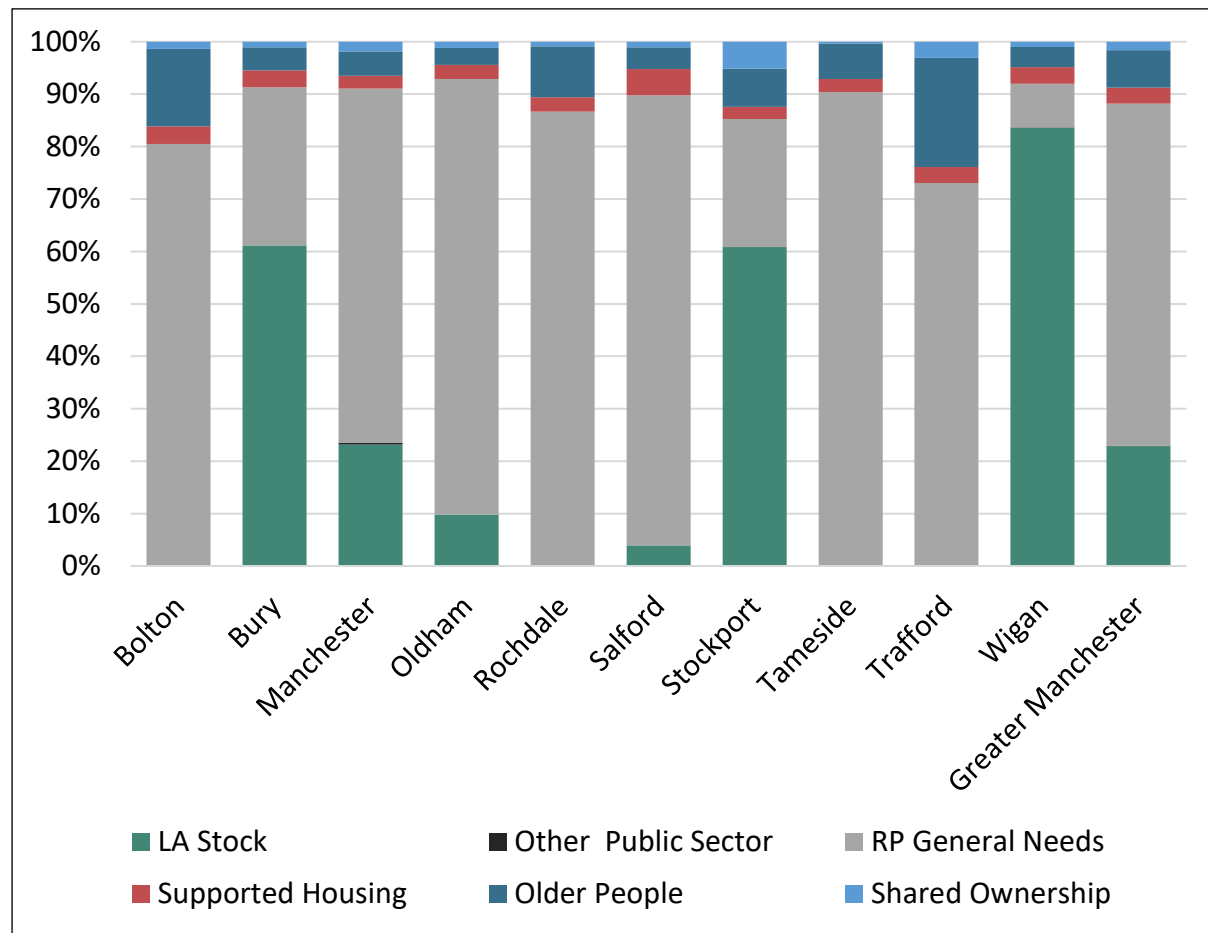
Source: MHCLG Live Table 100 Dwelling stock: Number of Dwellings by Tenure and district, 2020.

5.37 Social housing makes up 21% of Greater Manchester's housing stock, at just under 260,000 homes in 2020. In some districts, the local authority still owns most of the social housing and others hold no stock having completed a stock transfer, so most or all social housing stock is held by Private Registered Providers (RPs).

5.38 Manchester has the highest level of social housing in terms of numbers and proportion of stock, at almost 67,000 dwellings and nearly 30% of the dwelling stock. The local authority own 7% of the dwelling stock. There are 31,013 social housing dwellings in Salford in 2020. Bolton (25,454) and Wigan (26,005) have similar amounts.

Bury is the local authority with the least number of social housing dwellings at 12,793 but Stockport has the smallest percentage of social dwellings at 13.4%.

Figure 5.12: Social housing stock by type in Greater Manchester, 2018/19



Source: Local Authority Housing Statistics dataset (including imputed data), England: Section A - Dwelling Stock; Regulator of Social Housing, Private Registered Provider Social Housing Stock in England: Statistical Data Return dataset 2018/19.

5.39 At a Greater Manchester level, 88% of RP owned social housing stock is general needs in 2018/19, 9% of stock is housing for older people and 4% is supported housing. Bury, Stockport and Wigan retain the majority of their housing stock (Bury and Stockport stock is managed through an Arms-Length Management Organisation (ALMO), Wigan by the local authority), but local authority figures are not broken down by the type of stock. Trafford and Bolton have notably larger proportions of older persons housing than Rochdale, another stock transfer authority.

## Affordable Housing Supply

5.40 Affordable housing is delivered through a number of different mechanisms. This includes delivery through the planning system and Homes England's [formerly the Homes and Communities Agency (HCA)] Affordable Homes Programme (AHP). There are also contributions to affordable housing by developers through Section 106 agreements (sometimes referred to as developer contributions, which mitigate the negative impacts of a development, for example by paying for affordable housing), commuted sums and off-site contributions. The following table shows the total affordable housing delivery across Greater Manchester over the past eight years.

Table 5.5: Total Additional Affordable dwellings completed, 2012-13-2019-20

Area	Total Additional Affordable dwellings - completions							
	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20
Bolton	95	250	157	53	111	60	147	64
Bury	127	70	116	69	69	100	142	52
Manchester	328	374	341	115	226	305	293	418
Oldham	136	219	148	15	77	21	45	169
Rochdale	113	119	123	31	65	54	130	111
Salford	180	171	570	211	461	258	244	301
Stockport	92	135	229	90	111	336	139	165
Tameside	157	144	212	83	102	80	106	88
Trafford	88	179	88	45	104	165	48	73
Wigan	75	66	155	106	221	336	325	467
<b>Greater Manchester</b>	<b>1,391</b>	<b>1,727</b>	<b>2,139</b>	<b>818</b>	<b>1,547</b>	<b>1,715</b>	<b>1,619</b>	<b>1,908</b>

Source: MHCLG, Live table 1008c, Total additional affordable dwellings by Local Authority District

5.41 The table shows additional affordable dwellings completed, that is the sum of additional social rent, affordable rent, intermediate rent, shared ownership and affordable home ownership dwellings.



- 5.42 Additional affordable completions have fluctuated over the period, with the highest level of delivery in 2014/15 and a lower level in 2015/16, due to the 2011-15 AHP<sup>51</sup> ending in this year. Figures for 2019/20 show an increase in affordable completions on the previous year at 1,908 dwellings.
- 5.43 Wigan, Manchester and Salford saw the highest numbers of additional affordable dwellings most recently. The lowest levels of affordable completions in the latest year were in Bury (52) and Bolton (64).

#### Section 106 Delivery

- 5.44 The following table shows the number of homes delivered through Section 106 agreements in Greater Manchester over the last six years. These numbers do not include average deals negotiated, which may contribute to more affordable homes being delivered. Stockport and Wigan have had the highest number of Section 106 completions at 271 and 747 completions respectively with the total in Greater Manchester over this period being 1,423 homes.

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<sup>51</sup> For further detail, visit [Housing and Communities agency: Affordable Homes Programme 2011 to 2015: guidance and allocations](#)

Table 5.6: Section 106 completions, 2014-15 to 2019-20

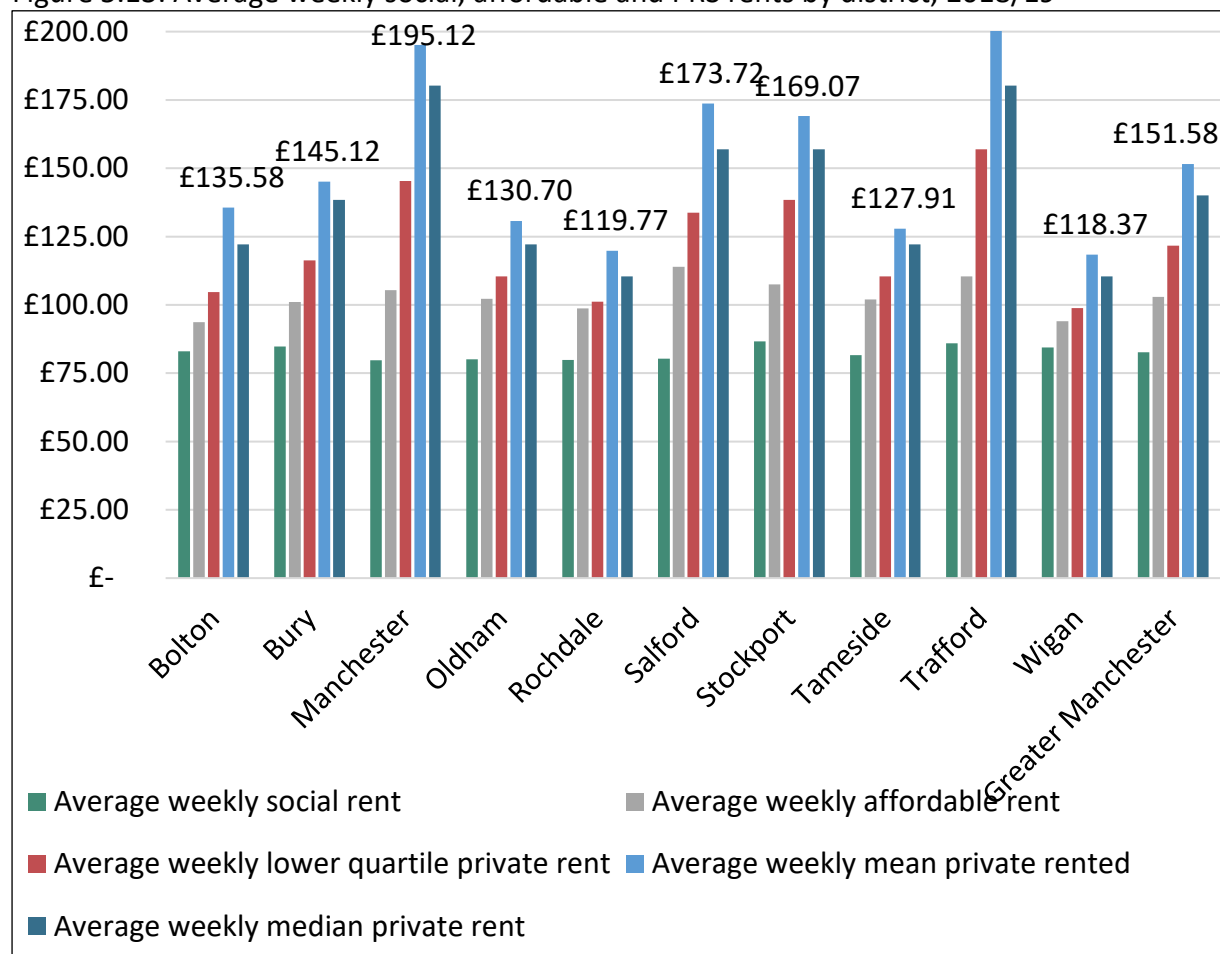
Area	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	Total
Bolton	-	-	-	10	21	2	33
Bury	24	28	30	27	-	41	150
Manchester	-	11	-	5	15	9	40
Oldham	-	-	29	-	-	-	29
Rochdale	3	-	5	-	7	-	15
Salford	17	30	15	16	20	21	119
Stockport	11	41	91	89	20	19	271
Trafford	-	4	15	-	-	-	19
Wigan	16	50	50	106	206	319	747
<b>Greater Manchester</b>	71	164	235	253	289	411	1,423

Source: MHCLG Live Table 1011c: Affordable Housing Supply Statistics

## Rental Affordability

5.45 In Greater Manchester, there is some variation between rental prices by district, with the regional centre and the south of the conurbation experiencing higher rents than the northern and western areas.

Figure 5.13: Average weekly social, affordable and PRS rents by district, 2018/19

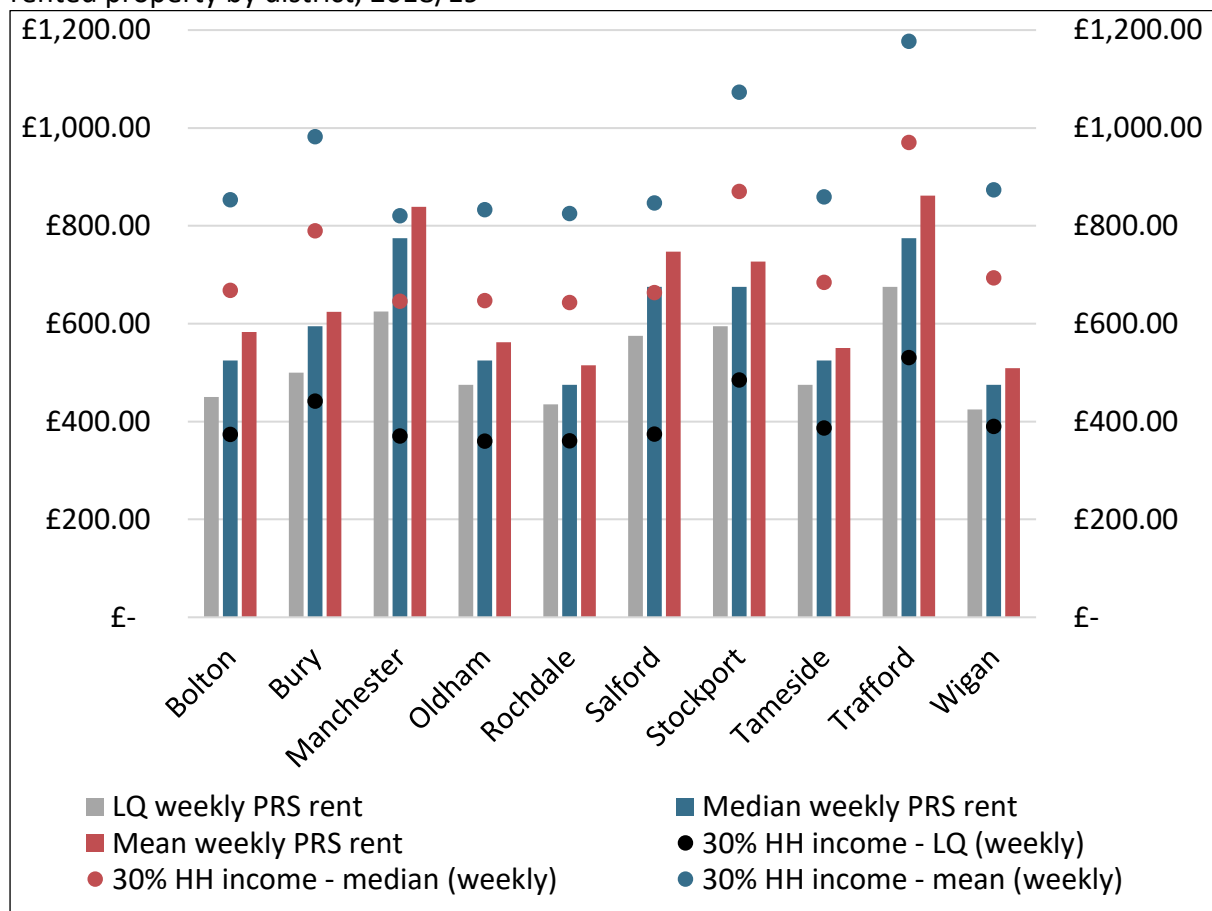


Source: Regulator of Social Housing, Private Registered Provider Social Housing Stock in England: Statistical Data Return dataset 2018/19, Local Authority Housing Statistics dataset: Section H - Rents and Rent Arrears and Valuation Office Agency Private Rental Market Statistics, 2019.

5.46 Figure 5.13 shows the average weekly social and affordable rents for the Greater Manchester districts, alongside lower quartile, mean and median private rents. In Trafford and Manchester, private rents are significantly higher than those in the

social rented sector, likely due to the high value rental properties in certain areas distorting the district figures. In Trafford, the weekly median rent is around £100 greater than the weekly social rent. In Wigan, Rochdale and Oldham there is less significant variation between rents; in Oldham the difference between weekly social rent and median private rent is around £40, and in Wigan and Rochdale it is around £30.

Figure 5.14: 30% of monthly household earnings in relation to renting the average privately rented property by district, 2018/19



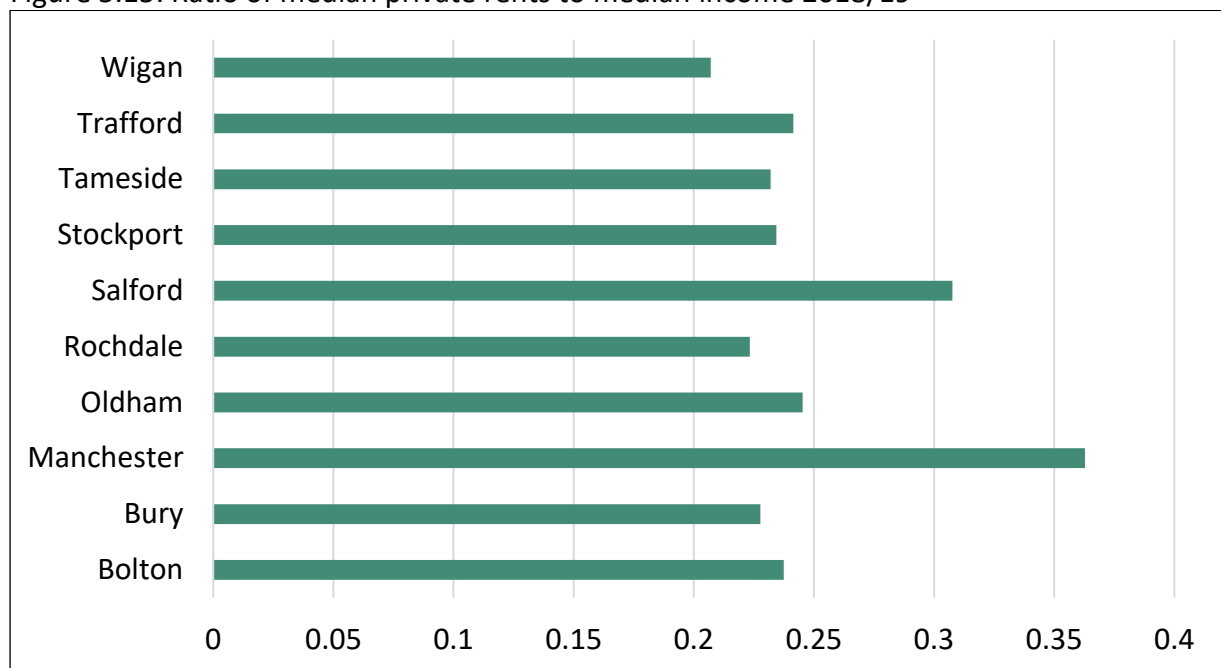
Sources: Valuation Office Agency Private Rental Market Statistics, 2018/19; CACI Paycheck 2020.

5.47 Figure 5.14 shows private rents in relation to 30% of household earnings. The chart suggests that Manchester is least affordable in terms of monthly private rents; although this is likely to be the case for many apartments in the regional centre,

there are substantial variations within the city that mean that the affordability challenge may not be as stark as is depicted here.

- 5.48 Across Greater Manchester there appears to be more of an issue around affordability at the lower quartile, with no boroughs having lower quartile rents that are significantly lower than 30% of lower quartile earnings. This suggests that those on lower incomes could be spending a larger proportion of their earnings on housing costs than those earning more money.

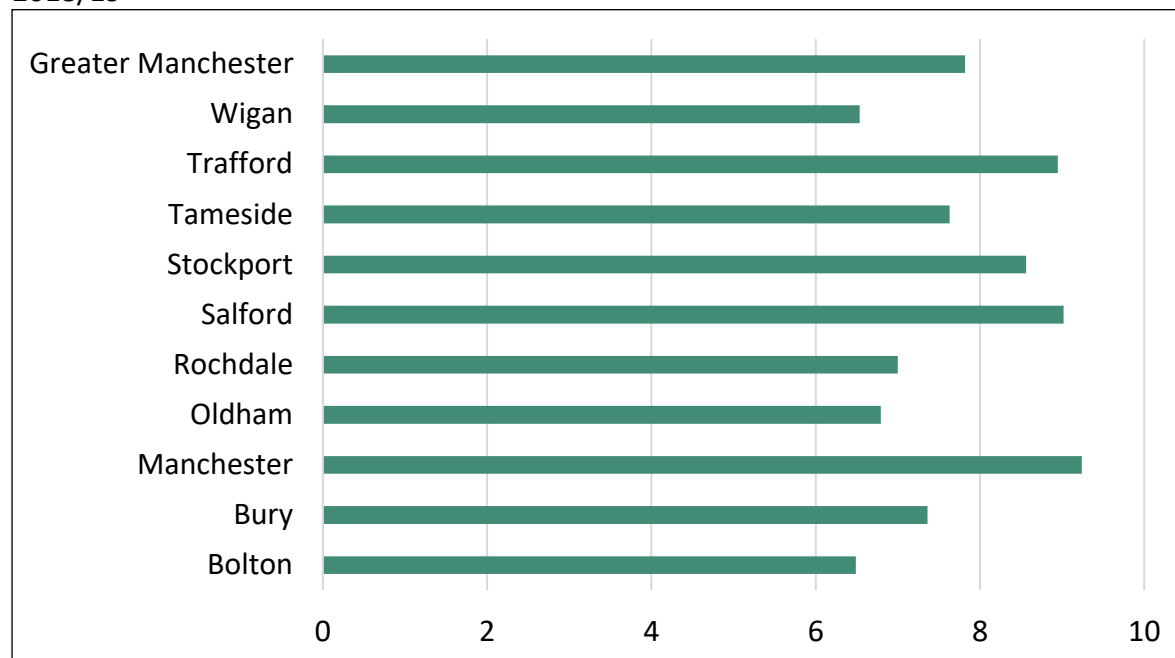
Figure 5.15: Ratio of median private rents to median income 2018/19



Sources: Valuation Office Agency Private Rental Market Statistics 2018/19, CACI Paycheck 2020.

- 5.49 Figure 5.15 shows that in Manchester and Salford renters at the median are paying more than 30% of their monthly income in rent, which is likely due to high rental prices and relatively low household incomes in these districts. In areas of high rents such as Trafford, incomes are also higher and so less than a third of income is spent on rent.

Figure 5.16: Ratio of lower quartile household incomes to lower quartile price paid in 2018/19



Source: H M Land Registry Price Paid Data 2019, CACI Paycheck 2020.

5.50 Looking at household incomes to lower quartile house price paid data across Greater Manchester, the purchase price for lower quartile value homes would be 7.8 times the lower quartile income. Manchester and Trafford have the highest ratios, at 9.2- and 8.9-times income respectively.

#### *Modelling of the affordability of affordable renting and homeownership products currently available in Greater Manchester*

5.51 There are currently several products for affordable renting and homeownership available to Greater Manchester residents. The following tables take the estimated monthly and annual costs of each product and models the income needed for these housing costs to amount to less than 35% of gross household income (using the IPPR model in the report *Priced Out? The affordability crisis in London*).<sup>52</sup> Using income

<sup>52</sup> [IPPR \(2017\), \*Priced Out? The affordability crisis in London\*.](#)

data from CACI, the approximate proportion of households that fall below this income level has been calculated.

Table 5.7: Renting options in Greater Manchester (based on two-bedroomed rental values)

Product	Total monthly payment	Total annual payment	Income needed to spend less than 35% on housing costs	Approx. % Greater Manchester households below income level needed*	Sources	Assumptions
Social rent	£355	£4,263	£12,180	23%	Private Registered Provider Social Housing Stock in England: Statistical Data Return dataset 2019	Assumes average of RP Social Rent in Greater Manchester, 2018/19
Affordable rent	£442	£5,308	£15,167	23%	Private Registered Provider Social Housing Stock in England: Statistical Data Return dataset 2019	
Private rent: lower quartile	£523	£6,276	£17,931	34%	<a href="#">VOA Private Rental Market Summary Statistics</a>	
Private rent: median	£602	£7,224	£20,640	34%		
Rent to Buy: just rental costs	£482	£5,779	£16,512	34%	Modelled from VOA	Assumes rental costs to be 80% of median rent

*\*Proportion of households below required income level modelled from CACI data which is displayed in £5k income bands, approximate proportions have been modelled assuming an even split of people across all incomes in bands.*

5.52 The table shows that approximately 20% of Greater Manchester households are at an income level below that needed to afford social rents and affordable rent. However, analysis of Housing Benefit (HB) and Universal Credit (UC) data suggests that at least 70% of households in the social rented sector in Greater Manchester are



in receipt of HB or UC covering housing costs. This suggests that those who would not be able to afford their rent are covered by HB.<sup>53</sup> It is likely also that some low-income households will be owner-occupiers who own their homes outright. While that still raises questions about their financial ability to maintain their property, this does mean that the figures above may overstate the proportions of Greater Manchester households below each of the thresholds identified.

- 5.53 Nonetheless, with that caveat, the model suggests that lower quartile private rents are unaffordable to approximately 34% of households in Greater Manchester and at the median private rent of £604 per month.
- 5.54 Interestingly, the Rent to Buy product, which allows households to rent a property at 80% of the median rent in order to save for a deposit to buy the property, could potentially be more affordable than even lower quartile rents, which are more than 80% of the median. However, the product is targeted by Government at households who are unable to afford market rent and thus by definition will find it hard to save up a deposit to buy.
- 5.55 However, as discussed earlier, all these rent levels and incomes are Greater Manchester average figures. Local variations within the market in each district may offer the scope for individual households to seek lower cost choices within the various elements of the rental sector and thus this high-level analysis potentially overstates the affordability problem at Greater Manchester level.

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<sup>53</sup> Analysis of HB data shows that in May 2017, 173,100 people were claiming HB or households were claiming the housing element of UC (*Source: DWP Stat-Xplore*) This is 70% of the households in the social rented sector at the 2011 Census (247,540); trends suggest that the number of households in the social rented sector in 2017 are likely to be lower than that at the 2011 Census.

Table 5.8: Home ownership options in Greater Manchester (All mortgages assumed to be 25 years and at 3.5% interest)

Product	Deposit saved/ needed	Assumed First time buyer sales price*	Total monthly payment	Total annual payment	Income needed to spend less than 35% on housing costs	Approx. % Greater Manchester households below income level needed**	Loan to Income ratio	Income needed for LTI ratio of >3.5	Approx. % Greater Manchester households below income level needed**	Assumptions
Shared Ownership	£3,853	£154,108	£438	£5,261.53	£15,033	23%	2.3	£9,907	12%	Purchase of 25% stake in property, with 10% deposit. Rent at 2.75% of value of remaining 75% of property.
Help to Buy	£7,705	£154,108	£579	£6,943.51	£19,839	34%	5.8	£33,023	60%	5% deposit and 20% equity loan. No modelling of repayment of equity loan on sale of property.
Purchase of average first-time buyer property	£15,411	£154,108	£694	£8,332.21	£23,806	44%	5.8	£39,628	66%	10% deposit on property at average price for first time buyer
Purchase of lower quartile property	£12,400	£124,000	£559	£6,704.35	£19,155	34%	5.8	£31,886	53%	10% deposit on property at lower quartile price Greater Manchester house price-land registry data

\*H M Land Registry, average first-time buyer price paid data.

\*\*Proportion of households below required income level modelled from CACI data, which is displayed in 5k income bands, approximate proportions have been modelled assuming an even split of people across all incomes in band.

- 5.56 Table 5.8 shows the relative affordability of various affordable homeownership options, as well as the scenarios of a first-time buyer purchasing an average property and a lower quartile property. The modelling does not consider the ability to save for the deposits required for each of these products, which are indicated in the second column. There is an absence of robust evidence on how much households on different incomes can save per month and how long it would take households at different levels to be able to afford a deposit. The complexity of combining this analysis with consideration of the ability of households to access alternative resources (notably contributions from other family members) may explain this absence.
- 5.57 The analysis shows that the average first time buyer property (£154,000) would be affordable for approximately 75% of Greater Manchester households if purchased under shared ownership, while 65% of households could afford the traditional purchase of a lower quartile property (£124,000). This seems to indicate that these options are more affordable than lower quartile private rent (although clearly the deposit issue will be a real barrier for many). This calculation followed the same methodology as for the rental products; however, it also included a calculation to understand whether the level of income required to spend less than 35% of income on housing costs would be enough to secure a mortgage at no more than 3.5 times income.<sup>54</sup> Once this was considered, only shared ownership was shown to have an income to mortgage ratio of lower than 3.5, the ratio for the purchase of a lower quartile property would be 5.8.

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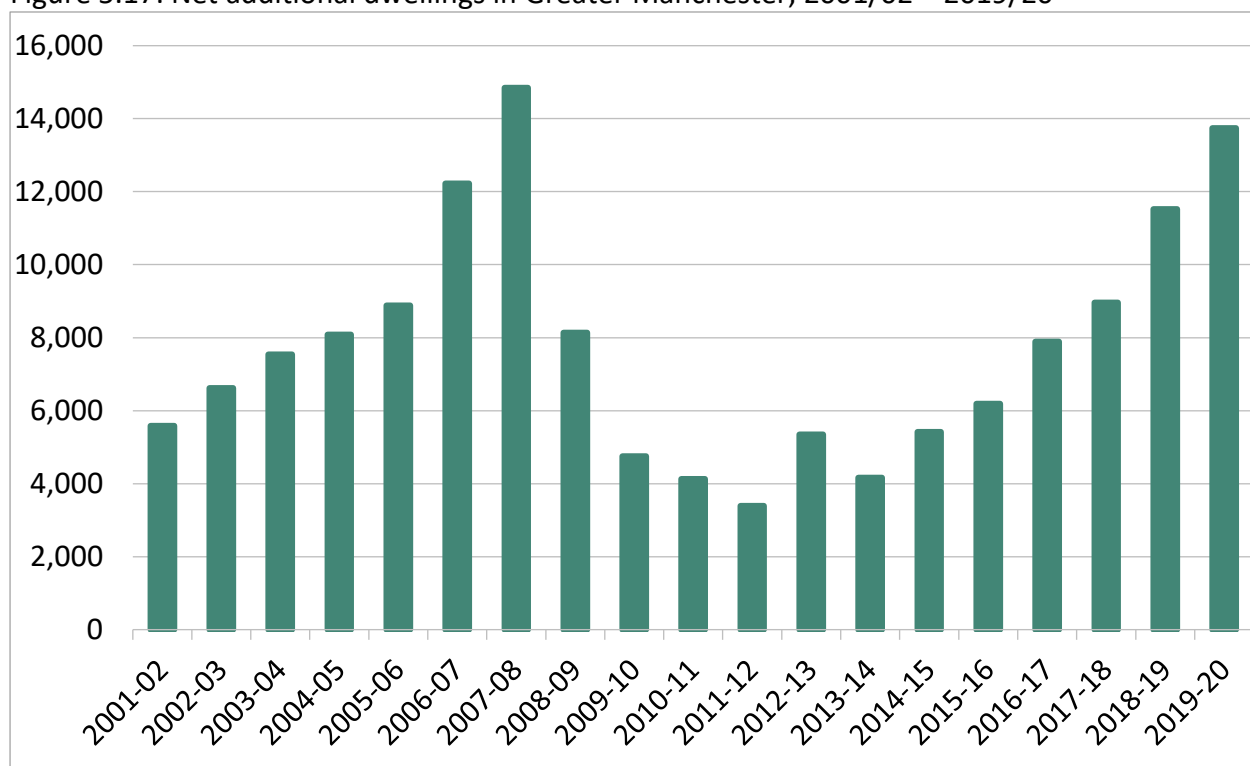
<sup>54</sup> Based on data from the CML (2015) showing the average first time buyer loan to income ratio in England was 3.61.

## 5.6 Housing development rates

5.58 MHCLG Live Table 122 provides data on the number of net additional dwellings provided each year since 2001. This data is based on the Housing Flows Reconciliation (HFR) forms completed by local authorities; there are some differences between the figures in the Live Table and those reported by districts through their development monitoring. This is likely to be partly a result of MHCLG information being rebased in light of the 2011 Census.

5.59 There were 13,742 net additional dwellings built in Greater Manchester in 2019/20. This is a 19.2% increase on the 2018/19 total. Notably, net completions in Stockport and Manchester were 70% more than in 2018/19. Nationally there was a 1.1% increase in net additional dwellings. Half of the Greater Manchester districts (Bolton, Bury, Rochdale, Tameside and Trafford) however, experienced some decline in completions since the previous year.

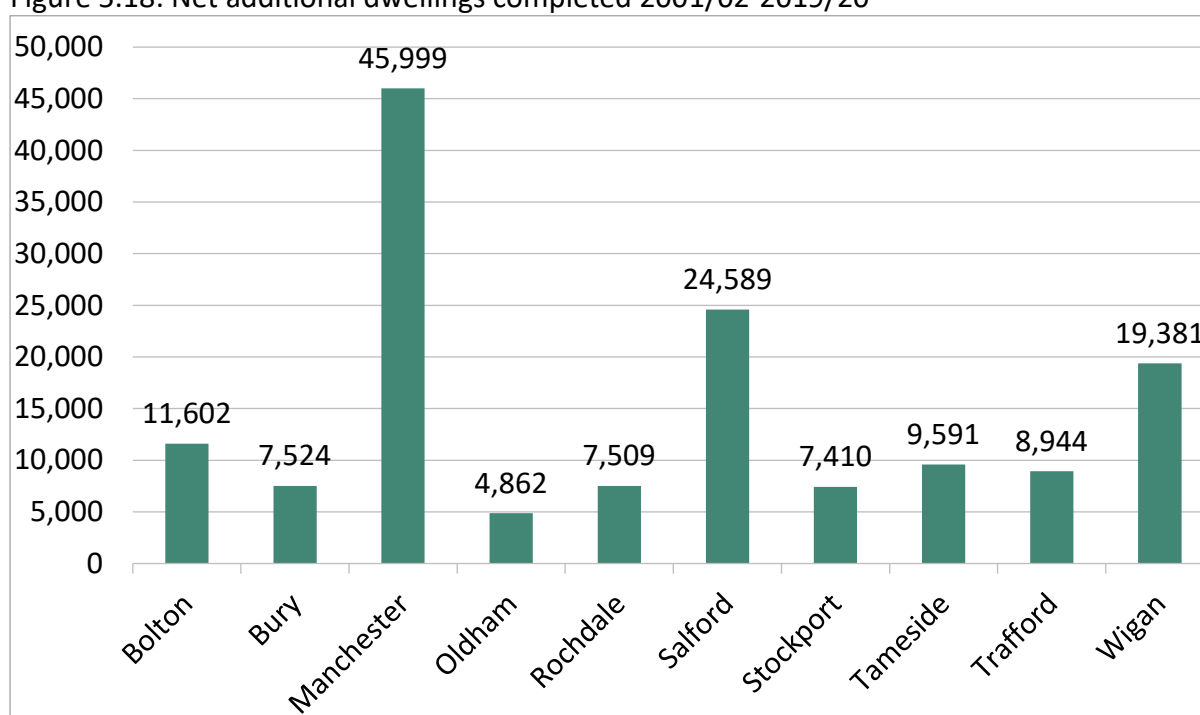
Figure 5.17: Net additional dwellings in Greater Manchester, 2001/02 – 2019/20



Source: MHCLG Live Table 122 Net additional dwellings by local authority district, England.

5.60 The chart below sets out the total net additional dwellings completed in each district between 2001/02 and 2019/20. Overall, 147,410 net additional dwellings were completed in Greater Manchester over this period, an average annual completions rate of 8,190 dwellings. Completions in Manchester accounted for 31.2% of the total. The next largest proportions were in Salford (16.7%) and Wigan (13.1%). and with net additional dwellings averaging 1,366 and 1,077 respectively since 2001/02.

Figure 5.18: Net additional dwellings completed 2001/02-2019/20



Source: MHCLG Live Table 122 Net additional dwellings by local authority district, England.

5.61 Net additions have been low in Oldham, with an average of 270 per annum in this period accounting for 3.3% of the Greater Manchester total, in part due to demolition programmes associated with the housing market renewal programme in the first half of the period, which also saw some demolition activity in Manchester, Rochdale and Salford.

## 5.7 Overcrowding, under-occupation and concealed households

### *Overcrowding and under-occupancy*

5.62 Between 2001 and 2011, all Greater Manchester districts saw an increase in overcrowding, as was the case nationally. Most of the increase was in households requiring one additional room to meet the Census standard. The rise in the proportion of households requiring two or more additional rooms was generally low and seven Greater Manchester districts saw a decline on this measure (Bury, Oldham, Rochdale, Stockport, Tameside, Trafford and Wigan).

5.63 Table 5.9 compares the levels of overcrowding recorded between the 2001 and 2011 Census periods. The Census uses the 'room' rather than 'bedroom' definition, but the occupancy level is calculated in the same way as described above. Using this measure of 'rooms', overcrowding in Greater Manchester is below the national average but the gap has narrowed very slightly between 2001 and 2011.

Table 5.9: Percentage change in level of overcrowding (total number of rooms short) 2001-2011

Area	2001			2011		
	1 room short %	2+ rooms short %	Total %	1 room short %	2+ rooms short %	Total %
Bolton	4.5	1.5	6.0	5.4	1.5	6.9
Bury	3.8	1.2	4.9	4.3	1.0	5.3
Manchester	7.7	3.5	11.2	12.2	4.2	16.4
Oldham	5.1	2.2	7.3	5.7	1.9	7.6
Rochdale	5.2	1.9	7.0	6.0	1.8	7.8
Salford	4.6	1.3	5.9	7.2	2.4	9.5
Stockport	3.5	1.0	4.5	3.9	0.9	4.8
Tameside	4.6	1.2	5.8	4.9	1.2	6.1
Trafford	3.4	1.3	4.7	4.4	1.2	5.6
Wigan	3.3	0.9	4.2	3.6	0.9	4.4
Greater Manchester	4.7	1.7	6.4	6.3	1.9	8.2
England	5.0	2.1	7.1	6.4	2.3	8.7

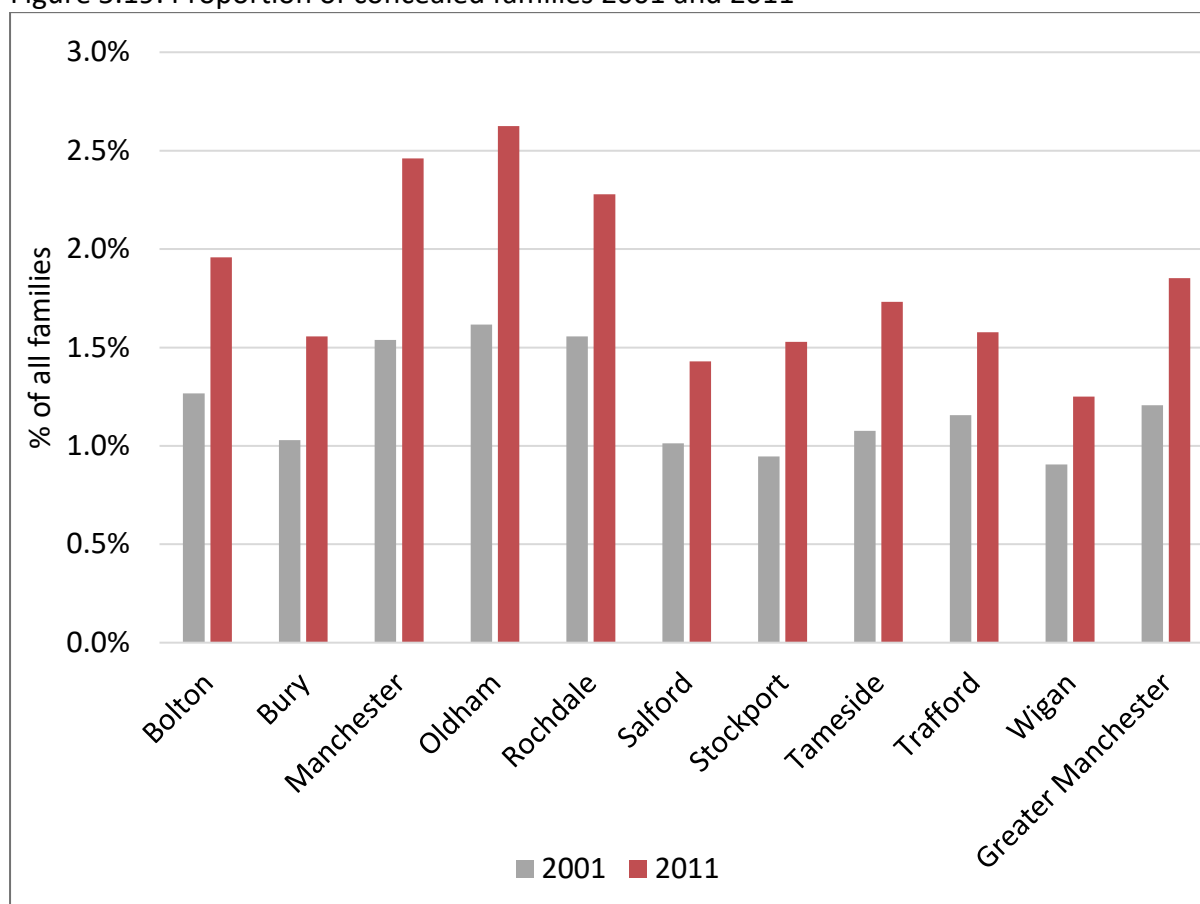
Source: ONS, 2001 Census and 2011 Census.

- 5.64 Both Manchester and Salford saw a significant increase in overcrowding, with Manchester more closely resembling the situation in London. Salford scored comparatively much worse on the 'rooms' measure than on the 'bedrooms' measure. The remaining Greater Manchester districts in general saw quite modest increases in overcrowding over this period.
- 5.65 The rooms' occupancy rating assumes that every household, including one-person households, requires a minimum of two rooms excluding bathrooms, in addition to the number of bedrooms needed. Based on this definition it is likely that the increase in overcrowding in Manchester and Salford is related to the expanding apartment market across the two cities in recent years, where there may only be one room other than bedrooms and bathrooms, (for example where the kitchen and lounge are combined rather than being separate). Such accommodation may be adequate for the households involved and so an increase in overcrowding on this measure may not necessarily mean that the quantity or type of housing supply is not meeting household need.

#### *Concealed families*

- 5.66 Between 2001 and 2011, the number of concealed families living with households in Greater Manchester increased from 8,300 to 13,640, an increase of 5,340 households (64%). As shown in Figure 5.19 below, the highest proportions of concealed families are in Oldham, Manchester and Rochdale, with relatively low levels in Wigan, Salford, Stockport and Bury.

Figure 5.19: Proportion of concealed families 2001 and 2011



Source: ONS, 2011 Census

5.67 Higher levels of concealment may not necessarily relate to issues of housing availability and affordability, and the ONS has observed that they could be a function of cultural issues:

*“Concealed family proportions may relate to cultural differences in familial ties between ethnic groups. Within England and Wales, ‘other households’ are more than twice as likely to have a HRP [household reference person] of non-white or mixed ethnic group (24 per cent) compared with all households (11 per cent). The ten LAs [local authorities] with the highest proportions of concealed families ... also have the highest proportions of the population identifying with a non-white ethnic group; high proportions of the population of these areas identified as Indian, Pakistani or*



*Bangladeshi. The high proportions of concealed families in these areas may be a result of closer familial ties in Asian cultures.”<sup>55</sup>*

- 5.68 Increases in the proportion of residents identifying themselves as Asian may therefore explain the increase in the proportion of concealed families at the regional and national levels identified above. For example, the proportion of residents identifying themselves as Asian has increased from 6% to 10% in Greater Manchester, 3% to 6% in the North West and 5% to 8% in England between 2001 and 2011.<sup>56</sup>
- 5.69 Manchester and Oldham have the highest proportions of residents identifying themselves as Asian in Greater Manchester, as well as the highest levels of overcrowding and concealed families, which would seem to support the ONS hypothesis. Wigan has the lowest proportions in Greater Manchester on all these measures, with Salford and Stockport next lowest in terms of both the proportions of concealment and of residents identifying themselves as Asian.

***Further information on concealed families is available in [Chapter 4](#).***

## **5.8 Vacancy levels**

- 5.70 Vacant dwellings, or empty homes, are a part of any functioning housing market as homes are bought, sold, re-let and refurbished. Concentrations of empty homes vacant for extended periods are potentially problematic, while conversely extremely low levels of vacant properties may indicate extremely high demand. Just over 2.6% of dwellings across Greater Manchester were classed as empty in 2019, which is slightly lower than the level in England as a whole (2.7%). At a district level, vacancy rates were lowest in Manchester, at 1.7% and highest in Oldham (3.1%). Between 2018 and 2019, the number of vacant dwellings in Greater Manchester increased by 3.3% but this was higher than for England (2.1%).

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<sup>55</sup> ONS (February 2014), What does the 2011 Census tell us about concealed families living in multi-family households in England and Wales?, p.11

<sup>56</sup> ONS, 2001 Census and 2011 Census.

5.71 Table 5.10 below provides an overall comparison of the number and proportion of vacant dwellings, including long-term empty homes (dwellings that have been empty for six or more months) across the conurbation in 2019.

Table 5.10: Vacant dwellings 2019

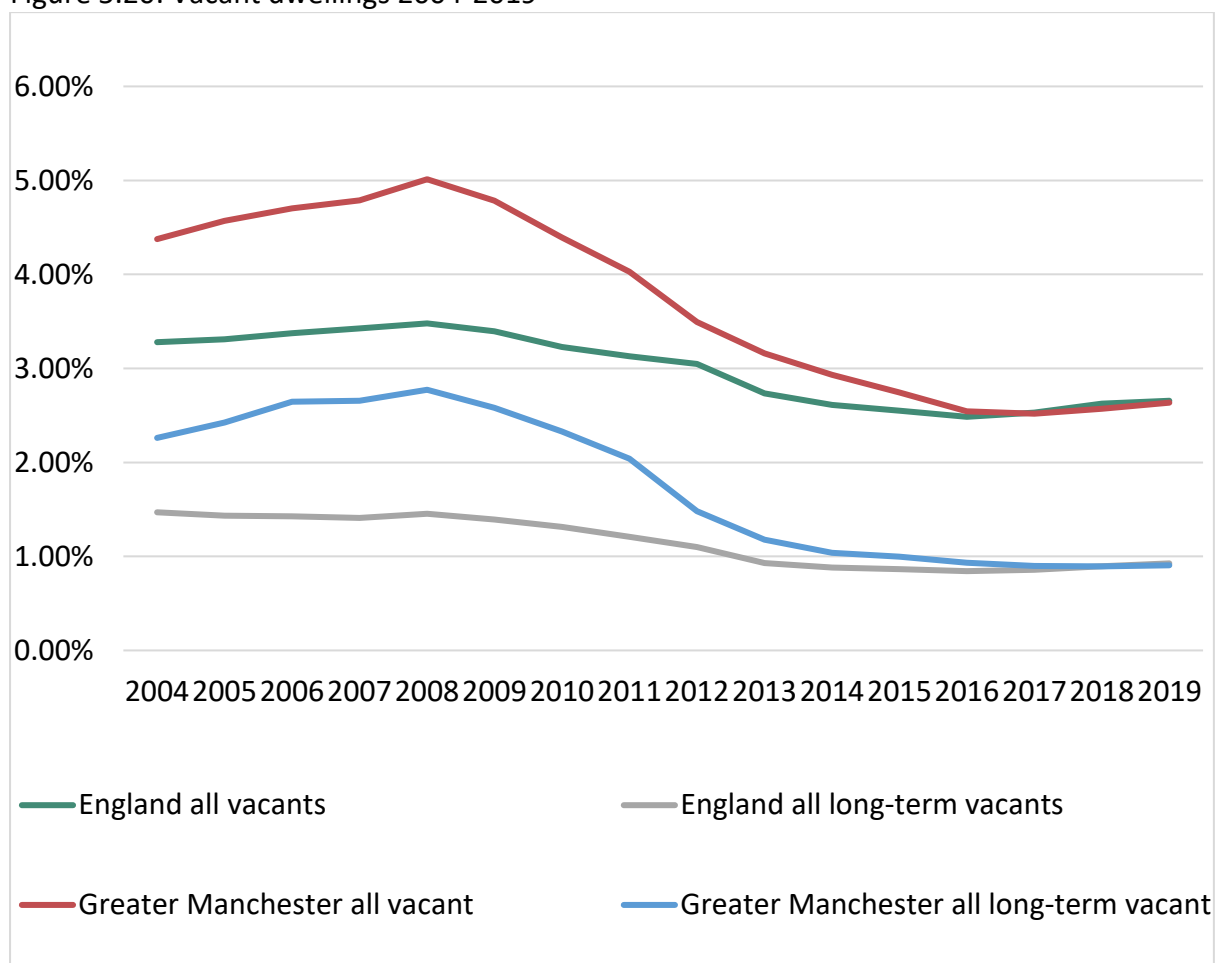
Area	Vacant dwellings		Vacant dwellings that are Long Term Empty Homes*		% of vacant dwellings that are Long Term Empty*
	Number	% of total dwellings	Number	% of total dwellings	
Bolton	3,625	2.9%	1,457	1.2%	40.2%
Bury	2,531	3.0%	966	1.1%	38.2%
Manchester	3,762	1.7%	1,218	0.5%	32.4%
Oldham	2,972	3.1%	1,164	1.2%	39.2%
Rochdale	2,805	3.0%	847	0.9%	30.2%
Salford	3,444	2.9%	1,238	1.0%	35.9%
Stockport	3,647	2.8%	1,518	1.2%	41.6%
Tameside	2,402	2.3%	962	0.9%	40.0%
Trafford	2,645	2.6%	841	0.8%	31.8%
Wigan	4,402	3.0%	870	0.6%	19.8%
Greater Manchester	32,235	2.6%	11,081	0.9%	34.4%
England	648,114	2.7%	225,845	0.9%	34.8%

Source: MHCLG, Live Table 615 All vacant dwellings by local authority district, England, 2018 and MHCLG Live Table 125: Dwelling stock estimates by local authority district, 2019

5.72 The longer-term trends in vacant dwellings in Greater Manchester are shown in Figure 5.20. Vacant dwellings in England have fallen slightly from 3.4% in 2009 to 2.7% in 2019.

5.73 Reductions in Greater Manchester have been more pronounced with the total number of vacant properties falling by 39% since 2006 from just over 53,000 to 32,235 homes in 2019.

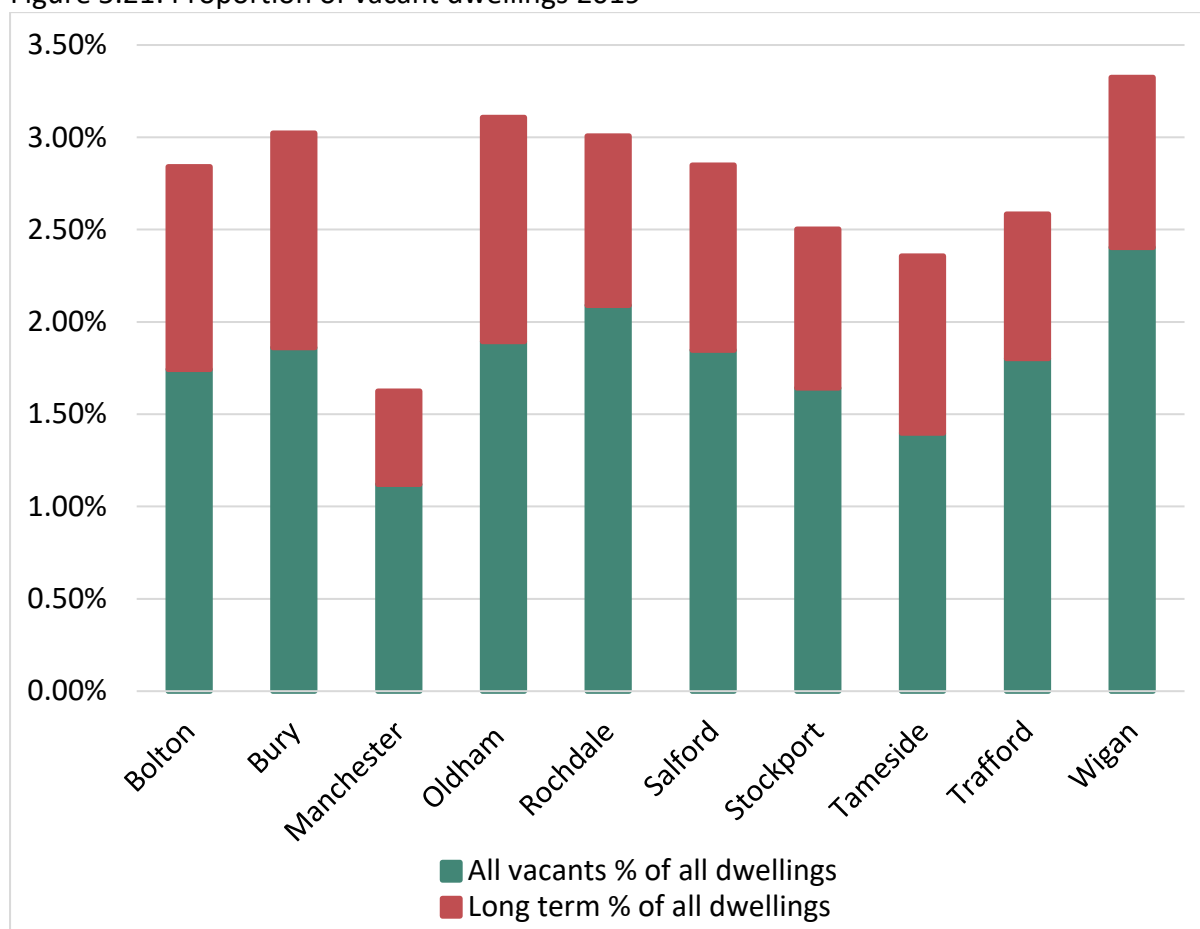
Figure 5.20: Vacant dwellings 2004-2019



Source: MHCLG Live Table 615 All vacant dwellings by local authority district, England, 2004-2008 and MHCLG Live Table 125: Dwelling stock estimates by local authority district, 2004-2019.

5.74 There has also been a significant reduction in long-term vacancies in Greater Manchester, from a peak of 2.8% of all dwellings in 2008 to just under 0.9% in 2019, the same rate as that nationally. Since 2006, long-term vacancies have reduced by 63%, from 29,815 in 2006 to 11,081 recorded in 2019. Almost 35% of all vacant dwellings in Greater Manchester have been empty for over six months, slightly higher than the England average (34%).

Figure 5.21: Proportion of vacant dwellings 2019



Source: MHCLG Live Table 615 All vacant dwellings by local authority district, England, 2018 and MHCLG Live Table 125: Dwelling stock estimates by local authority district, 2019.

- 5.75 Figure 5.21 shows the proportion of vacant dwellings across Greater Manchester districts for 2019. Trafford has consistently had the lowest proportion of long-term vacant dwellings in Greater Manchester at 0.8%, although this was surpassed by Manchester in 2016, which continues to have a long-term vacancy rate of 0.5% in 2019.
- 5.76 The reduction in vacant dwellings is likely to reflect a continuing increase in the number of households at a time when the supply of new dwellings dropped considerably due to the recession, as well as concerted efforts by local authorities to address long-term vacancies.

## 6 Housing needs of particular groups

## Chapter summary

Finding the right home is an essential for all of us. The diverse needs of the different cohorts of the population should be reflected in the housing choices available across Greater Manchester. How well do we understand the different elements of our housing jigsaw?

- Our average life expectancy is almost two years lower than the average for England and the gap is even bigger (nearly three years for men, almost four for women) in the number of years of good or very good health we can expect to enjoy.
- There is a higher proportion of people with a long-term health problem or disability that limits their day-to-day activities living in the social rented sector than in either owner-occupation or private renting.
- In 20 years' time (2041), 9.9% of Greater Manchester's residents will be 75 years or older<sup>57</sup> - and 3% will be 85 or older.
- In 20 years' time, almost one in three of us aged 65 or over will have a limiting long-term illness that limits our day-to-day activities 'a lot' and just under 8% will have dementia.
- The Greater Manchester Supported Housing Census shows that we have over 33,000 units of accommodation for those who need support as well as housing in Greater Manchester.
- In 2019/20 the five higher education institutions (HEIs) in Greater Manchester together have a student body of almost 104,470<sup>58</sup> and around 13,000 student households live in mainstream housing stock in Salford, Bolton and Manchester (which houses around 85% of total students).
- The private rented sector is likely to continue to grow, to evolve in terms of the investors and management of rented homes and in the types of households living in the sector. National policy, regulation and taxation regimes may have a significant impact on changes in the sector. On current trend, more families with children and older households will rent privately.

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<sup>57</sup> Source: ONS, 2018-based subnational population projections by single year of age.

<sup>58</sup> Source: [Who's studying in HE? | HESA](#)

- By 2035/36, we will need to provide up to 103 Gypsy and Traveller plots across Greater Manchester based on the expected net cultural need, and 204 Travelling Showpeople plots.

## 6.1 Introduction

6.1 This chapter reviews the needs of groups within the population who have specialist housing needs, or whose housing needs differ from the wider population. Paragraph 001 of the Housing Needs of Different Groups<sup>59</sup> PPG states that authorities must consider the housing needs of particular groups when producing plans. The Greater Manchester SHMA will complement work carried out at a local level.

6.2 The following key groups have been identified and analysed as potentially having housing needs which may differ from those of the wider population in Greater Manchester:

- Older people.
- People who require housing with care (including those with disabilities).
- Private renters.
- People wishing to build their own homes.
- Students.
- Families.
- Members and ex-members of the Armed Forces; and
- Gypsies and Travellers.

## 6.2 Older persons housing

6.3 Within Greater Manchester, there is a lower proportion of older people than the national average, with 18.7% of households aged over 65 compared to 20.7% in England.<sup>60</sup> The population is projected to increase for all age groups (except 5-9) but especially so for those aged 70 or more. Those 90 or over are projected to increase by 87% between 2018 and 2043. The overall population of Greater Manchester is projected to increase by 10.1% in the same time-period.<sup>61</sup>

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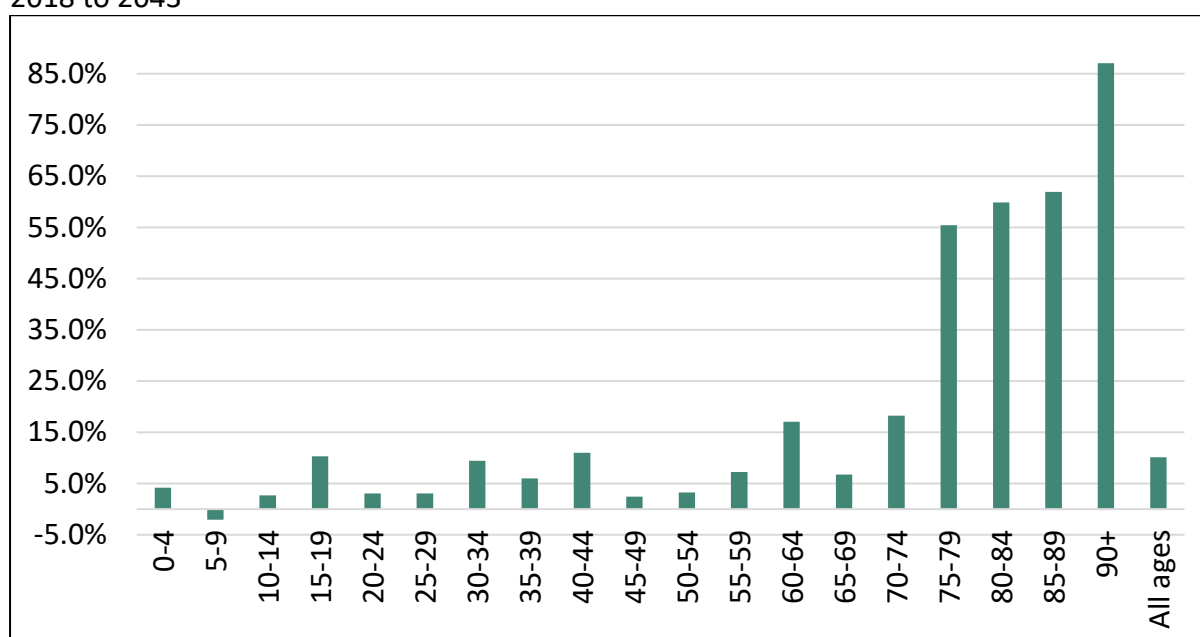
<sup>59</sup> [PPG, Housing needs of different groups, July 2019](#),

<sup>60</sup> ONS, 2011 Census

<sup>61</sup> ONS, 2018-based SNPP.



Figure 6.1: Percentage change in population by five-year age band in Greater Manchester, 2018 to 2043



Source: ONS, 2018-based SNPP

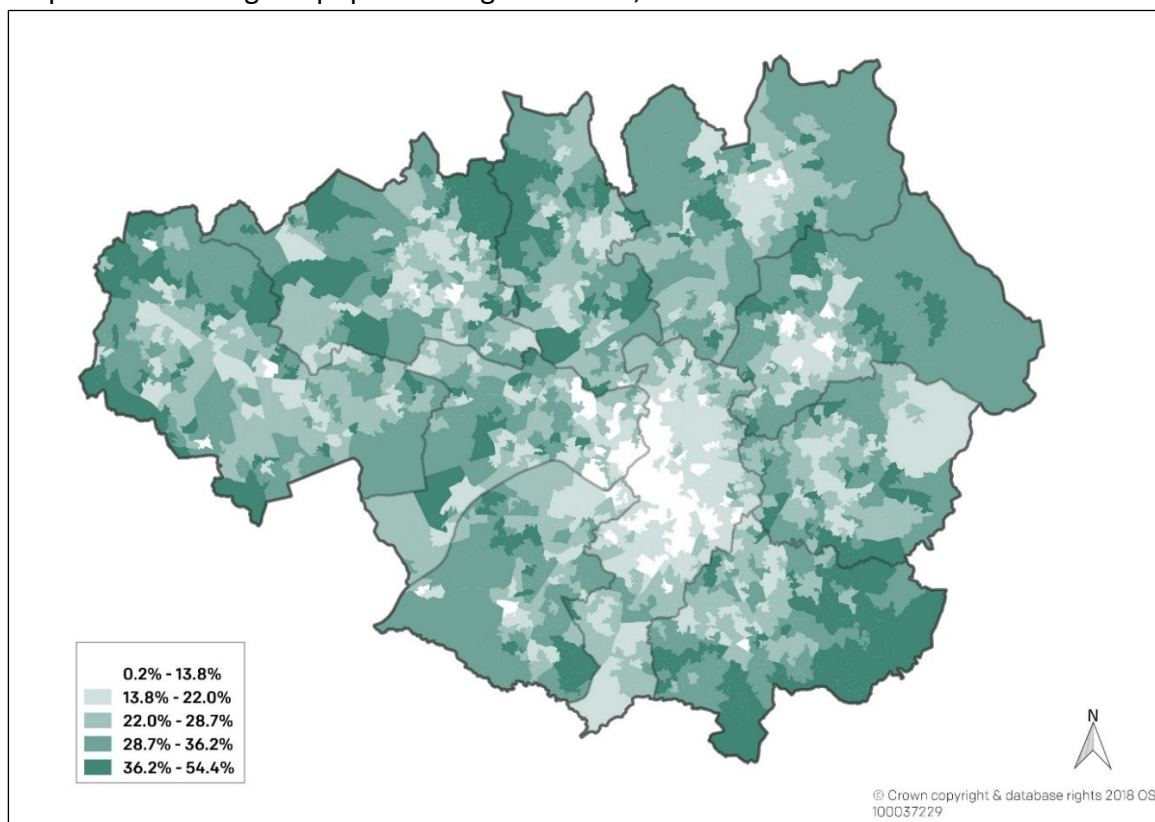
6.4 The latest household projections (2018-based) show that in Greater Manchester 3.5% of all Household Reference Persons (HRF) were aged 85 or older at mid-2018 and 12.5% were aged 75 or over. By 2043, this is projected to rise to 5.3% for those aged over 85 and 17.8% for those aged 75 to 84.<sup>62</sup> In terms of households, in 2016 3.5% of all heads of households in Greater Manchester were aged over 85 and 8.8% were aged between 75 and 84. By 2036, this is expected to rise to 5.6% for those aged over 85 and 11.5% for those aged 75 to 84.<sup>63</sup>

6.5 Map 6.1 below shows the areas where there are higher concentrations of older people in Greater Manchester, most notably in districts to the south (Stockport and Trafford), to the east of Oldham and the border of Bolton and Bury.

<sup>62</sup> ONS, 2018-based SNHP.

<sup>63</sup> ONS, 2016-based SNHP.

Map 6.1: Percentage of population aged over 55, Greater Manchester



Source: ONS, 2011 Census

### *Healthy and life expectancy*

- 6.6 Table 6.1 highlights the life expectancies and healthy life expectancies by gender in Greater Manchester, the North West and England. Expectancies in Greater Manchester are lower for both measures and genders, with male life expectancy being 78.1 years and female life expectancy 81.7 years.
- 6.7 Calculations of healthy life expectancies add a quality-of-life dimension to estimates of life expectancy by dividing expected lifespan into time spent in different states of health or disability. Healthy life expectancy estimates the period of time that an individual can expect to live in “very good” or “good” health and is based on how individuals perceive their general health based on a rolling three-year aggregate period. Healthy life expectancy is again generally lower in Greater Manchester than the regional and national average, but the gender difference is smaller, with male healthy life expectancy slightly higher at 61.7 years compared to the female 60.8 years.

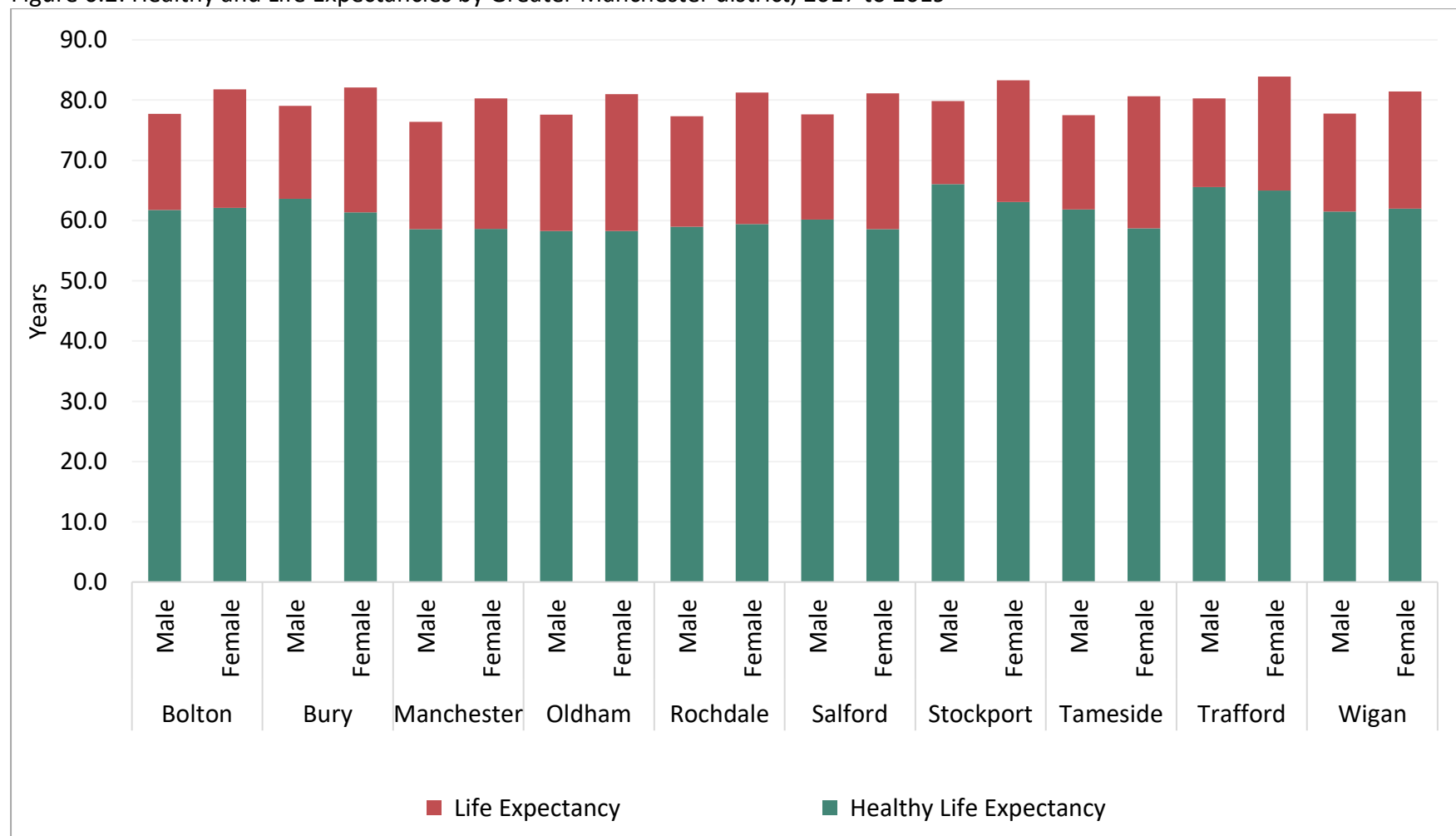
Table 6.1: Healthy and Life Expectancies by Gender, 2017 to 2018

<i>Area</i>	Male Life Expectancy (years)	Male Healthy Life Expectancy (years)	Female Life Expectancy (years)	Female Healthy Life Expectancy (years)
<b>Greater Manchester</b>	<b>78.1</b>	<b>61.7</b>	<b>81.7</b>	<b>60.8</b>
North West	78.4	61.7	82.1	62.2
England	79.8	63.2	83.4	63.5

Source: [ONS \(2021\)](#)

- 6.8 The chart below represents healthy and life expectancies at district level in Greater Manchester. Trafford and Stockport are nearest to or slightly above the national average with the former having a male life expectancy of 80.3 years and a female life expectancy of 83.9 years. By contrast, in Manchester, males and females have a healthy life expectancy of 58.6 years.

Figure 6.2: Healthy and Life Expectancies by Greater Manchester district, 2017 to 2019



Source: [ONS \(2021\)](#)

### *Housing type and tenure for older people*

6.9 Across Greater Manchester, residents aged 65 and over occupy 30.2% of all one-bedroom properties<sup>64</sup>. This rate is highest in Oldham and lowest in Manchester, where one-bedroom properties tend to be marketed towards young professionals within the PRS. Table 6.2 also shows the percentage of one-person households increase as age increases, with this pattern similar across all districts. This trend is pronounced in Oldham where for those aged 55 to 59, 26.6% are one-person households and this rises to 74.3% for those aged over 85.

Table 6.2: Percentage of one-person households by age band in Greater Manchester

<i>Area</i>	Aged 55-59	Aged 60-64	Aged 65-74	Aged 75-84	Aged 85+
Bolton	28.1%	33.5%	40.4%	55.1%	71.7%
Bury	27.6%	32.2%	40.3%	53.5%	70.4%
Manchester	38.8%	46.2%	51.3%	57.8%	67.9%
Oldham	26.6%	33.2%	41.9%	56.9%	74.3%
Rochdale	30.0%	35.8%	42.3%	56.2%	72.3%
Salford	35.6%	40.1%	44.7%	58.1%	73.2%
Stockport	27.2%	31.8%	40.0%	53.3%	68.3%
Tameside	30.0%	34.6%	43.0%	56.7%	72.9%
Trafford	25.9%	32.6%	39.9%	52.6%	68.4%
Wigan	26.6%	30.7%	36.6%	52.4%	71.0%
<b>Greater Manchester</b>	<b>30.0%</b>	<b>35.3%</b>	<b>42.0%</b>	<b>55.1%</b>	<b>70.7%</b>

*Source: 2011 Census*

6.10 The majority of those 65 and over tend to be owner-occupiers and the majority own their home outright.

6.11 Of those that do not own their home, there is a considerable reliance on the social rented sector in Greater Manchester compared to nationally, with 25.6% of all over

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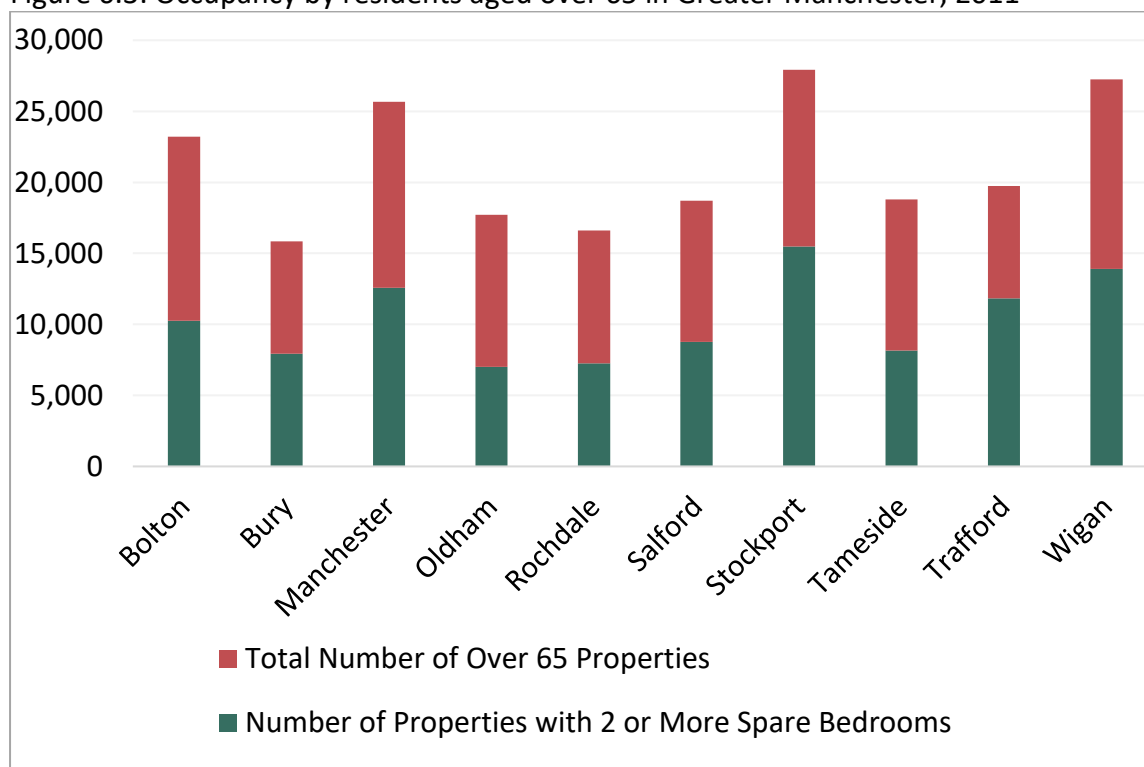
<sup>64</sup> Source: 2011 Census DC1402EW - Household composition by number of bedrooms.

65 properties falling into this tenure bracket in the conurbation, compared to 19.8% nationally and 20.2% in the North West. Seven out of ten districts in Greater Manchester have a higher percentage of over 65s in social rented housing than the national figure. This figure is highest in Manchester where 42.4% of over 65 are living in the social rented sector.

6.12 The PRS accounts for only a small share of housing for over 65s, at 4.4% across England compared to around 15% for all age groups. Greater Manchester has a smaller PRS for over 65s compared to the national figure, at 3.6%. The only district to have a higher figure than England is Manchester, where 5.1% of over 65s live in the PRS.

6.13 Of properties occupied by those over 65 (Figure 6.3), across Greater Manchester 48.8% have 2 or more spare bedrooms and while this is lower than the North West (51.8%) and England (51.6%) it still represents a significant proportion of older persons housing. Under-occupancy for those aged over 65 is lowest in Oldham at 39.5% and highest in Trafford (59.9%).

Figure 6.3: Occupancy by residents aged over 65 in Greater Manchester, 2011



Source: ONS, 2011 Census

### 6.3 Housing with care (households with specific needs)

6.14 NPPF guidance states local planning authorities should plan for a mix of housing, which takes account of the care needs of different groups in the community. This section considers groups within the population that have specialist housing and housing with care needs, looking specifically at:

- Older people;
- People with disabilities; and
- Supported housing.

#### Older people

6.15 In Greater Manchester there will be 33.1% more people aged 65 and over living alone by 2040 rising from 145,444 in 2020 to 193,542 in 2040 – this is an increase of just over 48,000 people. This is slightly lower than the national average increase of 41.8%. In total, almost a third (32.7%) of Greater Manchester residents aged 65 and over are expected to be living alone by 2040. There will be 48.4% more people aged 65 and over who will be living in a care home by 2040, compared to a national increase of 59.3%. 34.6% more people over 65 in Greater Manchester will be unable to carry out at least one domestic task on their own and would therefore need some form of care rising from 128,652 to 173,227 people in 2040, meaning almost 1 in 3 people aged 65 and over will need some form of care. See table 6.21 below.

6.16 By 2040, 26.5% of those aged over 65 in Greater Manchester will have a limiting long-term illness that limits their day-to-day activities a lot (higher than the national average of 25.). In Greater Manchester, 7.5% of over 65s are predicted to have dementia in 2040, an increase of 43.4% from 2020. This is a lower proportion than for the North West as a whole (7.7%) and nationally (7.9%) but still represents an increase from 30,837 to 44,214 people in 2040. The districts of Wigan and Rochdale are expected to experience the largest increase in the numbers of people with

dementia in Greater Manchester, 53.1% and 48.1% respectively See table 6.21 below.<sup>65</sup>

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<sup>65</sup> *ibid*



Table 6.21: Percentage of people aged 65 and over who will have one of the following characteristics and percentage change from 2020 to 2040.

	Living Alone		Living in a Care Home		Unable to manage at least one domestic task on their own		Limiting long term illness		Dementia	
	% of population over 65	% change 2020 to 2040	% of population over 65	% change 2020 to 2040	% of population over 65	% change 2020 to 2040	% of population over 65	% change 2020 to 2040	% of population over 65	% change 2020 to 2040
England	33.1%	41.8%	3.6%	59.3%	29.9%	44.1%	25.0%	45.4%	7.9%	54.9%
North West	33.0%	36.1%	3.9%	53.1%	29.7%	38.2%	28.8%	37.9%	7.7%	48.6%
<b>Greater Manchester</b>	<b>32.7%</b>	<b>33.1%</b>	<b>3.5%</b>	<b>48.4%</b>	<b>29.3%</b>	<b>34.6%</b>	<b>26.5%</b>	<b>35.7%</b>	<b>7.5%</b>	<b>43.4%</b>
Bolton	32.8%	30.6%	2.8%	50.4%	29.4%	33.0%	30.1%	33.2%	7.6%	45.3%
Bury	33.1%	28.8%	4.4%	51.0%	29.9%	31.3%	26.3%	31.8%	7.9%	44.4%
Manchester	32.1%	39.1%	3.2%	40.3%	28.2%	38.9%	35.3%	39.5%	6.7%	38.6%
Oldham	32.8%	33.7%	4.7%	52.7%	29.4%	35.9%	29.3%	36.8%	7.5%	46.7%
Rochdale	32.6%	37.7%	4.0%	56.6%	29.2%	40.0%	30.2%	39.7%	7.4%	48.1%
Salford	32.3%	31.9%	3.2%	39.6%	28.9%	32.7%	33.3%	33.2%	7.2%	36.0%
Stockport	33.2%	26.8%	3.4%	42.6%	30.0%	28.3%	24.1%	30.2%	8.0%	38.2%
Tameside	32.6%	32.7%	3.7%	51.0%	29.1%	34.4%	30.2%	34.2%	7.3%	44.6%
Trafford	33.4%	31.8%	2.9%	40.0%	30.2%	32.7%	24.9%	33.0%	8.0%	38.9%
Wigan	32.3%	37.1%	3.4%	56.9%	28.7%	39.3%	32.5%	38.9%	7.2%	53.1%

### *Housing stock*

- 6.17 As of 2018/19, the current stock of housing specifically designed for older people in Greater Manchester consists of 1,108 properties with 32,447 dwelling units.<sup>66</sup> The majority of these are for rent (24,845) rather than for sale (4,991).
- 6.18 Analysis by the Housing Learning and Improvement Network (LIN)/Elderly Accommodation Counsel (EAC),<sup>67</sup> produced for GMCA, estimates that the shortfall - the 'gap' between future demand and current supply, for specialist housing and accommodation for older people, is likely to be by 2037 over 18,000 units of housing for older people. This consists of approximately 7,300 units for sale and over 6,300 units for rent (including shared ownership). Furthermore, there will be a shortfall of approximately 4,960 units of housing with care made up of 3,115 units of extra care housing for rent and 1,850 units of extra care housing for sale (including shared ownership). This is broken down by district as in the table below:

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<sup>66</sup> Elderly Accommodation Council (EAC)

<sup>67</sup> The Strategic Housing for Older People Analysis Tool (SHOP@) has been developed by the Housing LIN and EAC. Extra Care and Enhanced Sheltered sectors are combined into a single Housing with Care typology.

Table 6.3: Estimated shortfall in specialist accommodation for older people, by type and tenure, in each local authority and across Greater Manchester by 2037.

<i>Area</i>	Housing for Older People for sale (units)	Housing for Older People for rent (units)	Housing with care for sale (units)	Housing with care for rent (units)	Total estimated shortfall (units)
Bolton	528	528	121	363	1,540
Bury	656	656	186	186	1,684
Manchester	574	574	102	305	1,555
Oldham	396	396	84	253	1,129
Rochdale	473	473	120	359	1,425
Salford	528	560	75	224	1,387
Stockport	1,350	665	349	349	2,713
Tameside	528	752	131	393	1,804
Trafford	1,026	505	227	227	1,985
Wigan	1,252	1,252	455	455	3,414
<b>Greater Manchester</b>	<b>7,309</b>	<b>6,360</b>	<b>1,850</b>	<b>3,115</b>	<b>18,634</b>

*Source: Housing Learning and Improvement Network (LIN)/Elderly Accommodation Counsel (EAC) (2020). 50/50% split assumed of the total estimated need where figures are the same for both sale and rent columns.*

6.19 At a district level, only Oldham (792) and Rochdale (946) are estimated to have a shortfall below 1,000 units by 2037 in Housing for Older People (without care). Stockport is projected to have the highest number of property shortfalls in Housing for Older People (without care) by 2035 at 2,015. In Stockport the projected shortfall includes more properties for sale rather than rent, which is also the case in Trafford. Tameside, however, have more of a shortfall for rent rather than to lease. The projected estimates for Housing with Care (often called assisted living in the private sector) suggest that there will be a shortfall of 1,850 units for sale and 3,115 for rent in Greater Manchester by 2037 with the greatest combined need in Wigan (910 units) and the lowest in Salford (299).

## People with disabilities

6.20 The 2011 Census defines a limiting long-term illness or disability (LLTI) as:

*“(a condition) that limits a person's day-to-day activities and has lasted, or is expected to last, at least 12 months. This includes problems that are related to old age. People were asked to assess whether their daily activities were limited a lot or a*

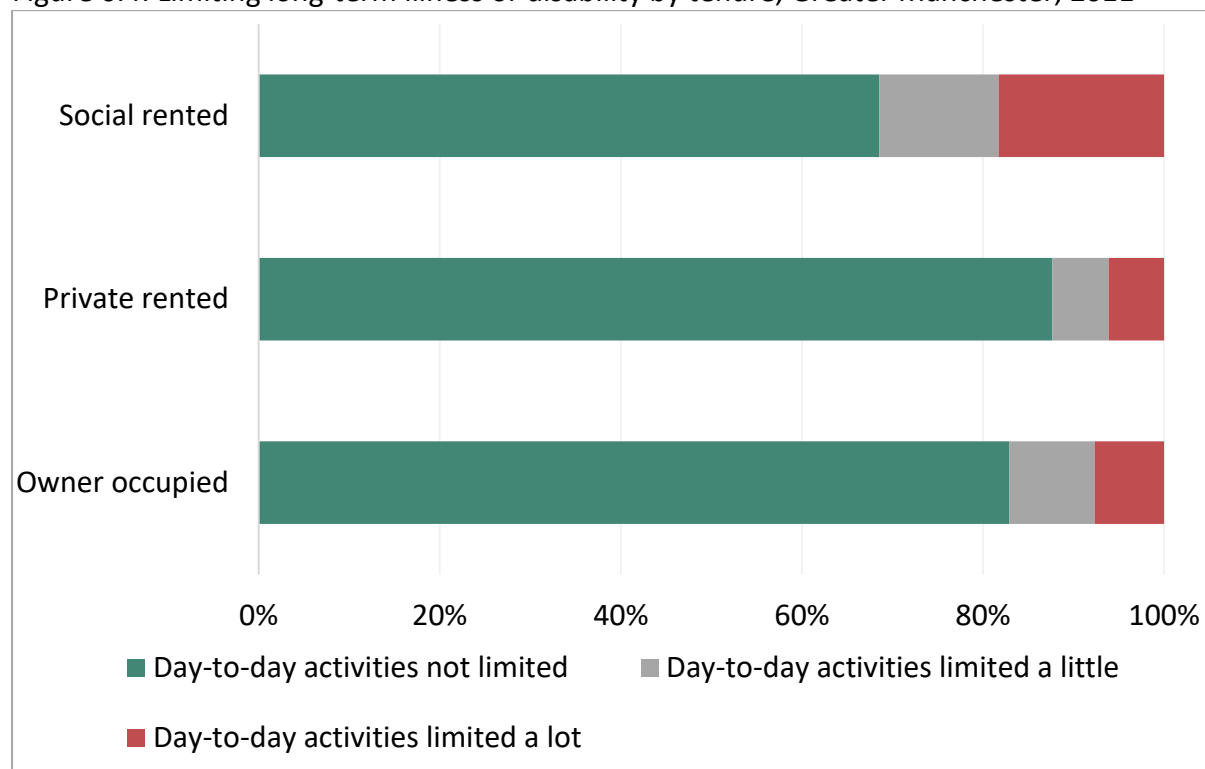
*little by such a health problem, or whether their daily activities were not limited at all.*<sup>68</sup>”

- 6.21 This definition is adopted for the analysis presented in this section.
- 6.22 Greater Manchester has a similar proportion of people with a self-reported LLTI compared to the North West, though with a smaller proportion reporting an issue that limits their daily activities ‘a little.’ However, both Greater Manchester and the North West have a greater share of people with a LLTI than England as a whole.
- 6.23 Figure 6.4 shows there is a relative concentration of people with a LLTI living in the social rented sector in Greater Manchester. Given the specialist and supported housing offered by the sector, this is expected to some degree, but it is clear from the numbers involved that this alone is insufficient to explain the differences between tenures. There are higher levels of people with a LLTI who own their home outright in Greater Manchester than other tenures, which is unsurprising as older households are more likely to have paid their mortgage in full. Only Trafford and Stockport have fewer owner-occupiers with a LLTI than the national average. All ten Greater Manchester districts have a higher percentage of people with a LLTI in social rented housing than the national average. While the proportions vary slightly, these overall patterns replicate those found in the wider North West and across England.

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<sup>68</sup> ONS, 2011 Census: Glossary of Terms, (May 2014) <http://www.ons.gov.uk/ons/guide-method/census/2011/census-data/2011-census-data/2011-first-release/2011-census-definitions/2011-census-glossary.pdf>

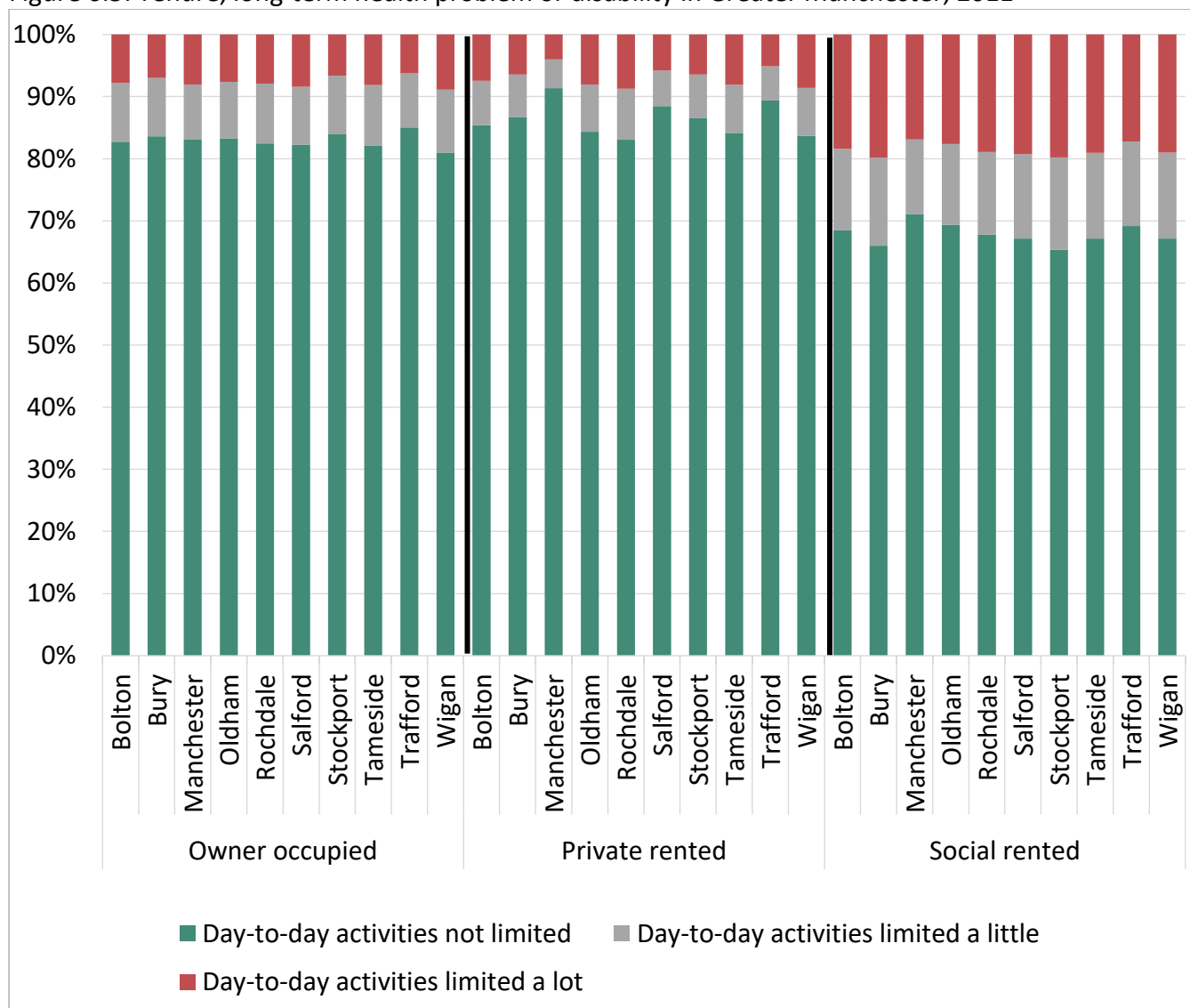
Figure 6.4: Limiting long-term illness or disability by tenure, Greater Manchester, 2011



Source: ONS, 2011 Census

6.24 Figure 6.5 below summarises the picture across the ten districts and three main tenures. Variations between districts are perhaps surprisingly limited, with the most notable being the lower levels of people with LLTI in the PRS in Manchester, Salford and Trafford, possibly reflecting the younger age profile of households in this tenure.

Figure 6.5: Tenure, long-term health problem or disability in Greater Manchester, 2011



Source: ONS, 2011 Census

6.25 Projecting Adult Needs and Service Information (PANSI)<sup>69</sup> is a programme designed to help explore the possible impact that demography and certain conditions may have on populations aged 18 to 64. A selection of these indicators are outlined below.

6.26 In Greater Manchester, 2.2% of the population are projected to have a serious physical disability by 2035, a rate like the North West and nationally, both at 2.3%.

<sup>69</sup> More information is available at: <http://www.pansi.org.uk/>

Manchester and Salford are expected to have the lowest proportions of people with a serious physical disability but are projected to have the greatest increase over the period 2017 to 2035 across the city region.

- 6.27 Compared to physical disability, a smaller proportion of the population are estimated to have a moderate or severe learning disability, although this is substantially higher in Greater Manchester (0.57%) than the region and England as a whole (both 0.15%).
- 6.28 Just over 16% of the population in the age group 18 to 64 are expected to have a common mental disorder in Greater Manchester by 2035 – similar to that for the region as a whole and nationally. Salford and Manchester have the lowest proportions of common mental disorders. However, they are projected to experience the largest increases up to 2035.

#### 6.4 People with a housing and support need

- 6.29 The Think Local Act Personal partnership describes how there is no single agreed definition of supported housing, as it is an umbrella term that covers a great variety of provision. They adopt the following definition in their report *'Making it Real for Supported Housing: A guide for providers and commissioners'*:
- ...[Supported housing is] "any scheme where housing, support and sometimes care services are provided with the purpose of enabling the person receiving the support to live as independently as possible in the community."*<sup>70</sup>
- 6.30 Supported housing may be provided for several different client groups, including (but not limited to) the following:
- Older people with varying levels of support needs;
  - People with physical and learning disabilities;
  - People with mental health needs;
  - People and families at risk of or affected by homelessness;
  - People recovering from alcohol or drug dependency;
  - People at risk of or seeking refuge from domestic abuse;

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<sup>70</sup> [Making it Real for Supported Housing: A guide for providers and commissioners](#)

- Offenders and ex-offenders; and
- Vulnerable young people (such as young parents and young people leaving care).

6.31 In England, supported housing is mostly owned by RPs, with some local authorities owning their own supported housing units; there are also a number of supported housing schemes that are run by the voluntary sector, such as charities and faith groups, as well as some units provided by the private sector.

6.32 The care or support package is usually commissioned by the local authority and is sometimes provided by the housing provider, with charities and specialist care or support providers also delivering these services. An exception to this is sheltered accommodation, which is largely not commissioned by local authorities, but wholly owned and managed by RPs or private sector providers.

#### *Supported housing provision in Greater Manchester*

6.33 It is difficult to assess the total number of units of supported housing in Greater Manchester from official datasets. Local authorities return housing data to MHCLG annually; however, stock is not broken down into general needs and supported units. RPs complete a Statistical Data Return to the Regulator of Social Housing (formerly the Homes and Communities Agency) each year, which gives us limited information on supported housing stock in Greater Manchester.



Table 6.4: Number of units of supported housing and housing for older people owned by Registered Providers, 2020

Area	Total units/bed spaces
Bolton	4,650
Bury	1,040
Manchester	4,871
Oldham	1,317
Rochdale	2,641
Salford	2,919
Stockport	1,780
Tameside	1,978
Trafford	3,739
Wigan	1,758
<b>Greater Manchester</b>	<b>26,693</b>

*Source: Regulator of Social Housing, Private Registered Provider Social Housing Stock in England: Statistical Data Return dataset 2020.*

- 6.34 Table 6.4 shows the amount of RP owned supported housing and housing for older people in each Greater Manchester district. The numbers appear to be relatively small because these statistics do not include any local authority, private sector or charitable sector owned units.
- 6.35 The social housing stock owning authorities (Bury, Manchester, Stockport and Wigan) appear to show low levels of supported housing, as their own supported housing units may not all have been taken into account in these figures.
- 6.36 The data return also does not provide information on the number of supported housing units by client group.

#### *Supported Housing census*

- 6.37 The GMCA has been working with the Greater Manchester Health and Social Care Partnership to undertake a census of supported housing, to identify the level of provision in Greater Manchester districts by client group.

Table 6.5: Supported Housing in Greater Manchester by client group, 2017

Client group	Total schemes	Total units
Complex Needs	20	720
Domestic Abuse	40	300
Extra Care	30	1,160
Homeless Families	20	200
Homelessness	370	740
Learning Disability	950	3,230
Mental Health	250	1,050
No client group provided	270	1,110
Offenders /Ex-Offenders/ At risk of offending	20	130
Older people	720	16,170
Other	60	180
Physical Disability	30	90
Refugees	10	60
Rough sleepers	20	220
Sheltered	490	5,520
Single Homeless	80	740
Substance Misuse	60	270
Veterans	-	20
Vulnerable adults	50	50
Women with support needs	-	30
Young homeless people	10	110
Young parents	10	60
Young People	120	460
Young People leaving care	20	60
Young people with Learning disabilities	10	20
<b>Total</b>	<b>3,660</b>	<b>32,690</b>

Source: Greater Manchester Supported Housing Census, 2017.

### *Future need for supported housing*

- 6.38 The future need for housing with care for older people is outlined in [Chapter 6.2](#) of this document, along with projections of the number of people with physical and learning disabilities and common mental disorders.
- 6.39 For other client groups, national data is available to project the future need of supported housing. MHCLG and the Department of Health commissioned research by the Personal Social Services Research Unit of London School of Economics (LSE) which suggests that there will be a 4.2% increase in need for supported housing for

single homeless people and a 4.3% increase in need for supported housing for other working age clients between 2015 and 2030.<sup>71</sup>

## 6.5 Private renters

- 6.40 The PRS consists of homes that are rented from a private landlord, letting agency or other private organisations or individuals.
- 6.41 Between 2001 and 2011, the share of households living in the PRS in Greater Manchester rose from 11% to 17.5%, with the majority of those households in Manchester and Salford. The rise was across all household types, but particularly young people and families with children.<sup>72</sup>
- 6.42 A total of 96% of household growth in Greater Manchester between the 2001 and 2011 Censuses was focused in the PRS and by 2011, the number of households in the PRS in Greater Manchester totalled 196,000.<sup>73</sup>
- 6.43 Figure 6.6 below sets out the proportion of households in the PRS in Greater Manchester, the North West and England & Wales at the 2001 and 2011 Censuses.

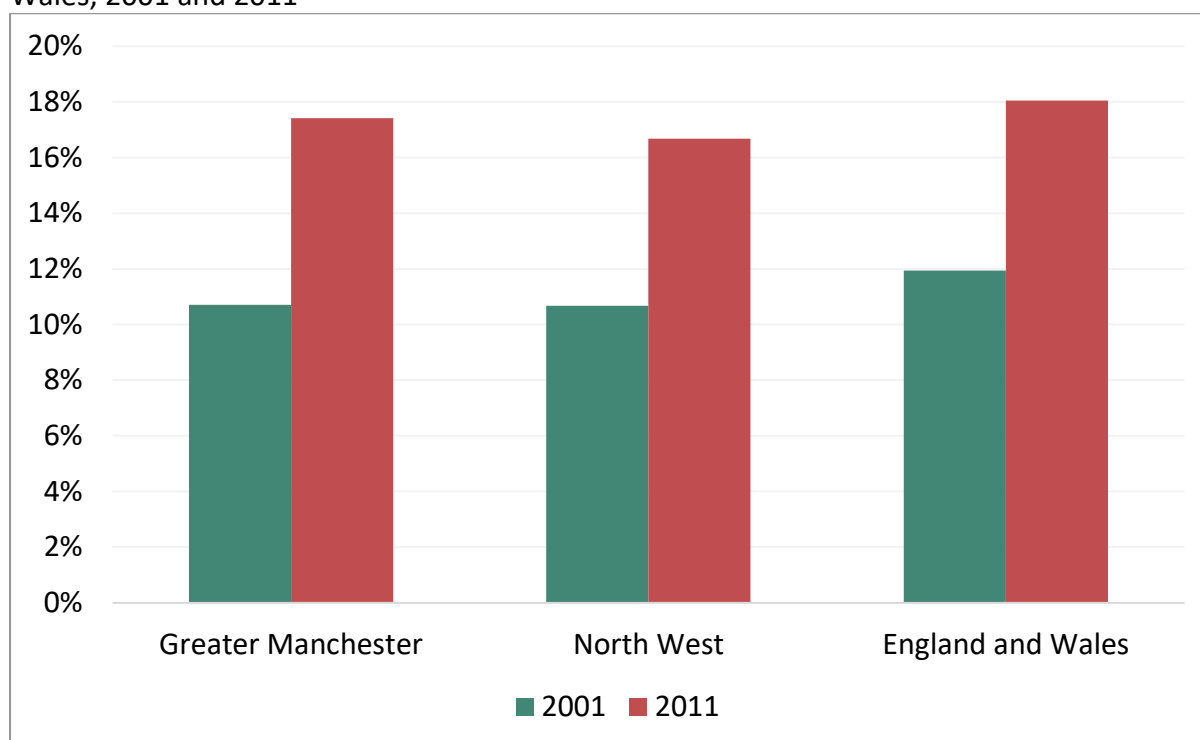
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<sup>71</sup> DCLG (now MHCLG) & Department of Health commissioned research by Personal Social Services Research Unit of London School of Economics (2017), Projected demand for supported housing in Great Britain 2015 to 2030, [http://eprints.lse.ac.uk/84075/1/Wittenberg\\_Protected%20demand\\_2017\\_author.pdf](http://eprints.lse.ac.uk/84075/1/Wittenberg_Protected%20demand_2017_author.pdf)

<sup>72</sup> ONS, 2011 Census

<sup>73</sup> ONS, 2001 Census and 2011 Census. Note that in the 2011 Census the definition changed to include households living rent free, but this change is not perceived to have contributed largely to growth in this category over the period.

Figure 6.6: Households private renting in Greater Manchester, North West and England & Wales, 2001 and 2011



Source: ONS, 2001 Census and 2011 Census

- 6.44 Growth in the PRS in Greater Manchester has outpaced that of the North West and England & Wales and it is anticipated that this growth will continue; in part due to Government policies such as support for institutional PRS investment, as well as due to the changing nature of the housing market and structural changes to households.
- 6.45 This section provides a spatial analysis of the sector across Greater Manchester and highlights the policy context for the PRS.

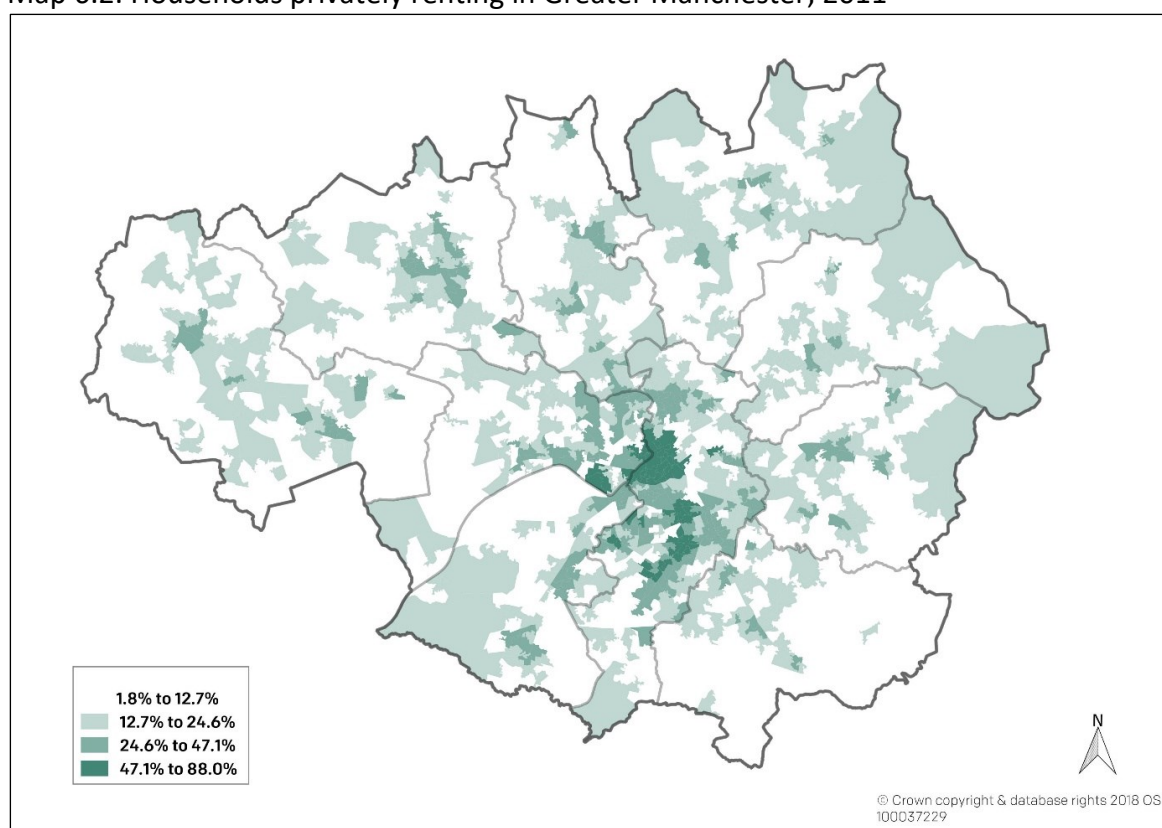
#### *Scale and distribution of PRS in Greater Manchester*

- 6.46 There are PRS households within all districts across Greater Manchester. Map 6.2 shows the distribution of all private rented households from the 2011 Census across Greater Manchester. There are clear clusters of private renting in central parts of the districts and the town and city centres.
- 6.47 High concentrations of PRS households (more than 50% of households) are found in the regional centre in Manchester and Salford. The map shows that although PRS

renters are present across the conurbation, there are far higher numbers in the regional centre, to the north of Manchester and in areas of central and south Manchester, which generally have higher student and graduate populations.

- 6.48 There are also notable pockets of PRS in Salford (just outside the regional centre, close to the university) and Bolton (close to the university). To a lesser extent, the town centres of Altrincham, Wigan, Leigh, Bolton, Rochdale and Stockport are home to PRS tenants.

Map 6.2: Households privately renting in Greater Manchester, 2011



Source: ONS, 2011 Census

### PRS Renter Groups

- 6.49 A large proportion of those who live in the PRS are under 35. In Greater Manchester the proportion under 35 is 51% of PRS renters as opposed to 45% for England & Wales). This sector is made up of a mixture of household types ranging from single people to families, with 32% of PRS households with dependent children in Greater

Manchester, a growth from 27% recorded in the 2001 Census. PRS tenants are also generally economically active; 68% of Greater Manchester PRS households are in work.<sup>74</sup>

6.50 Compared with social renting or owner-occupation households, the PRS consists of a broader range of households, with the sector meeting a wide variety of housing needs.

6.51 Modelling work by *New Economy* using income data from the 2014 Annual Survey of Household Earnings (ASHE) and occupation from 2011 census split PRS households in Greater Manchester into six groups:

- Lifestyle Renters (renting through choice);
- Constrained Renters (may be unable to access homeownership due to deposit cost/insecure nature of work);
- Low Pay renters;
- Unemployed/economically inactive renters;
- Retired renters; and
- Students.

6.52 Low Pay and Constrained renters make up almost half of PRS renters in Greater Manchester. They are distributed relatively evenly across the conurbation. This suggests that in Greater Manchester there is a large proportion of renters that are in the PRS involuntarily and that these renters are not concentrated in any particular area. For these groups private renting is the primary housing option, where previously it might have been social housing.

### *Landlords*

6.53 Alongside differences in the tenure mix of people living in the PRS, there is a range of landlords from large-scale institutional investors to small buy-to-let landlords.

6.54 Research from the LSE and the Council for Mortgage Lenders (CML) found that 62% of landlords sampled owned only one property. Those who owned more than one property also owned 40% of the PRS stock. A total of 30% of landlords sampled had

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<sup>74</sup> ONS, 2011 Census

at least one buy-to-let mortgage, but 50% of the properties owned by landlords sampled were purchased with a buy-to-let mortgage.<sup>75</sup>

- 6.55 There is emerging evidence that the growth in institutional landlords developing new homes in the PRS is focused in apartment blocks and, to a lesser extent, housing for families. PRS developers in Greater Manchester include Sigma Capital (developing PRS homes for families), Legal and General, Renaker and Manchester Life (largely developing apartments).
- 6.56 Government's Housing White Paper *Fixing our broken housing market* set out the need for more institutional investment in the PRS, including through pension funds and expanding the 'Build to Rent' market, particularly into family housing.<sup>76</sup>

### *Security of tenure*

- 6.57 The PRS has traditionally provided shorter-term tenancies than the social rented sector (where tenancies have generally been indefinite, sometimes after an introductory period), reflecting the fact that the PRS was often seen as a temporary tenure for young people before moving into owner-occupation.
- 6.58 PRS research conducted in Greater Manchester by *New Economy* in 2014 found that 46% of tenant survey respondents indicated that a medium-term tenancy of 1-5 years would be their favoured length.<sup>77</sup>
- 6.59 The *English Housing Survey* (EHS) showed that in 2015/16, 81% of PRS tenants were given an initial tenancy of 6 or 12 months. Furthermore, 26% of PRS tenants had been in their current home for less than one year, as opposed to 8% of social renters and 5% of owner-occupiers. Data from MHCLG shows those households that were accepted as homeless due to the end of an assured short-hold tenancy increased by 25% between 2015/16 and 2016/17.<sup>78</sup>

### *Type and condition of stock*

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<sup>75</sup> CML Research, 'The profile of UK private landlords', Kath Scanlon and Christine Whitehead, LSE London, December 2016

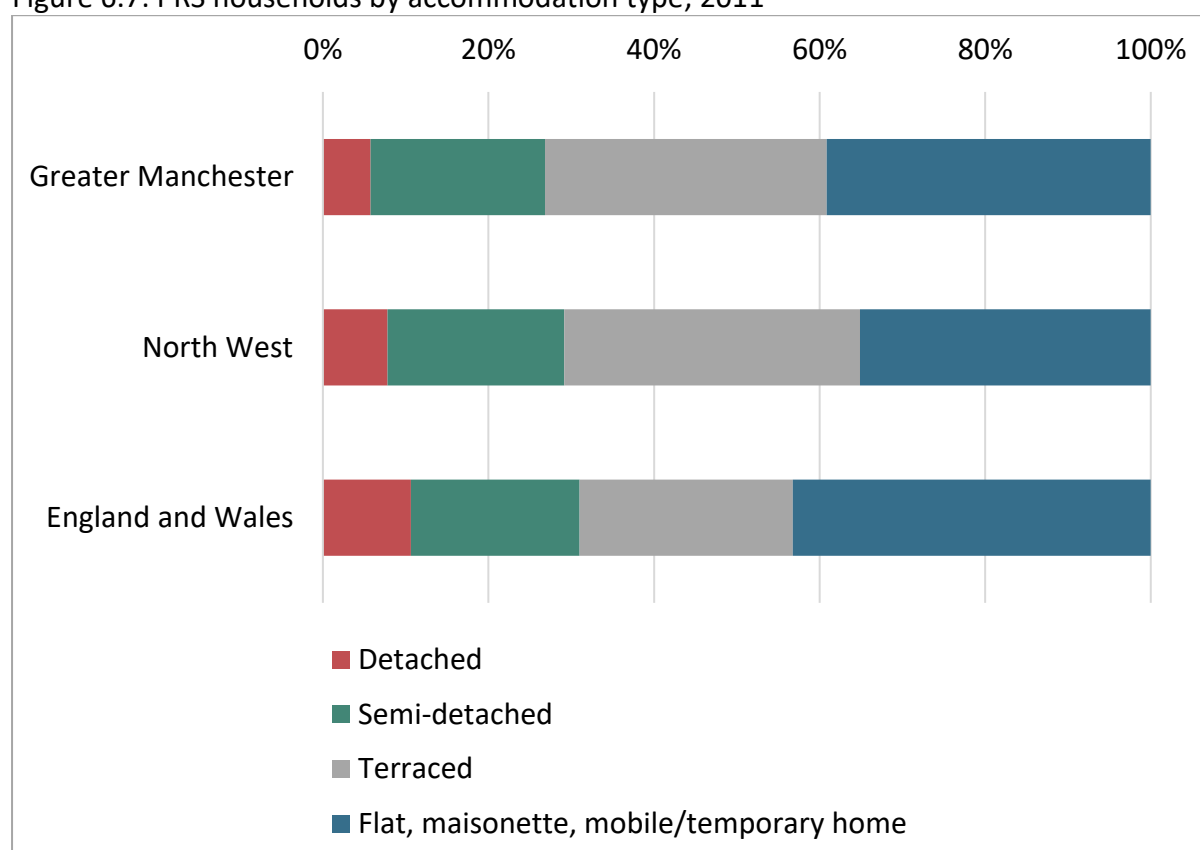
<sup>76</sup> [Government Housing White Paper. Fixing our broken housing market. February 2017.](#)

<sup>77</sup> New Economy, 'Private Rented Sector in Greater Manchester', 2014.

<sup>78</sup> MHCLG Live Tables on Homelessness, [Table 784a: local authorities' action under the homelessness provisions of the Housing Acts: quarterly data for 2014 Q2 to 2017 Q1](#)

6.60 The most detailed source of data on the PRS stock in Greater Manchester comes from the 2011 Census. The stock profile is varied across the districts in Greater Manchester; however, the rates for the conurbation are broadly in line with the rates for England & Wales.

Figure 6.7: PRS households by accommodation type, 2011



Source: ONS, 2011 Census

6.61 Greater Manchester overall has fewer apartments than the national average, as well as higher levels of terraced accommodation (but lower than seen across the North West). However, Greater Manchester has levels of detached PRS housing below both the regional and national averages.

6.62 It is not possible to say with certainty how many homes in the PRS in Greater Manchester are not meeting Government's Decent Homes Standard. The EHS suggests that nationally 27% of PRS homes do not meet the Decent Homes Standard, 20% of homes have 'serious disrepair' and 15% of homes have at least one hazard



that is a serious and immediate risk to a person's health and safety.<sup>79</sup> Given the age profile of Greater Manchester's housing stock and the substantial proportion of the PRS stock that is in older, terraced properties, it is reasonable to assume that conditions may be worse in Greater Manchester than nationally.

#### *Future trends in the PRS*

- 6.63 Recent trends suggest that the PRS will continue to grow, with more households in the constrained renters and low pay categories. The increases in these groups are influenced by lack of access to home ownership (for example due to deposit and income requirements of mortgage lenders and changes in the nature of the job market) and decreasing access to social housing.
- 6.64 Trends also suggest an increase in families living in the PRS, which has implications for the stock profile as well as security of tenure. *New Economy's* PRS research found that families prioritise security of tenure when choosing a PRS property.
- 6.65 Growth in the sector is predicted to continue. Those groups who may have traditionally accessed home ownership will continue to live in the PRS. Modelling of increase in the sector has been undertaken by both the Cambridge Centre of Housing and Planning Research (CCHPR 2012) and Clapham *et al* (2012). The CCHPR modelling looked at growth based on a cautious economic growth scenario and continuing weak growth scenario, both models predicted a growth in the sector. The CCHPR model expects a continuing weak economy, and in this scenario, they predict a growth in the PRS from 18% in 2012 to 22% in 2025. Clapham *et al* (2012) looked at growth in the sector for young people (18-30) to 2020. In their scenario, they predicted an increase from 1.3 million young people in the PRS in 2008 to 3.7 million living in the sector by 2020.
- 6.66 Several factors have influenced the significant growth in the sector over the last ten years. A range of commentators have analysed the reasons for this and deemed that it is related to the housing supply and demand of both owner-occupation and social

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<sup>79</sup> English Housing Survey, Headline Report.

housing. The common themes that have influenced the growth of the PRS are as follows.<sup>80</sup>

#### *Demand for PRS*

- Undersupply of all housing tenures.
- Mortgage constraints and difficulties in saving for a deposit due to high house prices in comparison to wages (see [Chapter 5](#) for more information).
- Changes to the overall supply of social housing - the overall reduction in new build social housing has meant that those who traditionally would have accessed social housing are now in the PRS.
- Flexibility and mobility in housing choice.
- The availability of HB within the rental sector.
- Not being solely responsible for property repairs and maintenance.
- Avoidance of housing debt.

#### *Supply side factors*

- Deregulation of the sector in the 1980s through the introduction of the Assured Short-hold Tenancy in 1988 and 1996 and making them the default for most private rented lettings.
- Buy-to-let mortgages were introduced in 1996 and spurred the growth of the PRS. The CML estimate that there are about 1.5 million outstanding buy-to-let mortgages.
- Changes to HB entitlement of those in the social rented sector may lead to an increase in demand for private sector properties. This is particularly so in areas (such as some of the districts of Greater Manchester) where social rent levels are similar to or higher than those of private rents. From April 2018, social housing tenants will only be entitled to HB to the level of the Local Housing Allowance (LHA), which means their entitlement will be equal to that of private tenants. Single people under the age of 35 will only be entitled to the Shared Accommodation Rate (SAR), or the level to cover a room in a shared house.

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<sup>80</sup> The Building and Social Housing Foundation (BSHF 2012: 14-15).

Therefore, people may be discouraged from renting in the social sector if they will encounter a significant shortfall in paying their rent and may instead look to the PRS for accommodation.

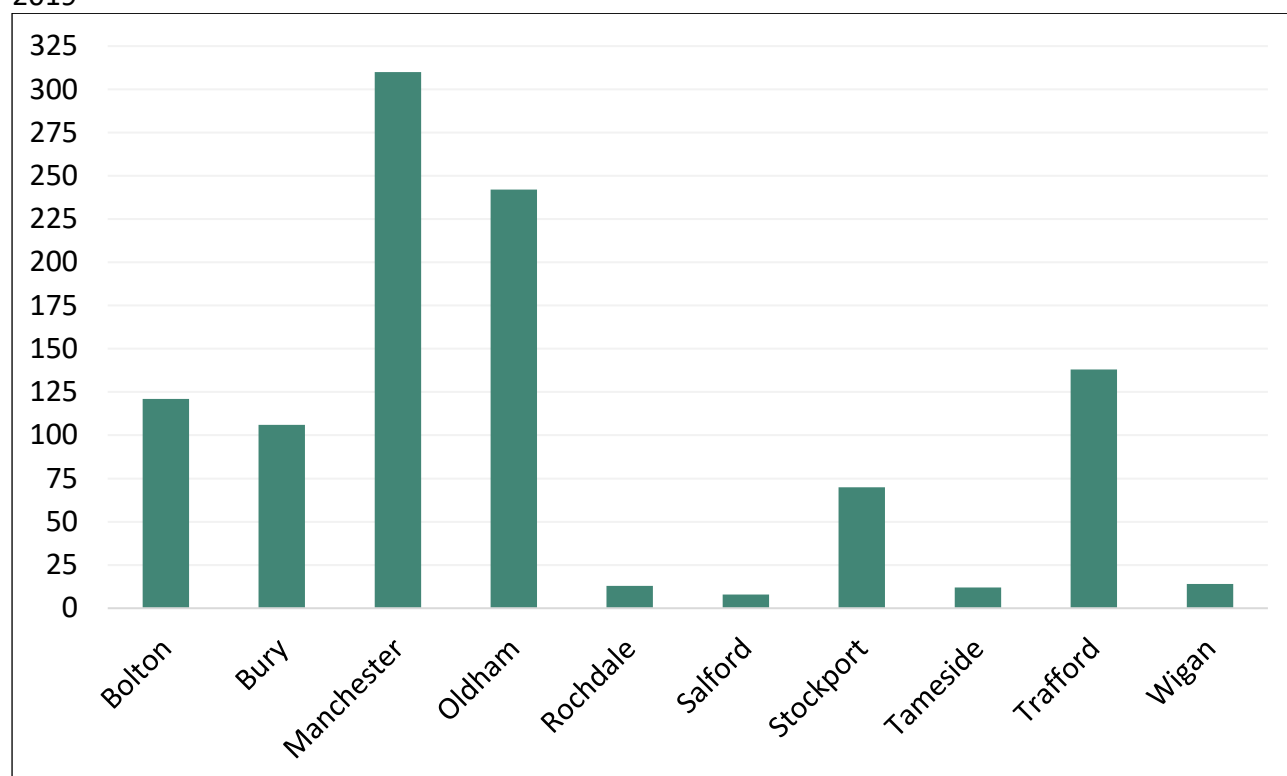
## **6.6 People wishing to build their own homes**

- 6.67 Planning guidance states that Government wants to enable more people to build or commission their own home and wants to make this form of housing a mainstream housing option. Historically, data regarding levels of self-build has been hard to come by. However, in accordance with The Self-build and Custom Housebuilding (Register) Regulations 2016, since 1 April 2016, each local authority is required to keep a register of individuals and associations of individuals who are seeking to acquire serviced plots of land in their area in order to build their own homes.
- 6.68 These registers may provide a false impression of demand because theoretically anyone can apply to be on a register even if they have no realistic means to build their own home. There is also nothing to prevent people from signing up to registers in numerous authorities, thus potentially inflating demand. They do nonetheless act as a barometer for demand for self-build plots.
- 6.69 The number of people registered on Greater Manchester's self-build registers as of September 2019 was 1,034. Manchester has the highest level, 310, on its register, followed by Oldham (242) and Trafford (138). Oldham has "Custom Build Vanguard"<sup>81</sup> status that may account for their higher number. The relatively high level of demand in Trafford could reflect the type of housing market and land values in the district, with self-build plots often the 'intensification' of urban areas, for example maximising the potential for constructing dwellings in large gardens or corner plots.

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<sup>81</sup> In September 2014, 11 key areas in the country received a share of £550,000 to pioneer the Right to Build scheme. These local authorities became known as the Vanguard Councils and would set the tone for custom build across the nation.

Figure 6.8: Number of people on Self-Build Registers in Greater Manchester, September 2019



Source: Greater Manchester local authorities (2019).

- 6.70 Anecdotal evidence from local authorities across Greater Manchester would suggest that key issues in relation to delivery of this type of unit are associated with skills and risk. Whilst there may be people with an ‘interest’ in self-build in Greater Manchester, there is normally a significant financial outlay, risks and time delays associated with self-build.
- 6.71 The evidence to date would suggest that this is currently a relatively niche sector, which could deliver a small number of new homes, including some bespoke high-end homes, but also more modest homes for sale. Given the nature and numbers involved with this type of unit, it is expected that most new delivery will be on small windfall sites and it is therefore unlikely to contribute significant numbers to Greater Manchester’s housing land supply over the next twenty years.
- 6.72 Nevertheless, the Self-build and Custom Housebuilding Act (2015) (as amended) places a duty on relevant bodies to have regard to the self-build and custom housebuilding register when carrying out their planning, housing, land disposal and

regeneration functions and to give suitable development permission to enough serviced plots of land to meet demand.

## **6.7 Students**

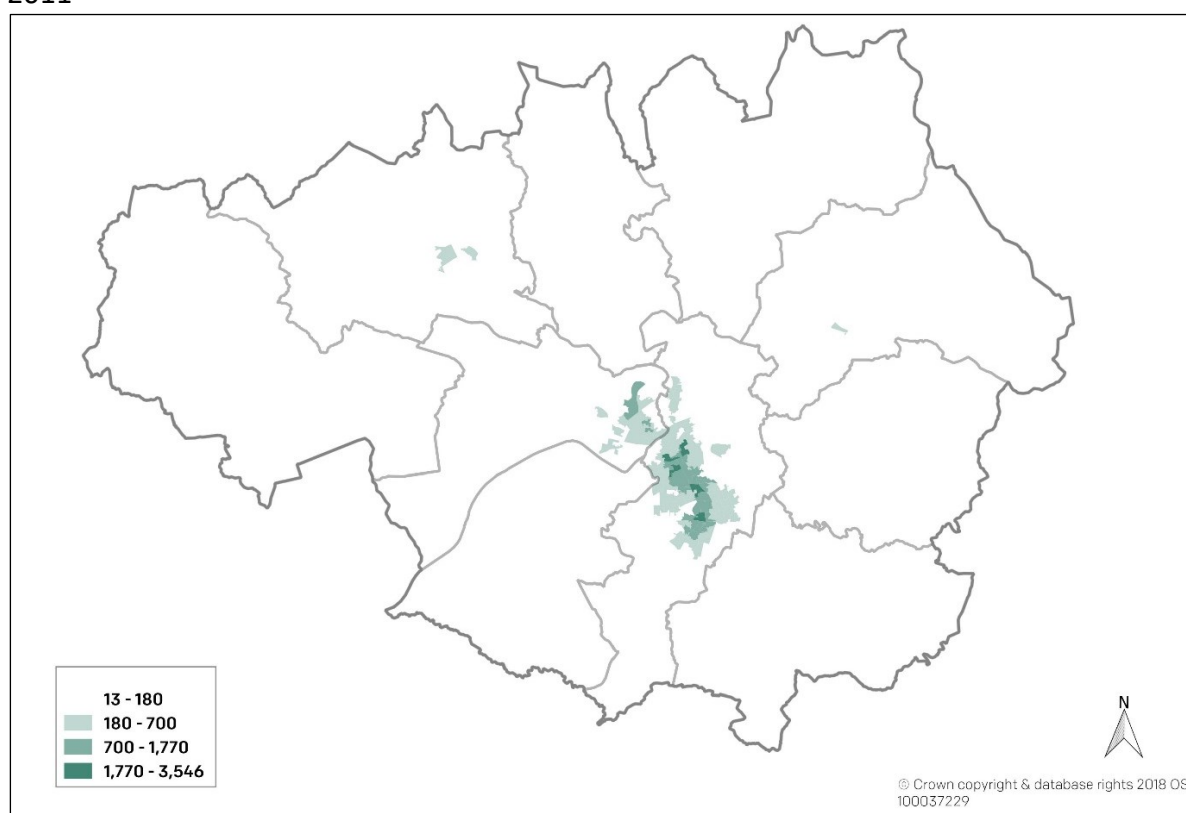
- 6.73 Greater Manchester has a significant student population, reflecting its strong university base largely situated in the regional centre.
- 6.74 The 2011 Census shows the proportion of Greater Manchester households consisting solely of full-time students is slightly above the national average; with Manchester having a relatively high figure of 3.2% compared to the England average of 0.6%.
- 6.75 Higher Education Leaver's Method (HELM) With each update of the population projections ONS may make changes to the methodology or changes to data sources. There can also be changes in the methodologies of the data sources which feed into the base year of any set of projections. One such change was the change to the midyear estimates that started with the mid-2017 population estimates from ONS. This change involved the distribution of students after they had graduated. The new methodology is known as the Higher Education Leaver's Method (HELM). This impacts internal migration figures for all local authorities in England in the projections. For some there will be a gain and for others there will be a loss compared to the old method of distributing students post-graduation. These changes will then impact on the later years after the base year in the projection for population and households. Any change in the population projections will also have an impact on the subsequent household projections from the base year onwards.
- 6.76 The latest population projections make use of internal migration data for two years. Normally it would be five years of internal migration data but a separate methodology change meant that only two years of data could be used for the 2018 SNPP. The impact of the HELM methodology in the second year (mid-2017 to mid-2018) of the internal migration data is not known but is likely to be of a similar order of magnitude as the first year (mid-2016 to mid-2017).
- 6.77 For Greater Manchester the overall impact is relatively low with approximately 250 more residents allocated elsewhere in England per year compared to the old methodology . For Manchester the impact is more negative with approximately 370

more residents allocated elsewhere in England (although some are allocated to other parts of Greater Manchester.)

#### *Spatial Distribution of Student households*

- 6.78 Student households are mostly in the area stretching from the Manchester City Centre ward to Withington, with more than 20% of households in the latter consisting wholly of full-time students, by far the highest proportion in Greater Manchester (although nine other wards in Manchester exceed 5%). The immediately surrounding areas also typically have above average proportions of student households, including adjoining wards to the city centre as well as those of Langworthy and Broughton in Salford.
- 6.79 Outside this area, only the ward of Halliwell in Bolton has more than 0.6% of households consisting solely of full-time students. This spatial pattern of student households means that 86% are located in Manchester, with 8% in Salford and 3% in Bolton. These rates are shown in the map below.

Map 6.3: Distribution of student households across Greater Manchester by Output Area, 2011



Source: ONS, 2011 Census

6.80 There are 13 Further Education colleges providing education and training and offer higher-level qualifications for young people across Greater Manchester.<sup>82</sup> There are five HEIs in Greater Manchester with a combined student body of 104,470 in 2019/20.<sup>83</sup> HEI enrolment in Greater Manchester is broken down in the table below.

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<sup>82</sup> Academy of Live and Recorded Arts; Bolton College; Bridge College; Bury College; Hopwood Hall College (Rochdale); The Manchester College; Oldham College; Salford City College; Seashell Trust; Stockport College; Tameside College; Trafford College; Wigan and Leigh College

<sup>83</sup> Higher Education Statistics Agency (HESA) (2019) [Who's studying in HE? | HESA](#)

Table 6.6: Student enrolments at Greater Manchester HEIs 2017/18 to 2020

Higher Education Institution	Enrolments			Percentage change 2017/18 to 2019/20
	2017/18	2018/19	2019/20	
University of Manchester	40,140	40,250	40,485	0.9
Manchester Metropolitan University	33,080	33,050	33,420	1.0
University of Salford	20,290	20,815	21,500	6.0
University of Bolton	6,545	6,945	8,175	24.9
Royal Northern College of Music	940	880	890	-5.3
<b>Total</b>	<b>100,995</b>	<b>101,940</b>	<b>104,470</b>	<b>3.4</b>

Source: Higher Education Statistics Authority (HESA) 22017/18 to 019/20. [Who's studying in HE? | HESA](#)

- 6.81 Students in higher education in Greater Manchester have increased by 3.4% between 2017/18 and 2019/20, with only the Royal Northern College of Music (RNCM) experiencing any decrease in enrolment during this period.
- 6.82 Enrolments at HEIs have recovered from the dip following the tuition-fees rise to £9,000 in the 2012/13 academic year. Despite an upward trajectory, the number of students studying in Greater Manchester is yet to return to levels equivalent to the peak of 106,675 enrolments in 2010/11. This peak occurring immediately prior to the increase in fees.<sup>84</sup>
- 6.83 Data from the Higher Education Statistics Authority (HESA) shows an increasing number of students are choosing to come from outside of Greater Manchester and outside of the UK. This is having an impact upon the relative scale of demand for accommodation, as fewer students are living at home whilst studying at Greater Manchester HEIs.

### *Types of student accommodation*

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<sup>84</sup> Higher Education Statistics Authority (HESA)



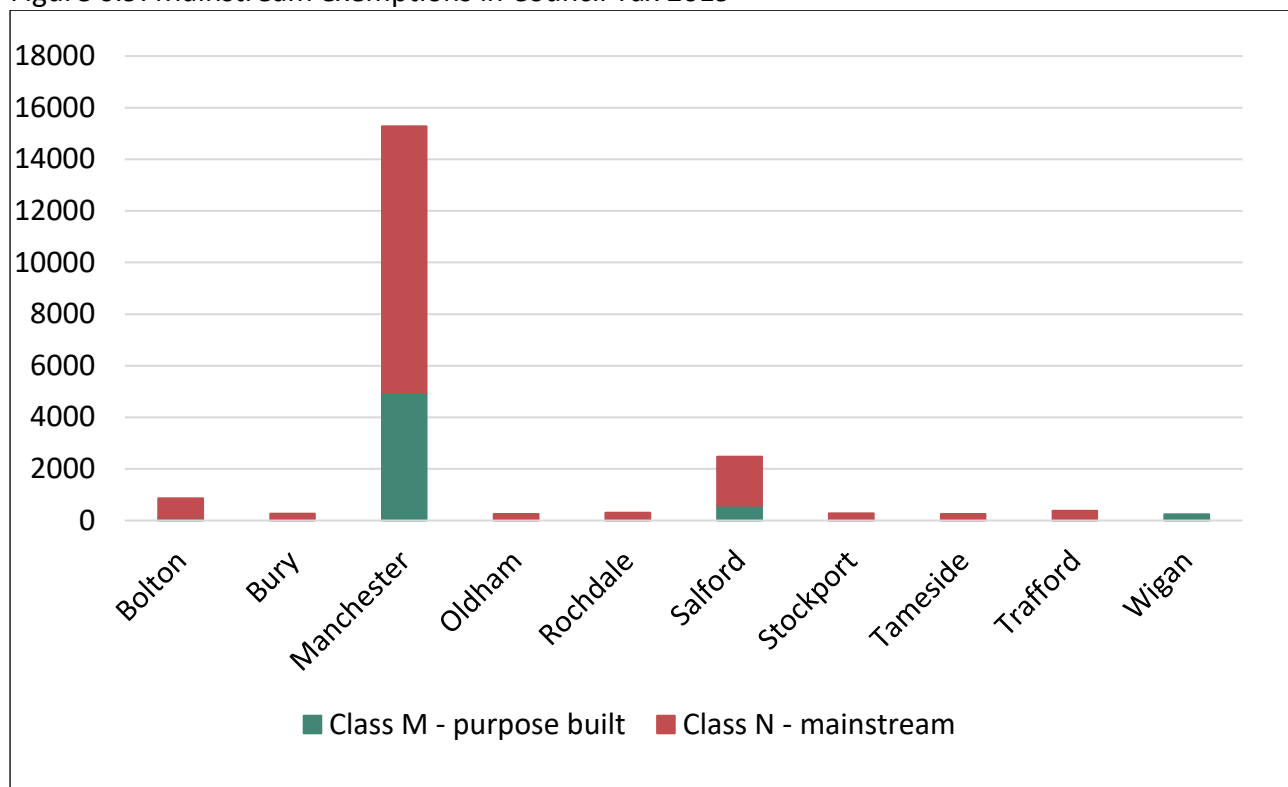
- 6.84 Broadly speaking there are two forms of student accommodation that students in Greater Manchester occupy. Purpose Built Student Accommodation (PBSA), refers to developments that have gone through planning as a dedicated student scheme and can only be let to student occupiers. Either they can be university halls of residence or schemes developed and managed by private providers. The second accommodation type is mainstream accommodation – i.e. properties let within the standard PRS. These can range from shared houses or HMOs through to flats and serviced apartments.
- 6.85 The number of student households exempt from Council Tax in May 2019 across Greater Manchester was 20,577. This has increased steadily over the last 5 years with an average exemption figure of 19,349 households. In May 2019, 71% of these student exemptions were in mainstream accommodation as opposed to custom-built student accommodation.

Table 6.7: Student enrolments at Greater Manchester HEIs 2015 to 2019

Greater Manchester	Number households 2019	Average 2015-2019	Percentage change 2015 to 2019
Occupied only by students, the foreign spouses of students, or school and college leavers (mainstream)	14,717	n/a	n/a
A hall of residence provided predominantly for the accommodation of students. (Purpose built)	5,860	n/a	n/a
Total	20,577	19,349	9.8
England	Number of households 2019	Average 2015-2019	Percentage change 2015 to 2019
Occupied only by students, the foreign spouses of students, or school and college leavers. (mainstream)	270,860	n/a	n/a
A hall of residence provided predominantly for the accommodation of students. (purpose built)	65,664	n/a	n/a
Total	336,524	314,426	18.0

Source: MHCLG, Council Tax Base Local Authority Level: Council Tax Base (CTB) Supplementary Form.

Figure 6.9: Mainstream exemptions in Council Tax 2019



Source: MHCLG, Council Tax Base Local Authority Level: Council Tax Base (CTB) Supplementary Form.

### Manchester

- 6.86 In recent years the student housing market in Manchester has shifted north towards the city centre - into the Oxford Road Corridor area and away from the traditional student neighbourhoods in south Manchester. The ongoing rationalisation of Manchester Metropolitan University's (MMU) estate has played a key role in this redistribution, particularly the closure of the Didsbury campus and the opening of the Birley Fields campus in Hulme.
- 6.87 This redistribution is largely due to a growing number of students living in mainstream apartments, facilitated by the large-scale residential development in the regional centre. Table 6.8 shows the number of students occupying accommodation in the city centre.

Table 6.8 Student Council Tax exemptions within the Manchester city centre apartment market

	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20
Purpose Built Student Accommodation	2,833	2,891	3,082	3,080	3,485	3,635
Mainstream	3,040	2,655	2,941	2,727	2,818	3,242
Total exemptions	5,873	5,546	6,023	5,807	6,303	6,877

Source: Manchester City Council

### *Salford*

- 6.88 In line with the University of Salford's Campus Plan (2011) the University has recently expanded its offer of university accommodation with an extra 1,300 beds at Peel Park Quarter delivered at the start of the 2015/16 academic year.
- 6.89 The concentration of students living in mainstream accommodation in and around the University of Salford campus has remained relatively consistent over time, with particular concentrations in parts of the terraced and apartment market in Langworthy and Broughton. There is also a growing concentration of student households living in Salford Quays, reflecting the offer from the University of Salford in terms of courses and study facilities at MediaCityUK.

### *Bolton*

- 6.90 Students studying at the University of Bolton are more likely to live in mainstream accommodation during term time. This is reflected in the student households exempt from Council Tax in the table above.<sup>85</sup>
- 6.91 Student households are concentrated in the terraced housing stock in neighbourhoods close to the University's campus. Students also occupy purpose-built accommodation in the town centre, following the completion of a number of these schemes over the last five years.

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<sup>85</sup> Bolton Student Housing Survey 2016.

## *Trafford*

- 6.92 A new university 'UA92' is now open in Trafford. As part of this proposal, PBSA will be delivered in phases from 2020. This purpose-built accommodation is expected to house around one third of their students.

## *Summary*

- 6.93 The spatial distribution of students is not expected to alter greatly in the near future in Greater Manchester. The future accommodation needs of students is expected to be met predominantly in Manchester, Salford and Bolton and within Trafford.

## **6.8 Family housing**

- 6.94 In 2018, Greater Manchester had an estimated 339,030 households with dependent children, 164,596 of these households contained just one dependent child and 59,422 contained three or more children (Table 6.9). By 2043, the number of dwellings in Greater Manchester containing any dependent children is projected to rise to just over 361,529, a rise of 6.6% or an actual change of 22,499. Most of this increase is in households with only one child (12,945) and there is projected to be a slight decline in the number of households with two dependent children.
- 6.95 In the North West, the total rise in households with dependent children is expected to be 2.7% from 2018-2043. For England, the increase is 2.4% by 2043. In the North West households with one child account for most of the rise and households (16,550) with small rises for households with two children (4,326) and three or more children (1,883). For England, it is a similar trend with one dependent child households increasing the most (120,806). Two child households increase by 27,912 and three or more child households increase by 7,416.

Table 6.9: Number of households with dependent children 2018 and 2043

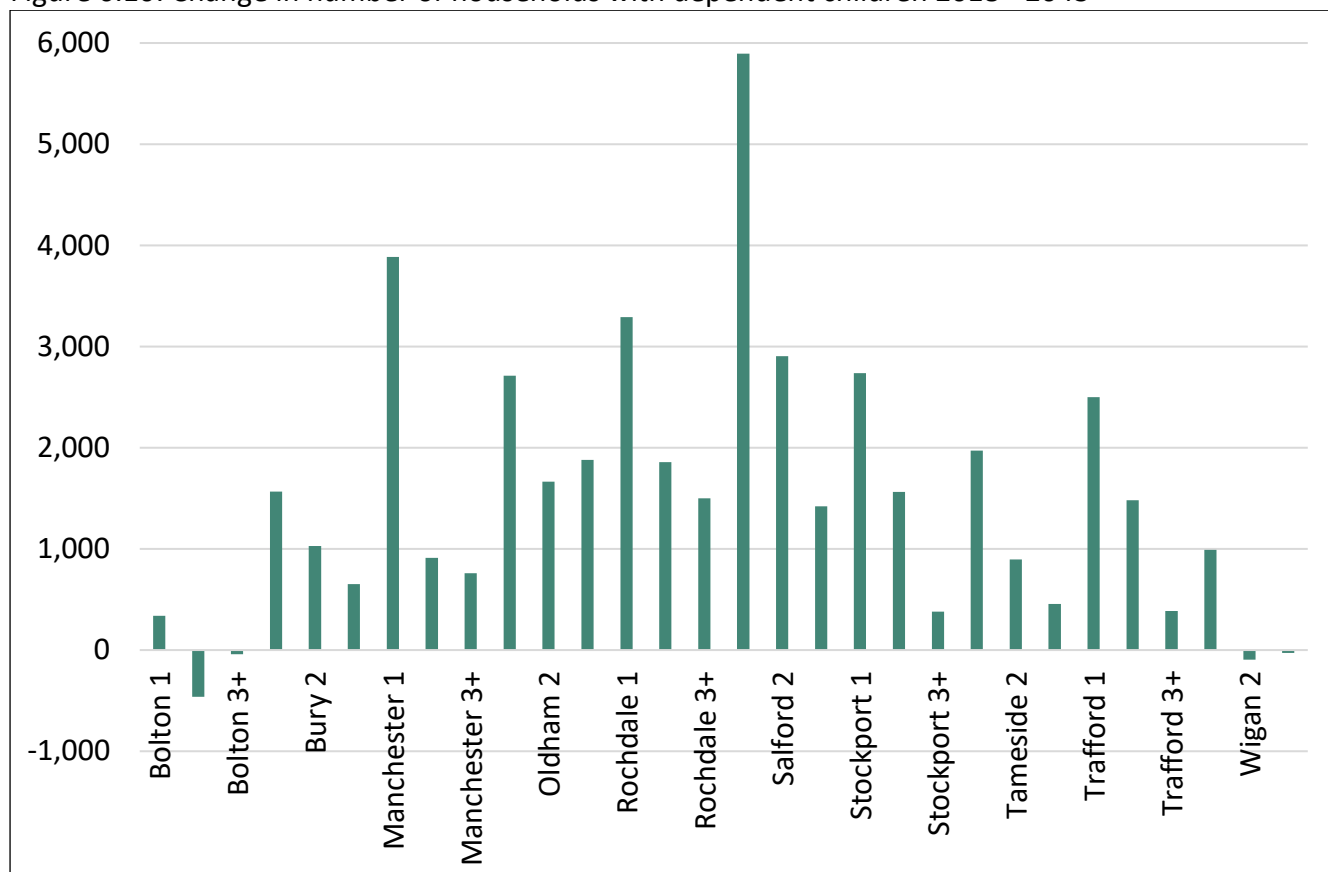
Area	Number of dependent children	Number of households 2018	Number of households 2043	Change in number of households 2018 to 2043	Percentage change in number of households 2018 to 2043
<b>Greater Manchester</b>	1	164,596	177,541	12,945	7.86
	2	115,012	120,887	3,679	6.19
	3 or more	59,422	63,101	5,875	5.11
	<b>All</b>	<b>339,030</b>	<b>361,529</b>	<b>22,499</b>	<b>6.63</b>
<b>North West</b>	1	413,668	430,218	16,550	4.00
	2	295,435	299,761	4,326	1.46
	3 or more	131,497	133,380	1,883	1.43
	<b>All</b>	<b>840,601</b>	<b>863,359</b>	<b>22,759</b>	<b>2.71</b>
<b>England</b>	1	3,042,954	3,163,760	120,806	3.97
	2	2,402,071	2,429,983	27,912	1.16
	3 or more	1,056,982	1,064,398	7,416	0.70
	<b>All</b>	<b>6,502,007</b>	<b>6,658,141</b>	<b>156,134</b>	<b>2.40</b>

Source: ONS, 2018-based Sub National Household Projections

6.96 Figure 6.10 below shows forecast change in households with one, two and three or more children in Greater Manchester from 2018-2043. Only Oldham and Rochdale show an overall forecast decrease in the total number of households with dependent children with decreases of 1.4% and 0.1% respectively. On the other hand, the districts of Salford (22.6%) Trafford (16.1%) and Manchester (15.1%) are expected to show the highest increase in households with dependent children.

6.97 When this is analysed by the number of dependent children, Manchester, Salford and Trafford again are projected to experience an increase in all dependent children's groups (i.e. one child, two children and three or more children). Oldham is only projected to increase the number of households with three or more children (15.5%) and the increase in Tameside is only in the number of households with one child (16.5%). The highest increases are in households with one child in Salford (37.1%), Trafford (26.3%) and Stockport (24%).

Figure 6.10: Change in number of households with dependent children 2018 - 2043



Source: ONS, 2018-based subnational household projections

## 6.9 Armed Forces

6.98 The Armed Forces Covenant covers serving and former members of the Armed Forces and their families. The Government published the Covenant in 2011. It is supported by local authorities, including the GMCA, which reaffirmed its commitment in June 2017 and was awarded a grant of £232,000 to continue to support the Armed Forces through access to services and online learning tools.<sup>86</sup> The Covenant is a commitment to ensure fair treatment of members of the armed forces in many aspects of civilian life, including housing.

<sup>86</sup> GMCA Press Release, [£232,000 BOOST FOR FORCES PERSONNEL, FAMILIES AND VETERANS IN GREATER MANCHESTER](#), 30 June 2017

### *Serving members of the armed forces*

- 6.99 Serving members of the armed forces are generally entitled to service accommodation, either Single Living Accommodation (SLA) or Service Family Accommodation (SFA) if they have dependent children. Ministry of Defence statistics show that around 78% of serving personnel are housed in this type of accommodation.<sup>87</sup>
- 6.100 As of February 2017, there were almost 50,000 SFA units in England; no units of SFA were recorded in Greater Manchester, but there were 308 in Lancashire. No detailed geographical breakdown was given for SLA, but there are 126,000 units in England.<sup>88</sup>

### *Ex-service personnel*

- 6.101 The Armed Forces Covenant also covers the housing of ex-service personnel. There are a number of housing options for those who have left the armed forces, including:
- Forces Help to Buy: a scheme currently in its pilot stage to allow service personnel to borrow up to half of their salary (up to a maximum of £25,000) interest free, to pay for a deposit for a home and other costs such as legal fees;<sup>89</sup>
  - Government funded shared ownership: ex-service personnel and surviving partners are given priority for these schemes for 2 years after service;<sup>90</sup> and
  - Accessing social housing through housing registers and housing associations.

### *Access to social housing for ex-service personnel*

- 6.102 Local authorities are able to make provision for ex-service personnel and their families to receive additional priority for rehousing in their allocations policies. Provisions include awarding additional preference to ex-service personnel in housing need, as well as removing local connection criteria for ex-service personnel and their families. All local authorities in Greater Manchester refer to ex-service personnel in

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<sup>87</sup> [House of Commons Library Briefing Paper: Armed Forces Housing](#), June 2017

<sup>88</sup> [Armed Forces: Housing: Written question – 68441](#)

<sup>89</sup> [Ministry of Defence Guidance: Forces Help to Buy: help to get on the property ladder](#)

<sup>90</sup> [The Armed Forces Covenant Annual Report, 2016](#)

their allocations policies, with provisions to award higher need and forego local connection criteria.

### *Supported housing for the armed forces*

6.103 In Greater Manchester there are some schemes providing supported housing for ex-service personnel, including Broughton House in Salford. The Greater Manchester Supported Housing Census has shown that there are a small number of supported housing schemes for veterans with around 20 bed spaces.

## **6.10 Gypsies and Travellers**

6.104 A robust evidence base has been developed in Greater Manchester for the current and future accommodation needs of Gypsies and Travellers and Travelling Showpeople across the city region.

6.105 A comprehensive Gypsy and Traveller Accommodation Assessment (GTAA)<sup>91</sup> was completed in 2014, with findings based on interviews with 496 Gypsy and Traveller and Travelling Showperson households across Greater Manchester. This evidence base was subsequently updated in 2018<sup>92</sup> and included a desktop review of relevant data sources and careful fieldwork observations across sites/yards<sup>93</sup> in Greater Manchester.

6.106 The 2018 GTAA Update takes into account the change in definition of the need for Gypsy and Traveller groups, which was revised in the Government's 'Planning policy for traveller sites' (PPTS) (August 2015). The definition now excludes, for planning purposes, Gypsies and Travellers who have stopped travelling on a permanent basis, although continues to include those who have ceased to travel temporarily. This has created a more restricted 'PPTS 2015' definition that applies to those who follow a nomadic habit of life, as compared with a broader 'cultural' definition.

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<sup>91</sup> [Gypsy and Traveller and Travelling Showperson Accommodation Assessment \(GTAA\) arc4 \(2014\)](#)

<sup>92</sup> [Gypsy and Traveller and Travelling Showperson Accommodation Assessment Update \(GTAA Update\) arc4 \(2018\)](#)

<sup>93</sup> "Pitch" means a pitch on a "gypsy and traveller" site and "plot" means a caravan on a "travelling showpeople" site (often called a "yard"). This terminology differentiates between residential pitches for "gypsies and travellers" and mixed-use plots for "travelling showpeople" which may/will need to incorporate space or to be split to allow for the storage of equipment.



- 6.107 The 2018 study provides analysis of households likely to meet this PPTS 2015 definition (based on the travelling practices) and which households do not (because they do not travel) but instead are included within a broader cultural definition.
- 6.108 Using both the PPTS and cultural definition of need allows a range of pitch need to be considered. The study recommends PPTS-defined need as a minimum need figure and the higher culturally defined need figure providing an upper range for pitch/plot provision requirements over the relevant period.

### *Current provision*

- 6.109 The table below summarises the range of sites known to the local authorities across Greater Manchester, as reported in spring 2018. There are 110 Gypsy and Traveller pitches on permanent local authority/Housing Association owned sites, 91 pitches on permanent private sites, five pitches on temporary private sites and seven pitches on unauthorised sites. Of the total 213 pitches identified, 31 were vacant leaving 182 occupied pitches in Greater Manchester, which accommodate 182 households. In terms of yard provision for Travelling Showpeople, there are 345 plots comprising 177 plots on yards owned by local authorities and 168 plots on permanent private yards. Two plots were identified as empty but are assumed unavailable for letting, as they are likely to be licenced to particular households.

Table 6.10: Current provision of Traveller Pitches and Travelling Showperson plots

	Permanent Local Authority / Housing Association	Permanent Private	Temporary Private	Unauthorised	Total	Vacant	Total Occupied
Gypsies and Traveller Pitches (Cultural definition)	110	91	5	7	213	31	182
Travelling Showpeople Plots	177	168	0	0	345	2	343

Source: *arc<sup>4</sup> 2018 GTAA*

6.110 The 2018 GTAA Update also found that 98% of Gypsies and Travellers own their own home and 2% rent from a Council. All Travelling Showpeople own their own home.

#### *Future need*

6.111 The 2018 study shows that there is a projected cultural need of 58 pitches for Gypsies and Travellers across Greater Manchester over the next five years (2017/18 to 2021/22).

6.112 The study also shows a total net cultural requirement of 103 pitches (accounting for 31 pitches which are currently vacant) over the period 2017/18 to 2035/36. As there is likely to be some turnover resulting in the availability of pitches, these figures should be regarded as being at the upper end of actual requirements based on current survey evidence and assumed household formation rates from households living on pitches.

6.113 For Travelling Showpeople, the analysis indicates a projected need of 148 plots in Greater Manchester over the period 2017/18 to 2021/22; and a total requirement of 204 plots over the period 2017/18 to 2035/36 based on households currently living on plots. Given that the need is based on demographic information of households actively participating in Travelling Showperson activities, it is considered that all of this need meets the PPTS definition. As there is likely to be some turnover resulting in the availability of plots the figures should be regarded as being at the upper end of actual requirements based on latest demographic evidence.

Table 6.11: Future provision of pitches and plots 2017/18 to 2035/36

	2017/18 - 2021/22	2022/23- 2026/27	2027/28- 2029/30	2030/31- 2035/36	Total
Gypsies and Traveller Pitch Requirements (PPTS definition)	18.9	8.1	10.4	6.2	43.5 (44 rounded)
Gypsies and Traveller Pitch Requirements (Cultural definition)	58	25	32	19	134
Travelling Showpeople Plot Requirements	148	12	21	23	204

Source: *arc<sup>4</sup> 2018 GTA*

- 6.114 The 2018 GTAA update identifies a considerable level of overcrowding on existing yards and recommends that up to 19 acres of land is identified for Travelling Showperson yard development, assuming that each acre would support 10 plots i.e. a caravan and space for equipment.
- 6.115 The study also provides an assessment of the need for temporary places to stop while travelling. Temporary, or transit, sites are intended for short-term use while in transit. Analysis of unauthorised encampment data and contextual information in the 2018 study indicates that new transit provision is needed across Greater Manchester and recommends provision for 59 transit pitches be made across the city-region.

***The full 2018 GTAA Update provides a detailed analysis on current and future need by district, and is available [here](#).***

# 7 Affordable Housing Need Assessment

## Chapter summary

We all need homes that we can afford, but as we saw in [Chapter 5](#), trying to agree what we mean by 'affordable' homes can be a complex task.

Government guidance tells us we should try to assess affordable housing need to help us decide how much additional housing we need overall, based on their definition of "social rented, affordable rented and intermediate housing, provided to eligible households whose needs are not met by the market."

The method Government asks us to follow includes estimates of:

- The need for affordable housing now;
- How that might change through time;
- How many affordable homes will be available to re-let as people move out of them;
- How many affordable homes will be built or could be made available from empty properties.

To make that calculation, we also need to make forecasts and assumptions about a range of things including how many and what types of households will emerge in the future, how many might be homeless, in temporary or overcrowded accommodation, what household incomes might be and the future costs of renting and buying property, across different parts of Greater Manchester.

The figure we come to is a total annual need figure for affordable housing of 5,850 households. That is not a target for building new affordable housebuilding through the planning system, but it is something we need to consider in developing the PfE and in our work with Homes England, housing providers and other partners to deliver the affordable homes we need for the future.

## **7.1 Introduction**

- 7.1 An assessment of affordable housing need has been undertaken, which is compliant with Government guidance to identify whether there is a shortfall or surplus of affordable housing in Greater Manchester. This has estimated current annual housing need of 5,850 households; this figure excludes existing social housing tenants where they would release a home for another household in need.
- 7.2 The link between the affordable housing need and the overall need for housing (or the LHN) is complex. Many of the households in need are already living in accommodation (existing households) and simply require an alternative form of housing, and the analysis does not suggest that there is any strong evidence of a need to allocate additional housing land specifically to help address the affordable need.
- 7.3 It should be stressed that these final figures are not targets for affordable housebuilding but a check to understand likely future demand. Besides delivery of affordable housing on mixed-tenure development schemes, there are also several other mechanisms that could deliver affordable housing. These include a wide range of funding programmes from Homes England, including their Shared Ownership and AHP and funding for specialist forms of affordable housing, such as extra care provision. Other sources such as Community Land Trusts (CLTs) may also deliver new affordable housing. Net changes in affordable housing stock may also be influenced by estate regeneration schemes, as well other factors such as the proposed extension of the Right-to-Buy to housing association properties.
- 7.4 The affordable housing need does not therefore represent an assessment of what proportion of additional households might require affordable housing. Instead, the model considers what needs can be expected to arise from both existing and newly forming households who require financial support to access suitable housing. This is then compared with the projected supply of affordable housing expected to arise from the turnover of existing stock and affordable housing in the development pipeline.
- 7.5 The affordable housing model thus includes supply-side factors. The net need figures derived are influenced by the current stock of affordable housing and its turnover.

This is influenced by past policies, funding mechanisms and investment decisions (at both the national and local levels), which in turn influence the need today.

- 7.6 Given that there has been some decrease in affordable housing stock over the last 15 years, the PRS has in effect taken on an increasing role in providing housing for households that require financial support in meeting their housing needs, supported by LHA. While the PRS does not fall within the definition of “affordable housing” it has evidently been playing a role in meeting the needs of households who require financial support with housing costs. The Government recognised this and indeed legislated through the 2011 Localism Act to allow councils to discharge their “homelessness duty” through providing an offer of a suitable property in the PRS.

## 7.2 Methodology

- 7.7 The affordable housing need must be calculated to establish the unmet need for affordable housing notwithstanding any conclusions around LHN in [Chapter 3](#) of this document, or our analysis of housing affordability in [Chapter 5](#).
- 7.8 Affordable housing is defined in the NPPF as:

*“Housing for sale or rent, for those whose needs are not met by the market (including housing that provides a subsidised route to home ownership and/or is for essential local workers)”.*<sup>94</sup>

- 7.9 PPG (*Housing and Economic Needs Assessment*) provides guidance on calculating affordable housing need, replacing the 2007 SHMA Practice Guidance,<sup>95</sup> stating that local authorities need to:

*“...estimate the current number of households and projected number of households who lack their own housing or who cannot afford to meet their housing needs in the market.”*

(Paragraph: 019 Reference ID: 2a-019-20190220)

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<sup>94</sup> [NPPF, Annex 2: Glossary](#)

<sup>95</sup> [Communities and Local Government Strategic Housing Market Assessments Annexes Planning](#)

- 7.10 This approach focuses on the use of secondary data and careful consideration must be given to the data available and relevant to calculating affordable housing need. For example, households who have a need due to issues such as insecure tenancies or an inability to meet housing costs are not readily captured from secondary data sources. Assumptions also need to be made about the likely income levels of different groups of the population (such as newly forming households), recognising that such households' incomes may differ from those in the general population.
- 7.11 The same PPG suggests that housing registers can inform estimate levels of affordable housing need. The allocations policies of districts can however vary considerably in their approaches to awarding banding and points to households on housing registers. This makes it difficult to use a housing register to define underlying needs in a consistent way. Housing registers also include households who no longer have a need and there will be households in need who do not register because they perceive (rightly or wrongly) that they have little chance of being allocated a suitable home.
- 7.12 The PPG<sup>96</sup> advises how to calculate unmet need for affordable housing by assessing past trends and estimates of:
- homeless households;
  - those in priority need who are currently housed in temporary accommodation;
  - households in overcrowded housing;
  - concealed households;
  - existing affordable housing tenants in need (i.e. householders currently housed in unsuitable dwellings); and
  - households from other tenures in need and those that cannot afford their own homes, either to rent, or to own, where that is their aspiration.

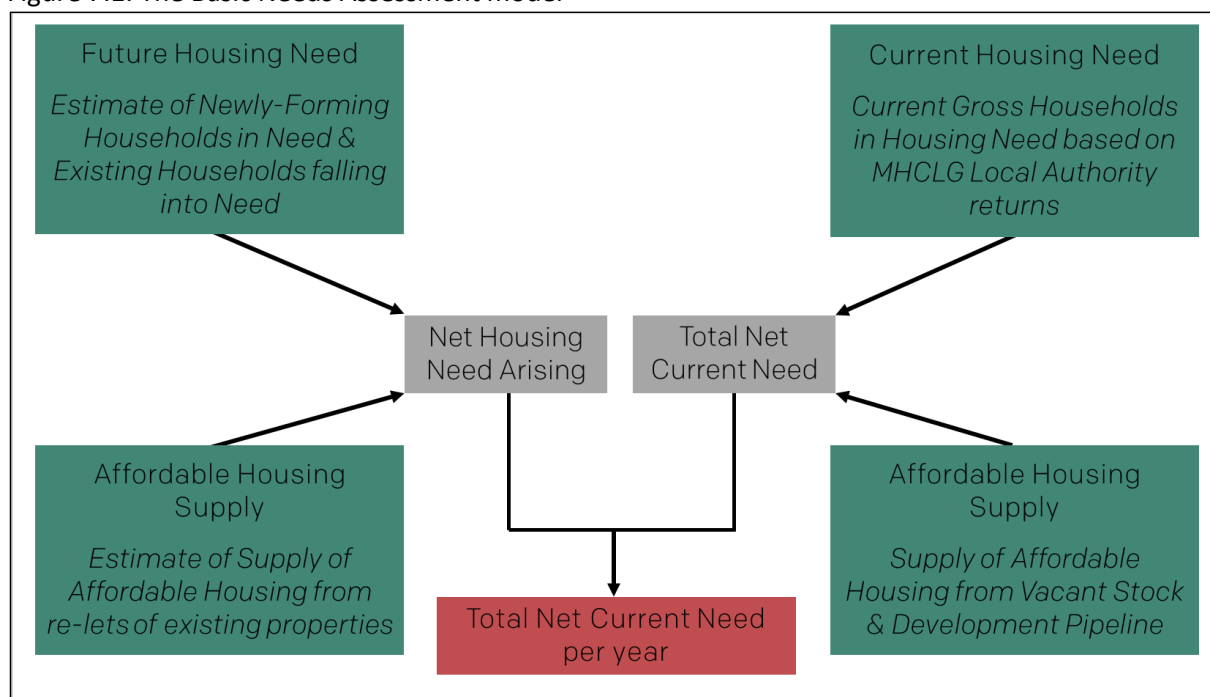
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<sup>96</sup> PPG - Housing and Economic Needs Assessment, Paragraph: 020 Reference ID: 2a-020-20190220 [Housing and economic needs assessment - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/414442/Housing_and_economic_needs_assessment_-_GOV.UK.pdf)



7.13 The process used to model to a total net housing need per year is illustrated below (Figure 7.1). The flow diagram shows future housing need and supply coming together with current need and supply to provide an estimate of the expected total net current housing need per year.

Figure 7.1: The Basic Needs Assessment model



7.14 The data used to underpin the methodology has been agreed through a collaborative approach working with Greater Manchester’s ten districts.

### 7.3 Stages of the assessment

7.15 From the PPG the following broad stages can be outlined to assess affordable housing need.

Table 7.1: Stages to assess affordable housing need

Stage	Details
Stage 1	Current unmet housing need (gross backlog)
Stage 2	Future housing need (net annual)
Stage 3	Affordable housing supply (net annual)
Stage 4	Total housing need (net annual)

***Stage 1: Current unmet housing need (gross backlog)***

- 7.16 Stage 1 assesses the number of households who lack their own housing or live in unsuitable housing and cannot afford to meet their housing needs in the market. It provides an understanding of the scale of housing need, including any backlog. All of Greater Manchester's districts use a housing register to record households who have expressed an interest in living in accommodation managed by the local authority or RPs.
- 7.17 Local authorities report these statistics to MHCLG, which are then compiled into a national statistical data return.<sup>97</sup> The figures for Greater Manchester are shown in Table 7.2. The figures provide a summary of the total current unmet housing need in Greater Manchester.
- 7.18 These figures include homeless households, overcrowded and concealed households and any other groups in reasonable preference (see [Section 5.5](#) for a further discussion of reasonable preference). To ensure the robustness of this data, these figures have been discussed and approved by each of the ten Greater Manchester districts, with five districts providing revised data. Otherwise, an average of unmet need has been used with the available data from 2011/12 to 2018/19 to smooth out some anomalies over time.

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<sup>97</sup> [MHCLG Statistical data set: Local authority housing statistics data returns for 2015 to 2016](#)

Table 7.2: Total current unmet housing need (gross backlog)

<i>Area</i>	Total households on the housing waiting list in a reasonable preference category
Bolton*	3,261
Bury	938
Manchester	5,997
Oldham	4,015
Rochdale*	1,661
Salford*	6,094
Stockport	3,217
Tameside*	4,040
Trafford	1,369
Wigan*	1,510
<b>Greater Manchester</b>	<b>32,102</b>

Source: \*=District figure provided otherwise MHCLG Local Authority Return – Section C – Allocations 2011/12 to 2018/19

### ***Stage 2: Total newly arising affordable housing need (gross per year)***

7.19 Stage 2 of the need's assessment model estimates the scale of newly arising need. This is based on estimating how many newly formed households will be unable to buy or rent in the market and the number of existing households who become unable to buy or rent in the market in any year.

#### **Step 2.1: New household formation**

7.20 This stage begins with estimating the number of new households likely to form each year. The PPG suggests that MHCLG household projections are an appropriate data source for this and that a gross figure should be used.

7.21 This has been undertaken by considering the changes in households in specific five-year age bands relative to numbers in the age band below five years previously, to provide an estimate of gross household formation.<sup>98</sup> To put it more simply, whatever else is happening in terms of overall household change, a person aged 15 in 2016 will

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<sup>98</sup> This differs from numbers presented in the demographic projections which are for net household growth and the two are not directly comparable (although there will be some relationship between the two).

be aged 35 in 2036 and would be likely to form a household at some point over this period.

- 7.22 During this stage, only newly forming households headed by a person aged under 45 have been considered. This is consistent with MHCLG 2007 SHMA Practice Guidance that after age 45 headship (household formation) rates ‘plateau’. There will be new households formed by older household heads (e.g. due to relationship breakdown) but the number is expected to be relatively small.
- 7.23 Using this data, it is possible to calculate for each ten-year population cohort the change in the headship rate between 2019 and 2029. When divided by ten, this gives the annual number of extra households formed by this cohort. Since most household formation is concentrated in the younger household age ranges, this analysis only looks at the 15-24, 25-34 and 35-44-year-old cohorts from 2011. The figures calculated using this methodology are presented below (Table 7.3).

Table 7.3: Gross household formation rates 2019 to 2029

<b>Area</b>	<b>Annual Formation Rate</b>
Bolton	1,922
Bury	1,231
Manchester	4,805
Oldham	1,366
Rochdale	1,292
Salford	1,763
Stockport	1,786
Tameside	1,400
Trafford	1,399
Wigan	2,011
<b>Greater Manchester</b>	<b>18,976</b>

Source: ONS, 2018-based household projections

### Step 2.2: Proportion of newly arising households unable to buy or rent in the market

- 7.24 The PPG guidance requires a calculation of the minimum household income needed to access lower quartile (entry level) market housing. It further requires an assessment of the proportion of newly forming households who will be unable to buy or rent in the market.

7.25 To estimate the cost of housing in Greater Manchester, ONS lower quartile house price data and VOA rental cost data has been used (Table 7.4).

Table 7.4: Indicative cost of housing in Greater Manchester

Area	Lower quartile house price (Quarter 3, 2019)*	Lower quartile Valuation Office Agency monthly rent**
Bolton	£92,000	£450
Bury	£120,000	£500
Manchester	£129,000	£625
Oldham	£91,250	£475
Rochdale	£91,000	£435
Salford	£122,500	£575
Stockport	£155,000	£595
Tameside	£110,000	£475
Trafford	£182,000	£675
Wigan	£96,000	£425
<b>Greater Manchester</b>	<b>£118,875</b>	<b>£495</b>

Source: \*ONS Lower Quartile House Price data by Local Authority, Table 6a.

\*\* VOA Table 2.7: Summary of monthly rents recorded 2019

7.26 The 2007 SHMA Guidance considers a household can afford to buy a home if the price is no more than 3.5 times their gross household income. This, however, does not consider money needed for deposits and/or the stricter lending criteria over more recent years. This is considered in more detail in [Chapter 6](#) above. Estimates of the income needed to access mortgage lending or afford rent as well as other basic needs are shown in Table 7.5.

Table 7.5: Income levels assumed to cover housing costs in Greater Manchester

Area	Required household income to access housing market (3.5 times)	Required household income to rent (where annual LQ rent is a third of annual income)
Bolton	£26,286	£18,000
Bury	£34,286	£20,000
Manchester	£36,857	£25,000
Oldham	£26,071	£19,000
Rochdale	£26,000	£17,000
Salford	£35,000	£22,000
Stockport	£44,286	£23,800
Tameside	£31,429	£19,000
Trafford	£52,000	£26,000
Wigan	£27,429	£17,000
<b>Greater Manchester</b>	<b>£33,964</b>	<b>£19,800</b>

Source: Based on ONS and VOA data 2019.

- 7.27 Taking this into account, households with a household income of under £19,800 at the Greater Manchester level could be judged as unable to **buy or rent** in the market. However, there are substantial differences at district level, highlighted in the table above.
- 7.28 CACI's Paycheck data is used to estimate the number of households in each district that would be unable to access the housing market. The total number of households in each district that fall below the district rental income are shown in Table 7.6.

Table 7.6: Number of current households assumed to be unable to access the housing market in Greater Manchester, 2019

<i>Area</i>	Total households	Number of current households that could not access the housing market	Proportion of current households that could not access the housing market
Bolton	120,498	40,569	34%
Bury	81,157	25,792	32%
Manchester	219,196	111,350	51%
Oldham	93,365	35,319	38%
Rochdale	91,737	30,383	33%
Salford	114,866	50,195	44%
Stockport	126,562	43,506	34%
Tameside	98,420	35,143	36%
Trafford	98,217	33,978	35%
Wigan	143,542	42,927	30%
<b>Greater Manchester</b>	<b>1,187,560</b>	<b>449,161</b>	<b>38%</b>

Source CACI Paycheck (2019): Household Banding.

### Step 2.3: Existing households falling into need

- 7.29 The SHMA Guidance recommends that the calculation of the existing households falling into need should be based on households “who have entered the housing register and been housed within the year” (page 46, paragraph 5).
- 7.30 This step can be calculated by using Continuous Recording of lettings and sales in social housing in England (CORE) data. Newly forming households have been considered in the previous step, so are excluded from the CORE data (for example, where previous accommodation type was living with family, staying with friends or a children’s home/foster care). Existing social tenants who are transferring between social/affordable homes are also excluded as their need is for a different, rather than additional, affordable home.

Table 7.7: Estimated existing households falling into need

Area	Total count [1]	Previous tenure							Step 2.3 Existing households falling into need (i.e. excluding all newly forming households [10] (5-8))
		LA General Needs tenancy [2]	HA/PRP General needs tenancy [3]	Existing Social tenants- "transfers" [4] (2 + 3)	Existing (non-social) Households falling into need [5] (1-(2+3))	Other* [6]	Previously Living with Friends or Family [7]	Newly forming households [8] (6+7)	
Bolton	2,320	266	407	673	1,647	368	407	775	872
Bury	1,071	289	95	384	687	101	205	306	381
Manchester	3,394	346	514	860	2,534	216	829	1,045	1,489
Oldham	1,785	216	351	567	1,218	194	326	520	698
Rochdale	1,847	158	424	582	1,265	198	470	668	597
Salford	2,194	277	380	657	1,537	193	458	651	886
Stockport	963	177	131	308	655	83	267	350	305
Tameside	1,982	78	351	429	1,553	139	614	753	800
Trafford	1,075	45	345	390	685	69	248	317	368
Wigan	2,245	503	205	708	1,537	268	516	784	753
<b>Greater Manchester</b>	<b>18,876</b>	<b>2,355</b>	<b>3,203</b>	<b>5,558</b>	<b>13,318</b>	<b>1,829</b>	<b>4,340</b>	<b>6,169</b>	<b>7,149</b>

Source: [CORE Lettings data 2018/19](#)

*\*Other includes more sensitive categories that have been combined to avoid disclosure. This includes previous tenure being that of children's home/foster care, hospitals, women's refuges, Home Office asylum support, prison/approved hostel support. It is not possible in this dataset to isolate children's homes/foster care so the broader definition has been used.*



7.31 CORE lettings data for the period 1 April 2018 to 31 March 2019 has been used to estimate the number of existing households falling into need in 2018/19 as 7,149 across Greater Manchester, shown as step 2.3 in Table 7.7.

**Step 2.4: Total newly arising housing need (gross per year)**

7.32 The assumed total newly arising housing need can be calculated by adding the number of existing households falling into need to the number of newly formed households unable to afford market housing. In Greater Manchester, there are an estimated 14,326 people classed as newly arising housing need per year.

7.33 Table 7.8 illustrates the calculation of the gross annual arising housing need.

Table 7.8: Assumed total newly arising housing need (gross per year)

Area	Step 2.1	Step 2.2	Step 2.3	Step 2.4
	New household formation (MHCLG figures (see above Figure 3))	Proportion of newly arising households unable to buy or rent in the market	Existing households falling into need	Total newly arising housing need (gross per year) = (2.1 x 2.2 + 2.3)
Bolton	1,922	0.34	872	1,519
Bury	1,231	0.32	381	772
Manchester	4,805	0.51	1,489	3,930
Oldham	1,366	0.38	698	1,215
Rochdale	1,292	0.33	597	1,025
Salford	1,763	0.44	886	1,662
Stockport	1,786	0.34	305	919
Tameside	1,400	0.36	800	1,300
Trafford	1,399	0.35	368	852
Wigan	2,011	0.30	753	1,354
<b>Greater Manchester</b>	<b>18,976</b>	<b>0.38</b>	<b>7,149</b>	<b>14,548</b>

*Note: New household formation figures based on 2018 projections.*

***Stage 3: Current and future affordable housing supply***

**Step 3.1: Affordable dwellings occupied by households in need**

7.34 The PPG indicates that the number of dwellings vacated by current occupiers that are fit for use by other households in need should be identified. This is an important

consideration in establishing the net levels of housing need, but the movement of these households within affordable housing will have a nil effect in terms of housing need.

- 7.35 As such, transfer applications have been excluded from the waiting list figures at step 1.3 and the level of affordable dwellings occupied by households in need is zero for the purposes of this calculation.

### Step 3.2: Surplus stock

- 7.36 There may be 'surplus' vacant affordable housing stock that could be brought back into use to meet housing need. The SHMA Guidance indicated that a certain level of voids is normal, however if an excess of 3% of long-term stock is empty (excluding affordable dwellings awaiting demolition), then these should be considered surplus stock.
- 7.37 The relevant data are shown in the table below, taken from MHCLG Local Authority Housing Statistics<sup>99</sup> and Statistical Data Returns.<sup>100</sup> Data from local authorities can be broken down by the length of time the property is vacant, but data from housing providers in their statistical return cannot, so the total value is used here.

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<sup>99</sup> [MHCLG Statistical data set: Local authority housing statistics data returns for 2013 to 2014](#)

<sup>100</sup> [Homes and Communities Agency: National Statistics Statistical Data Return 2013 to 2014](#)

Table 7.9: Calculation of surplus stock

Area	Local Authority*		Housing Provider**			Total	
	Stock	Vacant dwellings for over 6 months and available for rent	Total Stock of General Needs – self-contained - owned low cost rental accommodation	General Needs self-contained units vacant and available for letting	Stock	Vacant dwellings available for rent	Percentage of vacant stock
Bolton	0	0	20,813	106	20,813	106	0.5
Bury	7,940	9	3,499	14	11,439	23	0.2
Manchester	15,845	0	45,579	172	61,424	172	0.3
Oldham	2,062	5	16,809	68	18,871	73	0.4
Rochdale	0	0	18,127	141	18,127	141	0.8
Salford	1,227	0	26,848	84	28,075	84	0.3
Stockport	11,306	0	4,185	17	15,491	17	0.1
Tameside	0	0	19,157	147	19,157	147	0.8
Trafford	0	0	11,699	37	11,699	37	0.3
Wigan	21,896	43	2,081	24	23,977	67	0.3
<b>Greater Manchester</b>	<b>60,276</b>	<b>57</b>	<b>168,797</b>	<b>810</b>	<b>229,073</b>	<b>867</b>	<b>0.4</b>

Source: \*MHCLG [Local authority housing data](#)\*. \*\*[Regulator of Social Housing Statistical Data Return 2018 to 2019](#)

7.38 Table 7.9 demonstrates there is no surplus stock, since the percentage of vacant stock is well below 3% in all districts. The figure for this step of the assessment is therefore **zero**.

**Step 3.3: Committed supply of new affordable units**

7.39 New affordable dwellings that are committed at the time of the assessment should also be considered. This includes housing on sites with full or outline planning permission, or where Government funding has been allocated to a specific scheme. This estimate includes developments by RPs and sites where affordable housing will be provided through Section 106 agreements. Guidance suggests that only those affordable dwellings that have been secured on sites and are most likely to go ahead or currently under construction can be included.

Table 7.10: Committed supply of new affordable units

Area	Total affordable starts on site 2018/19
Bolton	49
Bury	26
Manchester	491
Oldham	57
Rochdale	236
Salford*	1,245
Stockport	236
Tameside	63
Trafford	124
Wigan	266
<b>Greater Manchester</b>	<b>2,007</b>

Source: \*District own data. [Homes England 2018/19](#).

**Step 3.4: Units to be taken out of management**

7.40 Guidance outlines the need to estimate any likely losses of affordable housing units that will result in households needing to be re-housed. Planned demolitions are only counted if they are currently occupied. In the absence of a robust and consistent published dataset, Greater Manchester districts have been consulted and confirmed it is reasonable to assume this number to be zero for our purposes.

Step 3.5: Assumed total affordable housing stock available

7.41 The total affordable dwelling stock that is available is therefore assumed to be the sum of steps 3.1 (dwellings currently occupied by households in need), 3.2 (surplus stock) and 3.3 (committed additional housing stock), minus 3.4 (units to be taken out of management). The following table illustrates this calculation.

Table 7.11: Total available affordable housing stock

Area	Step 3.1	Step 3.2	Step 3.3	Step 3.4	Step 3.5
	Affordable dwellings occupied by households in need	Surplus stock	Committed supply of new affordable housing	Units to be taken out of management	Total affordable housing stock available = 3.1 + 3.2 + 3.3 – 3.4
Bolton	0	0	49	0	49
Bury	0	0	26	0	26
Manchester	0	0	491	0	491
Oldham	0	0	57	0	57
Rochdale	0	0	236	0	236
Salford	0	0	1,245	0	1,245
Stockport	0	0	236	0	236
Tameside	0	0	63	0	63
Trafford	0	0	124	0	124
Wigan	0	0	266	0	266
<b>Greater Manchester</b>	<b>0</b>	<b>0</b>	<b>2,793</b>	<b>0</b>	<b>2,793</b>

Step 3.6: Estimated annual supply of social housing re-lets

7.42 Step 3.6 estimates the number of units that become available for re-let to a new household, with the PPG clear that this should be calculated based on past trends. The average number of re-lets over the previous four years have been used to predict future levels. Transfers of tenancies to other household members have not been included, with only properties that come up for re-let being counted. The average number of social re-lets required for the calculation (general needs, supported housing and affordable rent) is shown in the table below as an average of

lettings between 2013/14 and 2018/19 and includes local authority and RP (mainly housing association) properties at both social and affordable rent levels.

Table 7.12: Estimating annual supply of social re-lets: average 2013/14 and 2018/19

Area	Total Count	LA General Needs tenancy	PRP General needs tenancy	Supported housing	Lets to Existing Social Tenants	Re-lets to new household
Bolton	2,712	275	595	141	1,011	1,701
Bury	1,209	432	107	95	634	575
Manchester	5,181	689	910	360	1,960	3,222
Oldham	2,034	256	338	71	665	1,369
Rochdale	1,893	124	393	103	619	1,274
Salford	2,885	310	646	106	1,062	1,823
Stockport	1,320	255	141	45	441	879
Tameside	2,243	80	435	156	671	1,572
Trafford	1,195	102	307	70	478	716
Wigan	2,234	545	155	107	806	1,429
<b>Greater Manchester</b>	<b>22,905</b>	<b>3,067</b>	<b>4,027</b>	<b>1,252</b>	<b>8,345</b>	<b>14,560</b>

Source: CORE lettings data 2013/14 to 2018/19

### Step 3.7: Future annual supply of intermediate affordable housing

7.43 The PPG recommends that the number of intermediate units that come up for re-let or re-sale should be taken into account in this stage. The former SHMA Guidance suggested that properties that are no longer affordable, e.g. social rented homes bought under the Right to Buy and shared equity homes where the purchaser has entirely bought out the landlord's share should not be included within this stage. At present, we have left a figure for the annual supply of intermediate housing out of the methodology due to a lack of robust and consistent figures across the districts. It is considered that any such figures would be low for the Greater Manchester districts, as levels of shared ownership are low across the conurbation.

### Step 3.8: Future annual supply of affordable housing units

7.44 The PPG clarifies that the future annual supply of affordable housing units is the sum of social re-lets (step 3.6) and intermediate affordable units that are re-let or resold (step 3.7). The table below illustrates this calculation.

Table 7.13: Assumed future annual supply of affordable housing units

Area	Step 3.6	Step 3.7	Step 3.8
	Annual supply of social re-lets (net)	Future annual supply of intermediate affordable housing	Annual supply of affordable housing (3.6 + 3.7)
Bolton	1,701	0	1,701
Bury	575	0	575
Manchester	3,222	0	3,222
Oldham	1,369	0	1,369
Rochdale	1,274	0	1,274
Salford	1,823	0	1,823
Stockport	879	0	879
Tameside	1,572	0	1,572
Trafford	716	0	716
Wigan	1,429	0	1,429
<b>Greater Manchester</b>	<b>14,560</b>	<b>0</b>	<b>14,560</b>

Source: CORE

#### **Stage 4 Estimate of net additional affordable housing requirement**

7.45 The PPG advises that the total need for affordable housing be calculated by subtracting total available stock from total gross need and converting into an annual flow. This can then be used to establish an aggregate estimate of net annual affordable housing requirement.

Table 7.14: Estimate of net additional affordable housing requirements

<i>Area</i>	Total net need = Step 1.4 - Step 3.5	Annual flow (20% of total net need)	Estimated net annual affordable housing requirement = (2.4 + Annual flow) - 3.8
Bolton	3,261	642	461
Bury	938	182	379
Manchester	5,997	1,101	1,810
Oldham	4,015	792	637
Rochdale	1,661	285	36
Salford	6,094	970	809
Stockport	3,217	596	636
Tameside	4,040	795	523
Trafford	1,369	249	385
Wigan	1,510	249	174
<b>Greater Manchester</b>	<b>32,102</b>	<b>5,862</b>	<b>5,850</b>

- 7.46 Table 7.14 above shows that the total net annual housing need across Greater Manchester is calculated, based on the various assumptions and estimates through the process, to be 5,850. At district level, this ranges from 36 in Rochdale to 1,810 in Manchester. The increase from the previous calculation in 2019 is primarily due to the decreasing number in the supply of the social re-lets over time.
- 7.47 The table below provides a detailed summary of the step-by-step calculations of housing need across Greater Manchester at district level using the process outlined in this chapter.



Table 7.15: Summary of Affordable Housing Needs Assessment by Greater Manchester district

	Bolton	Bury	Manchester	Oldham	Rochdale	Salford	Stockport	Tameside	Trafford	Wigan	Greater Manchester
<b>Step 1 – Estimated Current Unmet Housing Need (Gross Backlog)</b>											
<b>1 Total current housing need (gross)</b>	3,261	938	5,997	4,015	1,661	6,094	3,217	4,040	1,369	1,510	32,102
<b>Step 2 – Assumed Future Housing Need (Net Annual)</b>											
2.1 New Household formation	1,922	1,231	4,805	1,366	1,292	1,763	1,786	1,400	1,399	2,011	18,976
2.2 Proportion of households unable to buy	0.34	0.32	0.51	0.38	0.33	0.44	0.34	0.36	0.35	0.30	0.38
2.3 Existing households falling into need	872	381	1,489	698	597	886	305	800	368	753	7,149
<b>2.4 Total newly arising need (gross per year) = (2.1 x 2.2) + 2.3</b>	1,519	772	3,930	1,215	1,025	1,662	919	1,300	852	1,354	14,458
<b>Step 3 – Estimated Affordable Housing Supply (Net Annual)</b>											
3.1 Affordable dwellings occupied by households in need	0	0	0	0	0	0	0	0	0	0	0
3.2 Surplus Stock	0	0	0	0	0	0	0	0	0	0	0
3.3 Committed supply of new affordable housing	49	26	491	57	236	1,245	236	63	124	266	2,793
3.4 Units to be taken out of management	0	0	0	0	0	0	0	0	0	0	0
<b>3.5 Total affordable housing stock available = 3.1 + 3.2 + 3.4 - 3.4</b>	49	26	491	57	236	1,245	236	63	124	266	2,793
3.6 Annual supply of social re-lets (net)	1,701	575	3,222	1,369	1,274	1,823	879	1,572	716	1,429	14,560
3.7 Annual supply of intermediate affordable housing available for re-let or resale at sub-market levels	0	0	0	0	0	0	0	0	0	0	0
<b>3.8 Annual supply of affordable housing = 3.6 + 3.7</b>	1,701	575	3,222	1,369	1,274	1,823	879	1,572	716	1,429	14,560
<b>Step 4 – Estimated Total Housing Need (Net Annual)</b>											
<b>Total net need = 1 - 3.5</b>	3,212	912	5,506	3,958	1,425	4,849	2,981	3,977	1,245	1,244	29,309
<b>Annual flow (20% of total net need)</b>	642	182	1,101	792	285	970	596	795	249	249	5,862
<b>Net annual housing need = (2.4 + Annual flow) - 3.8</b>	461	379	1,810	637	36	809	636	523	385	174	5,850

## 8 Appendices

8.1 This section provides a summary of data sources of supporting material for each chapter.

<b>Chapter 2: Defining the Housing Market</b>
<a href="#">2011 Census</a>
<a href="#">H M Land Registry House Price Index (2020)</a>
<b>Chapter 3: Local Housing Need</b>
<a href="#">MHCLG Table 406: Household projections by district, England 2018</a>
<a href="#">Ratio of house price to workplace-based earnings (lower quartile and median) Table 5c</a>
<b>Chapter 4: Characteristics of the Housing Market Area</b>
<a href="#">ONS Mid-Year Population Estimates (MYPE) 2018</a>
<a href="#">ONS Sub National Population Projections (SNPP) 2018</a>
<a href="#">2011 Census</a>
<a href="#">Annual Population Survey (APS) 2018</a>
<a href="#">BRES 2018</a>
<a href="#">Greater Manchester Forecasting Model (GMFM)</a>
CACI Paycheck 2019 (Licensed to GMCA from CACI)
<a href="#">MHCLG Live Table 784</a>
<a href="#">MHCLG Rough sleeping statistics England</a>
<a href="#">Valuation Office Agency (VOA), Table CTSOP3.0</a>
<a href="#">Annual Survey for Hours and Earnings (ASHE) 2018</a>
<a href="#">Index of Multiple Deprivation (IMD) 2019</a>
<a href="#">MHCLG, Energy Performance of Buildings Data England &amp; Wales</a>
<a href="#">H M Land Registry House Price Index (2020)</a>
<b>Chapter 5: Market Signals</b>
<a href="#">ONS House Price Statistics for Small Areas (HPSSAs)</a>
<a href="#">H M Land Registry House Price Index (2020)</a>
<a href="#">Valuation Office Agency (VOA) Private Rental Market Statistics 2018 to 2019</a>
<a href="#">Local Authority Housing Statistics dataset, England 2018-19: Section C – Allocations</a>
CACI Paycheck 2019 (Licensed to GMCA from CACI)
<a href="#">2011 Census</a>
Zoopla 2020 (Manchester City Council)
<a href="#">Regulator of Social Housing, Private Registered Provider Social Housing Stock in England: Statistical Data Return dataset 2018, Local Authority Housing Statistics dataset, England 2016-17: Section H - Rents and Rent Arrears and Valuation Office Agency Private Rental Market Statistics, 2018</a>
<a href="#">MHCLG Live Table 122</a>
<a href="#">MHCLG Live Table 125</a>

<a href="#">MHCLG Live Table 615</a>
<a href="#">Residential Land Values (per Hectare), 2019</a>
<a href="#">Index of Private Housing Rental Prices</a>
Local Authority and Private Registered Provider housing stock in Greater Manchester by rent level, 2018/19
<a href="#">MHCLG Live table 1008c, Total additional affordable dwellings by Local Authority District</a>
<a href="#">MHCLG Live Table 1011c: Affordable Housing Supply Statistics</a>
<a href="#">MHCLG Live Table 615 All vacant dwellings by local authority district, England, 2019</a>
Chapter 6: Housing needs of particular groups
<a href="#">ONS Healthy and Life Expectancies by Greater Manchester District 2019</a>
<a href="#">2011 Census</a>
Self-Build Registers (Greater Manchester Local Authorities)
<a href="#">MHCLG Council Tax Base Local Authority Level: Council Tax Base (CTB) Supplementary Form</a>
Tenure of specialist housing for older people in Greater Manchester (Elderly Accommodation Council/Housing LIN)
<a href="#">Subnational population projections (SNPP) for local authorities 2018</a>
<a href="#">Student enrolments at Greater Manchester HEIs 2018/19</a>
Mainstream student exemptions within the Manchester city centre apartment market (Manchester City Council)
<a href="#">Current provision of Traveller Pitches and Travelling Showperson plots</a>
<a href="#">Future provision of pitches and plots 2017/18 to 2035/36</a>
<a href="#">Projections of those Living Alone, Living in Care Home and those having difficulty with domestic tasks 2017 to 2035</a>
<a href="#">Projections of those with a limiting long-term illness</a>
<a href="#">Housing with care need</a>
Chapter 7: Affordable Housing Need Assessment
<a href="#">2011 Census</a>
<a href="#">MHCLG Local Authority Return – Section C – Allocations 2018-19</a>
<a href="#">ONS, 2018 based household projectionsv</a>
CACI Paycheck (2019): Household Banding (Licensed to GMCA from CACI)
<a href="#">CORE Lettings data 2018/19</a>
<a href="#">MHCLG Calculation of Surplus Stock</a>
Committed supply of new affordable units (Homes England)

